



Global Business Map

Make the Web Work for You



Dear Partners,

In the last ten years the web has become part of life for most people in the US and Europe. In fact 2.4 billion people are online today. But by the end of this decade over 5 billion people around the world will be online, via computers and mobile devices.

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? This Global Business Map gives you powerful data on 48 countries. In 2010, our German team, ever alert to export opportunities, developed a first edition focused on the fast growing economies of 21 emerging markets. A great response and some great results encouraged us to go global.

Here you will find a wide range of information potentially transformational for your business. This includes a breakdown per country of fundamental facts, the advertising market and trends of online and mobile behaviour. For example, did you know that in the amount of time it takes you to read this page, roughly 400 Android phones will be activated; more than 250,000 words will be written on Blogger; and 72 hours of video will be uploaded to YouTube. Or that Brazil is one of the top five countries worldwide for mobile Internet usage, whilst in Israel users spend on average 11.1 hours on social sites, more than double the global average.

On the final pages of the book you'll find details of online tools that you can begin to use to access the global opportunity, amongst them Insights for Search, AdWords, YouTube, Google+ Pages. And of course your Google teams are here to help.

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

Best Wishes



Matt Brittin



Lars Lehne



Matt Brittin
Vice President Northern
& Central Europe
Google Inc.



Lars Lehne
Country Director Agency
Google DACH

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How to use the Global Business Map

Before you begin planning your next ventures, we present here a few brief guidelines on how to use this Global Business Map: what kind of data you will find where and the measurement of the different metrics included.

The first section of this guide provides a country profile for each of 48 countries on 6 different continents. The country profiles give an overview of fundamental country facts and specific market insights from the various markets where Google is active: **Advertising**, **Search**, **Mobile** and **Display**. In each area, we have collected those metrics most relevant for uncovering market potential and to help you recognise business opportunities specific to your company.

The second section of this guide provides an introduction to a range of products and tools available to you at Google, which are each explained briefly to help you get acquainted with the different ways in which you can reach out and connect with your target markets.

Each country page contains the following data:

The **General Country Facts** include a wide range of basic facts, demographics, Internet statistics and a Google contact. In some cases, where additional information is given in the Appendix, this will be marked by an asterisk (*) beside the relevant field.

Basic Facts

Provide official country name, capital, area, top-level domain, official or most spoken language, local currency, age distribution and GDP in terms of purchasing power parity and rank. GDP in each country has been expressed in US Dollars.

Demographics

Give the population (total, growth and country rank), a breakdown of the age distribution according to gender and age group, median age.

Internet statistics

Dive a bit deeper into the status of Internet usage per country. We report the Internet penetration of the population, the total number of broadband and fixed Internet subscriptions, as found by the International Telecommunications Union.

Google Contact

The email address that you can use to get in touch with our local representatives. They will be happy to give you more insight into the statistics you can find in the pages here and connect your ideas with the appropriate Google products.

Advertising Market Statistics provide information regarding expenditure in the various modes of advertising, as reported in ZenithOptimedia, Advertising Expenditure Forecast in December 2011. Here you can find the total ad spend for 2011 per country and online spend for 2011. As in other sections, all expenditure values are expressed in US dollars.

Search is a fundamental market today. To give insight into the search behaviour of the population in each country, we include search trends evolution for both desktop and mobile, as well as the top rising categories observed in the searches conducted over two years.

Search Query Trends

Allow you to compare search volume patterns across specific regions, categories, time frames and properties. We have split mobile from desktop search trends, indicating their growth over two years.

Top Rising Categories

Reveals more detail regarding the development of searches conducted in each country. Here we name the five categories that have experienced the strongest year over year growth (from November 2010 to November 2011).

The **mobile** market of today is closely tied to Internet usage. In this part, we provide an overview of the extent to which mobiles and smartphones have penetrated the population in each country. The statistics included here show total mobile penetration, smartphone penetration, smartphone users in terms of operating system and mobile Internet penetration and the average traffic per user, as well as the top activities and usage frequency of mobile subscribers. For this market, we have consulted a wide range of sources, including from the International Telecommunications Union, Canalys, eMarketer, Strategy Analytics.

Total Mobile Penetration

This is a measure of the number of mobile subscriptions as a percentage of the total population.

Smartphone Penetration

This is a measure of the number of smartphone subscriptions in each country, expressed as a percentage of overall population. Where no country data was available, regional estimates were used, as reported by Strategy Analytics.

Smartphone Users by OS

Gives a breakdown of the share of smartphone users subscribed to each Operating System (OS): Android, iOS, Symbian, BBOS, Windows and Other.

Mobile Internet Penetration

Presents the share of mobile subscribers that are actively browsing the Internet from their mobile device. Where no country-specific data was available, regional estimates were used, as reported by Strategy Analytics.

Mobile Internet Traffic

Expresses the average megabytes (MB) per user transmitted when using mobile devices on a monthly basis.

Mobile Usage, Top 3 Activities

Highlight for each country what are currently the three largest markets for advertisers targeting mobile users, as found by Strategy Analytics. Handset Browsing, Games and Applications, and Social Networking are the most popular in many countries. Where no country-specific data was available, regional estimates were used.

Mobile Usage, Frequency

Measured in terms of the total Internet sessions recorded monthly in each country. Here also, the data comes from Strategy Analytics and regional estimates were used where no country-specific data was available.

The **Display** metrics give insight into the YouTube and Global Display Network (GDN) markets. Countries may have a local YouTube domain, yet this doesn't necessarily mean that ads can be displayed. For those countries that have a YouTube domain, we indicate whether or not ads are served and the share of the online population visiting YouTube each month, in terms of percentage, Page Views and Unique Users. Similarly for the GDN market, we report the monthly statistics for share of the online population reached through GDN sites, expressed also in terms of Page Views and Unique Users. These metrics have been collected primarily from ComScore and Nielsen.

Status

Refers to whether or not a country has a YouTube domain and it serves Ads. Countries are categorised either as Available, Just launched and Not available.

Reach

Gives the percentage share of the online population that visits either YouTube or GDN sites respectively.

Page Views

The total number of pages visited by all visitors to YouTube or GDN sites respectively on a monthly basis.

Unique Users

This is a metric to measure the total number of unique individuals that visit YouTube or GDN sites respectively within a given month. As opposed to the total visitors, this statistic indicates the total number of individuals that you can reach with an ad displayed on a particular site.

The **Social** facts refer to social behaviour as we observe it through specific key facts. A different fact is included for each country to give you a glimpse of the use of social sites as an extension of the other metrics concerning mobile and Internet behaviour.

Argentina

One of South America's leading media markets

Lino Cattaruzzi,
Country Director
Argentina



General Country Facts

Basic Facts

Official country name	Argentine Republic
Capital	Buenos Aires
Area	2,780,400 sq km
Top level domain	.ar
Language (official)	Spanish
Currency	Argentine Pesos (ARS)
GDP PPP	596 \$ Billion
GDP rank	23

Internet


Fixed broadband subscriptions	3,862,354
Fixed internet subscriptions	3,995,319
Internet penetration	66 % of population

Demographics

Total population	41,769,726
Population rank	32
Population growth	1.02 %
Population growth rank	115



0-14 years	25 %
15-64 years	64 %
65 years and older	11 %
Median age	30.5 years

 gbm-ar@google.com

Advertising Market

Total

Total Ad Spend, 2011 (total media spend)

2,455 \$ Million

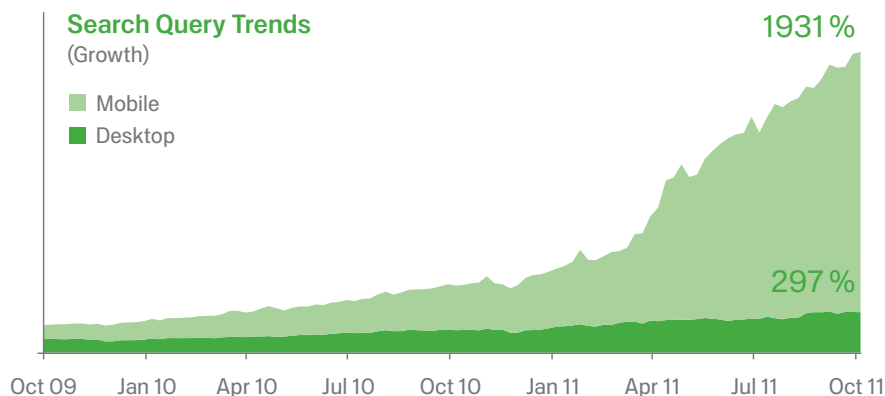
Online Ad Spend, 2011

118 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 84% **Online Communities**
- 52% **Games**
- 52% **News & Current Events**
- 50% **Shopping**
- 50% **Society**

“Argentina is rich in resources, has a well-educated workforce and is one of South America’s largest economies. The country is diverse and includes rain forest in the north, fertile farming land in the centre, Andean mountains to the west, desolate plains of Patagonia in the south and glaciers at the southern tip.”



Mobile

Total Mobile Penetration

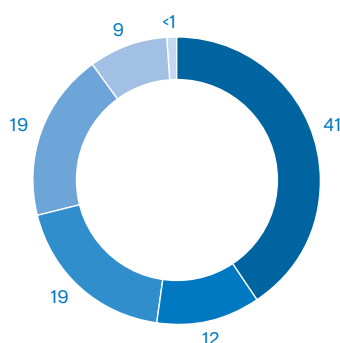
Total mobile users

128 % of population

Smartphone Penetration

Smartphone users

24 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
279.4 \$ Million
- Music**
96.1 \$ Million
- Games and Applications**
64.2 \$ Million

Mobile Internet Penetration

Handset browsing users

30 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

6.2 MB

Usage, Frequency

Total internet sessions, monthly

2,659 Million

Display



YouTube

Status: **Available**

Reach

73 % of online population

Page Views, monthly

1.3 Billion

Unique Users, monthly

9.8 Million

YouTube

(Homepage)

Reach

30 % of online population

Page Views, monthly

44 Million

Unique Users, monthly

4 Million

GDN

(Google Display Network)

Reach

> 80 % of online population

Page Views, monthly

3.9 Billion

Unique Users, monthly

12 Million

Social

Social networking accounts for 1 of every 4 minutes spent online in Argentina.

Australia

Australians and New Zealanders' first love is sport

Nick Leeder,
Managing Director Australia
and New Zealand



General Country Facts

Basic Facts

Official country name	Commonwealth of Australia
Capital	Canberra
Area	7,741,220 sq km
Top level domain	.au
Language (official)	English
Currency	Australian Dollars (AUD)
GDP PPP	882.4 \$ Billion
GDP rank	17

Internet

Fixed broadband subscriptions	5,165,000
Fixed internet subscriptions	6,092,000
Internet penetration	78 % of population

Demographics

Total population	21,766,711
Population rank	55
Population growth	1.15 %
Population growth rank	101



0-14 years	18 %
15-64 years	68 %
65 years and older	14 %
Median age	37.7 years

 gbm-au@google.com

Advertising Market

Total

Total Ad Spend, 2011 (total media spend)

11,417 \$ Million

Online

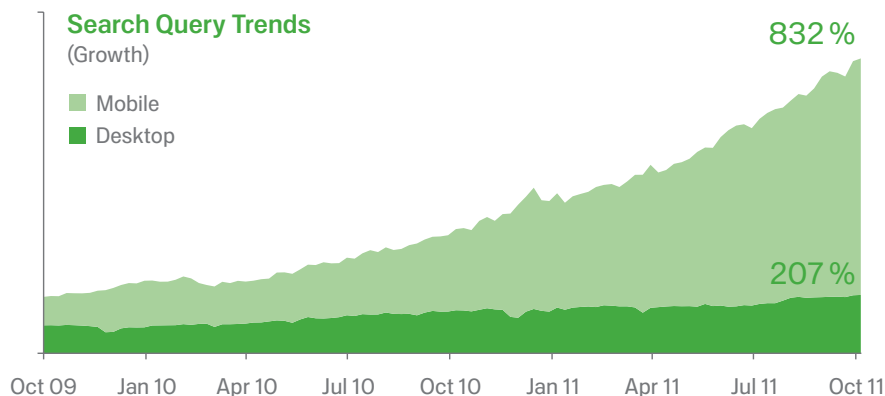
Online Ad Spend, 2011

2,413 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 28 % **Food & Drink**
- 28 % **Beauty & Personal Care**
- 27 % **Local**
- 26 % **Science**
- 26 % **News & Current Events**

“Digital technology is a close second. Our very high per capita GDP of ~US\$ 65K means we have one of the world’s highest penetrations of smart phones and tablets. And both countries are in the process of universal roll outs of high speed fibre which means some of what happens in digital will happen here first.”



Mobile

Total Mobile Penetration

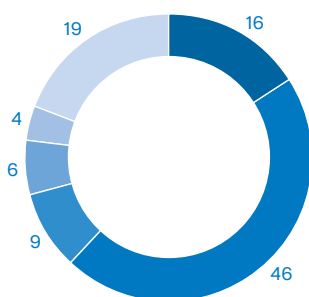
Total mobile users

132 % of population

Smartphone Penetration

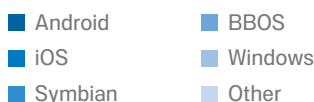
Smartphone users

52 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
357 \$ Million
- Games and Applications**
151 \$ Million
- Social Networking**
121 \$ Million

Mobile Internet Penetration

Handset browsing users

35 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

35.1 MB

Usage, Frequency

Total internet sessions, monthly

2,261 Million

Display



YouTube

Status: **Available**

Reach

53 % of online population

Page Views, monthly

610 Million

Unique Users, monthly

7.9 Million

YouTube

(Homepage)

Reach

28 % of online population

Page Views, monthly

41.7 Billion

Unique Users, monthly

4.1 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

8.7 Billion

Unique Users, monthly

16 Million

Social

Australians lead the way in company interaction via social media.

Austria

Mobile usage is strong in the heart of Europe

Stefan Tweraser,
Country Manager
Germany and Austria



General Country Facts

Basic Facts

Official country name	Republic of Austria
Capital	Vienna
Area	83,871 sq km
Top level domain	.at
Language (official)	German
Currency	Euros (EUR)
GDP PPP	332 \$ Billion
GDP rank	35

Internet

Fixed broadband subscriptions	2,002,000
Fixed internet subscriptions	2,149,000
Internet penetration	75 % of population

Demographics

Total population	8,217,280
Population rank	93
Population growth	0.03%
Population growth rank	189



0-14 years	14 %
15-64 years	68 %
65 years and older	18 %
Median age	43 years

 gbm-at@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

4,334 \$ Million

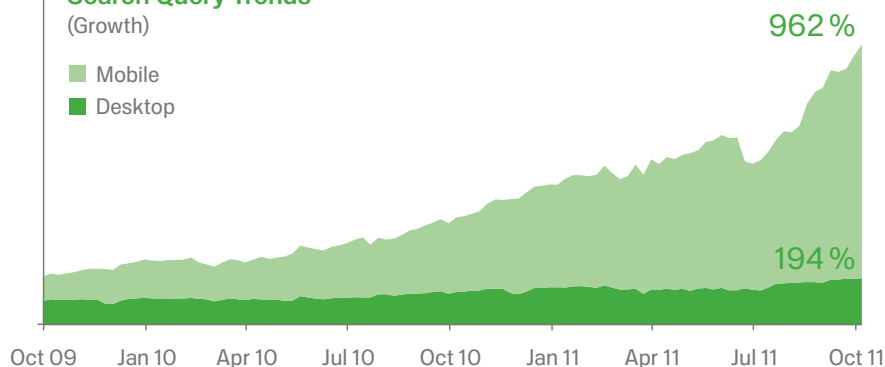
■ Online Ad Spend, 2011

560 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 32 % **Food & Drink**
- 30 % **News & Current Events**
- 28 % **Home & Garden**
- 28 % **Science**
- 27 % **Real Estate**

“With its mountains, the Alps, Austria is a leading destination for sports, securing global winter sports games. It’s location in the centre of Europe allows easy access to the rapidly growing markets in Central and Eastern Europe.”

Mobile

Total Mobile Penetration

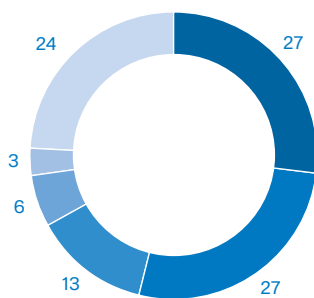
Total mobile users

162 % of population

Smartphone Penetration

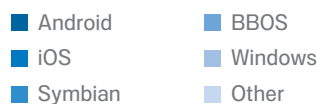
Smartphone users

36 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,797.2 \$ Million
- Music**
474 \$ Million
- Social Networking**
263.9 \$ Million

Mobile Internet Penetration

Handset browsing users

40 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

72.7 MB

Usage, Frequency

Total internet sessions, monthly

119 Million

Display



YouTube

Status: **Not available**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 80 % of online population

Page Views, monthly

1.6 Billion

Unique Users, monthly

5.1 Million

Social

47 % of Smartphone users access Social Networking Sites at least once a day.

Brazil

Brazil is set to become a singular superpower

Fabio Coelho,
Country Director
Brazil



General Country Facts

Basic Facts

Official country name	Federative Republic of Brazil
Capital	Brasilia
Area	8,514,877 sq km
Top level domain	.br
Language (official)	Portuguese
Currency	Reals (BRL)
GDP PPP	2.172 \$ Trillion
GDP rank	8

Internet

Fixed broadband subscriptions	14,086,729
Fixed internet subscriptions	20,992,424
Internet penetration	37 % of population

Demographics

Total population	203,429,773
Population rank	5
Population growth	1.13 %
Population growth rank	104



0-14 years	26 %
15-64 years	67 %
65 years and older	7 %
Median age	29.3 years



gbm-br@google.com

Advertising Market

Total

Total Ad Spend, 2011 (total media spend)

15,470 \$ Million

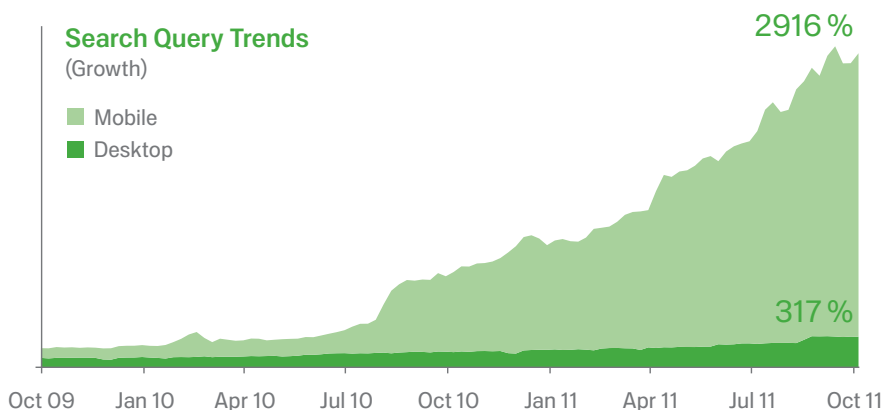
Online Ad Spend, 2011

804 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 167 % **Online Communities**
- 55 % **Beauty & Personal Care**
- 50 % **Sports**
- 50 % **Telecommunications**
- 50 % **Shopping**

“Brazil is looking at its future with a healthy ambition; it has no wars or enemies, a great internal market of 200 million Brazilians, natural resources galore, lots of water, it is becoming self sufficient in oil, no natural disasters and strong agriculture for food and energy. More importantly, it has warm, cheerful, welcoming, hard-working and pro-business people. Not without its problems, Brazil is bound to become a superpower of joy.”



Mobile

Total Mobile Penetration

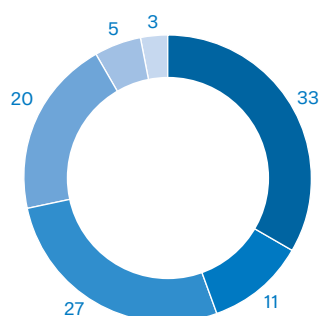
Total mobile users

108 % of population

Smartphone Penetration

Smartphone users

14 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,251 \$ Million
- Music**
516 \$ Million
- Games and Applications**
299 \$ Million

Mobile Internet Penetration

Handset browsing users

30 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

6.3 MB

Usage, Frequency

Total internet sessions, monthly

12,365 Million

Display



YouTube

Status: Available

Reach

70 % of online population

Page Views, monthly

3.8 Million

Unique Users, monthly

32.6 Million

YouTube

(Homepage)

Reach

44 % of online population

Page Views, monthly

238 Million

Unique Users, monthly

20.6 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

57 Billion

Unique Users, monthly

72 Million

Social

95 % of Brazilian managers use social media several times a week.

Bulgaria

An Economy Standing for Stability and Growth

Artur Waliszewski,
Regional Business Director Poland &
Central and Eastern Europe



General Country Facts

Basic Facts

Official country name	Republic of Bulgaria
Capital	Sofia
Area	110,879 sq km
Top level domain	.bg
Language (official)	Bulgarian
Currency	Leva (BGN)
GDP PPP	96.78 \$ Billion
GDP rank	71

Internet

Fixed broadband subscriptions	1,101,634
Fixed internet subscriptions	1,091,067
Internet penetration	48 % of population

Demographics

Total population	7,093,635
Population rank	100
Population growth	-0.78 %
Population growth rank	227



0-14 years	14 %
15-64 years	68 %
65 years and older	18 %
Median age	41.9 years

 gbm-bg@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

713 \$ Million

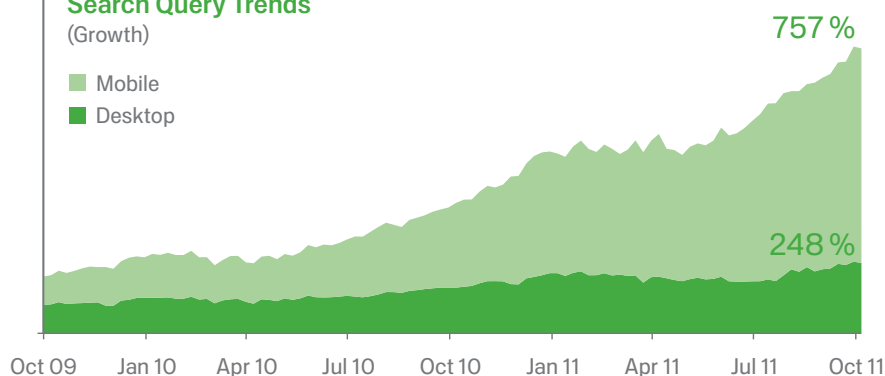
■ Online Ad Spend, 2011

30 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 42 % **Food & Drink**
- 34 % **Shopping**
- 34 % **Finance & Insurance**
- 32 % **Automotive**
- 29 % **Computers & Electronics**

“With the help of a stable macroeconomic policy, positive credit ratings, and the integration into the EU, Bulgaria’s economy has on average expanded 5 % p.a. for the past decade. This growth is backed by tourism, foreign investments, and strong exports, accounting for 53 % of GDP.”



Mobile

Total Mobile Penetration

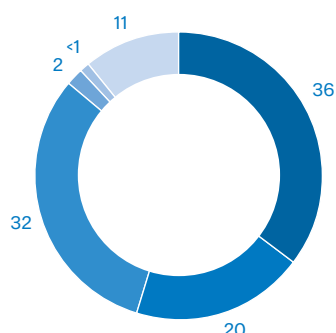
Total mobile users

149 % of population

Smartphone Penetration

Smartphone users

131 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,972 \$ Million
- Games and Applications**
849 \$ Million
- Music**
363 \$ Million

Mobile Internet Penetration

Handset browsing users

28 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

6.8 MB

Usage, Frequency

Total internet sessions, monthly

11,782 Million

Display



YouTube

Status: **Not available**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

1.6 Billion

Unique Users, monthly

3.2 Million

Social

Bulgaria ranks 4th in Eastern Europe in terms of social media use: 63 % of the population engage in social networking from home.

Canada

A unique country, many opportunities

Chris O'Neill,
Managing Director
Canada



General Country Facts

Basic Facts

Official country name	Canada
Capital	Ottawa
Area	9,984,670 sq km
Top level domain	.ca
Language (official)	English, French
Currency	Canadian Dollars (CAD)
GDP PPP	1.33 \$ Trillion
GDP rank	14

Internet

Fixed broadband subscriptions	10,138,741
Fixed internet subscriptions	10,953,303
Internet penetration	79 % of population

Demographics

Total population	34,030,589
Population rank	37
Population growth	0.79 %
Population growth rank	135



0-14 years	16 %
15-64 years	68 %
65 years and older	16 %
Median age	41 years

 gbm-ca@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

10,529 \$ Million

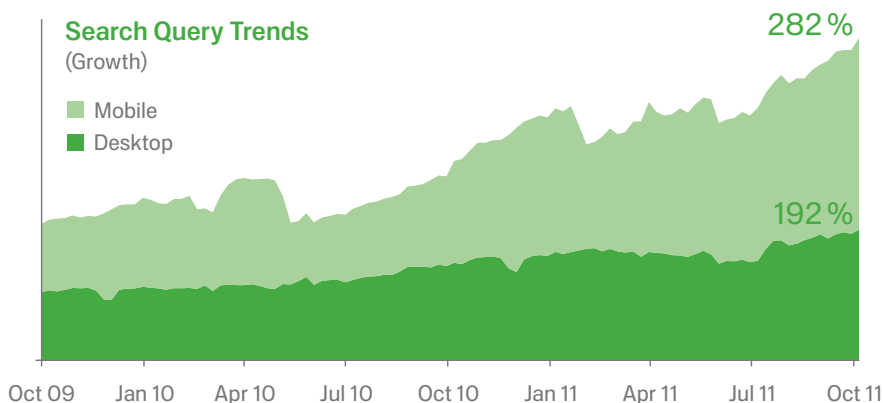
■ Online Ad Spend, 2011

2,577 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 15 % **Society**
- 15 % **Lifestyles**
- 15 % **Reference**
- 11 % **Entertainment**
- 10 % **Computers & Electronics**

“Canada is the second largest country in the world, attracting residents from all over the world and resulting in a highly diverse and skilled population. Canada continues to lead the world in online engagement, with Smartphone adoption on the rise. It is dominated by the service industry and its primary sector.”



Mobile

Total Mobile Penetration

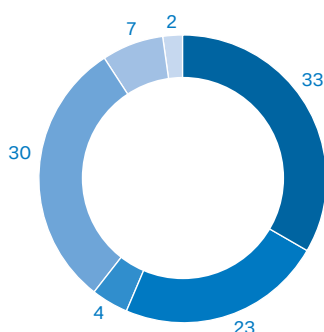
Total mobile users

72 % of population

Smartphone Penetration

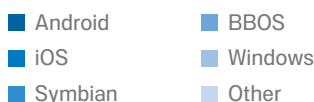
Smartphone users

33 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,256 \$ Million
- Games and Applications**
338 \$ Million
- Social Networking**
115 \$ Million

Mobile Internet Penetration

Handset browsing users

36 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

90.6 MB

Usage, Frequency

Total internet sessions, monthly

4,974 Million

Display



YouTube

Status: **Available**

Reach

76 % of online population

Page Views, monthly

4.99 Million

Unique Users, monthly

19.2 Million

YouTube

(Homepage)

Reach

43 % of online population

Page Views, monthly

328.5 Million

Unique Users, monthly

10.9 Million

GDN

(Google Display Network)

Reach

> 80 % of online population

Page Views, monthly

14 Billion

Unique Users, monthly

24 Million

Social

Nearly 50 % of Canadians with social networking profiles 'follow' at least one brand or company.

Chile

Modern, stable country with great landscapes and people

Eduardo Pooley,
Country Director
Chile



General Country Facts

Basic Facts

Official country name	Republic of Chile
Capital	Santiago
Area	756,102 sq km
Top level domain	.cl
Language (official)	Spanish
Currency	Chilean Pesos (CLP)
GDP PPP	257.9 \$ Billion
GDP rank	45

Internet

Fixed broadband subscriptions	1,788,490
Fixed internet subscriptions	1,818,799
Internet penetration	55 % of population

Demographics

Total population	16,888,760
Population rank	59
Population growth	0.84 %
Population growth rank	130



0-14 years	22 %
15-64 years	68 %
65 years and older	10 %
Median age	32.1 years

 gbm-cl@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

1,220 \$ Million

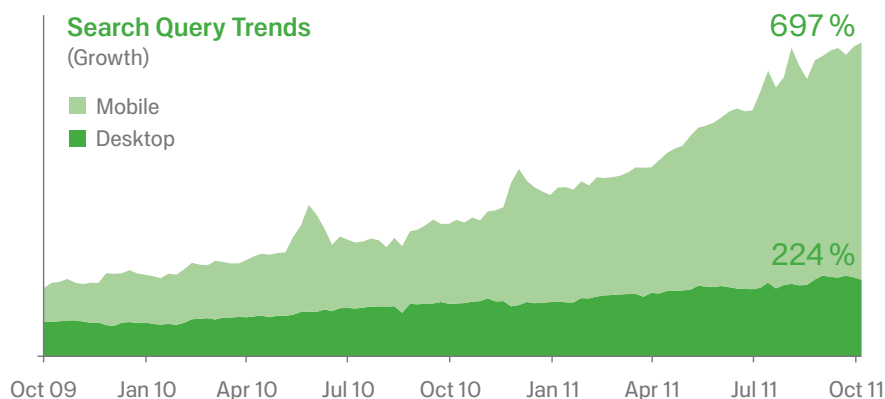
■ Online Ad Spend, 2011

56 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 34% **Lifestyles**
- 30% **Entertainment**
- 29% **Society**
- 27% **Games**
- 21% **Computers & Electronics**

“Chile is one of the best-evaluated countries in Latin America and emerging economies worldwide. Thanks to its political, macroeconomic, and social stability, it has consolidated its standing as an attractive destination for foreign investment.”



Mobile

Total Mobile Penetration

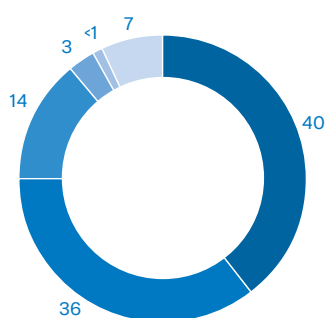
Total mobile users

136 % of population

Smartphone Penetration

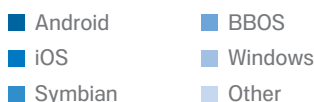
Smartphone users

11 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- 1. Music**
680 \$ Million
- 2. Handset Browsing**
516 \$ Million
- 3. Games and Applications**
350 \$ Million

Mobile Internet Penetration

Handset browsing users

11 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

4.7 MB

Usage, Frequency

Total internet sessions, monthly

4,946 Million

Display



YouTube

Status: **Just launched**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

3.5 Billion

Unique Users, monthly

6.1 Million

Social

Social networking accounts for 1 of every 4 minutes spent online in Chile.

China

Staggering Scale in World's Most Populous Internet-using Country

John Liu,
VP, Sales and Operations
Greater China



General Country Facts

Basic Facts

Official country name	People's Republic of China
Capital	Beijing
Area	9,596,961 sq km
Top level domain	.cn
Language (official)	Standard Chinese or Mandarin
Currency	Renminbi Yuan (RMB)
GDP PPP	10.09 \$ Trillion
GDP rank	2

Internet

Fixed broadband subscriptions	126,337,000
Fixed internet subscriptions	111,522,000
Internet penetration	39 % of population

Demographics

Total population	1,336,718,015
Population rank	1
Population growth	0.49 %
Population growth rank	151



0-14 years	18 %
15-64 years	74 %
65 years and older	9 %
Median age	35.5 years



gbm-cn@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

29,943 \$ Million

■ Online Ad Spend, 2011

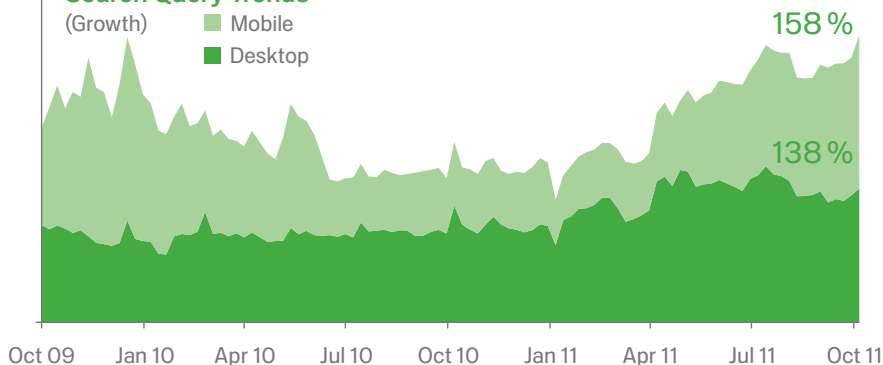
6,405 \$ Million

Search

Search Query Trends

(Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 24 % **Computers & Electronics**
- 22 % **Entertainment**
- 17 % **Society**
- 17 % **Internet**
- 15 % **Games**

“520 million Internet users. 355 million mobile Internet users. These astounding numbers speak for themselves, as China's bewildering scale represents the future of global growth for the Internet industry. For those who persevere despite the challenges, huge rewards await in China.”

Mobile

Total Mobile Penetration

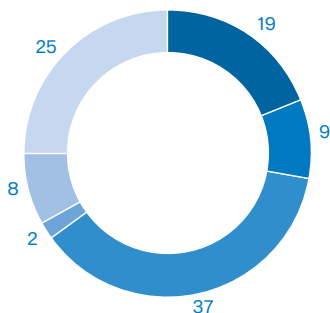
Total mobile users

68 % of population

Smartphone Penetration

Smartphone users

33 % of population



Smartphone Users by OS

Total mobile users (% of population)

- Android
- iOS
- Symbian
- BBOS
- Windows
- Other

Usage, Top 3 Activities

Marketsize (\$ Million)

- Music**
4,308 \$ Million
- Handset Browsing**
1,714 \$ Million
- Games and Applications**
1,153 \$ Million

Mobile Internet Penetration

Handset browsing users

16 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

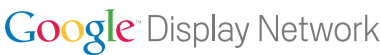
4.8 MB

Usage, Frequency

Total internet sessions, monthly

25,060 Million

Display



YouTube

Status: Not available

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

76 Billion

Unique Users, monthly

340 Million

Social

83 % of companies use social media for business, e.g. contacting suppliers and clients.

Colombia

A truly diverse country with modern cities, caribbean beaches and archaeological ruins

Laura Camacho,
Country Manager
Colombia



General Country Facts

Basic Facts

Official country name	Republic of Colombia
Capital	Bogota
Area	1,138,910 sq km
Top level domain	.co
Language (official)	Spanish
Currency	Colombian Pesos (COP)
GDP PPP	435.4 \$ Billion
GDP rank	28

Internet

Fixed broadband subscriptions	2,621,764
Fixed internet subscriptions	2,675,548
Internet penetration	50 % of population

Demographics

Total population	44,725,543
Population rank	30
Population growth	1.16 %
Population growth rank	100



0-14 years	27 %
15-64 years	67 %
65 years and older	6 %
Median age	28 years

 gbm-co@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

1,252 \$ Million

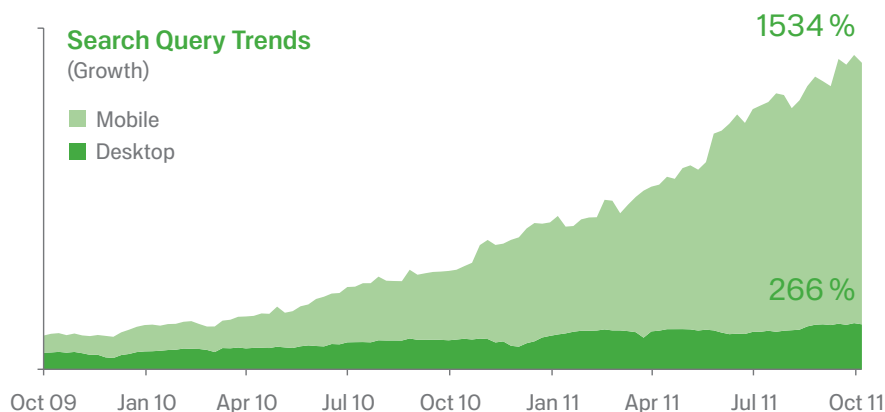
■ Online Ad Spend, 2011

59 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 62% **News & Current Events**
- 51% **Shopping**
- 48% **Sports**
- 46% **Lifestyles**
- 43% **Food & Drink**

“The fourth largest country in South America and one of the continent’s most populous nations, Colombia has substantial oil reserves and is a major producer of gold, silver, emeralds, platinum and coal. Internet access in Colombia shows a marked increase during the last few years.”

Mobile

Total Mobile Penetration

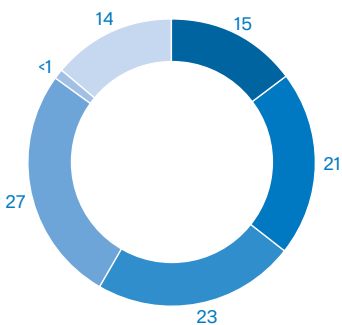
Total mobile users

103 % of population

Smartphone Penetration

Smartphone users

20 % of population



Smartphone Users by OS

Total mobile users (% of population)

- Android
- iOS
- Symbian
- BBOS
- Windows
- Other

Usage, Top 3 Activities

Marketsize (\$ Million)

- 1. Music**
680 \$ Million
- 2. Handset Browsing**
516 \$ Million
- 3. Games and Applications**
350 \$ Million

Mobile Internet Penetration

Handset browsing users

11 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

4,7 MB

Usage, Frequency

Total internet sessions, monthly

4,946 Million

Display



YouTube

Status: **Just launched**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 65 % of online population

Page Views, monthly

3.5 Billion

Unique Users, monthly

16 Million

Social

Colombia ranks 7th among the top countries for the average time spent using social media per visitor.

Croatia

A Country of Mediterranean & Central European
Tradition on its Road into the EU

Artur Waliszewski,
Regional Business Director Poland &
Central and Eastern Europe



General Country Facts

Basic Facts

Official country name	Republic of Croatia
Capital	Zagreb
Area	56,594 sq km
Top level domain	.hr
Language (official)	Croatian
Currency	Kuna (HRK)
GDP PPP	78.09 \$ Billion
GDP rank	78

Internet

Fixed broadband subscriptions	803,823
Fixed internet subscriptions	1,498,260
Internet penetration	59 % of population

Demographics

Total population	4,483,804
Population rank	124
Population growth	-0.08 %
Population growth rank	202



0-14 years	15 %
15-64 years	68 %
65 years and older	17 %
Median age	41.4 years



gbm-hr@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

2,071 \$ Million

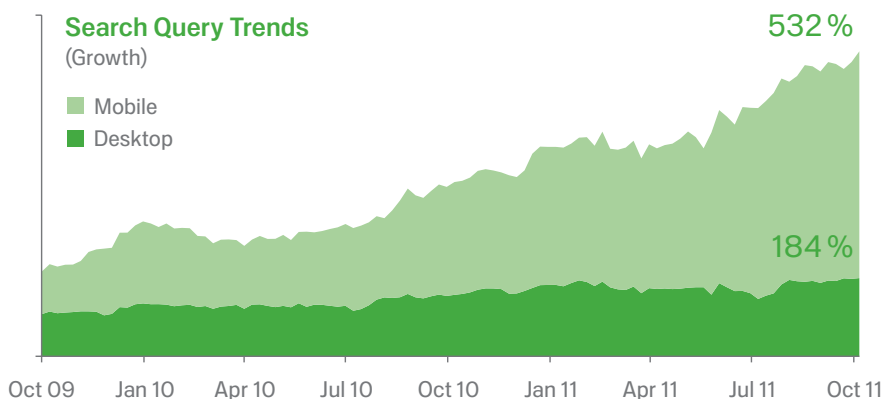
■ Online Ad Spend, 2011

22 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 37% **News & Current Events**
- 33% **Food & Drink**
- 32% **Shopping**
- 31% **Science**
- 31% **Home & Garden**

“An average GDP growth rate of 4.4 % p.a. over the last decade underlines Croatia’s highly dynamic development. With social and economic reforms, the country is ready to shape its future and deal with the impact of the financial crisis.”

Mobile

Total Mobile Penetration

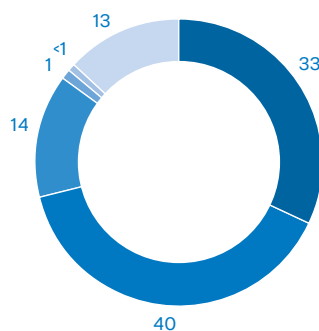
Total mobile users

142 % of population

Smartphone Penetration

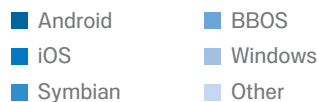
Smartphone users

15 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,972 \$ Million
- Games and Applications**
849 \$ Million
- Music**
363 \$ Million

Mobile Internet Penetration

Handset browsing users

28 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

6.8 MB

Usage, Frequency

Total internet sessions, monthly

11,782 Million

Display



YouTube

Status: **Not available**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

1.5 Billion

Unique Users, monthly

2 Million

Social

71,000 Croatians tweet at least once a month.

Czech Republic

Export Driven Economy with Engineering Tradition
in the Heart of Europe

Tania le Moigne,
Country Director
Czech Republic



General Country Facts

Basic Facts

Official country name	Czech Republic
Capital	Prague
Area	78,867 sq km
Top level domain	.cz
Language (official)	Czech*
Currency	Koruny (CZK)
GDP PPP	261.3 \$ Billion
GDP rank	43

Internet


Fixed broadband subscriptions	1,537,899
Fixed internet subscriptions	1,529,115
Internet penetration	70.9 % of population

Demographics

Total population	10,190,213
Population rank	82
Population growth	-0.12 %
Population growth rank	206



0-14 years	13 %
15-64 years	70 %
65 years and older	16 %
Median age	40.8 years

 gbm-cz@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

1,362 \$ Million

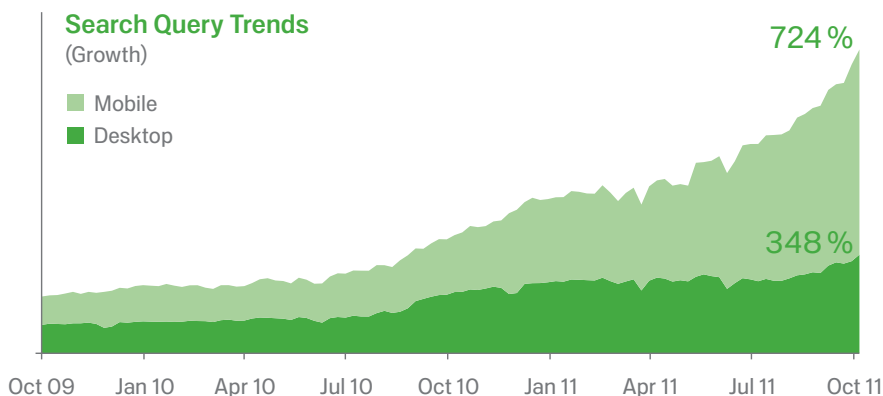
■ Online Ad Spend, 2011

226 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 40% **Online Communities**
- 32% **Food & Drink**
- 31% **Finance & Insurance**
- 29% **Real Estate**
- 29% **Health**

* majority 94.9 %

“A stable economy, a qualified labor force, and superb business locations attract foreign investments and R&D hubs. A developed online ecosystem combined with an extensive mobile penetration creates one of the most favorable business environments for e-commerce in Europe.”



Mobile

Total Mobile Penetration

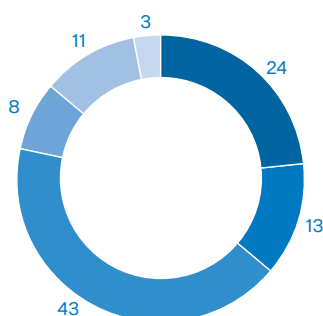
Total mobile users

139 % of population

Smartphone Penetration

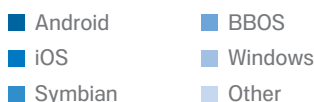
Smartphone users

17 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
76 \$ Million
- Games and Applications**
24 \$ Million
- Music**
17 \$ Million

Mobile Internet Penetration

Handset browsing users

28 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

10.8 MB

Usage, Frequency

Total internet sessions, monthly

613 Million

Display



YouTube

Status: **Available**

Reach

63 % of online population

Page Views, monthly

490 Million

Unique Users, monthly

4.3 Million

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

750 Thousand (daily)

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

3.2 Billion

Unique Users, monthly

6.2 Million

Social

YouTube ranked 5th among the top 500 websites visited in the Czech Republic.

Denmark

The happiest and least corrupt country in the world,
according to Forbes Magazine

Peter Friis,
Country Sales Director
Denmark



General Country Facts

Basic Facts

Official country name	Kingdom of Denmark
Capital	Copenhagen
Area	43,094 sq km
Top level domain	.dk
Language	Danish
Currency	Danish Kroner (DKK)
GDP PPP	201.7 \$ Billion
GDP rank	52

Internet

Fixed broadband subscriptions	2,074,739
Fixed internet subscriptions	2,166,997
Internet penetration	86 % of population

Demographics

Total population	5,529,888
Population rank	111
Population growth	0.25 %
Population growth rank	172



0-14 years	18 %
15-64 years	65 %
65 years and older	17 %
Median age	40.9 years

 gbm-dk@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

2,097 \$ Million

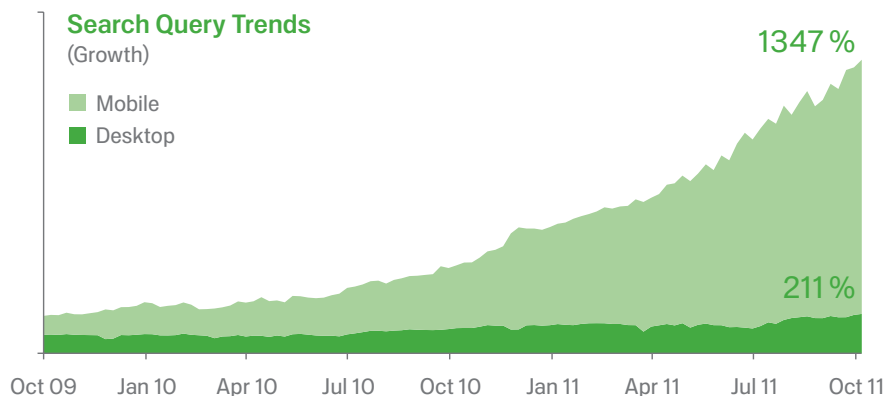
■ Online Ad Spend, 2011

602 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 31% **Finance & Insurance**
- 29% **Food & Drink**
- 29% **Science**
- 29% **News & Current Events**
- 27% **Telecommunications**

“Denmark is made up of a peninsula and 406 islands, many of the linked by bridges. You are never far from the sea, to enjoy a swim in the summer or a bracing walk in the winter snow. It has the one of the world's oldest monarchies, stretching back to the Viking Age.”

Mobile

Total Mobile Penetration

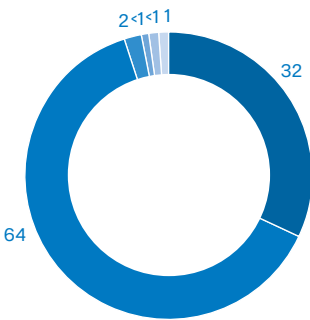
Total mobile users

136 % of population

Smartphone Penetration

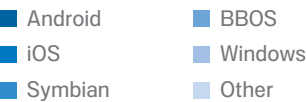
Smartphone users

45 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
128 \$ Million
- Social Networking**
35 \$ Million
- Games and Applications**
37 \$ Million

Mobile Internet Penetration

Handset browsing users

51 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

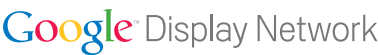
59 MB

Usage, Frequency

Total internet sessions, monthly

1,006 Million

Display



YouTube

Status: **Not available**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

2.2 Billion

Unique Users, monthly

4.3 Million

Social

53 % of smartphone users access social networking sites at least once per day.

Egypt

At the heart of the Internet Revolution



Wael Fakharany,
Regional Manager
Egypt and North Africa

General Country Facts

Basic Facts

Official country name	Arab Republic of Egypt
Capital	Cairo
Area	1,001,450 sq km
Top level domain	.eg
Language (official)	Arabic
Currency	Egyptian Pounds (EGP)
GDP PPP	497.8 \$ Billion
GDP rank	26

Internet

Fixed broadband subscriptions	1,476,546
Fixed internet subscriptions	2,118,181
Internet penetration	26.4 % of population

Demographics

Total population	82,079,636
Population rank	15
Population growth	1.96 %
Population growth rank	57



0-14 years	33 %
15-64 years	63 %
65 years and older	5 %
Median age	24.3 years

 gbm-eg@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

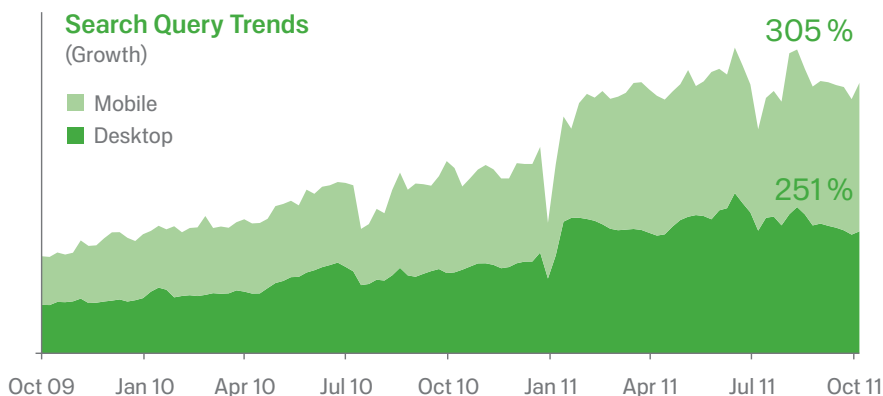
(online not available)

361 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 100 % **Business**
- 63 % **News & Current Events**
- 51 % **Online Communities**
- 48 % **Society**
- 47 % **Shopping**

“The Arab Spring in North Africa has given a voice to the people. At Google, we are determined to add value to the economic, social and cultural lives of the 60M Internet users growing at a rate of 40 %. Let’s work to bring the true magic of the Internet to this ever-growing region.”



Mobile

Total Mobile Penetration

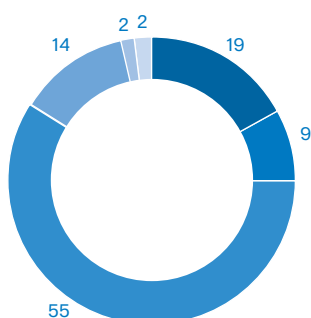
Total mobile users

93 % of population

Smartphone Penetration

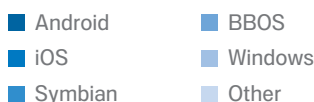
Smartphone users

26 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,471 \$ Million
- Music**
383 \$ Million
- Social Networking**
171 \$ Million

Mobile Internet Penetration

Handset browsing users

41 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

2.3 MB

Usage, Frequency

Total internet sessions, monthly

15,431 Million

Display



YouTube

Status: **Just launched**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 75 % of online population

Page Views, monthly

2.2 Billion

Unique Users, monthly

14 Million

Social

66 % of smartphone users access social networking sites at least once per day.

Finland

Covered two-thirds in forest and about a tenth by water

Anni Ronkainen,
Country Manager
Finland



General Country Facts

Basic Facts

Official country name	Republic of Finland
Capital	Helsinki
Area	338,145 sq km
Top level domain	.fi*
Language (official)	Finnish, Swedish
Currency	Euros (EUR)
GDP PPP	186 \$ Billion
GDP rank	55

Internet

Fixed broadband subscriptions	1,559,400
Fixed internet subscriptions	-
Internet penetration	85 % of population

Demographics

Total population	5,259,250
Population rank	114
Population growth	0.08 %
Population growth rank	185



0-14 years	16 %
15-64 years	66 %
65 years and older	18 %
Median age	42.5 years

 gbm-fi@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

1,836 \$ Million

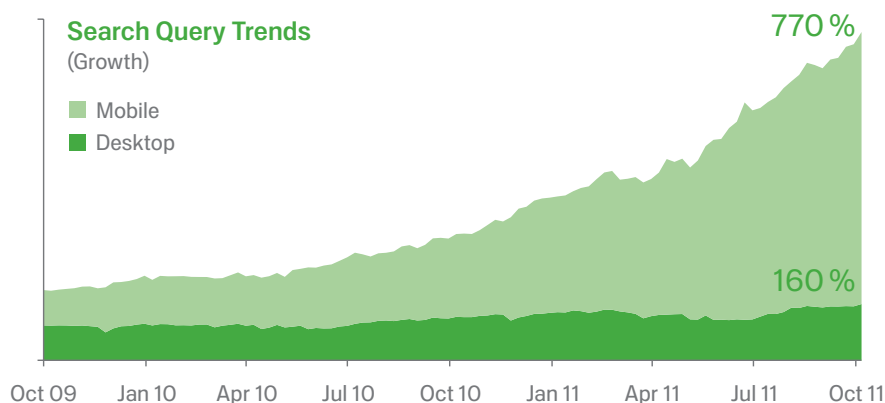
■ Online Ad Spend, 2011

309 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 25 % **News & Current Events**
- 24 % **Food & Drink**
- 21 % **Science**
- 20 % **Finance & Insurance**
- 20 % **Sports**

* Aland Islands are assigned .ax

"In the far north, the sun does not set for around 10 weeks during summer, while in winter it does not rise above the horizon for nearly 8 weeks. Finland spends heavily on education, training and research – investment which pays dividends by delivering one of the best-qualified workforces in the world. Finland has made broadband access a legal right for every citizen."

Mobile

Total Mobile Penetration

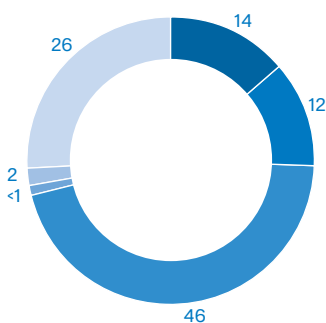
Total mobile users

173 % of population

Smartphone Penetration

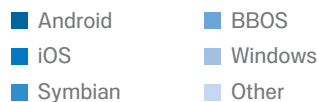
Smartphone users

38 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
154 \$ Million
- Games and Applications**
36 \$ Million
- Social Networking**
33 \$ Million

Mobile Internet Penetration

Handset browsing users

55 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

74.5 MB

Usage, Frequency

Total internet sessions, monthly

1,057 Million

Display



YouTube

Status: Not available

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

2,6 Billion

Unique Users, monthly

3,9 Million

Social

The most used social media channels in organizations include chat (66 %), discussion forums (59 %) and document sharing (57 %).

France

Home to renowned artists like Renoir and Monet,
famous for its cuisine

Jean-Marc Tassetto,
Managing Director,
France



General Country Facts

Basic Facts

Official country name	French Republic
Capital	Paris
Area (total)	643,801 sq km
Top level domain	metropolitan France (.fr)*
Language (official)	French
Currency	Euros (EUR)
GDP PPP	2.145 \$ Trillion
GDP rank	9

Internet

Fixed broadband subscriptions	21,300,000
Fixed internet subscriptions	21,800,000
Internet penetration	77 % of population

Demographics

Total population	65,312,249
Population rank	21
Population growth	0.50 %
Population growth rank	150



0-14 years	19 %
15-64 years	65 %
65 years and older	13 %
Median age	39.9 years

 gbm-fr@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

12,823 \$ Million

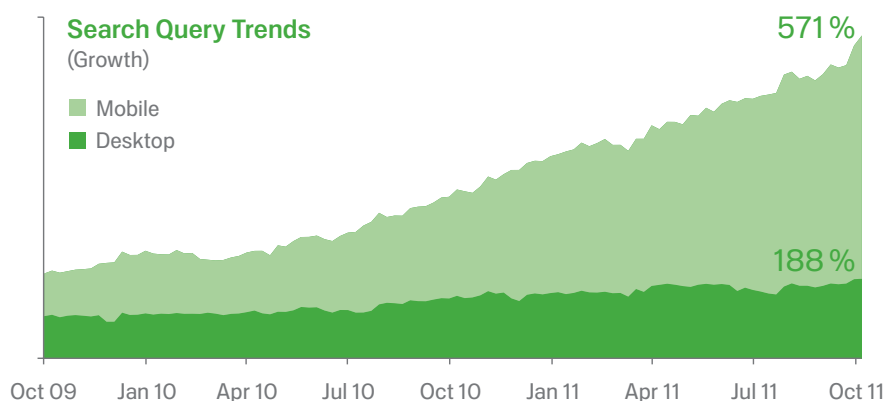
■ Online Ad Spend, 2011

2,436 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 27% **Food & Drink**
- 24% **Sensitive Subjects**
- 24% **Health**
- 23% **News & Current Events**
- 23% **Finance & Insurance**

* TLD France: other domains include French Guiana (.gf); Guadeloupe (.gp); Martinique (.mq); Mayotte (.yt); Reunion (.re)

“France has the eurozone’s second-largest economy and is a leading industrial power, especially in the automotive and aerospace sectors, as well as in cosmetics, luxury goods telecoms and pharmaceuticals. It is the world’s leading tourist destination with the highest number of science graduates per 1000 workers in Europe.”



Mobile

Total Mobile Penetration

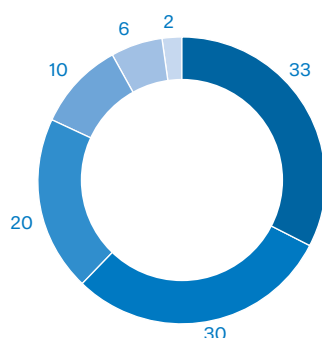
Total mobile users

95 % of population

Smartphone Penetration

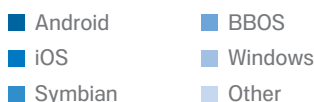
Smartphone users

38 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,437 \$ Million
- Games and Applications**
345 \$ Million
- Social Networking**
268 \$ Million

Mobile Internet Penetration

Handset browsing users

42 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

73.2 MB

Usage, Frequency

Total internet sessions, monthly

10,545 Million

Display



YouTube

Status: **Available**

Reach

55 % of online population

Page Views, monthly

1.47 Billion

Unique Users, monthly

22.9 Million

YouTube

(Homepage)

Reach

26 % of online population

Page Views, monthly

89 Million

Unique Users, monthly

10.68 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

17 Billion

Unique Users, monthly

46 Million

Social

French people spend an average of 4.1 hours per month on social networking sites.

Germany

The world's largest exporter of goods, continues pushing technological innovation

Stefan Tweraser,
Country Manager
Germany and Austria



General Country Facts

Basic Facts

Official country name	Federal Republic of Germany
Capital	Berlin
Area	357,022 sq km
Top level domain	.de
Language (official)	German
Currency	Euros (EUR)
GDP PPP	2.94 \$ Trillion
GDP rank	5

Internet

Fixed broadband subscriptions	26,000,000
Fixed internet subscriptions	-
Internet penetration	82.7 % of population

Demographics

Total population	81,471,834
Population rank	16
Population growth	-0.21 %
Population growth rank	211



0-14 years	13 %
15-64 years	66 %
65 years and older	21 %
Median age	44.9 years



gbm-de@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

24,419 \$ Million

■ Online Ad Spend, 2011

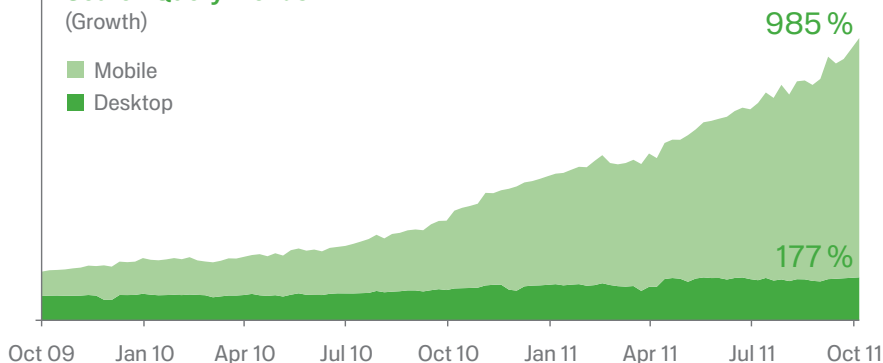
4,577 \$ Million

Search

Search Query Trends

(Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 44 % **Online Communities**
- 24 % **Food & Drink**
- 21 % **News & Current Events**
- 20 % **Health**
- 20 % **Finance & Insurance**

“Internationally German companies have an excellent reputation, ‘Made in Germany’ is known as a seal of quality. They represent innovation, quality and cutting-edge technology. Germany is a land of ideas. The German mobile market is the largest in Europe in terms of subscribers, revenue – and growth potential.”



Mobile

Total Mobile Penetration

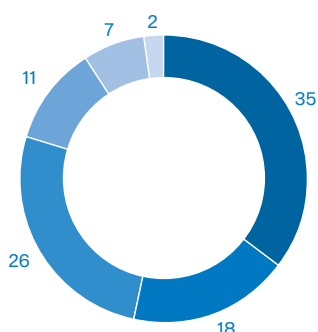
Total mobile users

136 % of population

Smartphone Penetration

Smartphone users

29 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- 1. Handset Browsing**
2,028 \$ Million
- 2. Games and Applications**
484 \$ Million
- 3. Social Networking**
399 \$ Million

Mobile Internet Penetration

Handset browsing users

40 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

62.7 MB

Usage, Frequency

Total internet sessions, monthly

12,313 Million

Display



YouTube

Status: **Available**

Reach

48 % of online population

Page Views, monthly

3.7 Billion

Unique Users, monthly

22.6 Million

YouTube

(Homepage)

Reach

30 % of online population

Page Views, monthly

317 Million

Unique Users, monthly

14.2 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

60 Billion

Unique Users, monthly

61 Million

Social

Of social media users in Germany, 64 % check their accounts several times a day, while 15 % are followers of a company brand. 50 % of German mobile surfers list social networks as their favourite online activity.

Greece

As Odysseus Already Knew: the Hub for the South of Europe and the Middle East

Stefanos Loukakos,
Country Manager
Greece



General Country Facts

Basic Facts

Official country name	Hellenic Republic
Capital	Athens
Area	131,957 sq km
Top level domain	.gr
Language (official)	Greek
Currency	Euros (EUR)
GDP PPP	318.1 \$ Billion
GDP rank	38

Internet

Fixed broadband subscriptions	2,252,653
Fixed internet subscriptions	2,282,653
Internet penetration	46 % of population

Demographics

Total population	10,760,136
Population rank	76
Population growth	0.08 %
Population growth rank	184



0-14 years	14 %
15-64 years	66 %
65 years and older	20 %
Median age	42.5 years



gbm-gr@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

(online not available)

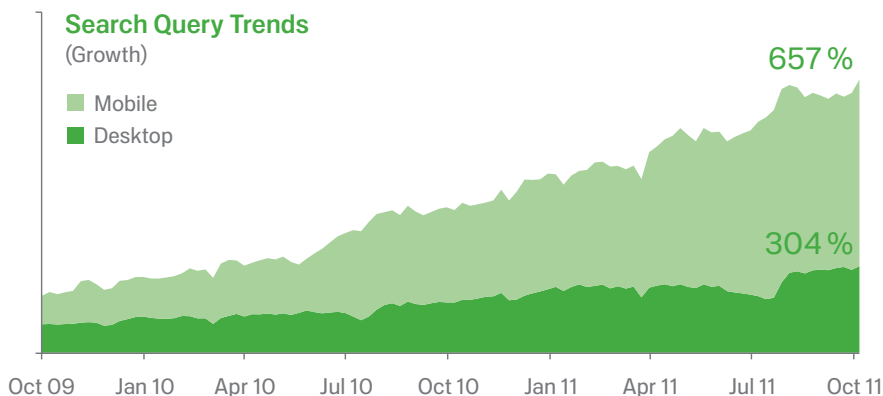
1,882 \$ Million

Search

Search Query Trends

(Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 51% **Finance & Insurance**
- 50% **Real Estate**
- 48% **Local**
- 41% **Food & Drink**
- 41% **Industries**

“With a booming online ad market and broadband penetration exceeding 20 % of the population, Greece provides strong opportunities for growth. Nowadays, the country is as attracting to foreign advertisers as it was for travellers since ancient times.”

Mobile

Total Mobile Penetration

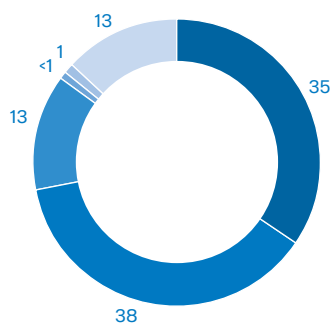
Total mobile users

136 % of population

Smartphone Penetration

Smartphone users

36 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,797 \$ Million
- Games and Applications**
474 \$ Million
- Social Networking**
264 \$ Million

Mobile Internet Penetration

Handset browsing users

40 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

72.7 MB

Usage, Frequency

Total internet sessions, monthly

119 Million

Display



YouTube

Status: **Not available**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

3 Billion

Unique Users, monthly

4.6 Million

Social

About 25 % of social networkers in Greece spend about 1–2 hours online daily and 23 % spend 2–4 hours online daily.

Hungary

Where Inventors Come up with Ideas like
Rubik's Cube or Holography

Edina Heal,
Country Manager
Budapest



General Country Facts

Basic Facts

Official country name	Republic of Hungary
Capital	Budapest
Area	93,028 sq km
Top level domain	.hu
Language	Hungarian*
Currency	Forints (HUF)
GDP PPP	187.6 \$ Billion
GDP rank	54

Internet

Fixed broadband subscriptions	1,956,218
Fixed internet subscriptions	1,971,355
Internet penetration	62 % of population

Demographics

Total population	9,976,062
Population rank	84
Population growth	-0.17 %
Population growth rank	210



0-14 years	15 %
15-64 years	68 %
65 years and older	17 %
Median age	40.2 years

gbm-hu@google.com

Advertising Market

Total

Online

Total Ad Spend, 2011 (total media spend)

810 \$ Million

Online Ad Spend, 2011

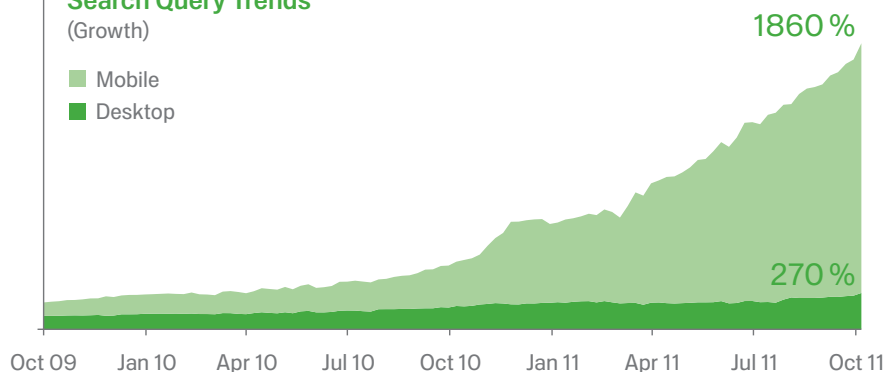
143 \$ Million

Search

Search Query Trends

(Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 37% **Finance & Insurance**
- 31% **Food & Drink**
- 30% **Science**
- 30% **News & Current Events**
- 29% **Beauty & Personal Care**

* majority 93.6 %

“With internet penetration above 60 % and high broadband usage, Hungary is becoming an internet-enabled society. Due to its central location in the region and strong educational system, the country is first choice for international companies for their HQs.”



Mobile

Total Mobile Penetration

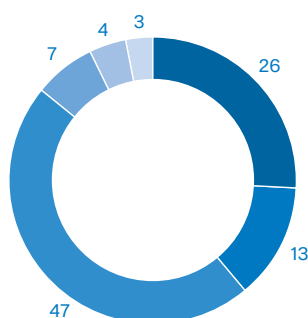
Total mobile users

108 % of population

Smartphone Penetration

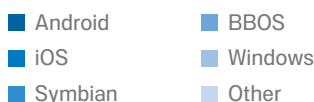
Smartphone users

16 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- 1. Handset Browsing**
1,972 \$ Million
- 2. Games and Applications**
849 \$ Million
- 3. Music**
363 \$ Million

Mobile Internet Penetration

Handset browsing users

28 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

6.8 MB

Usage, Frequency

Total internet sessions, monthly

11,782 Million

Display



YouTube

Status: **Just launched**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

3.4 Billion

Unique Users, monthly

5.6 Million

Social

Social networking and reading blogs are the most popular social media activities.

India

The world's largest democracy and second most populous country



Rajan Anandan,
VP India Sales
and Operations

General Country Facts

Basic Facts

Official country name	Republic of India
Capital	New Delhi
Area	3,287,263 sq km
Top level domain	.in
Language (official)	Hindi*
Currency	Indian Rupees (INR)
GDP PPP	4.06 \$ Trillion
GDP rank	4

Internet

Fixed broadband subscriptions	10,990,000
Fixed internet subscriptions	18,690,000
Internet penetration	10.2 % of population

Demographics

Total population	1,189,172,906
Population rank	2
Population growth	1.34 %
Population growth rank	86



0-14 years	30 %
15-64 years	65 %
65 years and older	5 %
Median age	26.2 years

 gbm-in@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

5,876 \$ Million

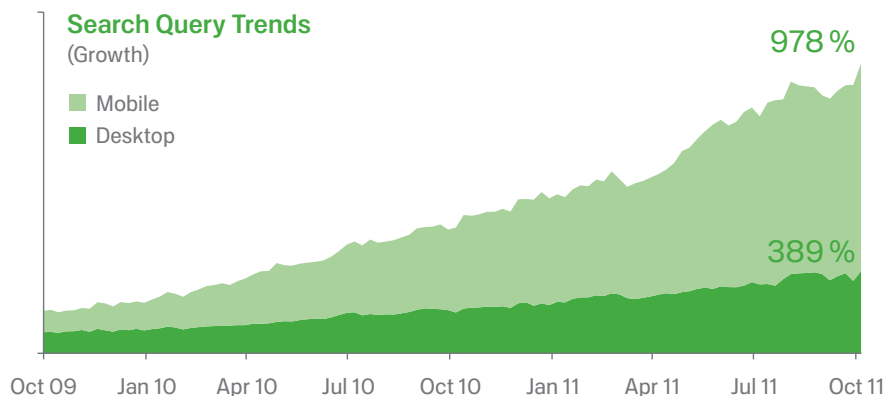
■ Online Ad Spend, 2011

166 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 120 % **Online Communities**
- 85 % **Photo & Video**
- 82 % **Society**
- 80 % **Food & Drink**
- 75 % **Lifestyles**

* majority 41 %

“India is one of the fastest-growing economies in the world. It has emerged as a global player with the world's fourth-largest economy in purchasing power parity terms and has made great strides in fields such as information technology. With its many languages, cultures and religions, India is highly diverse.”



Mobile

Total Mobile Penetration

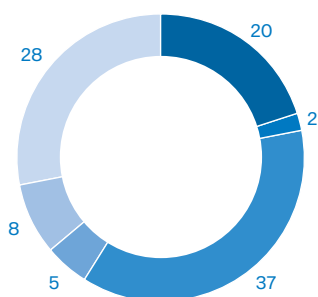
Total mobile users

50 % of population

Smartphone Penetration

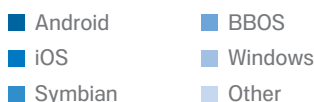
Smartphone users

23 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- 1. Music**
1,271 \$ Million
- 2. Games and Applications**
768 \$ Million
- 3. Handset Browsing**
722 \$ Million

Mobile Internet Penetration

Handset browsing users

10 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

2.2 MB

Usage, Frequency

Total internet sessions, monthly

10,687 Million

Display



YouTube

Status: **Available**

Reach

52 % of online population

Page Views, monthly

1.6 Billion

Unique Users, monthly

24 Million

YouTube

(Homepage)

Reach

18 % of online population

Page Views, monthly

67.9 Million

Unique Users, monthly

8.47 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

12 Billion

Unique Users, monthly

45 Million

Social

Indian social network users make up 72 % of the Internet-user population aged 18+.

Indonesia

The world's fourth most populous country

Rudy Ramawy,
Country Head
Indonesia



General Country Facts

Basic Facts

Official country name	Republic of Indonesia
Capital	Jakarta
Area	1,904,569 sq km
Top level domain	.id
Language (official)	Bahasa Indonesia*
Currency	Indonesian Rupiah (IDR)
GDP PPP	1.03 \$ Trillion
GDP rank	15

Internet

Fixed broadband subscriptions	1,900,300
Fixed internet subscriptions	-
Internet penetration	22.4 % of population

Demographics

Total population	245,613,043
Population rank	4
Population growth	1.07 %
Population growth rank	110



0-14 years	27 %
15-64 years	67 %
65 years and older	6 %
Median age	28.2 years

gbm-id@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

5,111 \$ Million

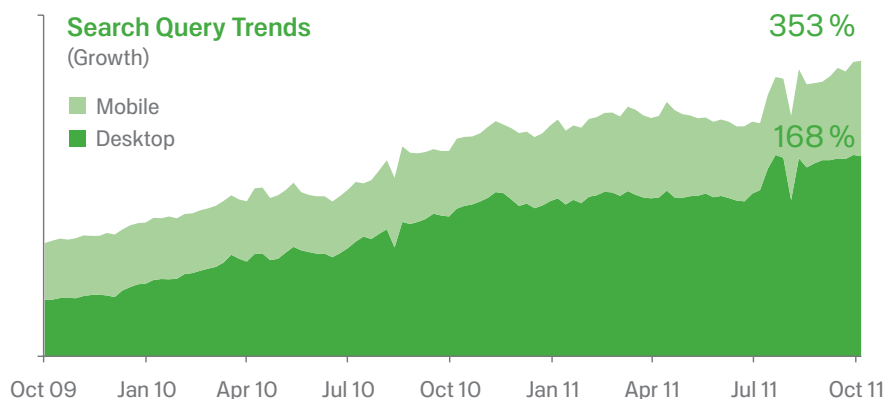
■ Online Ad Spend, 2011

1 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 62% **Shopping**
- 59% **News & Current Events**
- 57% **Food & Drink**
- 51% **Home & Garden**
- 50% **Beauty & Personal Care**

* modified form of Malay

“Despite challenges, Indonesia continues to post significant economic growth. It is the biggest economy in South East Asia and predicted to be the tenth largest in the world by 2030. The internet had become the second-largest media platform after TV in major cities, surpassing newspapers and radio.”



Mobile

Total Mobile Penetration

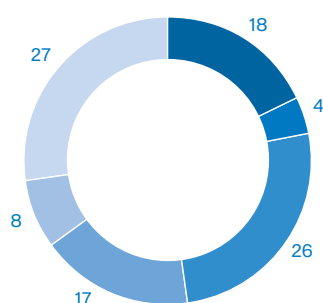
Total mobile users

100 % of population

Smartphone Penetration

Smartphone users

17 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Music**
1,650 \$ Million
- Games and Applications**
1,260 \$ Million
- Handset Browsing**
910 \$ Million

Mobile Internet Penetration

Handset browsing users

9 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

3.2 MB

Usage, Frequency

Total internet sessions, monthly

13,358 Million

Display



YouTube

Status: Not available

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 65 % of online population

Page Views, monthly

1.9 Billion

Unique Users, monthly

13 Million

Social

Indonesia is the 4th largest twitter nation.

Israel

A Western Oasis of Innovation in the Middle East

Meir Brand,
Managing Director Israel,
South Africa, and Greece



General Country Facts

Basic Facts

Official country name	State of Israel
Capital	Jerusalem
Area	20,770 sq km
Top level domain	.il
Language (official)	Hebrew
Currency	New Israeli Shekels (ILS)
GDP PPP	219.4 \$ Billion
GDP rank	51

Internet

Fixed broadband subscriptions	1,864,900
Fixed internet subscriptions	-
Internet penetration	70 % of population

Demographics

Total population	7,473,052
Population rank	97
Population growth	1.58 %
Population growth rank	73



0-14 years	28 %
15-64 years	62 %
65 years and older	10 %
Median age	29.4 years

 gbm-il@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

1,078 \$ Million

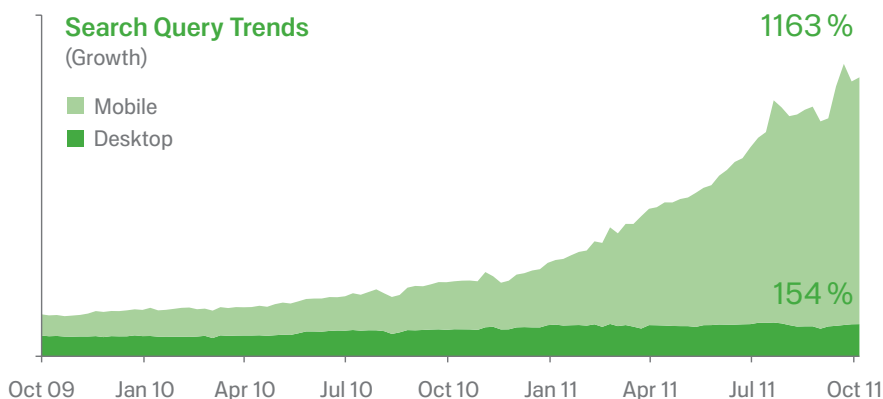
■ Online Ad Spend, 2011

204 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 33% **Shopping**
- 31% **Local**
- 27% **News & Current Events**
- 27% **Sensitive Subjects**
- 24% **Internet**

“With the highest number of startups per capita worldwide, 75 % broadband penetration, 133 % mobile penetration and exports accounting for almost 50 % of its GDP, it is no surprise that Israel is considered to be the most innovative economy in the Middle East.”



Mobile

Total Mobile Penetration

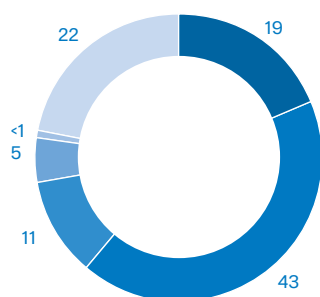
Total mobile users

133 % of population

Smartphone Penetration

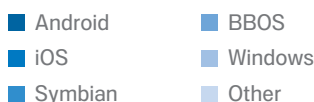
Smartphone users

31 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,471 \$ Million
- Music**
383 \$ Million
- Social Networking**
171 \$ Million

Mobile Internet Penetration

Handset browsing users

16 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

2.3 MB

Usage, Frequency

Total internet sessions, monthly

15,431 Million

Display



Google Display Network

YouTube

Status: Available

Reach

81 % of online population

Page Views, monthly

580 Million

Unique Users, monthly

3.56 Million

YouTube

(Homepage)

Reach

37 % of online population

Page Views, monthly

18 Million

Unique Users, monthly

1.6 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

6.6 Billion

Unique Users, monthly

4.2 Million

Social

Israelis spent an average of 11.1 hours using social networks – more than double the global average of 5.7 hours.

Italy

The Internet is going to play a key role in the Italian economy with a GDP contribution rate of 4.4 % by 2015

Paola Marazzini,
Agency Head
Italy



General Country Facts

Basic Facts

Official country name	Italian Republic
Capital	Rome
Area	301,340 sq km
Top level domain	.it
Language (official)	Italian
Currency	Euros (EUR)
GDP PPP	1.774 \$ Trillion
GDP rank	10

Internet

Fixed broadband subscriptions	13,400,000
Fixed internet subscriptions	13,400,000
Internet penetration	59 % of population

Demographics

Total population	61,016,804
Population rank	23
Population growth	0.42 %
Population growth rank	156



0-14 years	14 %
15-64 years	66 %
65 years and older	20 %
Median age	43.5 years



gbm-it@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

10,040 \$ Million

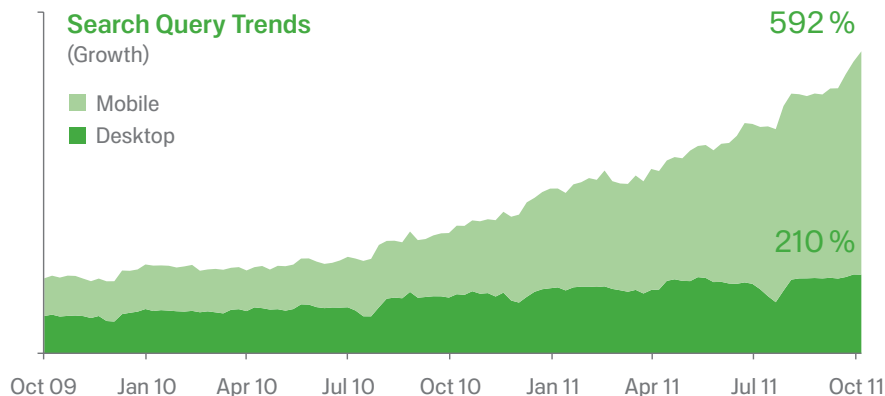
■ Online Ad Spend, 2011

647 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 45% **News & Current Events**
- 42% **Finance & Insurance**
- 33% **Food & Drink**
- 29% **Animals**
- 28% **Science**

“Key growth drivers for Italy are high smartphone penetration combined with users’ attitudes about mobile devices as well as an important network of small and medium companies that will leverage digital as a key asset. E-commerce represents a significant growth opportunity, especially for ‘Made in Italy’ categories, like Fashion, Luxury and Food.”



Mobile

Total Mobile Penetration

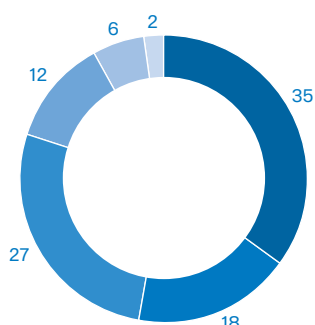
Total mobile users

151 % of population

Smartphone Penetration

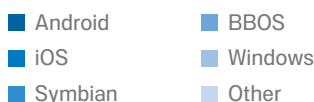
Smartphone users

28 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,814 \$ Million
- Games and Applications**
361 \$ Million
- Social Networking**
356 \$ Million

Mobile Internet Penetration

Handset browsing users

49 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

100.6 MB

Usage, Frequency

Total internet sessions, monthly

13,004 Million

Display



YouTube

Status: **Available**

Reach

58 % of online population

Page Views, monthly

1.5 Billion

Unique Users, monthly

17.13 Million

YouTube

(Homepage)

Reach

34 % of online population

Page Views, monthly

99.98 Million

Unique Users, monthly

10.17 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

12 Billion

Unique Users, monthly

34 Million

Social

The most intense users of social networks in Italy are those in the 15–24 age group, spending 11.2 hours online per month.

Japan

The world's third-largest economy

Mak Arima,
Country Managing Director
Japan



General Country Facts

Basic Facts

Official country name	Japan
Capital	Tokyo
Area	377,915 sq km
Top level domain	.jp
Language (official)	Japanese
Currency	Yen (JPY)
GDP PPP	4.31 \$ Trillion
GDP rank	3

Internet

Fixed broadband subscriptions	34,055,343
Fixed internet subscriptions	-
Internet penetration	80 % of population

Demographics

Total population	126,475,664
Population rank	10
Population growth	- 0.28 %
Population growth rank	214



0-14 years	13 %
15-64 years	64 %
65 years and older	23 %
Median age	44.8 years

gbm-jp@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

45,358 \$ Million

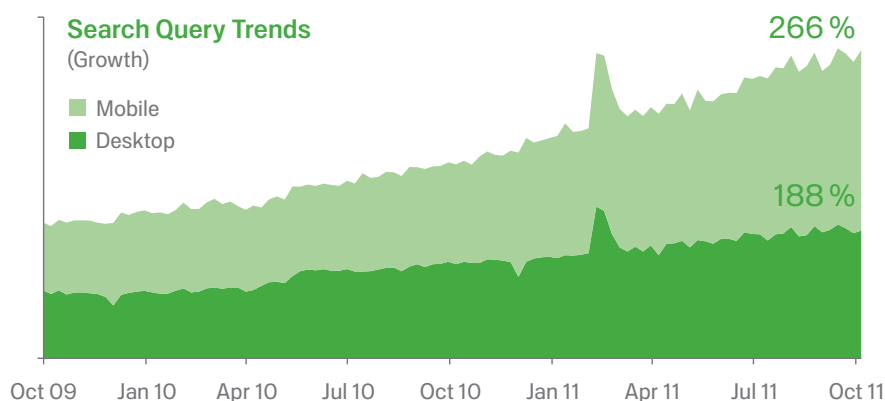
■ Online Ad Spend, 2011

9,266 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 47% **Online Communities**
- 41% **Beauty & Personal Care**
- 41% **Adult**
- 40% **Sports**
- 40% **News & Current Events**

“It is the world’s fourth-largest exporter and fourth-largest importer with the automobile manufacturing and the electronic goods industry leading the way. Widespread 3G networks and entertainment-focused feature phones have led users in Japan to use their phones for entertainment and communication.”



Mobile

Total Mobile Penetration

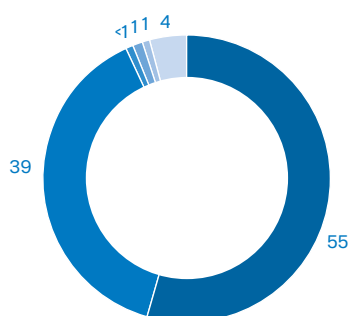
Total mobile users

99 % of population

Smartphone Penetration

Smartphone users

20 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
30,375 \$ Million
- Social Networking**
7,103 \$ Million
- Games and Applications**
4,537 \$ Million

Mobile Internet Penetration

Handset browsing users

77 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

363 MB

Usage, Frequency

Total internet sessions, monthly

146,718 Million

Display



YouTube

Status: **Available**

Reach

48 % of online population

Page Views, monthly

3.3 Billion

Unique Users, monthly

29.8 Million

YouTube

(Homepage)

Reach

21 % of online population

Page Views, monthly

146.3 Million

Unique Users, monthly

12.9 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

49 Billion

Unique Users, monthly

88 Million

Social

86 % of Japanese are aware of social networks, 34 % are members and 58 % log on daily.

Kenya

Kenya, Bursting with Opportunity, Generous Rewards

Joe Mũcherũ,
Country Manager
Kenya



General Country Facts

Basic Facts

Official country name	Republic of Kenya
Capital	Nairobi
Area	580,367 sq km
Top level domain	.ke
Language (official)	English, Kiswahili*
Currency	Kenyan Shillings (KES)
GDP PPP	66.03 \$ Billion
GDP rank	82

Internet

Fixed broadband subscriptions	4,305
Fixed internet subscriptions	12,216
Internet penetration	25.5 % of population

Demographics

Total population	41,070,934
Population rank	33
Population growth	2.46 %
Population growth rank	29



0–14 years	42 %
15–64 years	55 %
65 years and older	3 %
Median age	18.9 years

 gbm-ke@google.com

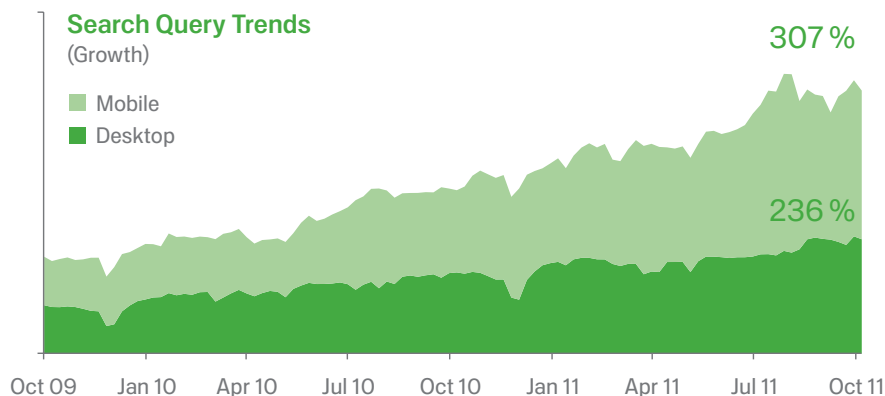
Advertising Market

(not available)

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 63 % **Sports**
- 60 % **News & Current Events**
- 54 % **Sensitive Subjects**
- 51 % **Photo & Video**
- 51 % **Real Estate**

* numerous indigenous languages

“Kenya was cited as the most improved country in Africa, in a survey released by Brand Finance on 25 May 2012. Kenya scored an impressive 41 % improvement, while the survey also ranked Kenya as the 8th most valuable country brand out of 54 countries in Africa.”



Mobile

Total Mobile Penetration

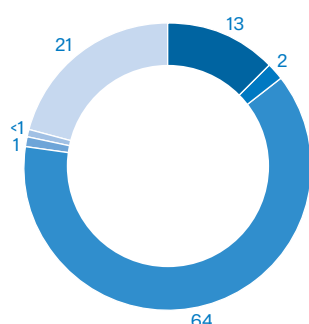
Total mobile users

61 % of population

Smartphone Penetration

Smartphone users

41 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,471 \$ Million
- Music**
383 \$ Million
- Social Networking**
171 \$ Million

Mobile Internet Penetration

Handset browsing users

16 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

2.3 MB

Usage, Frequency

Total internet sessions, monthly

15,431 Million

Display



YouTube

Status: **Just launched**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 75 % of online population

Page Views, monthly

0.43 Billion

Unique Users, monthly

2.8 Million

Social

Of 1,000 Kenyans interviewed, 26 % have access to the Internet and 19 % of these use social media regularly.

Latvia

Standing Tall: A Country of Extremes
with a Challenging Future

Artur Waliszewski,
Regional Business Director Poland &
Central and Eastern Europe



General Country Facts

Basic Facts

Official country name	Republic of Latvia
Capital	Riga
Area	64,589 sq km
Top level domain	.lv
Language (official)	Latvian
Currency	Lati (LVL)
GDP PPP	32.51 \$ Billion
GDP rank	105

Internet

Fixed broadband subscriptions	434,876
Fixed internet subscriptions	-
Internet penetration	68 % of population

Demographics

Total population	2,204,708
Population rank	142
Population growth	-0.60 %
Population growth rank	223



0-14 years	14 %
15-64 years	70 %
65 years and older	17 %
Median age	40.6 years

 gbm-lv@google.com

Advertising Market

Total

Online

Total Ad Spend, 2011 (total media spend)

84 \$ Million

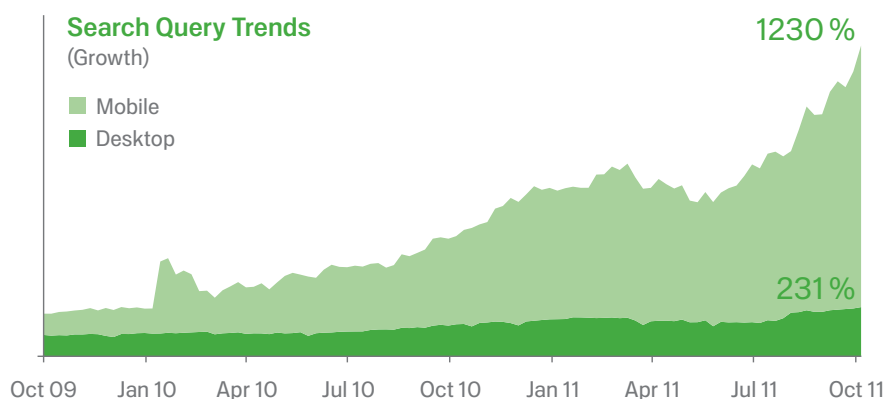
Online Ad Spend, 2011

13 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 54% Sensitive Subjects
- 48% Online Communities
- 38% Finance & Insurance
- 36% Internet
- 35% Adult

“In its eventful past, Latvia has seen many changes. Following last decade’s rapid transformation and growth, the country now deals with the impact of the financial crisis. Even though the economy is under pressure, its currency remains stable.”



Mobile

Total Mobile Penetration

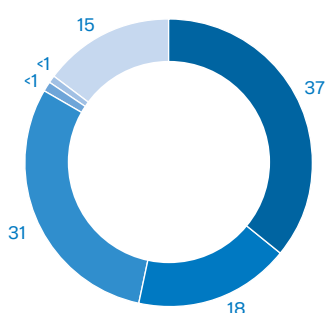
Total mobile users

105 % of population

Smartphone Penetration

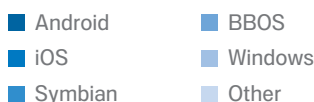
Smartphone users

12 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,972 \$ Million
- Games and Applications**
849 \$ Million
- Music**
363 \$ Million

Mobile Internet Penetration

Handset browsing users

28 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

6.8 MB

Usage, Frequency

Total internet sessions, monthly

11,782 Million

Display



YouTube

Status: Not available

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

1.6 Billion

Unique Users, monthly

1.4 Million

Social

YouTube and BlogSpot rank 3rd and 17th respectively among the top 500 websites visited in Latvia.

Lithuania

A Baltic Tiger on a Good Path to Recovery

Artur Waliszewski,
Regional Business Director Poland &
Central and Eastern Europe



General Country Facts

Basic Facts

Official country name	Republic of Lithuania
Capital	Vilnius
Area	65,300 sq km
Top level domain	.lt
Language (official)	Lithuanian
Currency	Litai (LTL)
GDP PPP	56.59 \$ Billion
GDP rank	88

Internet

Fixed broadband subscriptions	684,057
Fixed internet subscriptions	685,195
Internet penetration	60 % of population

Demographics

Total population	3,535,547
Population rank	131
Population growth	-0.28 %
Population growth rank	213



0-14 years	14 %
15-64 years	70 %
65 years and older	16 %
Median age	40.1 years

 gbm-lt@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

123 \$ Million

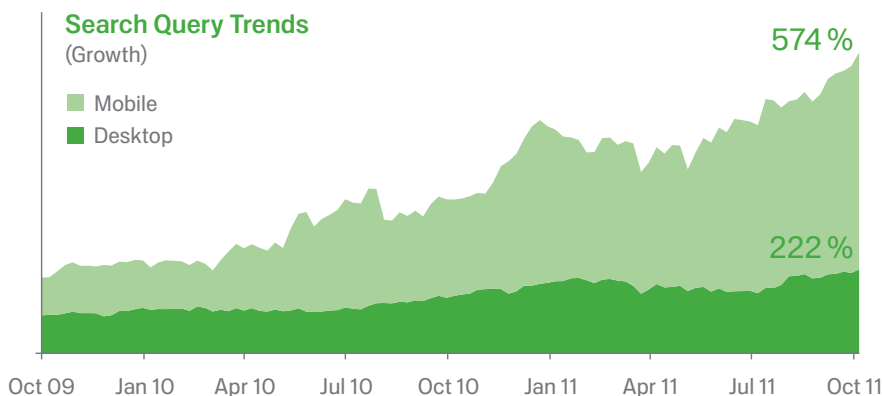
■ Online Ad Spend, 2011

10 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 60% **Online Communities**
- 50% **Shopping**
- 49% **Finance & Insurance**
- 44% **Real Estate**
- 36% **Recreation**

“In the last decade, Lithuania has seen rapid economic growth. Becoming a knowledge-based economy with emphasis on biotechnology and IT, the country is ready and strong enough to face and overcome the twin-challenges of mass emigration and the financial crisis.”



Mobile

Total Mobile Penetration

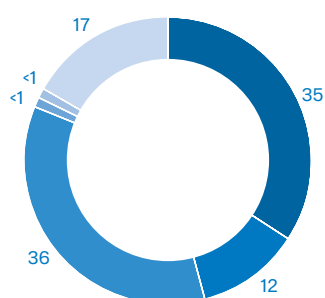
Total mobile users

138 % of population

Smartphone Penetration

Smartphone users

7.8 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,972 \$ Million
- Games and Applications**
849 \$ Million
- Music**
363 \$ Million

Mobile Internet Penetration

Handset browsing users

28 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

6.8 MB

Usage, Frequency

Total internet sessions, monthly

11,782 Million

Display



YouTube

Status: **Not available**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

1.3 Billion

Unique Users, monthly

1.8 Million

Social

YouTube and Blogger rank 3rd and 13th respectively among the top 500 websites visited in Lithuania.

Mexico

Mexico is a strong pillar of Latin America in the digital world and accelerates at a fast pace

Pablo Slough,
Country Manager
Mexico



General Country Facts

Basic Facts

Official country name	United Mexican States
Capital	Mexico City (Distrito Federal)
Area	1,964,375 sq km
Top level domain	.mx
Language (official)	Spanish*
Currency	Mexican Pesos (MXN)
GDP PPP	1.567 \$ Trillion
GDP rank	11

Internet

Fixed broadband subscriptions	11,325,022
Fixed internet subscriptions	11,628,726
Internet penetration	37 % of population

Demographics

Total population	113,724,226
Population rank	11
Population growth	1.10 %
Population growth rank	105



0-14 years	28 %
15-64 years	65 %
65 years and older	7 %
Median age	27.1 years

 gbm-mx@google.com

Advertising Market

Total

■ **Total Ad Spend, 2011** (total media spend)

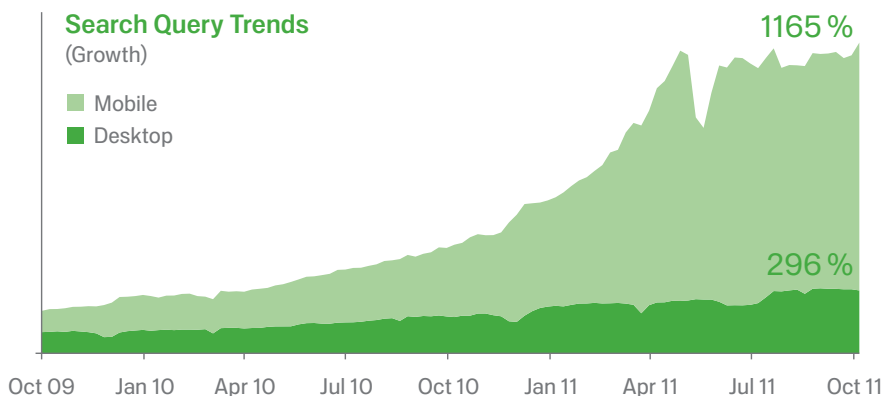
(online not available)

5,894 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 53% **Lifestyles**
- 50% **Society**
- 49% **Entertainment**
- 42% **Reference**
- 30% **Computers & Electronics**

* majority 92.7 %

“With more than 5M SMBs, 23M smartphones connected to the web, an e-commerce market of 3.6B USD and 40M internet users, Mexico has the largest growth potential in Latin America.”

Mobile

Total Mobile Penetration

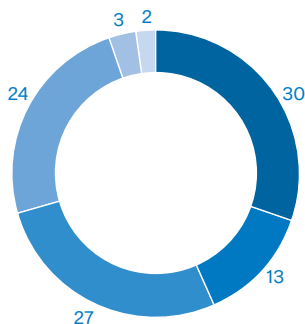
Total mobile users

84 % of population

Smartphone Penetration

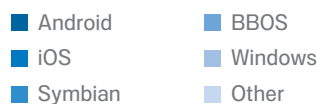
Smartphone users

20 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
696 \$ Million
- Music**
502 \$ Million
- Games and Applications**
156 \$ Million

Mobile Internet Penetration

Handset browsing users

30 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

6.9 MB

Usage, Frequency

Total internet sessions, monthly

6,476 Million

Display



YouTube

Status: **Available**

Reach

69 % of online population

Page Views, monthly

2.8 Billion

Unique Users, monthly

17.6 Million

YouTube

(Homepage)

Reach

31 % of online population

Page Views, monthly

104.8 Million

Unique Users, monthly

7.95 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

12 Billion

Unique Users, monthly

28 Million

Social

The leading online activity among Mexican Internet users is social networking, taking up 28.6 % of their time online.

Morocco

At the heart of the Internet Revolution



Wael Fakharany,
Regional Manager
Egypt and North Africa

General Country Facts

Basic Facts

Official country name	Kingdom of Morocco
Capital	Rabat
Area	446,550 sq km
Top level domain	.ma
Language (official)	Arabic
Currency	Moroccan Dirhams (MAD)
GDP PPP	151.4 \$ Billion
GDP rank	57

Internet

Fixed broadband subscriptions	498,682
Fixed internet subscriptions	500,491
Internet penetration	49 % of population

Demographics

Total population	31,968,361
Population rank	38
Population growth	1.07 %
Population growth rank	111



0-14 years	28 %
15-64 years	66 %
65 years and older	6 %
Median age	26.9 years

 gbm-ma@google.com

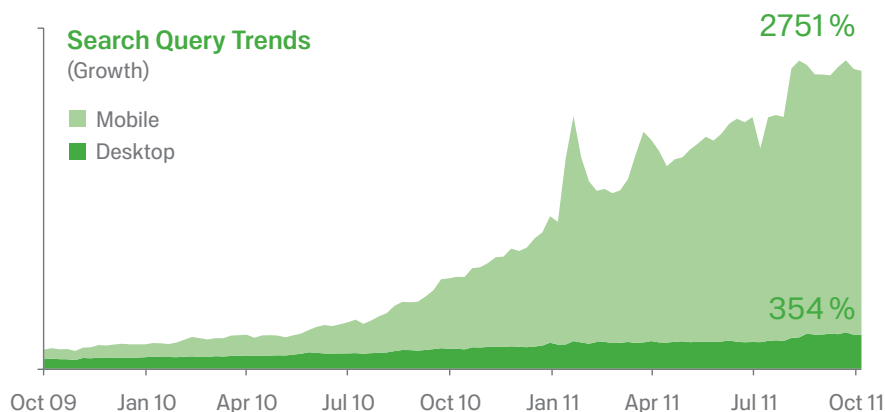
Advertising Market

(Not available)

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 73% **Shopping**
- 71% **Online Communities**
- 62% **Recreation**
- 61% **News & Current Events**
- 61% **Beauty & Personal Care**

“The Arab Spring in North Africa has given a voice to the people. At Google, we are determined to add value to the economic, social and cultural lives of the 60M Internet users growing at a rate of 40 %. Let’s work to bring the true magic of the Internet to this ever-growing region.”



Mobile

Total Mobile Penetration

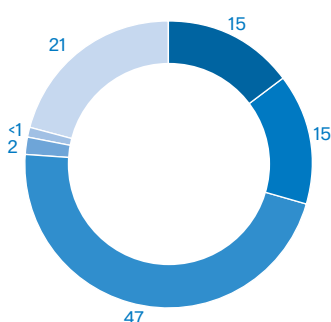
Total mobile users

100 % of population

Smartphone Penetration

Smartphone users

53 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,471 \$ Million
- Music**
383 \$ Million
- Social Networking**
171 \$ Million

Mobile Internet Penetration

Handset browsing users

28 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

2.3 MB

Usage, Frequency

Total internet sessions, monthly

15,431 Million

Display



YouTube

Status: **Just launched**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 60 % of online population

Page Views, monthly

1 Billion

Unique Users, monthly

8,3 Million

Social

Of Internet users, 29 % visit social networking sites at least once per day.

Netherlands

One of the most densely populated countries in Europe

Pim van der Feltz,
Country Director
Benelux



General Country Facts

Basic Facts

Official country name	Kingdom of the Netherlands
Capital	Amsterdam
Area	41,543 sq km
Top level domain	.nl
Language (official)	Dutch, Frisian
Currency	Euros (EUR)
GDP PPP	676.9 \$ Billion
GDP rank	21

Internet

Fixed broadband subscriptions	6,308,000
Fixed internet subscriptions	6,330,000
Internet penetration	89.5 % of population

Demographics

Total population	16,847,007
Population rank	60
Population growth	0.37 %
Population growth rank	161



0-14 years	17 %
15-64 years	67 %
65 years and older	16 %
Median age	41.1 years



gbm-nl@google.com

Advertising Market

Total

Online

Total Ad Spend, 2011 (total media spend)

5,029 \$ Million

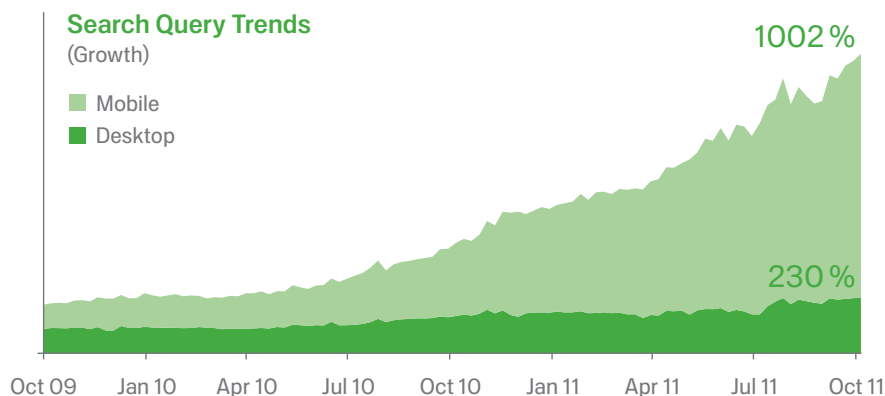
Online Ad Spend, 2011

1,174 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 46% **Online Communities**
- 26% **Finance & Insurance**
- 25% **Food & Drink**
- 23% **Sensitive Subjects**
- 21% **News & Current Events**

“The Netherlands has produced many of the world’s most famous artists from Rembrandt and Vermeer to Van Gogh. It attracts visitors from across the globe. With its ports and airports it has a significant role as a European transportation hub. Netherlands has a solid and open economy that depends heavily on foreign trade.”



Mobile

Total Mobile Penetration

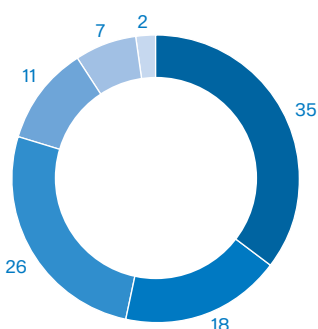
Total mobile users

120 % of population

Smartphone Penetration

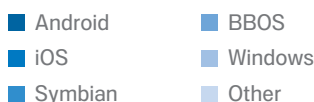
Smartphone users

43 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,797 \$ Million
- Games and Applications**
474 \$ Million
- Social Networking**
264 \$ Million

Mobile Internet Penetration

Handset browsing users

40 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

72.7 MB

Usage, Frequency

Total internet sessions, monthly

119 Million

Display



YouTube

Status: **Available**

Reach

74 % of online population

Page Views, monthly

1.74 Billion

Unique Users, monthly

8.8 Million

YouTube

(Homepage)

Reach

40 % of online population

Page Views, monthly

80.2 Million

Unique Users, monthly

4.7 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

9.6 Billion

Unique Users, monthly

13 Million

Social

The Netherlands ranks #1 for the highest engagement of the Internet population in professional social media.

Norway

A country with a strong energy sector, leading to the world's highest GDP per capita

Jan Gronbech,
Country Director
Norway



General Country Facts

Basic Facts

Official country name	Kingdom of Norway
Capital	Oslo
Area	323,802 sq km
Top level domain	.no
Language (official)	Bokmal Norwegian, Nynorsk Norwegian
Currency	Norwegian Kroner (NOK)
GDP PPP	255.3 \$ Billion
GDP rank	46

Internet

Fixed broadband subscriptions	1,689,469
Fixed internet subscriptions	1,733,868
Internet penetration	94 % of population

Demographics

Total population	4,691,849
Population rank	119
Population growth	0.33 %
Population growth rank	167



0-14 years	18 %
15-64 years	66 %
65 years and older	16 %
Median age	40 years

gbm-no@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

2,555 \$ Million

Online

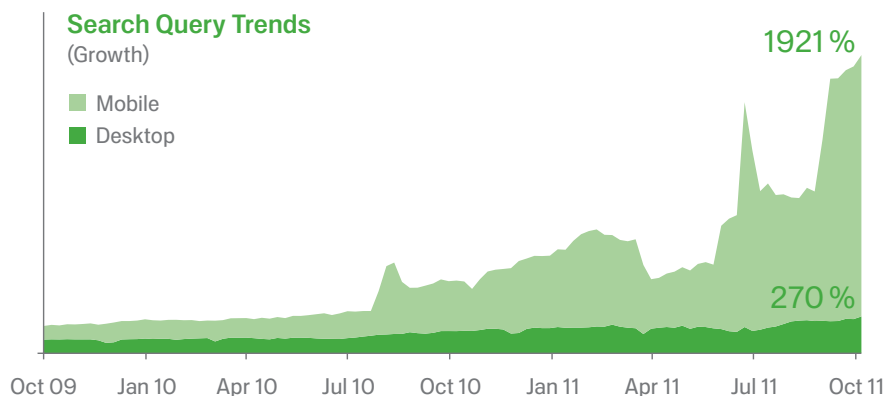
■ Online Ad Spend, 2011

736 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 79% **Entertainment**
- 77% **Telecommunications**
- 68% **Online Communities**
- 55% **News & Current Events**
- 46% **Society**

"Norway is a highly wired nation. Over 90 % of all new phones sold are smart-phones. Internet penetration is above 80 % and broadband is everywhere. Norway is mainly a raw material economy driven by oil, natural gas and the fishing industry. At the same time, there is a boost of innovative IT companies. Norway has been named the best country in the world to live in by the UN, even though it often tends to snow in June."



Mobile

Total Mobile Penetration

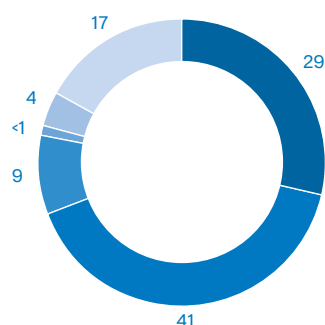
Total mobile users

118 % of population

Smartphone Penetration

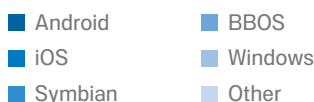
Smartphone users

54 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- 1. Handset Browsing**
100 \$ Million
- 2. Games and Applications**
33 \$ Million
- 3. Social Networking**
22 \$ Million

Mobile Internet Penetration

Handset browsing users

39 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

57.5 MB

Usage, Frequency

Total internet sessions, monthly

681 Million

Display



YouTube

Status: Not available

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

1.9 Billion

Unique Users, monthly

4.2 Million

Social

34 % of Norwegians have a profile with a social network.

Peru

Building the Internet ecosystem by inspiring users and customers

Gianfranco Polastri,
Country Manager
Peru



General Country Facts

Basic Facts

Official country name	Republic of Peru
Capital	Lima
Area	1,285,216 sq km
Top level domain	.pe
Language (official)	Spanish, Quechua
Currency	Nuevo Sol (PEN)
GDP PPP	275.7 \$ Billion
GDP rank	42

Internet

Fixed broadband subscriptions	911,640
Fixed internet subscriptions	924,511
Internet penetration	34 % of population

Demographics

Total population	29,248,943
Population rank	42
Population growth	1.03 %
Population growth rank	114



0-14 years	29 %
15-64 years	65 %
65 years and older	6 %
Median age	26.2 years

 gbm-pe@google.com

Advertising Market

Total

Total Ad Spend, 2011 (total media spend)

570 \$ Million

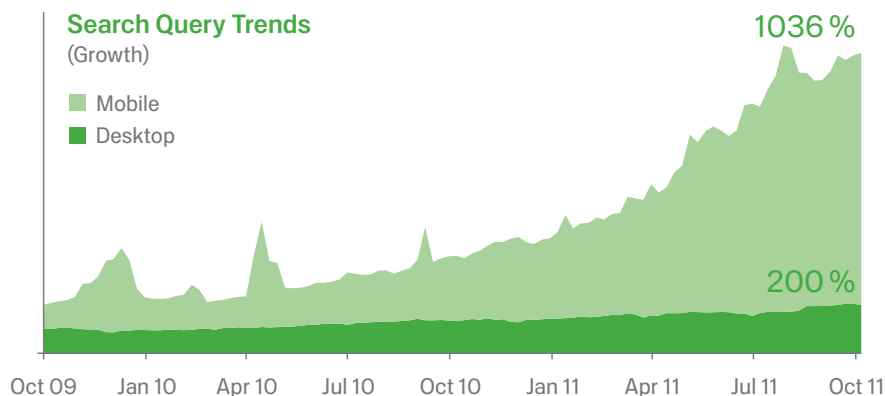
Online Ad Spend, 2011

22 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 80% **Online Communities**
- 59% **Beauty & Personal Care**
- 44% **Society**
- 39% **Shopping**
- 36% **Reference**

“Peru is one the fastest growing economies in the Americas and will continue to grow as fast as Asia over the coming years, driven by high private and public investment.”

Mobile

Total Mobile Penetration

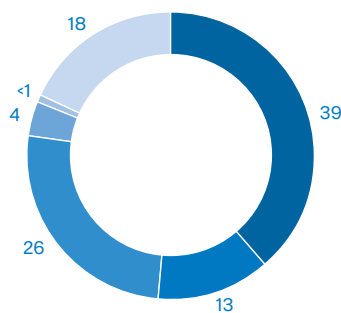
Total mobile users

93 % of population

Smartphone Penetration

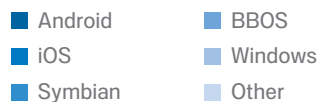
Smartphone users

10 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Music**
680 \$ Million
- Handset Browsing**
516 \$ Million
- Games and Applications**
350 \$ Million

Mobile Internet Penetration

Handset browsing users

11 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

4.7 MB

Usage, Frequency

Total internet sessions, monthly

4,946 Million

Display



YouTube

Status: **Just launched**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 75 % of online population

Page Views, monthly

1.4 Billion

Unique Users, monthly

6.8 Million

Social

Internet users in Peru averaged 8.7 hours on social networking sites in December 2011.

Philippines

The second fastest growing Asian economy behind China.

Loren Shuster,
Country Director Singapore &
Emerging Markets



General Country Facts

Basic Facts

Official country name	Republic of the Philippines
Capital	Manila
Area	300,000 sq km
Top level domain	.ph
Language (official)	Filipino (based on Tagalog), English
Currency	Philippine Pesos (PHP)
GDP PPP	351.4 \$ Billion
GDP rank	33

Internet

Fixed broadband subscriptions	1,722,400
Fixed internet subscriptions	3,600,000
Internet penetration	29 % of population

Demographics

Total population	101,833,938
Population rank	12
Population growth	1.90 %
Population growth rank	60



0-14 years	35 %
15-64 years	61 %
65 years and older	4 %
Median age	22.9 years

gbm-ph@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

1,356 \$ Million

■ Online Ad Spend, 2011

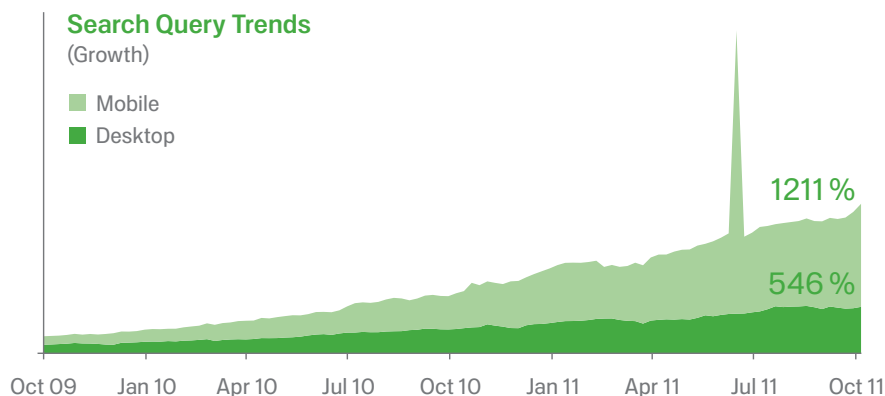
38 \$ Million

Search

Search Query Trends

(Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 60% **Online Communities**
- 58% **Food & Drink**
- 58% **Science**
- 57% **Reference**
- 56% **Telecommunications**

“The Philippines bears witness to a vibrantly democratic society, providing a plethora of media choices to a society well known for its love of entertainment. The openness of the people and the need for connectivity have made the people of the Philippines major users of new technologies and services, such as YouTube and social networking platforms.”



Mobile

Total Mobile Penetration

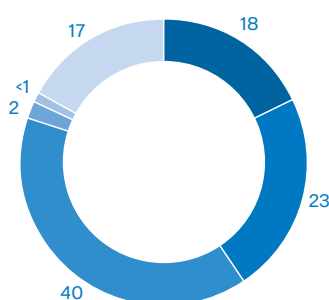
Total mobile users

90 % of population

Smartphone Penetration

Smartphone users

40 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Music**
1,650 \$ Million
- Games and Applications**
1,260 \$ Million
- Handset Browsing**
910 \$ Million

Mobile Internet Penetration

Handset browsing users

9 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

3.2 MB

Usage, Frequency

Total internet sessions, monthly

13,358 Million

Display



YouTube

Status: **Available**

Reach

66 % of online population

Page Views, monthly

404 Million

Unique Users, monthly

3.9 Million

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

3.6 Million (daily)

GDN

(Google Display Network)

Reach

> 80 % of online population

Page Views, monthly

2.5 Billion

Unique Users, monthly

6.7 Million

Social

Filipino Internet users are the most social media-addicted worldwide, dedicating 41.3 % of their online time to social networking.

Poland

The only country in Europe that has kept its head above water

Artur Waliszewski,
Regional Business Director Poland &
Central and Eastern Europe



General Country Facts

Basic Facts

Official country name	Republic of Poland
Capital	Warsaw
Area	312,685 sq km
Top level domain	.pl
Language (official)	Polish
Currency	Zlotych (PLN)
GDP PPP	721.3 \$ Billion
GDP rank	20

Internet

Fixed broadband subscriptions	5,044,000
Fixed internet subscriptions	4,962,993
Internet penetration	62 % of population

Demographics

Total population	38,441,588
Population rank	34
Population growth	-0.06 %
Population growth rank	200



0-14 years	15 %
15-64 years	72 %
65 years and older	14 %
Median age	38.5 years

gbm-pl@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

2,378 \$ Million

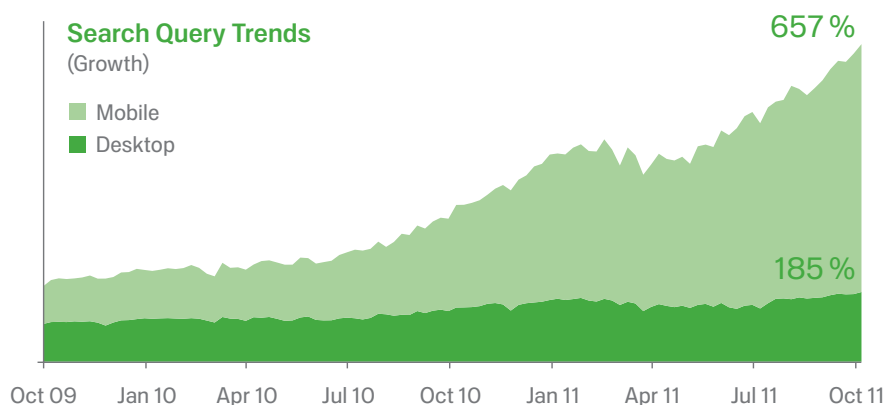
■ Online Ad Spend, 2011

369 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 32% **Science**
- 30% **Food & Drink**
- 23% **Finance & Insurance**
- 23% **Reference**
- 23% **Health**

“Many of its neighbors suffered in the global downturn because they relied heavily on exports, whereas Poland has a large demand from its domestic market and maintained steady GDP growth even in the middle of the storm.”

Mobile

Total Mobile Penetration

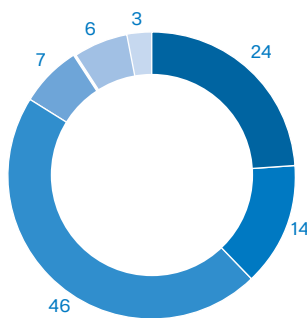
Total mobile users

117 % of population

Smartphone Penetration

Smartphone users

24 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
279 \$ Million
- Games and Applications**
89 \$ Million
- Music**
62 \$ Million

Mobile Internet Penetration

Handset browsing users

28 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

7 MB

Usage, Frequency

Total internet sessions, monthly

2,157 Million

Display



YouTube

Status: Available

Reach

65 % of online population

Page Views, monthly

—

Unique Users, monthly

12.3 Million

YouTube

(Homepage)

Reach

45 % of online population

Page Views, monthly

—

Unique Users, monthly

8.46 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

28 Billion

Unique Users, monthly

21 Million

Social

Seven out of ten Internet users in Poland visit social networking websites occasionally; four in ten use at least one social network regularly.

Romania

Beyond Dracula's Castles: a Rich History
with a Promising Future

Dan Bulucea,
Country Manager
Romania



General Country Facts

Basic Facts

Official country name	Romania
Capital	Bucharest
Area	238,391 sq km
Top level domain	.ro
Language (official)	Romanian
Currency	Lei (RON)
GDP PPP	254.2 \$ Billion
GDP rank	47

Internet

Fixed broadband subscriptions	3,000,000
Fixed internet subscriptions	3,000,000
Internet penetration	39 % of population

Demographics

Total population	21,904,551
Population rank	54
Population growth	-0.25 %
Population growth rank	212



0-14 years	15 %
15-64 years	70 %
65 years and older	15 %
Median age	38.7 years

 gbm-ro@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

440 \$ Million

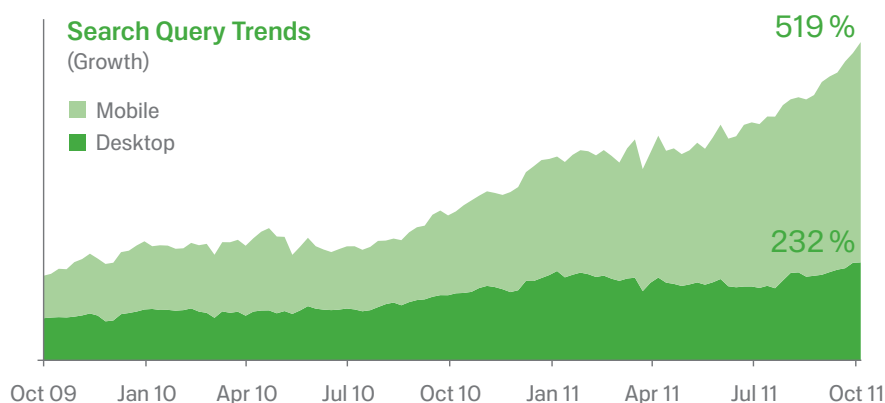
■ Online Ad Spend, 2011

40 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 41% **Online Communities**
- 38% **Science**
- 37% **Food & Drink**
- 36% **Society**
- 34% **Finance & Insurance**

“Following the liberalization of its telecommunication market, broadband penetration in Romania is soaring. However, economic reforms and the entry into the EU are just two of the country’s steps to shape its future.”

Mobile

Total Mobile Penetration

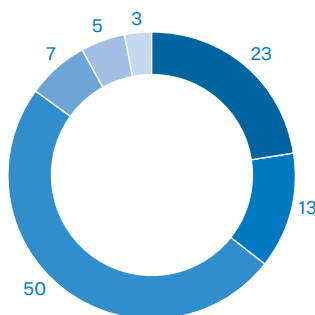
Total mobile users

126 % of population

Smartphone Penetration

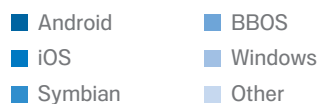
Smartphone users

13 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Hanset Browsing**
1,972 \$ Million
- Games and Applications**
849 \$ Million
- Music**
363 \$ Million

Mobile Internet Penetration

Handset browsing users

28 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

6.8 MB

Usage, Frequency

Total internet sessions, monthly

11,782 Million

Display



YouTube

Status: Not available

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 80 % of online population

Page Views, monthly

2.7 Billion

Unique Users, monthly

6.9 Million

Social

Internet market growth, the only growing media channel in Romania, was driven by significant investment from advertised brands on social network platforms.

Russia

Being Different Creates Opportunities, and There Are Some ...

Tania le Moigne,
Country Director
Czech Republic



General Country Facts

Basic Facts

Official country name	Russian Federation
Capital	Moscow
Area	17,098,242 sq km
Top level domain	.ru*
Language (official)	Russian
Currency	Russian Rubles (RUB)
GDP PPP	2.223 \$ Trillion
GDP rank	6

Internet

Fixed broadband subscriptions	15,700,000
Fixed internet subscriptions	59,700,000
Internet penetration	44.3 % of population

Demographics

Total population	138,739,892
Population rank	9
Population growth	-0.47 %
Population growth rank	222



0-14 years	15 %
15-64 years	72 %
65 years and older	13 %
Median age	38.7 years

 gbm-ru@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

8,174 \$ Million

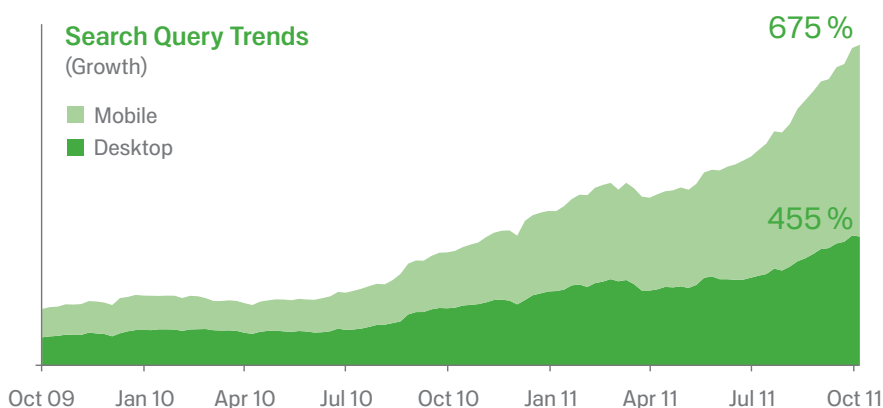
■ Online Ad Spend, 2011

1,131 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 78 % **Real Estate**
- 74 % **Online Communities**
- 69 % **Food & Drink**
- 69 % **Home & Garden**
- 67 % **Shopping**

* TLD Russia: Russia also has responsibility for a legacy domain ".su" that was allocated to the Soviet Union and is being phased out.

“Imagine the opportunities that arise from a market with 10 time zones, 140 million people, 200 % mobile phone penetration and 43 % internet penetration. However, since this market is expanding constantly, Russia’s great future has just begun.”



Mobile

Total Mobile Penetration

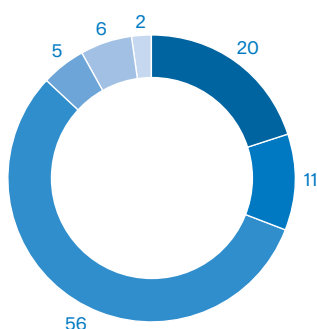
Total mobile users

162 % of population

Smartphone Penetration

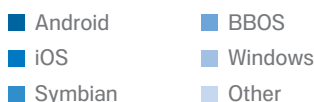
Smartphone users

25 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- 1. Handset Browsing**
1,306 \$ Million
- 2. Games and Applications**
325 \$ Million
- 3. Music**
227 \$ Million

Mobile Internet Penetration

Handset browsing users

28 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

6.6 MB

Usage, Frequency

Total internet sessions, monthly

7,364 Million

Display



YouTube

Status: **Available**

Reach

50 % of online population

Page Views, monthly

—

Unique Users, monthly

21.7 Million

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

1 Million (daily)

GDN

(Google Display Network)

Reach

> 95 % of online population

Page Views, monthly

120 Billion

Unique Users, monthly

41 Million

Social

Russians spend an average of 10.6 hours on social networking sites, ranking 2nd worldwide.

Saudi Arabia

The Middle East's largest market and highest Purchasing Power

Abdulrahman Tarabzouni,
Regional Manager
Emerging Arabia



General Country Facts

Basic Facts

Official country name	Kingdom of Saudi Arabia
Capital	Riyadh
Area	2,149,690 sq km
Top level domain	.sa
Language (official)	Arabic
Currency	Saudi Riyals (SAR)
GDP PPP	622 \$ Billion
GDP rank	22

Internet

Fixed broadband subscriptions	1,496,607
Fixed internet subscriptions	1,897,960
Internet penetration	60 % of population

Demographics

Total population	26,131,703
Population rank	46
Population growth	1.54 %
Population growth rank	77



0-14 years	29 %
15-64 years	68 %
65 years and older	3 %
Median age	25.3 years

 gbm-sa@google.com

Advertising Market

Total

■ **Total Ad Spend, 2011** (total media spend)

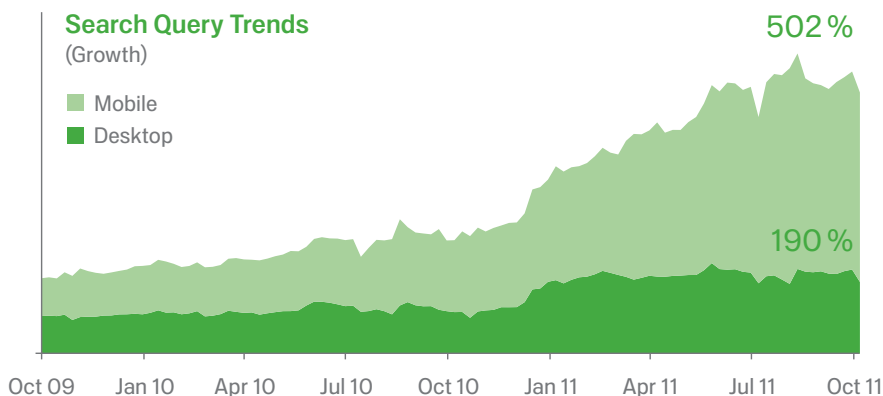
(online not available)

596 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 111% **Business**
- 94% **Animals**
- 93% **Finance & Insurance**
- 90% **Society**
- 90% **News & Current Events**

“Saudi Arabia’s ongoing and exciting transformation already puts it among the top 10 most competitive nations globally in 2010 and 13th in ‘Ease of Doing Business’. The country constitutes one of the Middle East’s largest internet user and content bases.”



Mobile

Total Mobile Penetration

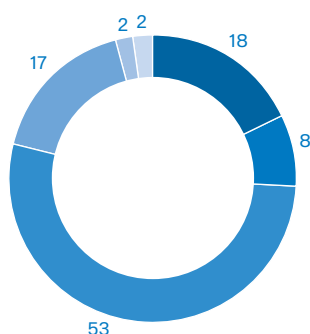
Total mobile users

203 % of population

Smartphone Penetration

Smartphone users

18 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,471 \$ Million
- Music**
383 \$ Million
- Social Networking**
171 \$ Million

Mobile Internet Penetration

Handset browsing users

69 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

2.3 MB

Usage, Frequency

Total internet sessions, monthly

15,431 Million

Display



YouTube

Status: **Just launched**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 80 % of online population

Page Views, monthly

2.1 Billion

Unique Users, monthly

8.3 Million

Social

The Middle East’s largest market and highest Purchasing Power.

Singapore

Asia's leading business hub

Loren Shuster,
Country Director Singapore &
Emerging Markets



General Country Facts

Basic Facts

Official country name	Republic of Singapore
Capital	Singapore
Area	697 sq km
Top level domain	.sg
Language (official)	Mandarin, English, Malay, Tamil
Currency	Singapore Dollars (SGD)
GDP PPP	291.9 \$ Billion
GDP rank	40

Internet

Fixed broadband subscriptions	1,257,400
Fixed internet subscriptions	1,333,600
Internet penetration	77 % of population

Demographics

Total population	4,740,737
Population rank	118
Population growth	0.82 %
Population growth rank	132



0-14 years	14 %
15-64 years	77 %
65 years and older	9 %
Median age	40.1 years



gbm-sg@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

1,814 \$ Million

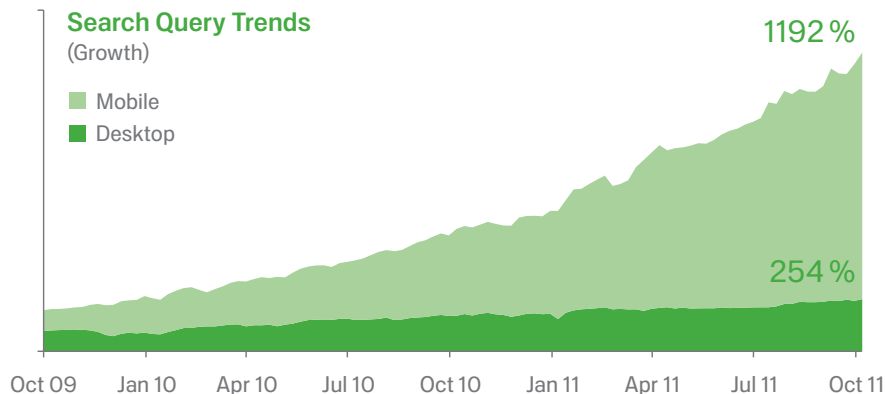
■ Online Ad Spend, 2011

128 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 37% **Food & Drink**
- 33% **Sensitive Subjects**
- 32% **News & Current Events**
- 31% **Lifestyles**
- 30% **Entertainment**

"Singapore is considered the technological hub of South East Asia. Culturally diverse, business friendly and technologically savvy, it is the regional base for many global corporates. With English as its main language, it has created an easy Asian platform for large multinationals to take advantage of the country widely recognised as the knowledge and service hub of Asia. Singapore has recently rolled out its Next Generation National Broadband Network with the goal of bringing fiber to every business and residence in the country."



Mobile

Total Mobile Penetration

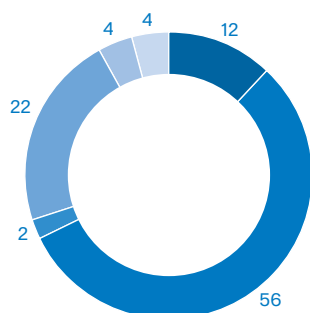
Total mobile users

159 % of population

Smartphone Penetration

Smartphone users

62 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- 1. Music**
1,650 \$ Million
- 2. Games and Applications**
1,260 \$ Million
- 3. Handset Browsing**
910 \$ Million

Mobile Internet Penetration

Handset browsing users

9 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

3.2 MB

Usage, Frequency

Total internet sessions, monthly

13,358 Million

Display



YouTube

Status: **Available**

Reach

60 % of online population

Page Views, monthly

236 Million

Unique Users, monthly

2.3 Million

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

800 Thousand

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

1.6 Billion

Unique Users, monthly

2.9 Million

Social

85 % of Singaporeans access social media sites, 69 % do so to connect or engage with brands and companies.

Slovenia

A Green Jewel in the Heart of Europe

Artur Waliszewski,
Regional Business Director Poland &
Central and Eastern Europe



General Country Facts

Basic Facts

Official country name	Republic of Slovenia
Capital	Ljubljana
Area	20,273 sq km
Top level domain	.si
Language (official)	Slovenian
Currency	Euros (EUR)
GDP PPP	56.58 \$ Billion
GDP rank	89

Internet

Fixed broadband subscriptions	495,045
Fixed internet subscriptions	502,464
Internet penetration	71 % of population

Demographics

Total population	2,000,092
Population rank	146
Population growth	-0.16 %
Population growth rank	209



0-14 years	13 %
15-64 years	70 %
65 years and older	17 %
Median age	42.4 years

 gbm-si@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

890 \$ Million

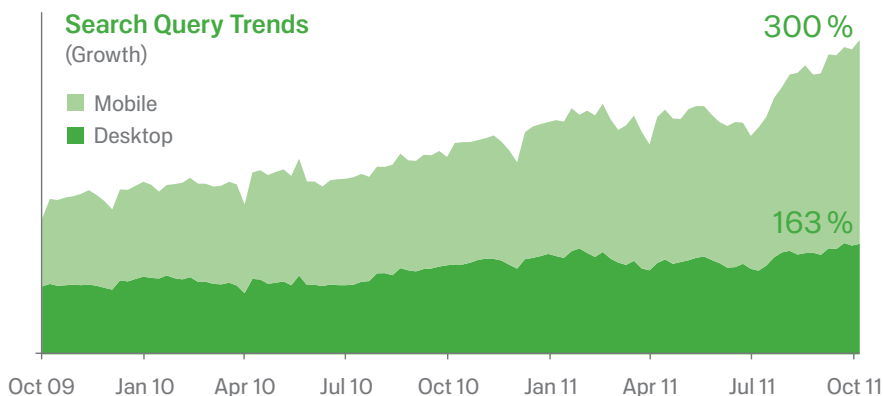
■ Online Ad Spend, 2011

42 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 27 % **News & Current Events**
- 27 % **Shopping**
- 27 % **Food & Drink**
- 24 % **Science**
- 20 % **Health**

“Being the first new member of the EU to adopt the Euro in 2004, Slovenia has become a model for economic success and stability. With the highest GDP per capita in Central Europe, it has an excellent infrastructure, a well-educated labor force, and commands a strategic location for doing business in Europe.”

Mobile

Total Mobile Penetration

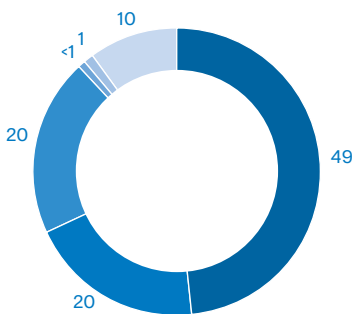
Total mobile users

106 % of population

Smartphone Penetration

Smartphone users

34 % of population



Smartphone Users by OS

Total mobile users (% of population)

- Android
- iOS
- Symbian
- BBOS
- Windows
- Other

Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,972 \$ Million
- Games and Applications**
849 \$ Million
- Music**
363 \$ Million

Mobile Internet Penetration

Handset browsing users

28 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

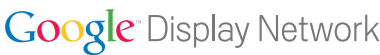
6.8 MB

Usage, Frequency

Total internet sessions, monthly

11,782 Million

Display



YouTube

Status: **Not available**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

1.1 Billion

Unique Users, monthly

1.2 Million

Social

47 % of the Internet population in Slovenia engage in social networking.

South Africa

The Heart of Africa at the Southern Tip of the Continent

Luke Mckend,
Country Manager
South Africa



General Country Facts

Basic Facts

Official country name	Republic of South Africa
Capital	Pretoria (administrative capital)
Area	1,219,090 sq km
Top level domain	.za
Language (official)	IsiZulu, IsiXhosa, Afrikaans*
Currency	Rand (ZAR)
GDP PPP	524 \$ Billion
GDP rank	25

Internet

Fixed broadband subscriptions	743,000
Fixed internet subscriptions	-
Internet penetration	14 % of population

Demographics

Total population	49,004,031
Population rank	25
Population growth	-0.38 %
Population growth rank	219



0-14 years	28 %
15-64 years	66 %
65 years and older	6 %
Median age	25 years

 gbm-za@google.com

Advertising Market

Total

Total Ad Spend, 2011 (total media spend)

6,433 \$ Million

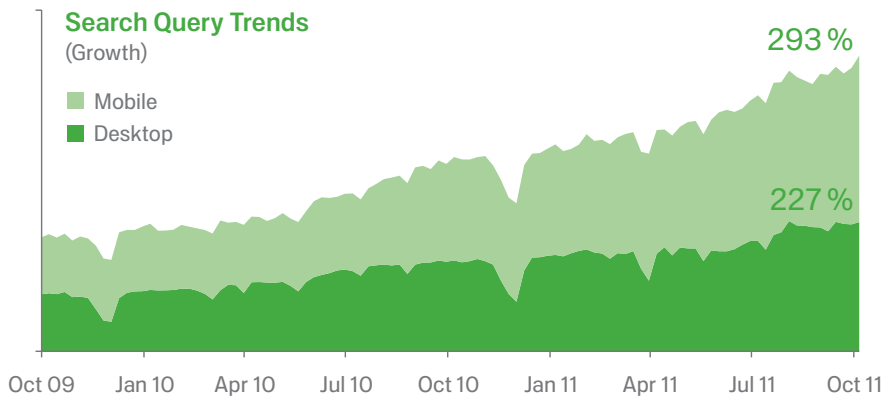
Online Ad Spend, 2011

96 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 42% **News & Current Events**
- 38% **Local**
- 36% **Finance & Insurance**
- 33% **Science**
- 33% **Food & Drink**

* Other official languages in South Africa include Sepedi, English, Setswana, Sesotho, Xitsonga, isiNdebele, Tshivenda, siSwati.

“With the combined land mass of Germany, Italy and France, South Africa is the economic hub and pulse of Africa. A widespread spirit of entrepreneurship is driving growth and innovation and therefore the opportunities are endless, especially in the mobile sector.”



Mobile

Total Mobile Penetration

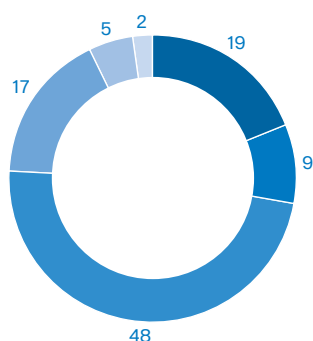
Total mobile users

117 % of population

Smartphone Penetration

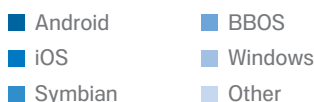
Smartphone users

15 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
296 \$ Million
- Games and Applications**
117 \$ Million
- Music**
89 \$ Million

Mobile Internet Penetration

Handset browsing users

30 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

4.1 MB

Usage, Frequency

Total internet sessions, monthly

1,509 Million

Display



YouTube

Status: **Available**

Reach

58 % of online population

Page Views, monthly

97 Million

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 80 % of online population

Page Views, monthly

1.3 Billion

Unique Users, monthly

3.8 Million

Social

Despite having the lowest penetration rate worldwide, 50 % of South Africans with Internet access use it primarily for social networking. 60 % access their preferred sites via mobile phone.

Spain

Where creative spirits meet tradition and Internet conquers the heart of its people and companies

Javier Zapatero,
Cluster & Country Director
Spain, Portugal, Turkey



General Country Facts

Basic Facts

Official country name	Kingdom of Spain
Capital	Madrid
Area	505,370 sq km
Top level domain	.es
Language (official)	Castilian Spanish
Currency	Euros (EUR)
GDP PPP	1.369 \$ Trillion
GDP rank	13

Internet

Fixed broadband subscriptions	10,579,147
Fixed internet subscriptions	10,659,216
Internet penetration	65.6 % of population

Demographics

Total population	46,754,784
Population rank	27
Population growth	0.57 %
Population growth rank	145



0-14 years	15 %
15-64 years	68 %
65 years and older	17 %
Median age	40.5 years



gbm-es@google.com

Advertising Market

Total

Online

Total Ad Spend, 2011 (total media spend)

7,357 \$ Million

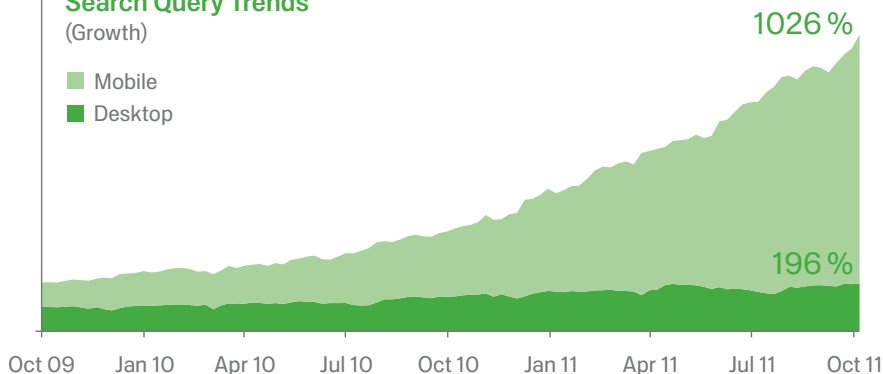
Online Ad Spend, 2011

1,150 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 35% **Online Communities**
- 35% **Telecommunications**
- 33% **News & Current Events**
- 30% **Shopping**
- 29% **Animals**

“Spain, on the fast track over the past 15 years now faces challenges to create its own future. The productivity model presenting itself is a blend of internet, innovation, and boosting the capacity of small and medium-sized businesses to address larger markets.”



Mobile

Total Mobile Penetration

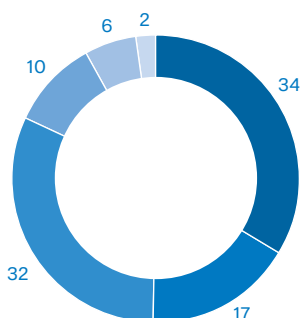
Total mobile users

124 % of population

Smartphone Penetration

Smartphone users

44 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- 1. Handset Browsing**
1,134 \$ Million
- 2. Games and Applications**
266 \$ Million
- 3. Social Networking**
192 \$ Million

Mobile Internet Penetration

Handset browsing users

40 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

65.9 MB

Usage, Frequency

Total internet sessions, monthly

7,018 Million

Display



YouTube

Status: **Available**

Reach

65 % of online population

Page Views, monthly

1.3 Billion

Unique Users, monthly

15.4 Million

YouTube

(Homepage)

Reach

35 % of online population

Page Views, monthly

81.4 Million

Unique Users, monthly

8.2 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

24 Billion

Unique Users, monthly

28 Million

Social

77 % of online consumers in Spain visit social networks and blogs, spending on average of 5.11 hours on these sites each month.

Sweden

Highly advanced knowledge-based economy with an innovative and entrepreneurial spirit

Stina Honkamaa,
Country Director
Sweden



General Country Facts

Basic Facts

Official country name	Kingdom of Sweden
Capital	Stockholm
Area	450,295 sq km
Top level domain	.se
Language (official)	Swedish
Currency	Swedish Kronor (SEK)
GDP PPP	354.7 \$ Billion
GDP rank	32

Internet

Fixed broadband subscriptions	2,963,000
Fixed internet subscriptions	3,231,105
Internet penetration	92 % of population

Demographics

Total population	9,088,728
Population rank	90
Population growth	0.16 %
Population growth rank	182



0-14 years	15 %
15-64 years	65 %
65 years and older	20 %
Median age	42 years

 gbm-se@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

3,510 \$ Million

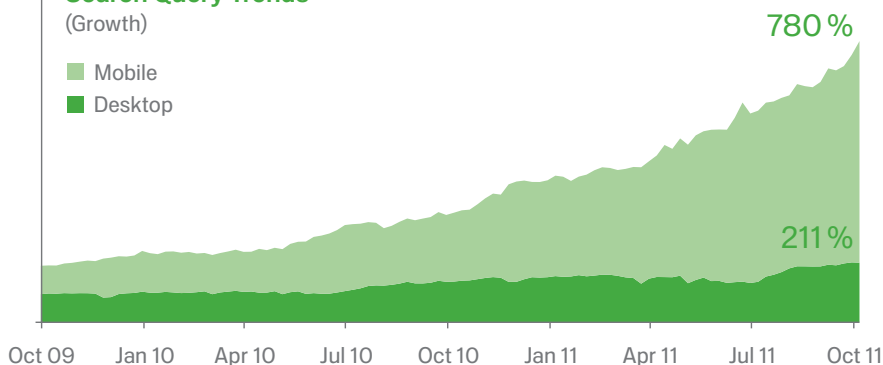
■ Online Ad Spend, 2011

897 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 38% **News & Current Events**
- 29% **Science**
- 29% **Food & Drink**
- 28% **Finance & Insurance**
- 26% **Online Communities**

“With broadband and smartphone penetration being among the highest in the world, a well educated workforce, and an internationally driven economy where exports accounts for more than 50 % of GDP, Sweden is ranked as one of the most technologically advanced nations.”



Mobile

Total Mobile Penetration

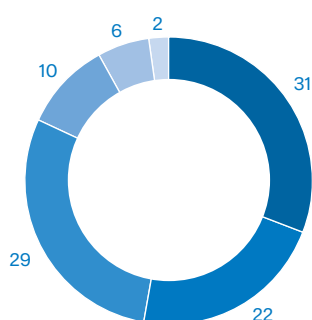
Total mobile users

150 % of population

Smartphone Penetration

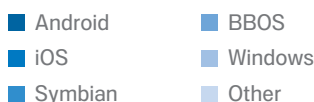
Smartphone users

51 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- 1. Handset Browsing**
204 \$ Million
- 2. Games and Applications**
61 \$ Million
- 3. Text and Media Alerts**
37 \$ Million

Mobile Internet Penetration

Handset browsing users

40 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

59.3 MB

Usage, Frequency

Total internet sessions, monthly

1,354 Million

Display



YouTube

Status: **Available**

Reach

67 % of online population

Page Views, monthly

730 Million

Unique Users, monthly

4.15 Million

YouTube

(Homepage)

Reach

34 % of online population

Page Views, monthly

40.38 Million

Unique Users, monthly

2.1 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

3.1 Billion

Unique Users, monthly

7.4 Million

Social

37 % of Swedish listed companies have active Twitter accounts; 51 % have a YouTube channel; 24 % published interviews with their CEO/CFO.

Switzerland

Export Driven Economy with Engineering
Tradition in the Heart of Europe

Patrick Warnking,
Country Director
Switzerland



General Country Facts

Basic Facts

Official country name	Swiss Confederation
Capital	Bern
Area	41,277 sq km
Top level domain	.ch
Language (official)	German, French, Italian Romansch
Currency	Swiss Francs (CHF)
GDP PPP	324.5 \$ Billion
GDP rank	37

Internet

Fixed broadband subscriptions	2,925,000
Fixed internet subscriptions	2,993,500
Internet penetration	84.2 % of population

Demographics

Total population	7,639,961
Population rank	95
Population growth	0.21 %
Population growth rank	180



0-14 years	15 %
15-64 years	68 %
65 years and older	17 %
Median age	41.7 years

 gbm-ch@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

4,697 \$ Million

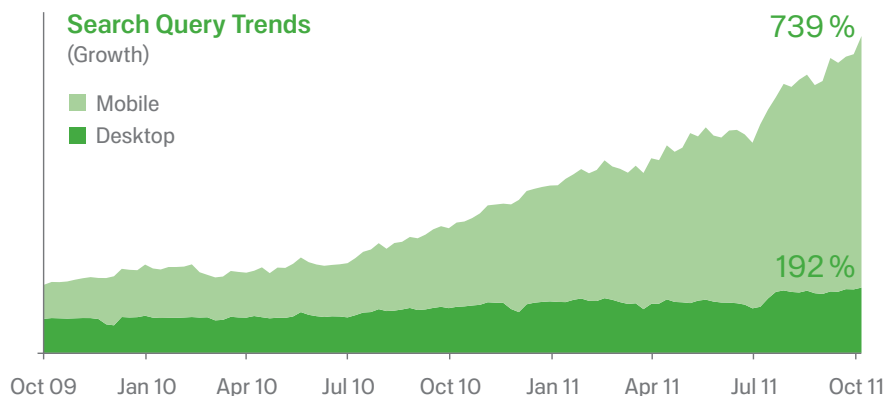
■ Online Ad Spend, 2011

455 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 40% **News & Current Events**
- 28% **Food & Drink**
- 27% **Beauty & Personal Care**
- 26% **Shopping**
- 26% **Reference**

“The market is highly developed on the user side, Swiss are tech-savvy fast-adopters that can effort the latest high-end devices. Swiss spend one forth of their time online. 96 % of internet users make web-purchases with a high average annual e-commerce budget of over 1500 €.”

Mobile

Total Mobile Penetration

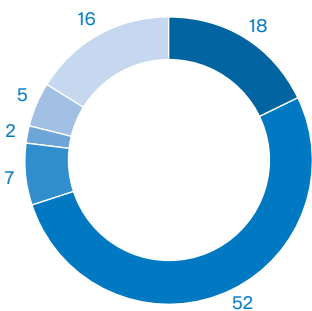
Total mobile users

127 % of population

Smartphone Penetration

Smartphone users

43 % of population



Smartphone Users by OS

Total mobile users (% of population)

- Android
- iOS
- Symbian
- BBOS
- Windows
- Other

Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,797 \$ Million
- Games and Applications**
474 \$ Million
- Social Networking**
264 \$ Million

Mobile Internet Penetration

Handset browsing users

40 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

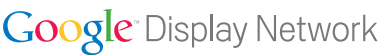
72.7 MB

Usage, Frequency

Total internet sessions, monthly

119 Million

Display



YouTube

Status: Not available

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 75 % of online population

Page Views, monthly

1.7 Billion

Unique Users, monthly

6.2 Million

Social

76 % of smartphone users visit social networks regularly.

Turkey

The Fascinating Bridge Between Two Continents

Bulent Hicsonmez,
Country Director
Turkey



General Country Facts

Basic Facts

Official country name	Republic of Turkey
Capital	Ankara
Area	783,562 sq km
Top level domain	.tr
Language (official)	Turkish
Currency	Turkish Liras (TRY)
GDP PPP	960.5 \$ Billion
GDP rank	16

Internet

Fixed broadband subscriptions	7,095,850
Fixed internet subscriptions	7,224,356
Internet penetration	44 % of population

Demographics

Total population	78,785,548
Population rank	17
Population growth	1.24 %
Population growth rank	95



0-14 years	27 %
15-64 years	67 %
65 years and older	6 %
Median age	28.5 years

gbm-tr@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

2,884 \$ Million

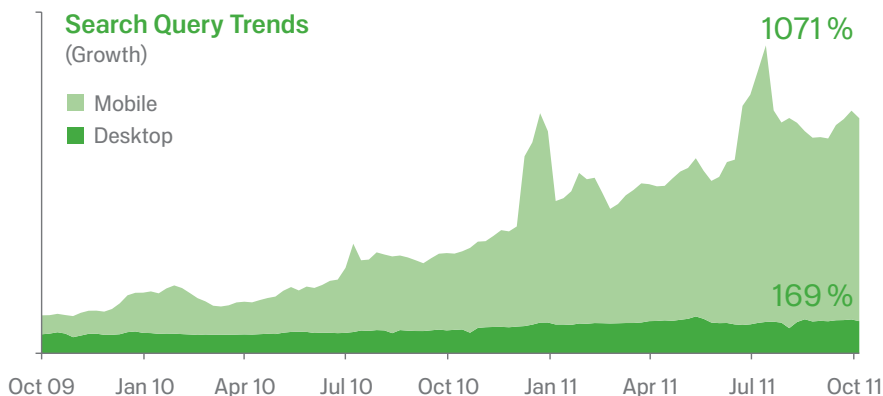
■ Online Ad Spend, 2011

208 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 60% **Shopping**
- 57% **Food & Drink**
- 54% **Real Estate**
- 53% **Sensitive Subjects**
- 46% **Finance & Insurance**

“Surpassed only by China, Turkey’s growth in Q1 2010 has been 11.7 %. With more than 35 million young and engaged internet users spending an average of 32 hours per month online, the bustling online market provides investors, advertisers, and marketers with great opportunities.”



Mobile

Total Mobile Penetration

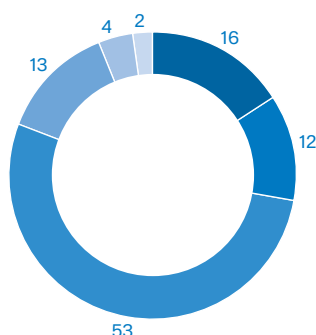
Total mobile users

81 % of population

Smartphone Penetration

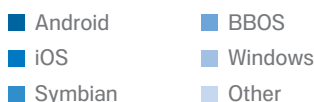
Smartphone users

14 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,471 \$ Million
- Music**
383 \$ Million
- Social Networking**
171 \$ Million

Mobile Internet Penetration

Handset browsing users

16 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

2.3 MB

Usage, Frequency

Total internet sessions, monthly

15,431 Million

Display



YouTube

Status: Not available

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 80 % of online population

Page Views, monthly

8.6 Billion

Unique Users, monthly

23 Million

Social

Internet users in Turkey spent 7.6 hours on social networking sites, ranking #4 after Israel, Russia and Argentina.

Ukraine

Opportunities are calling

Svyatoslav Komakha,
Country Marketing Manager
Ukraine



General Country Facts

Basic Facts

Official country name	Ukraine
Capital	Kyiv (Kiev)
Area	603,550 sq km
Top level domain	.ua
Language (official)	Ukrainian
Currency	Hryvnia (UAH)
GDP PPP	305.2 \$ Billion
GDP rank	39

Internet

Fixed broadband subscriptions	3,661,180
Fixed internet subscriptions	3,661,180
Internet penetration	34 % of population

Demographics

Total population	45,134,707
Population rank	28
Population growth	-0.62 %
Population growth rank	224



0-14 years	14 %
15-64 years	71 %
65 years and older	15 %
Median age	39.9 years

 gbm-ua@google.com

Advertising Market

Total

Total Ad Spend, 2011 (total media spend)

754 \$ Million

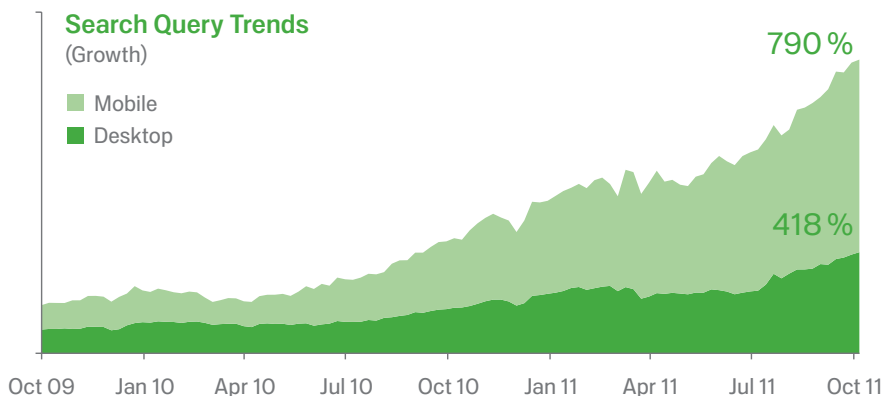
Online Ad Spend, 2011

36 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

72 % **Food & Drink**

72 % **Online Communities**

66 % **Real Estate**

62 % **Shopping**

62 % **Recreation**

“Ukraine is one of the largest and fastest growing online communities in the region. So seize opportunities of both internal market with fast growing online retail, tourism and travel, and export, since Ukraine emerges as European IT outsourcing and developers superpower with over 20K active and highly skilled developers.”



Mobile

Total Mobile Penetration

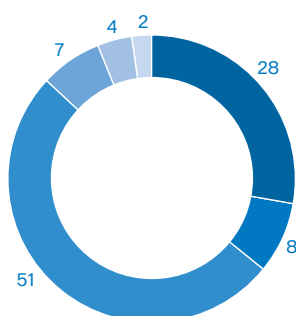
Total mobile users

120 % of population

Smartphone Penetration

Smartphone users

10 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,972 \$ Million
- Games and Applications**
849 \$ Million
- Music**
363 \$ Million

Mobile Internet Penetration

Handset browsing users

28 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

6.8 MB

Usage, Frequency

Total internet sessions, monthly

11,782 Million

Display



YouTube

Status: Not available

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

15 Billion

Unique Users, monthly

7,5 Million

Social

Ukraine's oldest hospital was one of the first to use Twitter to facilitate communication, both internally and externally.

United Arab Emirates

The hub of the Middle East and North Africa region, and the emerging global center of travel and tourism

Mohamad Mourad,
Regional Manager Gulf



General Country Facts

Basic Facts

Official country name	United Arab Emirates
Capital	Abu Dhabi
Area	83,600 sq km
Top level domain	.ae
Language (official)	Arabic
Currency	Emirati Dirhams (AED)
GDP PPP	246.8 \$ Billion
GDP rank	50

Internet

Fixed broadband subscriptions	786,818
Fixed internet subscriptions	1,374,903
Internet penetration	69 % of population

Demographics

Total population	5,148,664
Population rank	115
Population growth	3.28 %
Population growth rank	6



0-14 years	20 %
15-64 years	79 %
65 years and older	1 %
Median age	30.2 years

 gbm-ae@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

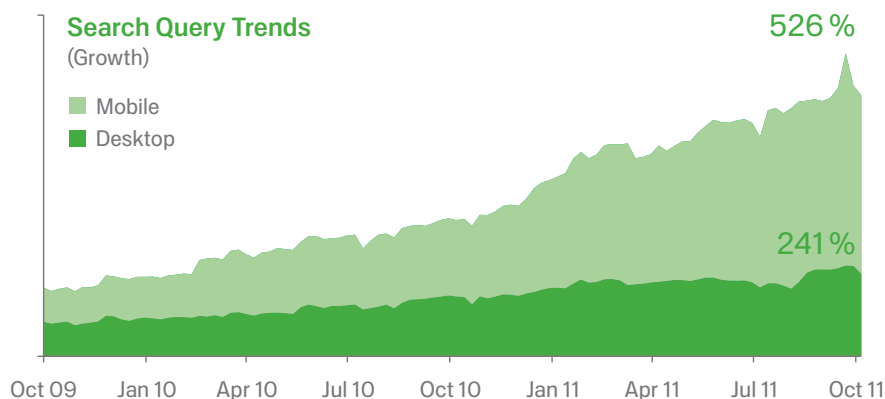
(online not available)

503 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 53% **Finance & Insurance**
- 50% **Food & Drink**
- 45% **Business**
- 41% **News & Current Events**
- 41% **Local**

“The UAE has invested in the most advanced infrastructure in the world. It has the highest level of mobile and smart phone penetration in the world and was ranked by the World Economic Forum as number one in ICT use and government efficiency. Abu Dhabi, its capital, is the richest city in the world, thanks to its hydrocarbon sector. Dubai has invested in Media and Internet cities, which host most of the ecosystem players, including Google.”



Mobile

Total Mobile Penetration

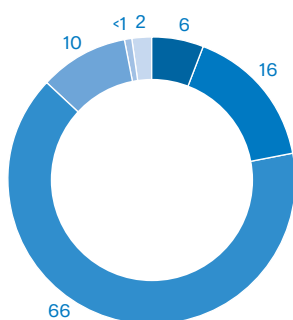
Total mobile users

239 % of population

Smartphone Penetration

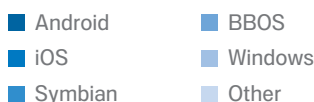
Smartphone users

61 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,471 \$ Million
- Music**
383 \$ Million
- Social Networking**
171 \$ Million

Mobile Internet Penetration

Handset browsing users

58 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

2.3 MB

Usage, Frequency

Total internet sessions, monthly

15,431 Million

Display



YouTube

Status: **Just launched**

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 80 % of online population

Page Views, monthly

16 Billion

Unique Users, monthly

2.9 Million

Social

An average of 50K AED per year are spend on social media by firms.

United Kingdom

A highly diverse and innovative country with a strong history in music and sports

Dan Cobley,
Managing Director
UK



General Country Facts

Basic Facts

Official country name	United Kingdom
Capital	London
Area	243,610 sq km
Top level domain	.uk
Language (official)	English
Currency	British Pounds (GBP)
GDP PPP	2.173 \$ Trillion
GDP rank	7

Internet

Fixed broadband subscriptions	19,468,000
Fixed internet subscriptions	20,528,001
Internet penetration	84.1 % of population

Demographics

Total population	62,698,362
Population rank	22
Population growth	0.56 %
Population growth rank	147



0-14 years	17 %
15-64 years	66 %
65 years and older	16 %
Median age	40 years

gbm-gb@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

18,355 \$ Million

Online

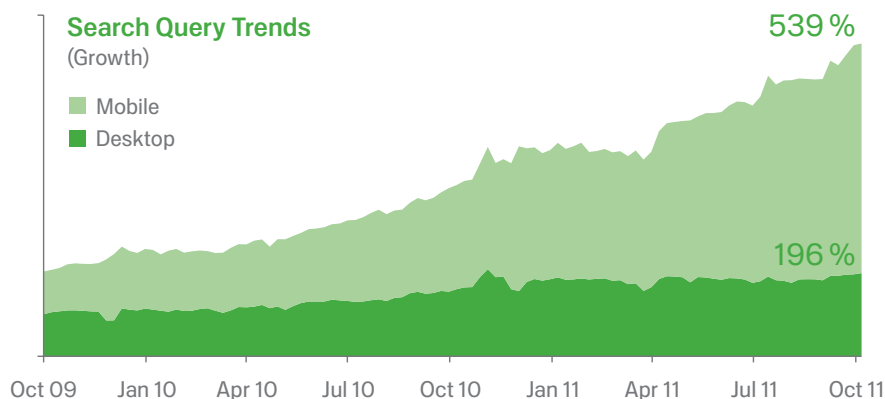
■ Online Ad Spend, 2011

5,929 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 27% Sensitive Subjects
- 24% Food & Drink
- 24% Science
- 23% Animals
- 22% Beauty & Personal Care

"The United Kingdom is made up of England, Wales, Scotland and Northern Ireland and commonly referred to as Britain. It was the world's first industrialized country. Its economy remains one of the largest with London being the world's largest financial centre alongside New York."



Mobile

Total Mobile Penetration

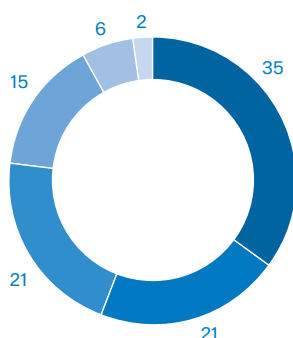
Total mobile users

127 % of population

Smartphone Penetration

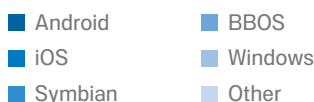
Smartphone users

51 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- Handset Browsing**
1,891 \$ Million
- Games and Applications**
719 \$ Million
- Social Networking**
364 \$ Million

Mobile Internet Penetration

Handset browsing users

47 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

92.5 MB

Usage, Frequency

Total internet sessions, monthly

12,029 Million

Display



YouTube

Status: **Available**

Reach

52 % of online population

Page Views, monthly

2.88 Billion

Unique Users, monthly

20.9 Million

YouTube

(Homepage)

Reach

32 % of online population

Page Views, monthly

212 Million

Unique Users, monthly

12.9 Million

GDN

(Google Display Network)

Reach

> 90 % of online population

Page Views, monthly

23 Billion

Unique Users, monthly

45 Million

Social

56 % of smartphone users access social networking sites at least once per day.

United States

A land of opportunities

John McAteer,
Managing Director,
US Sales



General Country Facts

Basic Facts

Official country name	United States of America
Capital	Washington, DC
Area	9,826,675 sq km
Top level domain	.us
Language (official)	English*
Currency	US Dollar (USD)
GDP PPP	14.66 \$ Trillion
GDP rank	1

Internet

Fixed broadband subscriptions	81,744,000
Fixed internet subscriptions	89,090,155
Internet penetration	78 % of population

Demographics

Total population	313,232,044
Population rank	3
Population growth	0.96 %
Population growth rank	118



0-14 years	20 %
15-64 years	67 %
65 years and older	13 %
Median age	36.9 years

 gbm-us@google.com

Advertising Market

Total

Online

■ Total Ad Spend, 2011 (total media spend)

154,935 \$ Million

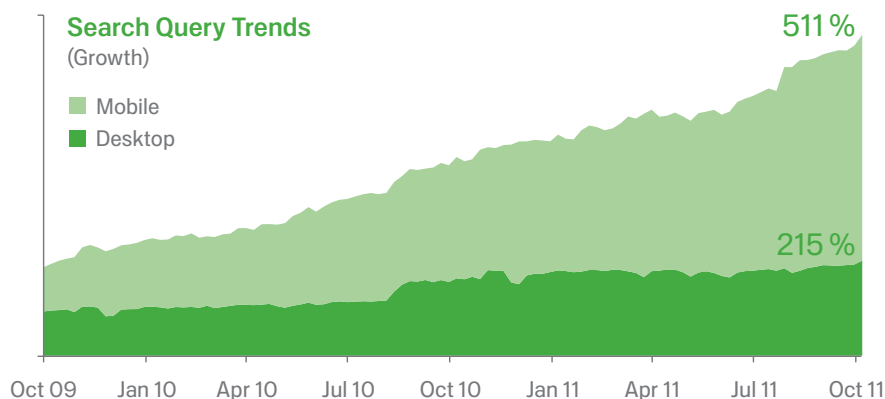
■ Online Ad Spend, 2011

25,984 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

- 25 % **Online Communities**
- 21 % **Science**
- 20 % **Food & Drink**
- 20 % **Sensitive Subjects**
- 19 % **Finance & Insurance**

* majority 82 %

"The US is the home of the internet. It has the largest and most technologically powerful economy in the world. The US is a multicultural country with people from all over the world. Dazzling cities, alpine lakes, vineyards and coastlines make this country furthermore unique."



Mobile

Total Mobile Penetration

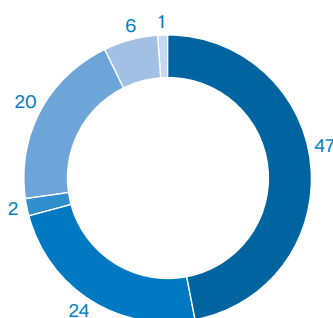
Total mobile users

105 % of population

Smartphone Penetration

Smartphone users

44 % of population



Smartphone Users by OS

Total mobile users (% of population)



Usage, Top 3 Activities

Marketsize (\$ Million)

- 1. Handset Browsing**
21,711 \$ Million
- 2. Games and Applications**
5,330 \$ Million
- 3. Social Networking**
3,180 \$ Million

Mobile Internet Penetration

Handset browsing users

54 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

169.2 MB

Usage, Frequency

Total internet sessions, monthly

118,794 Million

Display



YouTube

Status: **Available**

Reach

58 % of online population

Page Views, monthly

17 Billion

Unique Users, monthly

128 Million

YouTube

(Homepage)

Reach

36 % of online population

Page Views, monthly

1.2 Billion

Unique Users, monthly

78.4 Million

GDN

(Google Display Network)

Reach

> 95 % of online population

Page Views, monthly

180 Billion

Unique Users, monthly

260 Million

Social

72% of US businesses use external social media for business purposes, like contacting suppliers, clients and customers.

Vietnam

Fastest growing Southeast Asian economy

Loren Shuster,
Country Director Singapore &
Emerging Markets



General Country Facts

Basic Facts

Official country name	Socialist Republic of Vietnam
Capital	Hanoi (Ha Noi)
Area	331,210 sq km
Top level domain	.vn
Language (official)	Vietnamese
Currency	Dong (VND)
GDP PPP	276.6 \$ Billion
GDP rank	41

Internet

Fixed broadband subscriptions	3,631,396
Fixed internet subscriptions	-
Internet penetration	33.7 % of population

Demographics

Total population	90,549,390
Population rank	14
Population growth	1.08 %
Population growth rank	109



0-14 years	25 %
15-64 years	69 %
65 years and older	6 %
Median age	27.8 years

 gbm-vn@google.com

Advertising Market

Total

■ Total Ad Spend, 2011 (total media spend)

595 \$ Million

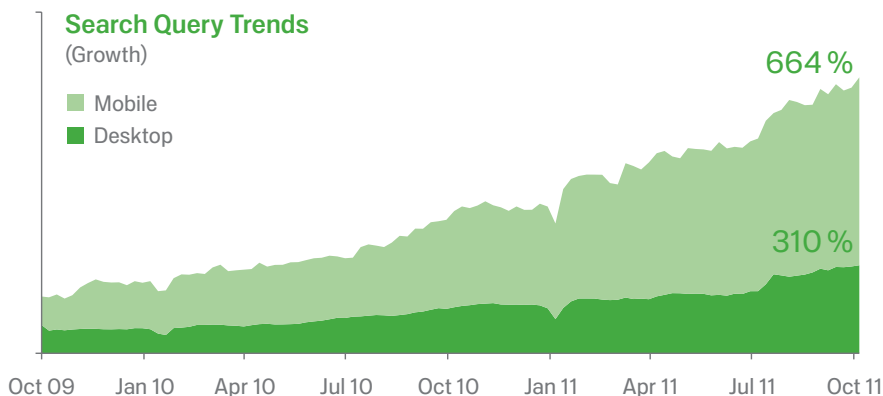
■ Online Ad Spend, 2011

2 \$ Million

Search

Search Query Trends (Growth)

■ Mobile
■ Desktop



Top 5 Rising Categories

Nov 2010 to Nov 2011 / growths (YoY %)

126% **Food & Drink**

92% **Industries**

90% **Society**

74% **Shopping**

70% **News & Current Events**

“Vietnam’s digital transformation has been rapid, with the Internet already constituting 0.9 % of its GDP (McKinsey) and surpassing 17 % spending growth for the ICT sector in 2011 (IDC). With young people under the age of 15 years accounting for 35 % of the population, they are expected to accelerate the technology-enabled marketplace and advanced infrastructure readiness.”

Mobile

Total Mobile Penetration

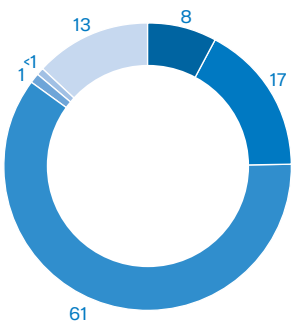
Total mobile users

124 % of population

Smartphone Penetration

Smartphone users

45 % of population



Smartphone Users by OS

Total mobile users (% of population)

- Android
- iOS
- Symbian
- BBOS
- Windows
- Other

Usage, Top 3 Activities

Marketsize (\$ Million)

- Music**
1,650 \$ Million
- Games and Applications**
1,260 \$ Million
- Handset Browsing**
910 \$ Million

Mobile Internet Penetration

Handset browsing users

9 % of mobile media users

Mobile Internet Traffic

Average traffic per user, monthly

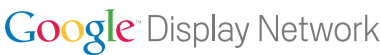
3.2 MB

Usage, Frequency

Total internet sessions, monthly

13,358 Million

Display



YouTube

Status: Not available

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

YouTube

(Homepage)

Reach

—

Page Views, monthly

—

Unique Users, monthly

—

GDN

(Google Display Network)

Reach

> 80 % of online population

Page Views, monthly

4 Billion

Unique Users, monthly

19 Million

Social

53 % of Vietnam’s Internet users regularly use Social Networks.

Google Products and Tools

Search advertising

With the power of **Google search**, your organisation strengthens its ability to access and disseminate organisational knowledge, increasing employee productivity, boosting website conversion rates and improving customers service.

For more information about Google Search Solutions for Business, please visit: www.google.com/enterprise/search and our Google Search Ads page: www.google.com/ads/searchads



Since our first advertising programme, **AdWords**, was introduced in 2000, our goal has been to show people ads that are so useful and relevant that they are a form of information in their own right. With AdWords, advertisers create simple text ads that then appear beside related search results, as well as on thousands of partner sites. Advertisers select their own target keywords and only pay when customers click their ads. It's easy to create ad text and manage online advertising accounts, with no large, up-front payment required. We also provide tools for advertisers to measure and improve the effectiveness of their ads in order to maximise their profits, as well as continually improve the ads that people see on Google. As the search advertising business continues to evolve worldwide, we're exploring new formats, for mobile devices, for example, which will make ads even more relevant for everyone.

For more information, please visit: www.google.com/adwords



Now also introducing **AdWords Express**. The easy way to help your local community find your business. Your ad will automatically reach people when they search your area for the products or services that you provide an ad for, whether they are searching on laptops or mobile phones.

For more information, please visit: www.google.com/awexpress

Display advertising

As the Internet ecosystem has evolved, so too have ad formats. Today we're deeply invested in display advertising, which we believe is an area of significant future growth not only for Google, but for online publishers. We believe that the technology and expertise that we've developed in search and search ads can improve display advertising for users, advertisers and publishers across the web. Our display advertising products include the **Google Display Network** (comprising more than one million partner websites and Google-owned sites like **YouTube**) and our **DoubleClick** advertising technology.



We aim to simplify display advertising, so that it's easier for advertisers and publishers to manage campaigns across different formats, on different websites and for different devices. We also work to offer advertisers better and more measurable results from their campaigns and to make display advertising open and accessible for every advertiser and publisher, from the smallest corner shop to the biggest global brand. Simply put, a display advertising system built on better technology can benefit everyone on the Internet.

Learn more on the product sites: Google Display Network: www.google.com/adwords/displaynetwork/ and DoubleClick: www.google.com/doubleclick

DoubleClick Ad Planner



With the option to define audiences by demographics and interests, this tool helps media buyers and planners identify websites that audiences are likely to visit and make informed advertising decisions. It provides data at a massive scale, which enables precision planning and makes it fast and easy to discover sites and plan media buys.

Visit the website for more information: www.google.com/adplanner/



For advertisers, publishers and agencies alike, we make video accessible with Video Ads. Video Ads allow you to manage and monetise your video advertising business with viewer-friendly programmes. It lets you reach customers when they watch, search or browse content on YouTube and the Google Display Network. **YouTube** captures the attention of the world's largest and most engaged media audience, with 800 million visitors every month. It is monetised in 39 different countries and territories and in 54 different languages and dialects across the Americas, Europe, Africa and Asia Pacific.

Check out the details about Video Ads and YouTube on the product websites: www.google.com/ads/video and www.youtube.com/advertise

Mobile advertising



Driven by the growth of smartphones with full WebKit browsers, mobile devices will soon overtake PCs as the primary way that people around the world access the web. We offer advertisers the ability to run search ad campaigns on mobile devices with popular mobile-specific ad formats, such as click-to-call ads (advertisers can include a phone number within ad text).

We also offer formats for mobile websites and mobile apps that facilitate reaching users on the go, which helps developers and publishers make money from their mobile content. And in 2010, we acquired in-app ads leader AdMob, which offers effective ad units and solutions for app developers and advertisers.

Check out more information about Google Mobile Ads at: www.google.com/ads/mobile and on our blog: googlemobileads.blogspot.com

TV Advertising

Reach your ideal audience by advertising on national television with Google TV Ads. With this tool, you can reach households, pick popular and niche programmes across all dayparts without any forced programme bundling and measure campaign performance and ROI with detailed next-day reporting.

Find out more about TV advertising on the Google TV Ads website: www.google.com/ads/tv

Local Advertising



Our free, easy-to-use tools help local business owners manage their presence on the web and grow their services. Any business can use our online local database, called Google Places, to add a new listing or edit an existing one. These listings appear free of charge when potential customers search for products, services and businesses on Google.com or Google Maps. Claiming a business listing ensures that people can receive the most accurate and current information about a business quickly and easily, such as location, phone number and hours of operation. Business owners can also edit and check their information at any time to find out how many people have seen or clicked their free listing.

For more details, have a look on our website: www.google.com/places

Earn Money from Your Site

Tools for publishers



Advertising can enhance the experience for visitors to an online publisher's website, as it helps publishers fund the cost of creating valuable content. This is why we've built services to support many hundreds of thousands of publishers on the Internet, from living-room bloggers to the largest newspapers in the world.

With **AdSense**, Google delivers ads that are precisely targeted to search results or the content on a site's pages. AdSense publishers can get the most revenue possible for their ad space without having to manage advertiser relationships.

More information can be found at www.google.com/adsense and our Inside AdSense Blog at adsense.blogspot.com

For larger publishers, our ad-serving technology (**DFP**) serves the most valuable ad that they've sold directly to advertisers or ad agencies.

For more information, go to: <http://www.google.com/doubleclick/publishers/dart.html>



The **DoubleClick Ad Exchange**, a real-time auction marketplace, maximises large publishers' overall returns by "dynamically allocating" the highest-value ad, whether directly sold or indirectly through an ad network. With all these services, our goal is to help online publishers maximise revenue and get the data they need to make the most effective use of their ad space. When publishers can maximise their returns, everyone using the web benefits from more vibrant online content.

Find more information, please visit the website: http://www.google.com/doubleclick/advertisers/ad_exchange.html

The Google Affiliate Network helps advertisers increase online conversations on a performance basis and enables publishers to monetise traffic with affiliate ads. Please visit the website to find out more: www.google.com/ads/affiliatenetwork

Enhance Your Website



Let visitors recommend your content by adding a **+1 button**. The +1 button gives something a public stamp of approval. It allows visitors to share recommendations with friends, contacts and the rest of the web when it is most helpful – on Google search. This tool enables you to customise the appearance of the +1 button and the snippet that is included when shared with others.

For more detailed information on how the +1 button works, visit this website: www.google.com/+1/button

Google+ for business. While Google+ is more widely known for its social networking value, it is now possible for businesses to create pages that support relationship building with customers. In combination with other solutions such as the +1 button, the **Google+ page** can serve as a landing page for sharing, promoting and measuring the interaction with your customers.

For more information, please visit the Google+ Your Business page: www.google.com/+business/

Find Insights and Stats

Think Insights offers you consumer trends, marketing insights and industry research. For more information, please visit <http://www.thinkwithgoogle.com/insights/>

See what the world is searching for. With **Google Insights for Search**, you can compare search volume patterns across specific regions, categories, time frames and properties. For more information, please visit <http://www.google.com/insights/search/>

Learn about smartphone adoption and usage across 40 countries with **Our Mobile Planet 2012**. Create custom charts to deepen your understanding of the mobile consumer and get the data you need to guide your mobile strategy. For more information, please visit <http://www.thinkwithgoogle.com/mobileplanet/en/>

Enterprise: Be more Productive

We've been committed to the enterprise business since we first introduced the Google Search Appliance in 2002. This solution provides your organisation with high relevancy that can be customised to meet your specific needs, and which scales easily as your content grows. It highlights features around search quality, access control and connectivity.

More information can be found at the website for Google Search Appliance:

http://www.google.com/enterprise/search/products_gsa.html



Enterprise-class web analytics made smarter and friendlier with **Google Analytics**. This tool gives you rich insights into your website traffic and marketing effectiveness. Powerful, flexible and easy-to-use features now let you see and analyse your traffic data in an entirely new way. With Google Analytics, you're more prepared to write better-targeted ads, strengthen your marketing initiatives and create higher converting websites.

Visit the Google Analytics homepage for more information: www.google.com/analytics



Adoption of **Google Apps**, available to businesses since 2007, continues to grow. Today more than 3 million businesses, from small businesses to big corporations, use Google Apps (which includes email, documents, calendars and more) to communicate and collaborate in the workplace. Cloud computing – web-based software that people can use on any device with a browser and an Internet connection (no special software or hardware required) – is especially suited to the workplace: employees can access their data any time and anywhere in order to collaborate on and share documents in real time, freeing them up to be productive in other ways that weren't possible with traditional desktop applications.

Our apps are constantly updated, so IT departments and employees don't have to deal with new versions and installations, thereby reducing overall costs. Furthermore, we believe that Google Apps can be more secure than traditional applications: companies don't need to manage software security patches because we take care of that. Google Apps is the first cloud computing suite of message and collaboration tools to receive US government security certification.

We also keep live copies of your data on multiple servers in each of the multiple locations, so that there's no scheduled downtime and no single point of failure. We continue to add value to Google Apps and our other enterprise tools for all our business and organisational customers – both current and future.

Check out all the features on the Google Apps homepage: www.google.com/apps/intl/en/business



A modern web browser for speed, security and simplicity. The **Chrome Browser** offers admin tools designed for organisations that need standardised, easy and secure deployment and management. For hassle-free computing, Chromebooks are optimised for web apps and other browser-based business tools, which makes it easy for organisations to innovate quickly, collaborate from anywhere and access the limitless scalability of the web. Chromebooks also include a web-based management console, enabling admins to manage an entire fleet of Chromebooks and users even if they are distributed across multiple locations. Together, Chromebooks and the web offer companies a competitive advantage over those relying on archaic IT infrastructure.

Find out more about security and cost-efficient computing with Chromebooks at: www.google.com/intl/en/chrome/business/chromebook



Put **Google Earth and Maps** to work for your organisation. Make it easy for your employees to view, understand and make decisions about location-based information. Google Earth and Maps for business combine the familiar, interactive Google mapping products with added features designed especially for business users.

Find out more about how to use these tools at: www.google.com/enterprise/earthmaps/



Create a blog with **Blogger**. Find out how with the Blogger Tour on the website: www.blogger.com. Also, Mobile BlogSpot optimises the layout of your blog for those reading from a mobile device. SMS/MMS posting lets you send text, photos and even videos straight to your blog while you're on the go.

Getting Started

Learn with Google



Watch video courses, read how-to guides and follow worksheets to get free tips on how to promote your business online.

Find out how to get started at <http://www.google.com/ads/learn/>

Sources

Country Facts	Metric	Source	Countries
Basic Facts	All	CIA, The World Factbook. 2011	All countries
Demographics	All	CIA, The World Factbook. 2011	All countries
Internet	Fixed broadband subscriptions	Internet WorldStats, Usage and Population Statistics. June 2011	All countries
	Fixed Internet subscriptions	International Telecommunication Union, Fixed Broadband Subscriptions. December 2010	All countries
	Internet penetration (% of population)	International Telecommunication Union, Fixed Internet Subscriptions. December 2010	All countries
Search	Metric	Source	Countries
Search Query Trends	Desktop search	Google Internal data	All countries
	Mobile search	Google Internal data	All countries
Top 5 Rising Categories (nov 2010 to nov 2011)	All	Google Internal data	All countries
Ad Market	Metric	Source	Countries
Total Ad Spend, 2011	Total media spend (\$M)	Zenith Optimedia, Advertising Expenditure Forecast. December 2011	All countries
Online Ad Spend, 2011	Online	Zenith Optimedia, Advertising Expenditure Forecast. December 2011	All countries
Mobile	Metric	Source	Countries
Total Mobile Penetration	Total mobile users (% of population)	Canalys, Mobile Subscribers 2011Q2: AMER, EMEA, CEMA, APAC. June 2011	All countries except for Bulgaria, Croatia, Italy, Kenya, Latvia, Lithuania, Morocco
		International Telecommunication Union, Mobile Cellular Subscriptions, Key Country data 2000–2010. December 2010	Bulgaria, Croatia, Italy, Kenya, Latvia, Lithuania, Morocco
Smartphone Penetration	Smartphone Users (% of population)	Netsize Guide 2011: Truly Mobile. November 2011	Greece, Hungary, Slovenia, Ukraine
		Insights MENA, Mobile Internet Usage. November 2010	Egypt, Saudi Arabia, Morocco, United Arab Emirates
		Strategy Analytics, Global Smartphone Sales Forecast. September 2011	Bulgaria, Latvia, Lithuania
		Ipsos/Mobile Marketing Association/Google, Global B2C Data Comparison, Smartphone	France, Germany, Japan, United Kingdom, United States
		Ipsos/Mobile Marketing Association/Google, Global Perspectives: The Smartphone User & The Mobile Marketer	Australia, Austria, Denmark, India, Indonesia, Israel, Italy, Kenya, Netherlands, Norway, Poland, Russia, Singapore, South Africa, Spain, Sweden, Switzerland, Turkey
Smartphone Users by OS	Android/iOS/Symbian/BBOS/Windows/Other	eMarketer, The Global Media Intelligence Report. October 2011	Chile, Colombia
		Google Internal data	Argentina, Croatia, Egypt, Iran, Kenya, Morocco, Philippines, Peru, Saudi Arabia, United Arab Emirates, Vietnam
		IPSOS, Global B2C data comparison. June 2011	Australia, Austria, China, Finland, India, Indonesia, Israel, Norway, Singapore
		StatCounter - Global Statistics. Top 8 Mobile Oss per Country. November 2011	Bulgaria, Chile, Colombia, Denmark, Greece, Hungary, Iran, Japan, Kenya, Latvia, Lithuania, Morocco, Peru, Philippines, Slovenia, United Arab Emirates, Vietnam

Mobile (cont.)	Metric	Source	Countries
		Strategy Analytics, Global Smartphone Sales Forecast by Country. September 2011	Argentina, Brazil, Canada, Czech Republic, Egypt, Germany, France, Hungary, Italy, Mexico, Netherlands, Poland, Romania, Russia, Saudi Arabia, South Africa, Spain, Sweden, Turkey, Ukraine, United Kingdom, United States
Mobile Internet Penetration	Handset browsing users (% of mobile media users)	Strategy Analytics, Global Media Forecast 2001-2016. March 2011	All countries except for Egypt, Saudi Arabia, Morocco, United Arab Emirates
		Insights MENA, Mobile Internet Usage. November 2010	Egypt, Saudi Arabia, Morocco, United Arab Emirates
Mobile Internet Traffic	Average traffic (MB) per user, monthly	Strategy Analytics, Handset Data Traffic. October 2010	All countries
Usage, Top 3 Activities	All	Strategy Analytics, Global Media Forecast 2001-2016. March 2011	All countries
Usage, Frequency	Total internet sessions (M), monthly	Strategy Analytics, Global Media Forecast 2001-2016. March 2011	All countries
Display	Metric	Source	Countries
YouTube	Status	Google, Youtube Global Resources Hub. Oct 2010; Aug 2011	Argentina, Australia, Brazil, Canada, Czech Republic, Germany, France, India, Israel, Italy, Japan, Mexico, Netherlands, Philippines, Poland, Russia, Singapore, South Africa, Spain, Sweden, United Kingdom, United States
		ComScore Ad Networks, EU Dashboard. Oct 2009	Austria
		ComScore Ad Networks, Global Marketing Dashboards. March 2011	Denmark
		ComScore Ad Networks, Key Measures. October 2011	Finland
		ComScore Ad Networks, Key Measures. October 2011	Norway
		Nielsen Netview, EU Dashboard. April 2011	Switzerland
		Google, Double Click Ad Planner. Last visited 30 Dec 2011	South Africa
		Business World Online, YouTube Philippines Launched. 13 October 2011	Philippines
		Nigerian Entertainment Today, YouTube launches in Nigeria. 8 December 2011	Colombia
		PC Advisor, YouTube launches in Kenya. 6 October 2011	Kenya
YouTube (Homepage)	Reach %	Google, YouTube Reach & Audience Dashboard. October 2011	India, Italy
		Google, YouTube Reach & Audience Dashboard. August 2011	Argentina, Australia, Brazil, Canada, Germany, France, Israel, Mexico, Netherlands, Spain, Sweden, United Kingdom
		Google, YouTube Reach & Audience Dashboard. July 2011	Singapore
		Google, YouTube Reach & Audience Dashboard. April 2011	Japan, Russia
		ComScore Ad Networks, EU Dashboard. October 2009	Austria
		ComScore Ad Networks, Global Marketing Dashboards. March 2011	Denmark
		ComScore Ad Networks, Key Measures. October 2011	Finland
		ComScore Ad Networks, Key Measures.	Norway

Display (cont.)	Metric	Source	Countries
		October 2011	
		Nielsen Netview, EU Dashboard. April 2011	Switzerland
		Google, YouTube APAC Market Data. July 2011; August 2011	Philippines
		Nielsen Netview Audience Profile Report. September 2011	United States
		Google, YouTube Homepage Unique Users. December 2011	Czech Republic
		Google, Global Marketing Dashboards. 2009; 2010; 2011	Austria, Denmark, Norway, Switzerland
		Google, Double Click Ad Planner. Last visited 30 Dec 2011	South Africa
	Page Views	Google Internal Data	Poland
		Google, YouTube Reach & Audience Dashboard. October 2011	India, Italy
		Google, YouTube Reach & Audience Dashboard. August 2011	Argentina, Australia, Brazil, Canada, Germany, France, Israel, Mexico, Netherlands, Spain, Sweden, United Kingdom
		Google, YouTube Reach & Audience Dashboard. July 2011	Singapore
		Google, YouTube Reach & Audience Dashboard. April 2011	Japan, Russia
		ComScore Ad Networks, EU Dashboard. October 2009	Austria
		ComScore Ad Networks, Global Marketing Dashboards. March 2011	Denmark
		ComScore Ad Networks, Key Measures. October 2011	Finland
		ComScore Ad Networks, Key Measures. October 2011	Norway
		Nielsen Netview, EU Dashboard. April 2011	Switzerland
		Google, YouTube APAC Market Data. July 2011; August 2011	Philippines
		Nielsen Netview Audience Profile Report. September 2011	United States
		Google, Double Click Ad Planner. Last visited 30 Dec 2011	Czech Republic, Poland, South Africa
		Google, Global Marketing Dashboards. 2009; 2010; 2011	Austria, Denmark, Norway, Switzerland
	Unique Users	Google, YouTube Reach & Audience Dashboard. October 2011	India, Italy
		Google, YouTube Reach & Audience Dashboard. August 2011	Argentina, Australia, Brazil, Canada, Germany, France, Israel, Mexico, Netherlands, Spain, Sweden, United Kingdom
		Google, YouTube Reach & Audience Dashboard. July 2011	Singapore
		Google, YouTube Reach & Audience Dashboard. April 2011	Japan, Russia
		ComScore Ad Networks, EU Dashboard. October 2009	Austria
		ComScore Ad Networks, Global Marketing Dashboards. March 2011	Denmark
		ComScore Ad Networks, Key Measures. October 2011	Finland

Display (cont.)	Metric	Source	Countries
YouTube (Homepage)	Reach %	ComScore Ad Networks, Key Measures. October 2011	Norway
		Nielsen Netview, EU Dashboard. April 2011	Switzerland
		Google, YouTube APAC Market Data. July 2011; August 2011	Philippines
		Nielsen Netview Audience Profile Report. September 2011	United States
		Google, Double Click Ad Planner. Last visited 30 Dec 2011	Czech Republic, South Africa
		Google, Global Marketing Dashboards. 2009; 2010; 2011	Austria, Denmark, Norway, Switzerland
		Google Internal Data	Poland
		Google, YouTube Reach & Audience Dashboard. October 2011	India, Italy
		Google, YouTube Reach & Audience Dashboard. August 2011	Argentina, Brazil, Canada, France, Germany, Israel, Mexico, Netherlands, Spain, Sweden, United Kingdom
		Google, YouTube Reach & Audience Dashboard. April 2011	Japan
	Page Views	Nielsen Netview Audience Profile Report. September 2011	United States
		Nielsen Netview Audience Profile Report. August 2011	Australia
		Google Internal Data	Poland
		Google, YouTube Reach & Audience Dashboard. October 2011	India, Italy
		Google, YouTube Reach & Audience Dashboard. August 2011	Argentina, Australia, Brazil, Canada, France, Germany, Israel, Mexico, Netherlands, Spain, Sweden, United Kingdom
		Google, YouTube Reach & Audience Dashboard. April 2011	Japan
		Nielsen Netview Audience Profile Report. September 2011	United States
		Google Internal Data	Czech Republic, Poland
	Unique Users	Google, YouTube Reach & Audience Dashboard. October 2011	India, Italy
		Google, YouTube Reach & Audience Dashboard. August 2011	Argentina, Australia, Brazil, Canada, France, Germany, Israel, Mexico, Netherlands, Spain, Sweden, United Kingdom
		Google, YouTube Reach & Audience Dashboard. April 2011	Japan
		Nielsen Netview Audience Profile Report. September 2011	United States
GDN	Reach %, Page Views, Unique Users	Google Internal Data	Czech Republic, Poland
		Double Click, Ad Planner. Last visited 20 January 2012	All countries

Social

Argentina	http://www.comscore.com/Press_Events/Press_Releases/2011/3/Social_Networking_Accounts_for_1_of_Every_4_Minutes_Spent_Online_in_Argentina_and_Chile
Australia	http://www.roi.com.au/social-media-optimisation/how-australians-use-the-internet-latest-market-data/#.TwsLOmOXRm5
Austria	http://services.google.com/fh/files/blogs/our_mobile_planet_austria_en.pdf
Brazil	http://rfpconnect.com/news/2011/12/16/kpmg-reports-companies-in-emerging-markets-surge-ahead-in-social-media-use
Bulgaria	http://totalaccess.emarketer.com/Chart.aspx?R=117121&dsNav=Ntk:basic%7cbulgaria%7c1%7c,Ro:2
Canada	http://www.ipsos-na.com/news-polls/pressrelease.aspx?id=5286
Chile	http://www.comscore.com/Press_Events/Press_Releases/2011/3/Social_Networking_Accounts_for_1_of_Every_4_Minutes_Spent_Online_in_Argentina_and_Chile
China	http://news.techeye.net/internet/social-media-crucial-to-business-in-emerging-markets#ixzz1ghtZNEAO
Colombia	http://totalaccess.emarketer.com/Chart.aspx?R=116634&dsNav=Ntk:basic%7csocial+network+users%7c1%7c-basic%7ccountry%7c1%7c,Rpp:50,Ro:4&kwredirect=n
Croatia	http://vanaimedia.tumblr.com/post/11140330393/state-of-social-media-in-croatia
Czech Republic	http://www.alexa.com/topsites/countries/CZ
Denmark	http://services.google.com/fh/files/blogs/our_mobile_planet_denmark_en.pdf
Egypt	http://services.google.com/fh/files/blogs/our_mobile_planet_egypt_en.pdf
Finland	http://www.slideshare.net/frankcom/social-media-use-in-finnish-workplaces
France	http://www.newmediatrendwatch.com/markets-by-country/10-europe/52-france?start=2
Germany	http://www.socialmedia-blog.de/2011/05/social-media-nutzerzahlen-deutschland-2011/
Greece	http://owni.eu/2011/06/09/greece-social-networks-in-times-of-crisis/
Hungary	http://totalaccess.emarketer.com/Chart.aspx?R=117121&dsNav=Ntk:basic%7chungary+social+media%7c1%7c,Ro:-1
India	http://totalaccess.emarketer.com/Article.aspx?R=1008766&dsNav=Ntk:basic%7csocial+network+users%7c1%7c-basic%7ccountry%7c1%7c,Rpp:50,Ro:-1&kwredirect=n
Indonesia	https://wiki.smu.edu.sg/digitalmediaasia/Digital_Media_in_Indonesia
Israel	http://thenextweb.com/socialmedia/2011/12/22/israelis-are-now-the-worlds-biggest-social-network-addicts-says-new-report
Italy	http://totalaccess.emarketer.com/Chart.aspx?R=116691&dsNav=Ntk:basic%7citaly+social+networking%7c1%7c,Ro:2
Japan	http://www.jeffbullas.com/2011/12/12/one-thousand-facts-and-figures-about-social-media-in-30-countries/
Kenya	http://www.moseskemibaro.com/2011/12/21/pew-research-center-findings-on-mobile-usage-trends-in-kenya/
Latvia	http://www.alexa.com/topsites/countries/LV
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Mexico	http://www.comscoredatamine.com/2011/09/social-networking-accounts-for-largest-share-of-minutes-in-mexico/
Morocco	http://www.insightsmena.com/en/#!place=category&cat=Activities&qid=Social+Networking&filter=Morocco
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Philippines	http://www.comscoredatamine.com/2011/06/the-philippines-spends-highest-share-of-time-on-social-networking-across-markets/
Poland	http://www.digitalcenter.org/pdf/poland_wip_report_2011.pdf
Romania	http://www.mediafactbook.ro/mfb-2011
Russia	http://totalaccess.emarketer.com/Chart.aspx?R=113778
Saudi Arabia	http://services.google.com/fh/files/blogs/our_mobile_planet_saudi_arabia_en.pdf
Singapore	http://sg.nielsen.com/site/NewsReleaseJuly112011.shtml
Slovenia	http://totalaccess.emarketer.com/Chart.aspx?R=117121&dsNav=Ntk:basic%7cslovenia%7c1%7c,Ro:1
South Africa	http://www.admadness.co/2011/01/digital-statistics-south-africa/
Spain	http://blog.nielsen.com/nielsenwire/global/social-media-accounts-for-22-percent-of-time-online/
Sweden	http://www.slideshare.net/SpringtimePR/presentation-swedish-listed-companies-use-of-social-media-for-investor-relationsn-ir-salong-110616-slideshare
Switzerland	http://services.google.com/fh/files/blogs/our_mobile_planet_switzerland_en.pdf
Turkey	http://www.newmediatrendwatch.com/markets-by-country/10-europe/81-russia
Ukraine	http://globalvoicesonline.org/2011/12/06/ukraine-public-hospital-pioneers-social-media-usage/
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United Kingdom	http://services.google.com/fh/files/blogs/our_mobile_planet_uk_en.pdf
United States	http://news.techeye.net/internet/social-media-crucial-to-business-in-emerging-markets#ixzz1ghtZNEAO
Vietnam	https://wiki.smu.edu.sg/digitalmediaasia/Digital_Media_in_Vietnam#Social_Networking_Sites

Thank You

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