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Export Business Map

Make the Web work for British exporters



Preface

Over the last ten years, the Web has become part of life for many people around the world. In fact 2.8 billion people are online today, that's still only 39% of the global population. Looking forward to 2020 Eric Schmidt predicted that there will be 8 billion people connected - many of these via smartphone.

The technology is fuelling a revolution in how we all communicate, share, make decisions, and make purchases. Research has shown that companies using the Web for sales and marketing are growing more than twice as fast as those not online. They also use the Web to reach a wider pool of customers – exporting twice the proportion of their “offline” competitors.

How can you take advantage of this major opportunity? Last year, we introduced the Global Business Map, which gave you an overview of market data from more than 40 countries. This year, we have picked ten of the most interesting markets for British exporters and go into even more detail: we have added new data and a seasonality calendar, which gives you insights into the most important bank holidays and events in each market.

You will find a wide range of information that is potentially transformational for your business. Every section starts with a breakdown of fundamental facts for each country, followed by information about search and display – including numbers about Web search or the advertising market. After that, you will get an overview of mobile behaviour in that specific country, displaying how many people own a mobile phone and what role the mobile Internet plays. In the section on social media, you will not only learn how many people are logged into social networks, but also how much time they spend there each month.

There's a multitude of market opportunities, and the Internet brings them to your door step – but of course, every country is unique. That's why we give you a lot of country-specific details at a glance. Did you know, for example, that Italy has the highest Internet user growth in Europe? Or that by 2016 Sweden will account for 4.8 million digital buyers?

It's time to reach new customers in new markets and make the Web work for you.

SOURCES:

Internet World Stats, June 2013

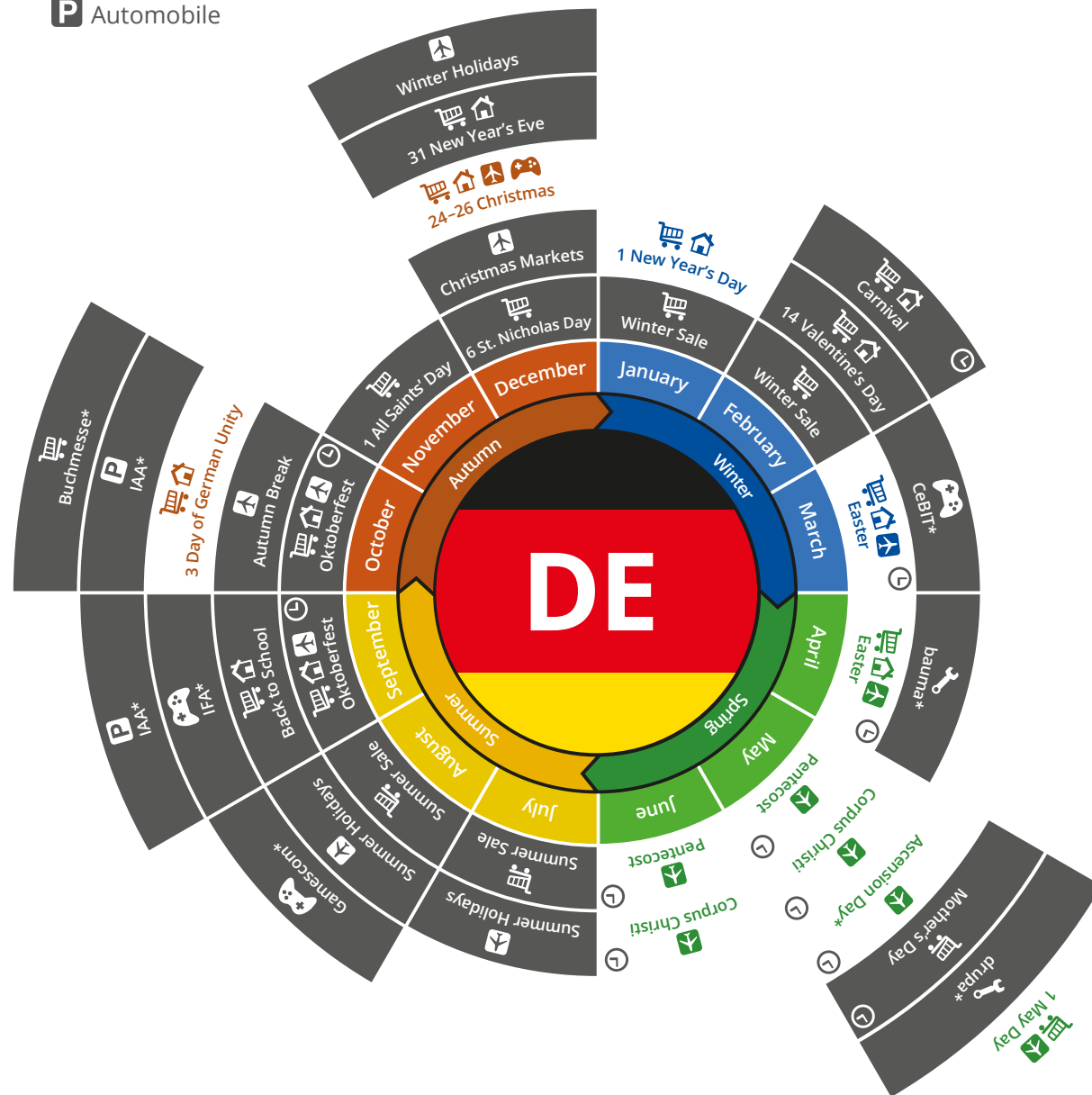
IW Köln, Faktor Google Studie (2011)

IW Consult & Bitkom “Wirtschaft digitalisiert” (2013)

SEASONALITY CALENDAR GERMANY

- Retail
- Travel
- Local
- B2B
- Tech
- Automobile

- Moveable feasts:
dates change each year
- Bank holiday



*Ascension – Also Father's Day
 *bauma – Engineering Vehicles and Tools Fair, Munich
 *Buchmesse – International Book Fair, Frankfurt
 *CeBIT – International Computer Expo, Hanover
 *drupa – Print Media Fair, Düsseldorf
 *Gamescom – Interactive Games and Entertainment Fair, Cologne
 *IAA – International Motor Show, Hanover
 *IFA – Consumer Electronics and Home Appliances Trade Show, Berlin

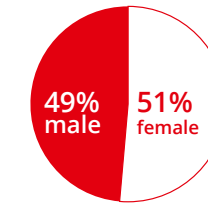
TARGETING GERMANY EXPORTING OPPORTUNITIES

OVERVIEW

Population

81.3
million ^[1]

Demographic Profile



Online Usage

62%
of the population uses
the Internet daily ^[2]

Online Shopping

64%
buy things online ^[2]

SEARCH, YOUTUBE AND DISPLAY

Web Searches

60%
of purchasers who
used a search engine
to do research before
purchasing ^[3]

YouTube Reach

48%
of online population ^[4]

Video Advertising

67%
say that being able
to skip ads increases
the enjoyment of the
content on YouTube ^[5]

Google Display Network Reach

90% ^[6]

MOBILE

Smartphone Penetration

50%
of people are using
a smartphone ^[10]

Mobile Internet Users

74%
of all smartphone users
are daily online with
their device ^[10]

Mobile Purchases

38%
purchase online on
their smartphone ^[10]

SOCIAL

Population

42%
are social
network users ^[8]

Frequency

64%
check their social
network accounts
several times a day ^[9]

Engagement

51%
of people read blogs
and online reviews at
least once a month ^[10]

Usage

50%
of mobile surfers
list social networks
as their favourite
online activity ^[11]

MORE FACTS

\$1.5 trillion exported.
Germany is the largest exporter
in Europe ^[12]

48% of retailers
offer an English version
of their website ^[13]

29 of Fortune Global 500
companies are headquartered
in Germany ^[14]

SOURCES:

[1] CIA: The World Factbook, April 2012
 [2] Connected Consumer Study, 2014
 [3] Consumer Barometer, 2013
 [4] Google Internal Data, 2012
 [5] YouTube Global Audience Study, 2013

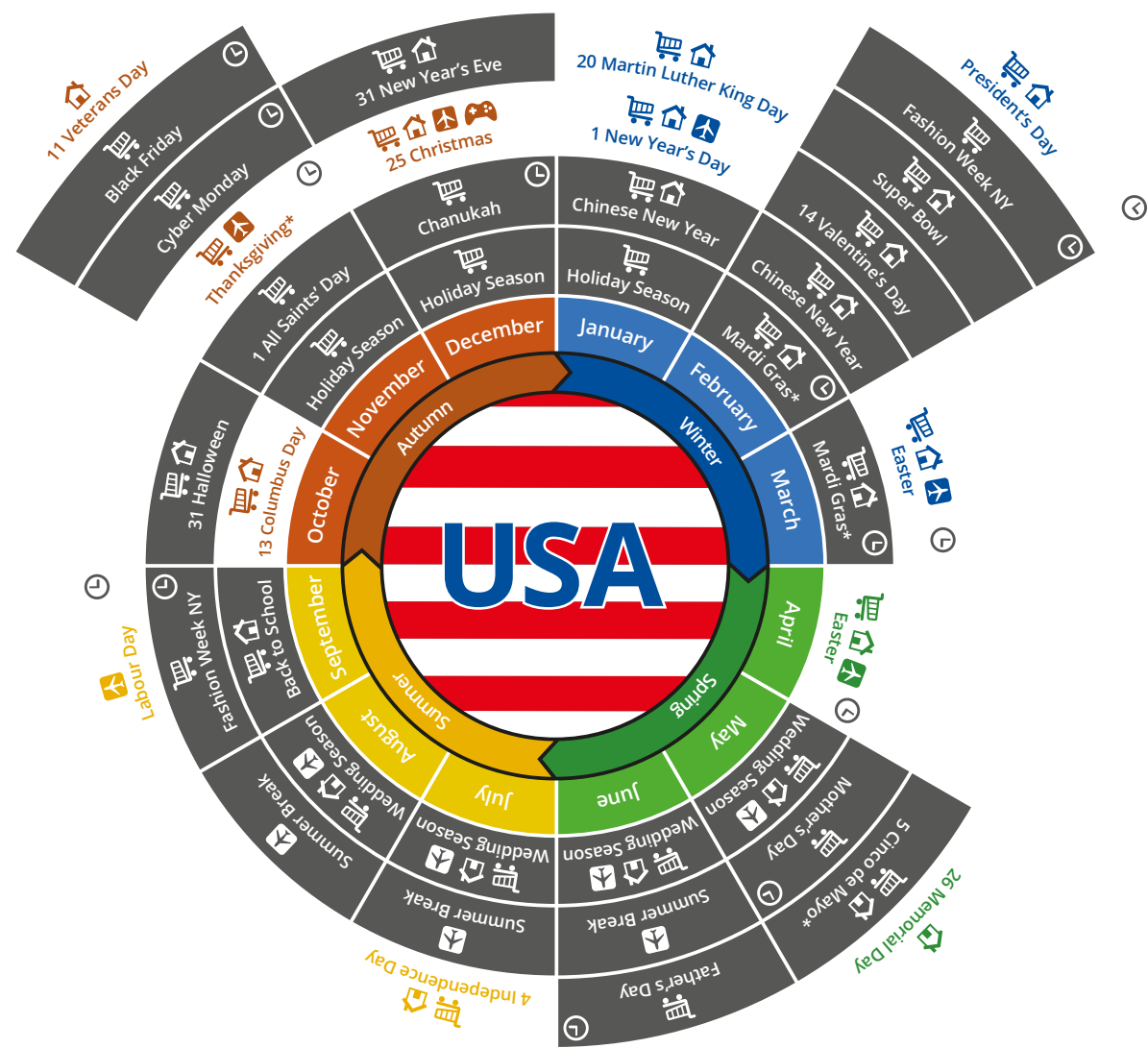
[6] Google Internal Data, 2012
 [7] Our Mobile Planet, 2013
 [8] eMarketer, 2013
 [9] Google Internal Data, 2012
 [10] Connected Consumer Study, 2014

[11] Google Internal Data, 2012
 [12] The World Factbook, 2013
 [13] OC&C Global Retail E-mpire report, 2013
 [14] Fortune, 2013

Export with Google

SEASONALITY CALENDAR USA

- Retail
- Travel
- Local
- Tech
- Moveable feasts: dates change each year
- Bank holiday



*Black Friday – Busy shopping day held the day after Thanksgiving.
*Cinco de Mayo – Celebration of Mexican heritage and pride held on the fifth of May.
*Cyber Monday – Held on the Monday immediately following Black Friday. Created by companies to persuade consumers to shop online.
*Mardi Gras – Carnival celebrations beginning on or after Epiphany and culminating on the day before Ash Wednesday.
*Thanksgiving – Holiday to give thanks for the food collected at the end of the harvest season. Held on the fourth Thursday of November.

TARGETING USA EXPORTING OPPORTUNITIES

OVERVIEW

Population

316.7
million ^[1]

Demographic Profile

49.2% male 50.8% female ^[1]

Online Usage

85%
of people have Internet access ^[2]

Online Shopping

64%
buy things online ^[2]

SEARCH, YOUTUBE AND DISPLAY

Web Searches

48%
of purchasers used a search engine to do research before purchasing ^[3]

YouTube Reach

58%
of online population ^[4]

Video Advertising

Gen C are 2x more likely to agree “I would rather watch videos posted by brands on YouTube than watch TV commercials” ^[5]

Google Display Network Reach

>95% ^[6]

MOBILE

Mobile Usage

38%
used a mobile coupon to purchase a product in store ^[7]

Smartphone Penetration

56%
of people are using a smartphone ^[7]

Mobile Internet Usage

92%
of smartphone owners use the mobile internet daily ^[7]

Mobile Purchases

46%
of smartphone owners have made a purchase on their phone ^[7]

SOCIAL

Population

67%
are social network users ^[8]

Frequency

67.2%
of Internet users use Social Networks ^[9]

Engagement

1.38
hours per day on social networks ^[10]

Usage

72%
of US businesses use external social media for business purposes ^[11]

MORE FACTS

Key languages:

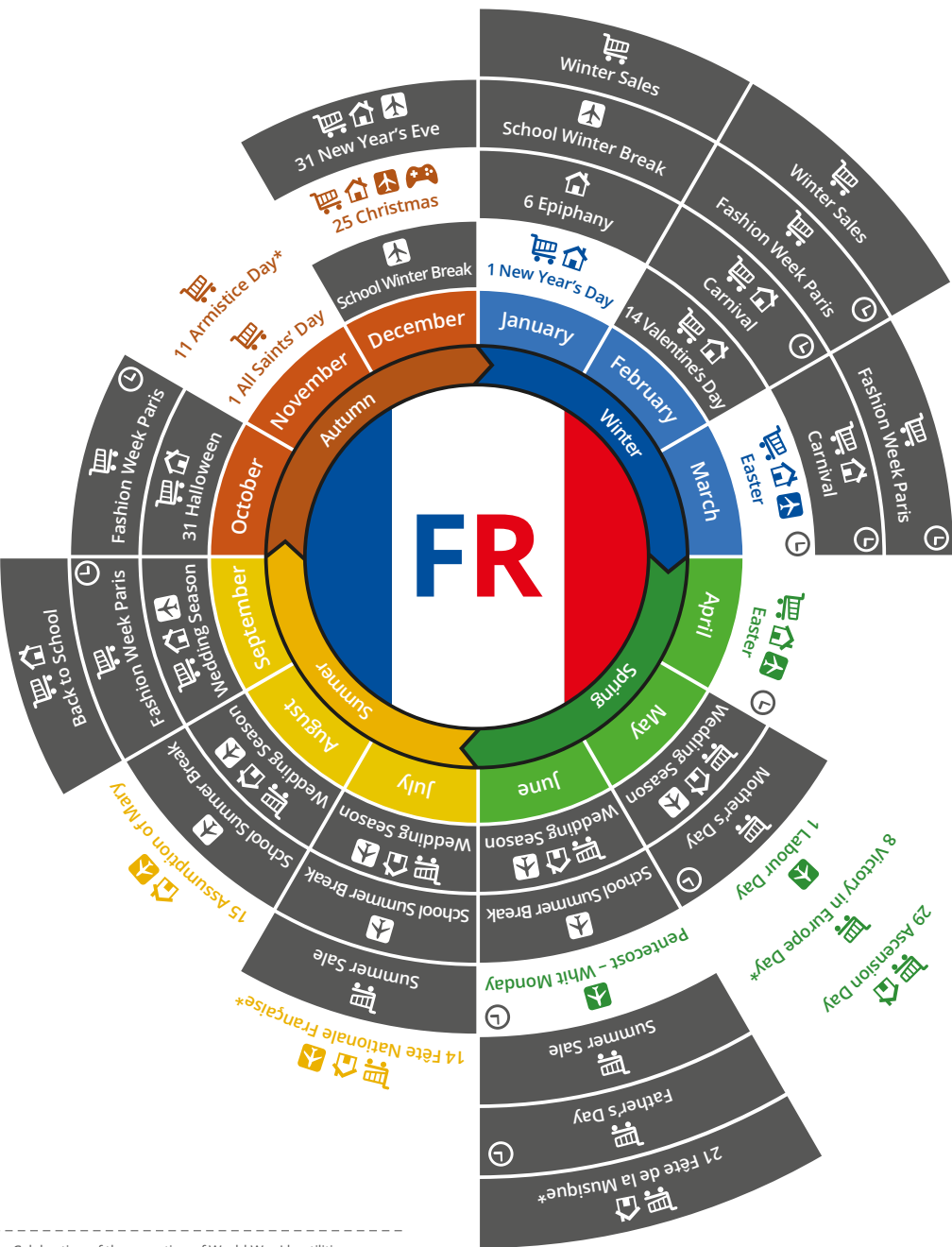
82.1% English
10.7% Spanish ^[12]

56% of US Internet users state deals and discounts on products to be the leading influence on digital purchasing decisions ^[13]

The ability to **compare prices** is the most important reason for US Internet users to shop online rather than in-store ^[14]

SEASONALITY CALENDAR FRANCE

- Retail
- Travel
- Local
- Tech
- Moveable feasts: dates change each year
- Bank holiday



*Armistice Day – Celebration of the cessation of World War I hostilities on the Western Front.
*Fête de la Musique – Music festival also known as World Music Day.
*Fête Nationale Française – Bastille Day – Celebration of French culture.
*Victory in Europe Day – Holiday to celebrate the end of World War II.

TARGETING FRANCE EXPORTING OPPORTUNITIES

OVERVIEW

Population
65.5
million ^[1]

Demographic Profile

^[1]

Online Usage
77%
of people have Internet access ^[2]

Online Shopping
51%
buy things online ^[3]

SEARCH, YOUTUBE AND DISPLAY

Web Searches
59%
of purchasers used a search engine to do research before purchasing ^[4]

YouTube Reach
55%
of online population ^[5]

Video Advertising
69%
say that being able to skip ads increases the enjoyment of the content on YouTube ^[6]

Google Display Network Reach
>90% ^[7]

MOBILE

Mobile Usage
60%
access information on smartphone and follow-up on other device ^[8]

Smartphone Penetration
49%
of people are using a smartphone ^[10]

Mobile Internet Usage
75%
of all smartphone users are daily online with their device ^[10]

Mobile Purchases
29%
purchase online on their smartphone ^[10]

SOCIAL

Population
4.1
hours per month on social networking sites ^[9]

Frequency
59%
of smartphone users visit social networks at least once a month ^[10]

Engagement
50%
of people read blogs and online reviews at least once a month ^[11]

Usage
47%
share or re-share links on social networks ^[11]

MORE FACTS

3rd
market in Europe in terms of B2C e-commerce sales ^[12]

38% of retailers offer an English version of their website ^[13]

\$579 billion exported ^[14]

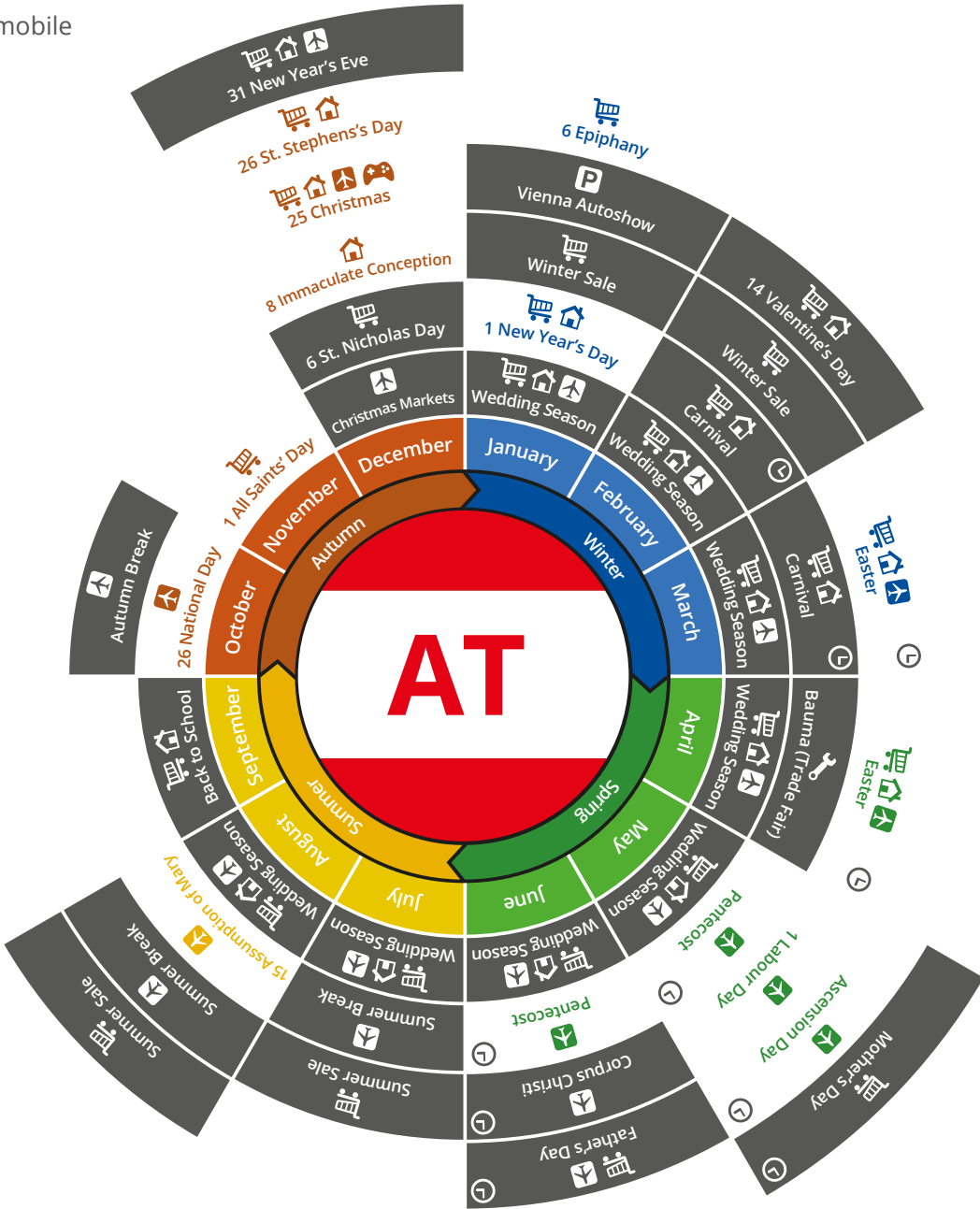
SOURCES:
[1] Insee, 2012
[2] Connected Consumer Study, 2012
[3] Connected Consumer Study, 2014
[4] Consumer Barometer, 2013
[5] Google Internal Data, 2012
[6] YouTube Global Audience Study, 2013
[7] Google Internal Data, 2012
[8] Our Mobile Planet, 2013
[9] Google Internal Data, 2012
[10] Connected Consumer Study, 2014
[11] YouTube Global Audience Study, 2013
[12] emarketer, June 2013
[13] OC&C Global Retail E-mpire report, 2013
[14] The World Factbook, 2012

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SEASONALITY CALENDAR

AUSTRIA

- Retail
- Travel
- Local
- Tech
- Automobile
- Moveable feasts:
dates change each year
- Bank holiday



TARGETING AUSTRIA

EXPORTING OPPORTUNITIES

OVERVIEW

Population
8.2 million ^[1]

Demographic Profile

48.7% male 51.3% female ^[1]

Online Usage
61% of the population uses the Internet daily ^[2]

Online Shopping
51% buy things online ^[2]

SEARCH, YOUTUBE AND DISPLAY

Web Searches
36% of purchasers used a search engine to do research before purchasing ^[3]

YouTube Reach
80% of YouTube users are online daily ^[4]

Video Advertising
YouTube users are 2.4x more likely to buy electronics, gadgets, or other devices ^[4]

MOBILE

Mobile Usage
44% have used mobile banking ^[5]

Smartphone Penetration
56% of people are using a smartphone ^[7]

Mobile Internet Usage
65% of all smartphone users are daily online with their device ^[7]

Mobile Purchases
25% purchase online on their smartphone ^[7]

SOCIAL

Population
37% are social network users ^[6]

Frequency
54% of smartphone users visit social networks at least once a month ^[7]

Engagement
46% of people read blogs and online reviews at least once a month ^[7]

Usage
43% of YouTube users talk about what they saw on YouTube with their peers ^[8]

MORE FACTS

\$167
billion exported ^[9]

GmbH
is the most common legal entity of all active online-shops with 61.6% ^[10]

50.8%
of all online-shops in Austria have a legal entity which is based outside the country ^[10]

SOURCES:

[1] CIA: The World Factbook, July 2013

[2] Connected Consumer Study, 2014

[3] Consumer Barometer, 2012

[4] Global YouTube Audience Study, 2013

[5] Our Mobile Planet, 2013

[6] eMarketer, 2012

[7] Connected Consumer Study, 2014

[8] YouTube Global Audience Study, 2013

[9] The World Factbook, 2012

[10] EHI, 2012

Export with Google

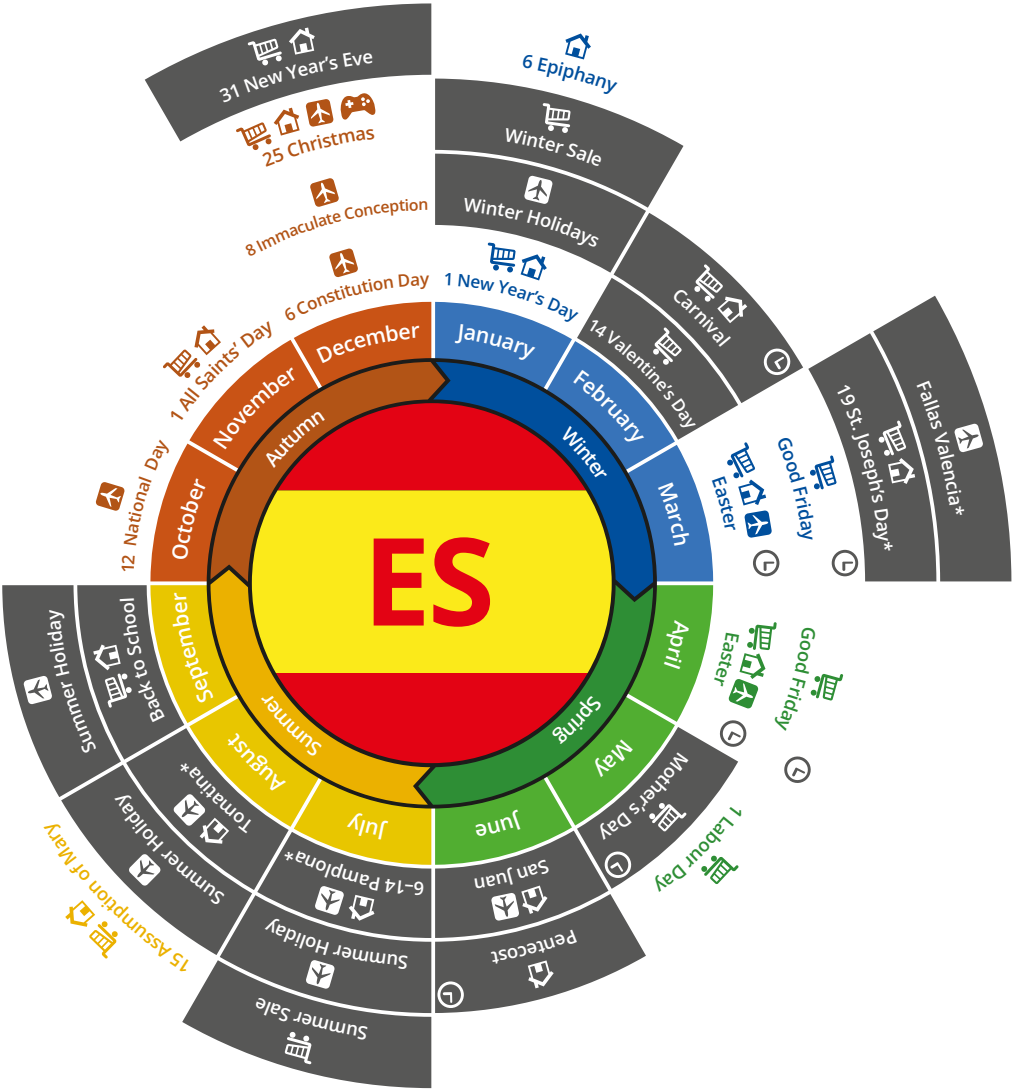
SEASONALITY CALENDAR

SPAIN

- Retail
- Travel
- Local
- B2B
- Tech
- Automobile

Moveable feasts:
dates change each year

Bank holiday



TARGETING SPAIN

EXPORTING OPPORTUNITIES

OVERVIEW

Population

47.3
million ^[1]

Demographic Profile

49% male 51% female ^[1]

Online Usage

78%
of the population uses
the Internet daily ^[2]

Online Shopping

41%
buy things online ^[2]

SEARCH, YOUTUBE AND DISPLAY

Web Searches

41%
of purchasers who
used a search engine
to do research before
purchasing ^[3]

YouTube Reach

86%
of YouTube users
are online daily ^[4]

Video Advertising

YouTube users are
2.8x more likely to buy
electronics, gadgets,
or other devices ^[4]

MOBILE

Mobile Usage

64%
have searched for
directions on
their smartphone ^[5]

Smartphone Penetration

72%
of people are using
a smartphone ^[7]

Mobile Internet Users

72%
of all smartphone users
are daily online with
their device ^[7]

Mobile Purchases

20%
purchase online on
their smartphone ^[7]

SOCIAL

Population

46%
are social
network users ^[6]

Frequency

70%
of smartphone users
visit social networks at
least once a month ^[7]

Engagement

50%
of people read blogs
and online reviews at
least once a month ^[7]

Usage

58%
of YouTube users talk
about what they saw
on YouTube with
their peers ^[8]

MORE FACTS

3rd most popular country
for British expats ^[9]

The UK is the **5th** biggest
export partner with 6.5% of
export ^[10]

Mobile marketing is worth
€110 million ^[11]

SOURCES:
[1] CIA World Factbook, July 2013
[2] Connected Consumer Study, 2014
[3] Consumer Barometer, 2014
[4] YouTube Global Audience Study, 2013

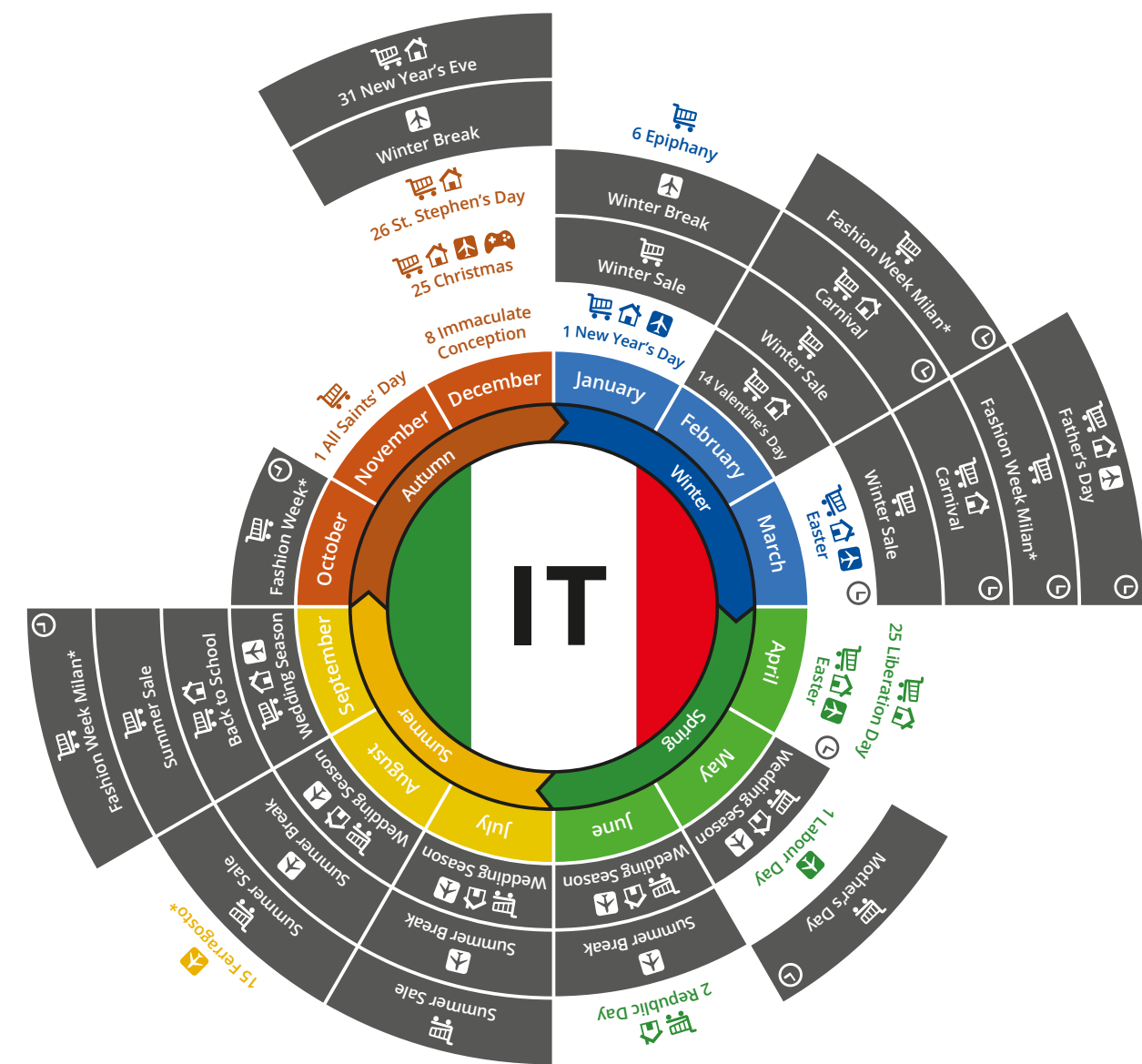
[5] Our Mobile Planet, 2013
[6] eMarketer, 2013
[7] Connected Consumer Study, 2014
[8] YouTube Global Audience Study, 2013
[9] International Passenger Survey, 2012

[10] The World Factbook, 2012
[11] eMarketer, 2013

SEASONALITY CALENDAR

ITALY

- Retail
- Travel
- Local
- Tech
- Moveable feasts: dates change each year
- Bank holiday



*Fashion Week Milan – Held semi-annually in Milan. Part of the "Big Four" Worldwide Fashion weeks.
*Ferragosto – Italian holiday to commemorate the Assumption of the Blessed Virgin Mary.

TARGETING ITALY

EXPORTING OPPORTUNITIES

OVERVIEW

Population

61.3
million ^[1]

Demographic Profile

49% male
51% female

^[1]

Online Usage

72%
of the population uses the Internet daily ^[2]

Online Shopping

41%
buy things online ^[2]

SEARCH, YOUTUBE AND DISPLAY

Web Searches

39%
of purchasers used a search engine to do research before purchasing ^[3]

YouTube Reach

80%
of YouTube users are online daily ^[4]

Video Advertising

74%
say that being able to skip ads increases the enjoyment of the content on YouTube ^[4]

MOBILE

Mobile Usage

45%
have searched for travel-information or holidays on their smartphone ^[5]

Smartphone Penetration

53%
of people are using a smartphone ^[7]

Mobile Internet Usage

78%
of all smartphone users are daily online with their device ^[7]

Mobile Purchases

21%
purchase online on their smartphone ^[7]

SOCIAL

Population

32%
are social network users ^[6]

Frequency

64%
of smartphone users visit social networks at least once a month ^[7]

Engagement

YouTube users are 3x more likely to attend live events ^[8]

Usage

1.55
hours on social networks daily ^[9]

MORE FACTS

\$474
billion exported ^[10]

66%
consider price the most important aspect of buying online ^[11]

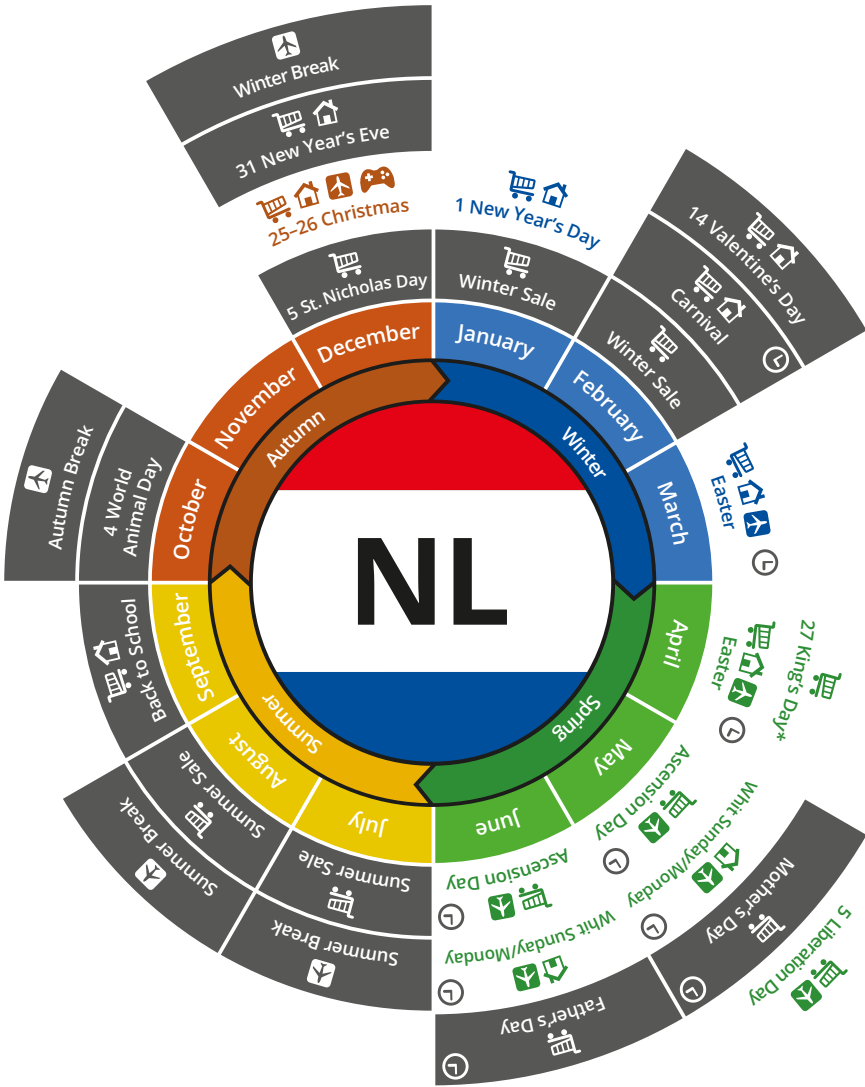
35%
consider ease and speed of the online checkout process ^[11]

SOURCES:
[1] CIA: The World Factbook, March 2012
[2] Connected Consumer Study, 2014
[3] Consumer Barometer, 2013
[4] YouTube Global Audience Study, 2013
[5] Our Mobile Planet, 2013
[6] eMarketer, 2013
[7] Connected Consumer Study, 2014
[8] YouTube Global Audience Study, 2013
[9] GlobalWebIndex, 2012
[10] The World Factbook, 2012
[11] Source: eMarketer, 2011

SEASONALITY CALENDAR

NETHERLANDS

- Retail
- Travel
- Local
- Tech
- Moveable feasts: dates change each year
- Bank holiday



TARGETING NETHERLANDS

EXPORTING OPPORTUNITIES

OVERVIEW

Population

16.8
million ^[1]

Demographic Profile

50% male 50% female ^[2]

Online Usage

80%
of the population uses the Internet daily ^[3]

Online Shopping

65%
buy things online ^[3]

SEARCH, YOUTUBE AND DISPLAY

Web Searches

60%
of purchasers used a search engine to do research before purchasing ^[4]

YouTube Reach

74%
of online population ^[5]

Video Advertising

72%
say that being able to skip ads increases the enjoyment of the content on YouTube ^[6]

Google Display Network Reach

>90% ^[7]

MOBILE

Mobile Usage

52%
use their smartphone as a way to get quick answers ^[8]

Smartphone Penetration

65%
of people are using a smartphone ^[9]

Mobile Internet Usage

75%
of all smartphone users are daily online with their device ^[9]

Mobile Purchases

24%
purchase online on their smartphone ^[9]

SOCIAL

Population

No.1
in Europe when it comes to active social media usage, with 65% of the population on social networks ^[8]

Frequency

69%
of smartphone users visit social networks at least once a month ^[9]

Engagement

1 million
active users per day on Google+ ^[10]

Usage

41%
say that YouTube has more unique content than TV ^[11]

MORE FACTS

No.8 for export in the world, with \$577 billion exported ^[12]

27% of retailers offer an English version of their website ^[13]

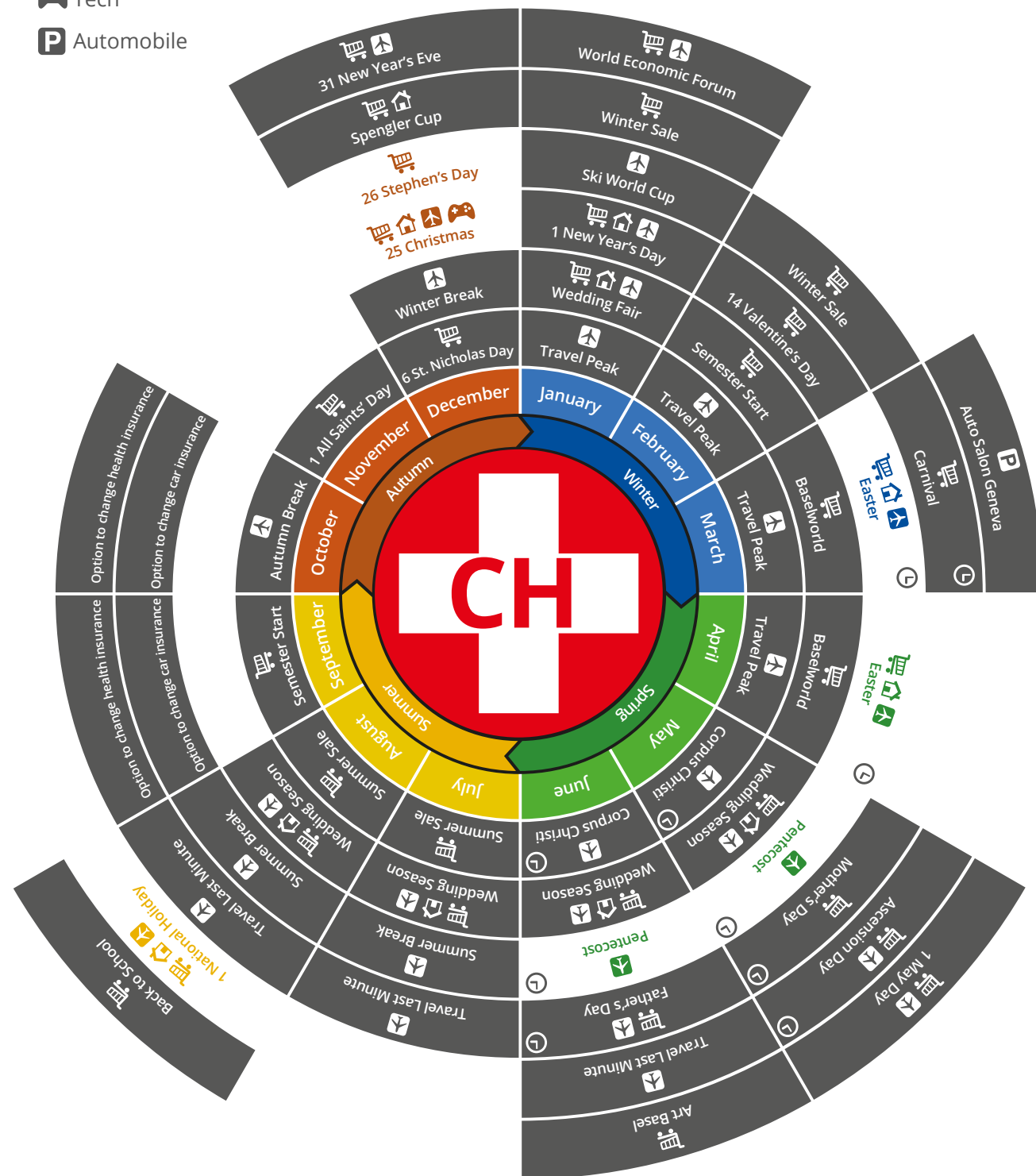
87% of dutch people speak english ^[14]

*Armistice Day – Celebration of the cessation of World War I hostilities on the Western Front.
*Fête de la Musique – Music festival also known as World Music Day.
*Fête Nationale Française – Bastille Day – Celebration of French culture.
*Victory in Europe Day – Holiday to celebrate the end of World War II.

SOURCES:
[1] CBS, September 2013
[2] CBS, April 2013
[3] Connected Consumer Study, 2014
[4] Consumer Barometer, 2013
[5] Google Internal Data, 2012
[6] YouTube Global Audience Study, 2013
[7] Google Internal Data, 2012
[8] Our Mobile Planet, 2013
[9] Connected Consumer Study, 2014
[10] NewCom, 2013
[11] YouTube Global Audience Study, 2013
[12] The World Factbook, 2012
[13] OC&C Global Retail E-mpire report, 2013
[14] European Commission, 2006

SEASONALITY CALENDAR SWITZERLAND

- Retail
- Travel
- Local
- Tech
- Automobile
- Moveable feasts: dates change each year
- Bank holiday



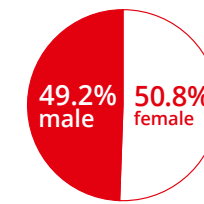
TARGETING SWITZERLAND EXPORTING OPPORTUNITIES

OVERVIEW

Population

7.99
million ^[1]

Demographic Profile



Online Usage

68%
of the population uses
the Internet daily ^[2]

Online Shopping

53%
buy things online ^[2]

SEARCH, YOUTUBE AND DISPLAY

Web Searches

36%
of purchasers used
a search engine to
do research before
purchasing ^[3]

YouTube Reach

88%
of YouTube users
are online daily ^[4]

Video Advertising

65%
say that being able to
skip ads increases the
enjoyment of the
content on YouTube ^[4]

Google Display Network Reach

>75% ^[5]

MOBILE

Mobile Usage

28%
are open to receiving
mobile ads if freebies
are included ^[6]

Smartphone Penetration

60%
of people are using
a smartphone ^[9]

Mobile Internet Usage

71%
of all smartphone users
are daily online with
their device ^[9]

Mobile Purchases

30%
purchase online on
their smartphone ^[9]

SOCIAL

Population

43%
are social
network users ^[7]

Frequency

76%
of smartphone users
visit social networks
regularly ^[8]

Engagement

39%
of people read blogs
and online reviews at
least once a month ^[9]

Usage

13%
of Internet users
shop via social
media platforms ^[10]

MORE FACTS

4 official languages: German, French, Italian and Romansch ^[11]

Switzerland has a GDP per capita of \$79,033 ^[12]

Only 18% of Internet users are comfortable buying products from unfamiliar websites ^[13]

SOURCES:

[1] CIA: The World Factbook, July 2013
[2] Connected Consumer Study, 2014
[3] Consumer Barometer, 2012
[4] Global YouTube Audience Study, 2013
[5] Google Internal Data, 2012

[6] Our Mobile Planet, 2013
[7] eMarketer, 2012
[8] Google Internal Data, 2012
[9] Connected Consumer Study, 2014
[10] eMarketer/PWC, 2013

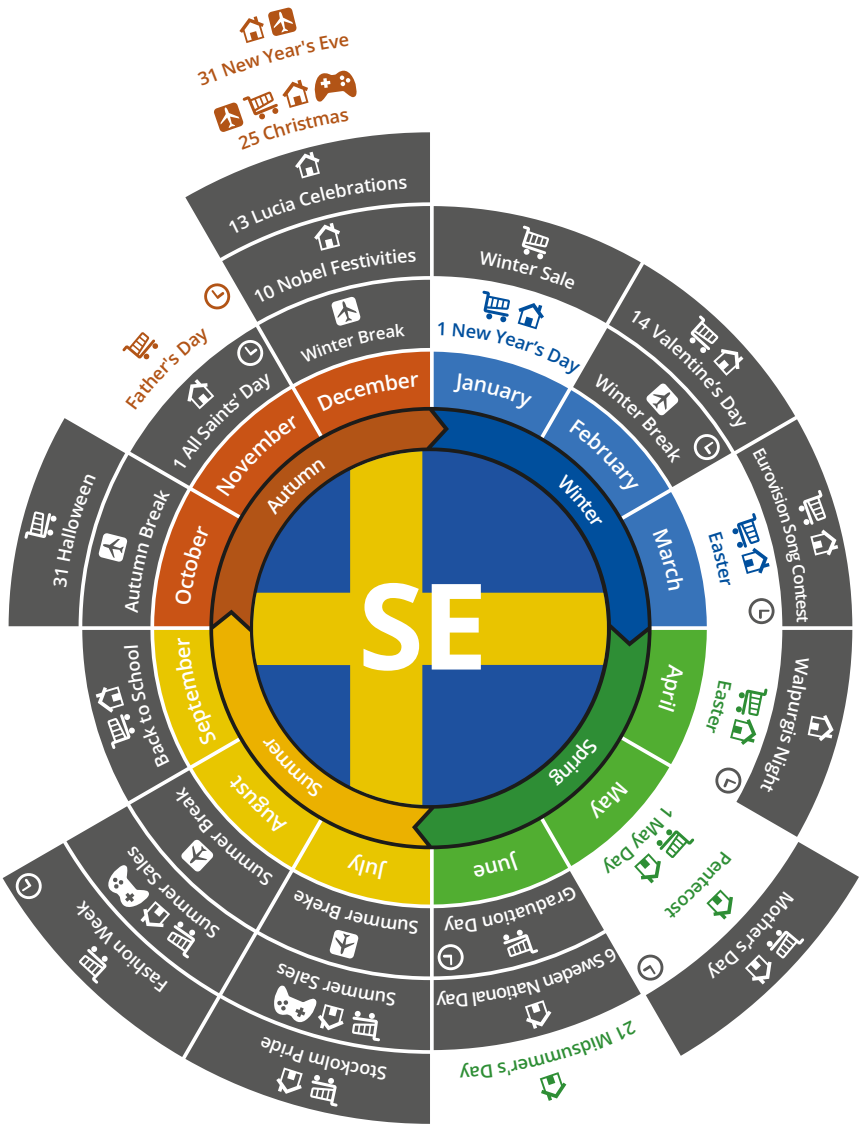
[11] CIA World Factbook, July 2013
[12] International Monetary Fund, 2013
[13] Consumer Commerce Barometer, 2011

Export with Google

SEASONALITY CALENDAR

SWEDEN

- Retail
- Travel
- Local
- Tech
- Moveable feasts: dates change each year
- Bank holiday



TARGETING SWEDEN

EXPORTING OPPORTUNITIES

OVERVIEW

Population

9.52
million ^[1]

Demographic Profile

53% male 47% female ^[2]

Online Usage

71%
of the population have access to the Internet ^[3]

Online Shopping

60%
buy things online ^[4]

SEARCH, YOUTUBE AND DISPLAY

Web Searches

37%
of purchasers used a search engine to do research before purchasing ^[5]

YouTube Reach

95%
of YouTube users are online daily ^[6]

Video Advertising

YouTube users are 3x more likely to buy electronics, gadgets, or other devices ^[6]

MOBILE

Mobile Usage

74%
have read the news on their phone ^[7]

Smartphone Penetration

75%
of people are using a smartphone ^[9]

Mobile Internet Usage

81%
of all smartphone users are daily online with their device ^[9]

Mobile Purchases

30%
purchase online on their smartphone ^[9]

SOCIAL

Population

57%
are social network users ^[8]

Frequency

67%
of smartphone users visit social networks at least once a month ^[9]

Engagement

47%
of people read blogs and online reviews at least once a month ^[9]

Usage

17%
of Internet users are active on Google+ ^[10]

MORE FACTS

\$181
billion exported ^[11]

UK is the 3rd biggest export partner ^[11]

89% of Swedish people speak English ^[12]

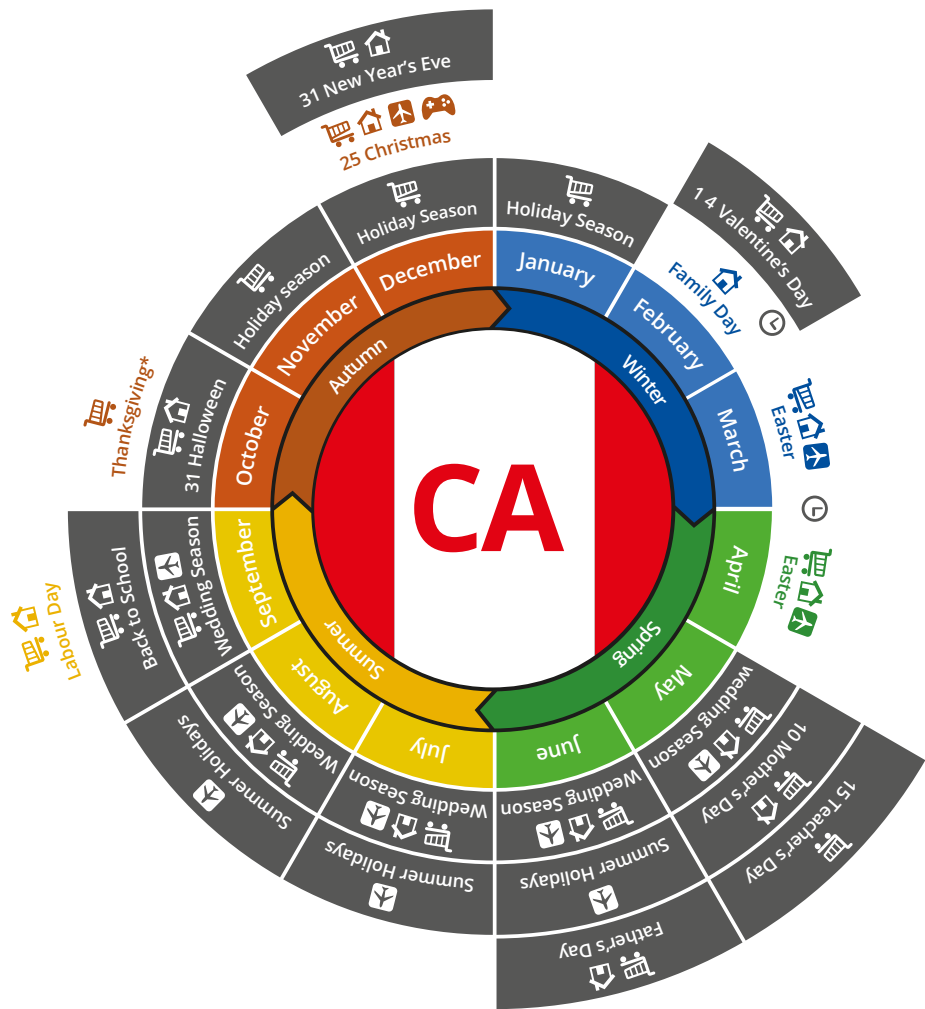
*Walpurgis bonfires are part of a Swedish tradition dating back to the early 18th century.

SOURCES:
[1] World Bank, 2012
[2] CIA World Factbook, July 2013
[3] Consumer Barometer, 2012
[4] Connected Consumer Study, 2014
[5] Consumer Barometer, 2012
[6] Global YouTube Audience Study, 2013
[7] Our Mobile Planet, 2013
[8] eMarketer, 2013
[9] Connected Consumer Study, 2014
[10] GlobalWebIndex, 2013
[11] The World Factbook, 2012
[12] European Commission, 2006

SEASONALITY CALENDAR

CANADA

- Retail
- Travel
- Local
- Tech
- Automobile
- Moveable feasts:
dates change each year
- Bank holiday



TARGETING CANADA

EXPORTING OPPORTUNITIES

OVERVIEW

Population

34.88
million ^[1]

Demographic Profile

52.8% male 47.2% female ^[2]

Online Usage

74%
of the population uses
the Internet daily ^[3]

Online Shopping

57%
buy things online ^[3]

SEARCH, YOUTUBE AND DISPLAY

Web Searches

33%
of purchasers used
a search engine to
do research before
purchasing ^[3]

YouTube Reach

YouTube is the 2nd
largest search engine,
accounting for 80%
of the hour of online
video watched on
average per day ^[4]

Video Advertising

17%
of the Internet users
are on YouTube ^[5]

MOBILE

Mobile Usage

76%
have used an app
on their smartphone ^[6]

Smartphone Penetration

58%
of people are using
a smartphone ^[8]

Mobile Internet Usage

70%
of all smartphone users
are daily online with
their device ^[8]

Mobile Purchases

36%
purchase online on
their smartphone ^[8]

SOCIAL

Population

66%
are social
network users ^[7]

Frequency

71%
of smartphone users
visit social networks at
least once a month ^[8]

Engagement

54%
of people read blogs
and online reviews at
least once a month ^[9]

Usage

20%
are subscribed to at
least one YouTube
channel ^[9]

MORE FACTS

\$459
billion exported ^[10]

UK is the 3rd biggest
export partner ^[10]

4th most popular country
for British expats ^[11]

*Labour Day - Start of Hockey Season.
*Thanksgiving - In October as opposed to the US Thanksgiving, which falls in November.

SOURCES:
[1] World Bank, 2012
[2] CIA World Factbook, July 2013
[3] Connected Consumer Study, 2014
[4] Google Engage Conference, Vancouver, 2012
[5] BrandSpark, 2013
[6] Our Mobile Planet, 2013
[7] eMarketer, 2013
[8] Connected Consumer Study, 2014
[9] eMarketer, 2013
[10] The World Factbook, 2012
[11] International Passenger Survey, 2012



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