NEXT BILLION USERS
Google for the Next Billion

“... to organize the world’s information and make it universally accessible and useful.”
The next billion users...

Global internet access

- 1994: 3B Internet users
- 2012: 4B Internet users
- 2014: 5B Internet users
... are largely located here
... are mobile first, and mostly, mobile only
They’re young, urbanizing fast, and aspirational

45% of people in these markets <25 years old

% of population under 25

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<tr>
<td>%</td>
<td>47%</td>
<td>42%</td>
<td>40%</td>
<td>33%</td>
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All these countries are growing more urban

% of pop. in urban areas (+growth by 2030)

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<tr>
<td>%</td>
<td>33%</td>
<td>46%</td>
<td>85%</td>
<td>81%</td>
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<tr>
<td>CAGR</td>
<td>10%</td>
<td>8%</td>
<td>3%</td>
<td>2%</td>
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Incomes much lower, but disposable income growing

GDP per capita PPP in $000s CAGR

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<tr>
<td>$000s</td>
<td>6</td>
<td>11</td>
<td>16</td>
<td>55</td>
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<tr>
<td>CAGR</td>
<td>7%</td>
<td>5%</td>
<td>N/A</td>
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Poverty level ~$1k / year; disposable income in IN will grow 80% by 2030

Source: World Bank, Euromonitor
... and they face similar serious challenges

Low spec phones  Connectivity  Localized content
Products for the Next Billion Users

Android Go

Google Go

YouTube Go

Google Assistant
Products for the Next Billion Users

- Tez
- Google Station
- Datally
- Files Go
Google Station in India
Public Wi-Fi hotspots increase connectivity but are challenging to deploy

Core Challenges:

**User Experience**
For users, Wi-Fi can be an unreliable and inconsistent experience. No uniform onboarding experience across hotspots.

**Operational Complexity**
For ISPs and Venues, networks are operationally complex. It can be difficult to set-up and operate the network at scale.

**Financially Unsustainable**
For providers, public Wi-Fi is expensive to provide and hard to monetize. Few generate enough revenue to cover operational costs.
Google Station - a simple, cost-effective, & scalable way for partners to offer free & fast Wi-Fi

For **users**, Google Station means

- **Fast**: high-quality internet for more HD videos and less buffering
- **Safe**: can trust that their data is safe and protected on our network
- **Easy, consistent experience**: simple log-on flow, developed and enhanced through custom UXR

For **partners**, Google Station means

- **More revenue**: scalable, sustainable ads-based monetization driven by Google’s world-class sales teams
- **Lower operational cost**: Station architecture simplifies integration and can lower ongoing costs
- **Simple to operate**: cloud-based; network monitored and maintained by Google
Google Station Partnership Model

**Partner** provides Network

- **WiFi network** Create, deploy and manage network (including hardware)
- **Backhaul** Provide and maintain backhaul
- **Maintenance** L1/L2 service, field service

**Google** provides free WiFi as a service

- **Network services** Access Gateway, DHCP DNS, AAA, user onboarding and management
- **Service operations platform** Operations, OSS, reporting and analytics
- **Monetization** Develop & manage ads program, share revenue equally with partner

All supported by large, dedicated team of Google engineers, designers and network experts
Google Station today

5 countries
8.2M monthly users
662 Google Station hotspots

Mexico
Nigeria
India
Thailand
Indonesia
Thank you!