



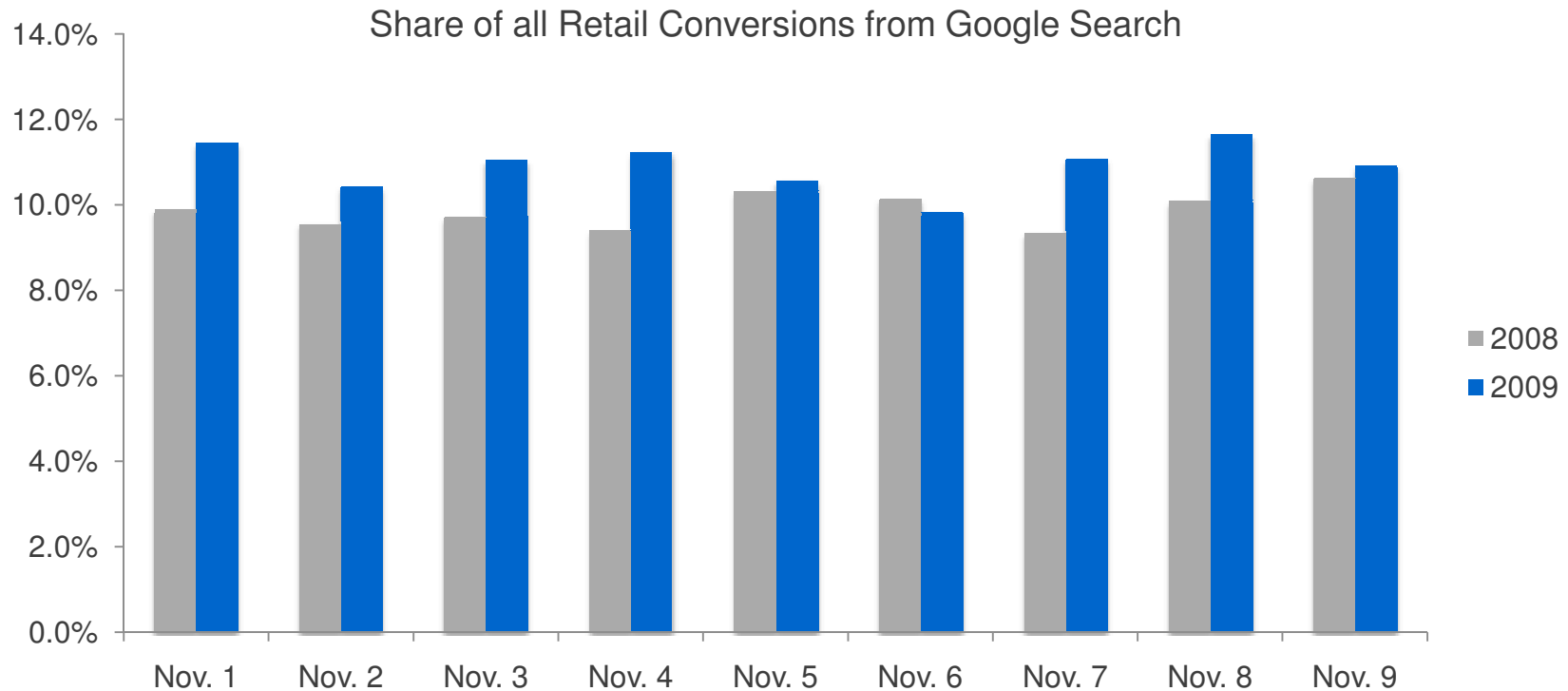
Retail 2009

Black Friday through December

Google Delivers More Purchasers in 2009



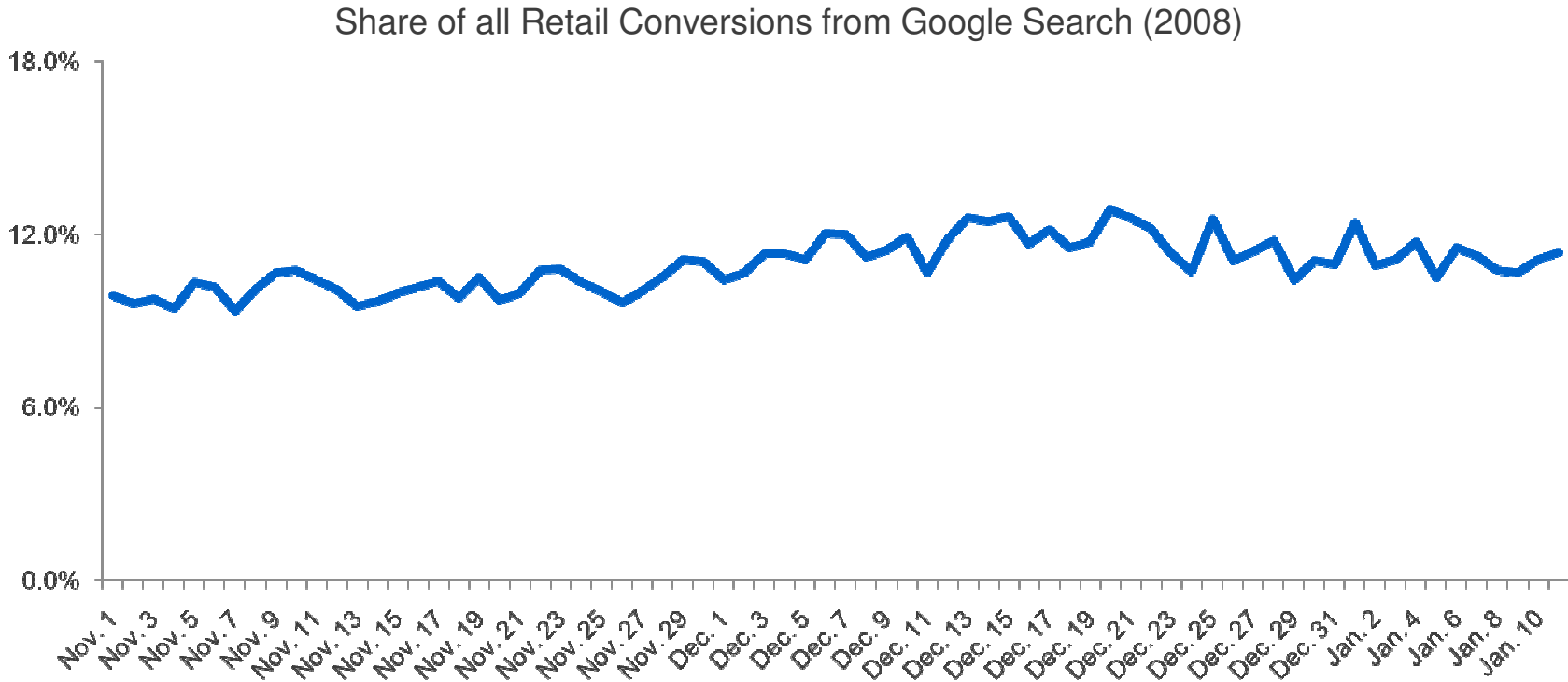
In 2009 Google Search is driving an increased share of purchases to Retail websites vs. 2008.



Google Consistently Delivers Purchasers Throughout The Holidays



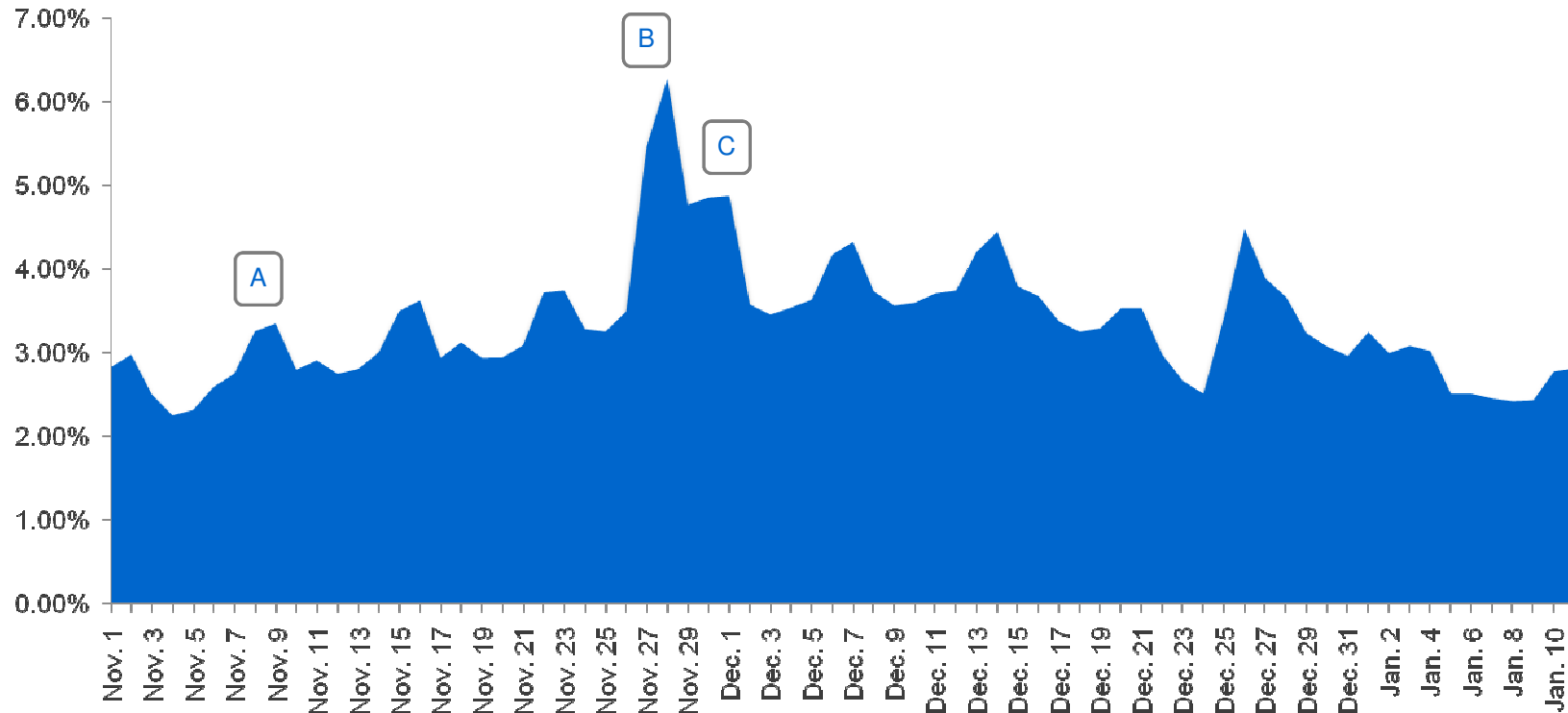
While conversion rates fluctuate throughout the season, Google-driven conversions remain constant.



Consumers Spend Time Shopping On Key Dates



Share of all Time Spent on the Web that was on Retail sites (2008)



A Weekends show increased time spent on retail sites online

B Thanksgiving and Black Friday show the highest time spent on retail sites, even higher than Cyber Monday

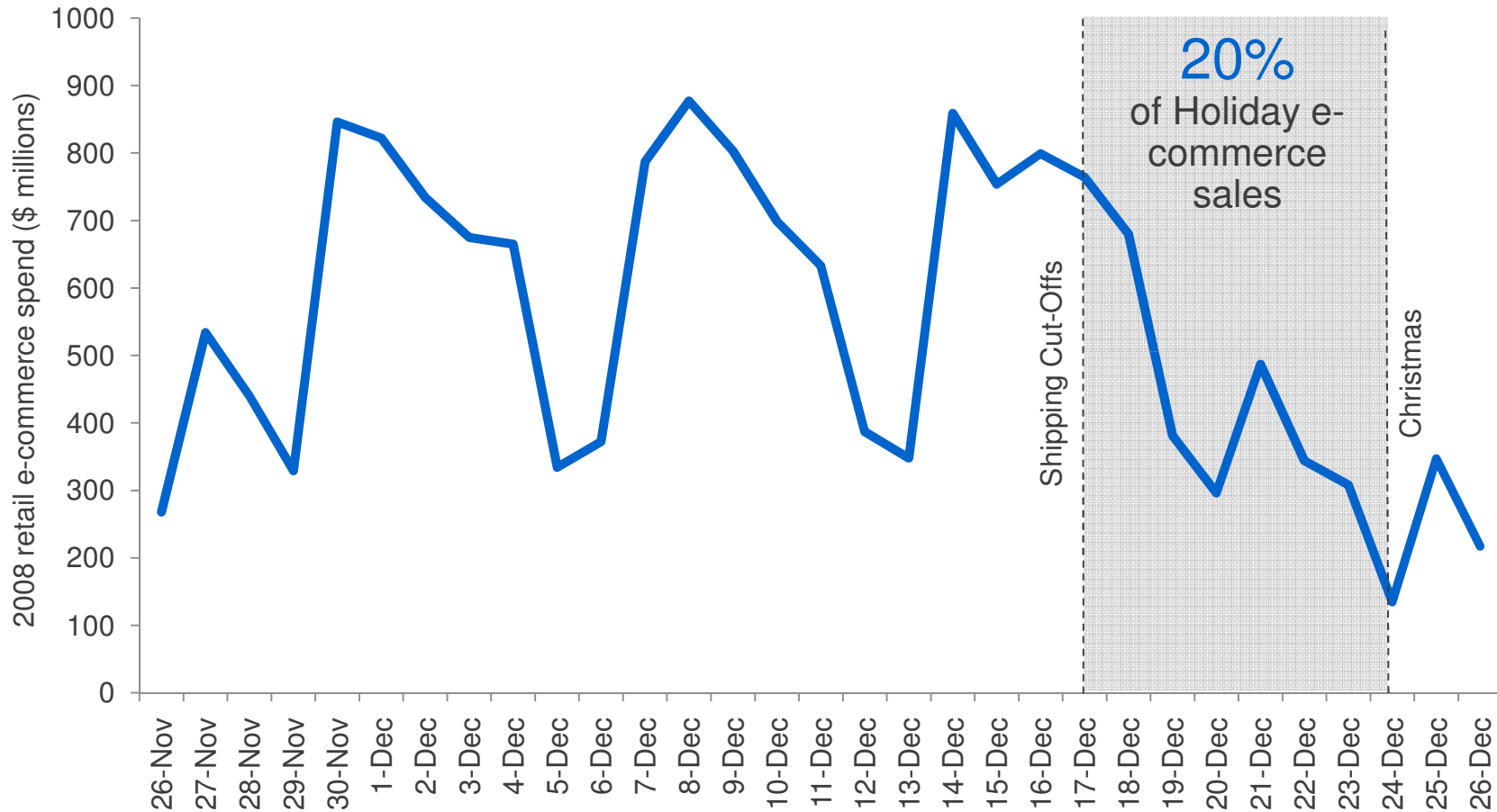
C Cyber Monday is the third highest day for time spent on retail sites during the holidays



Keeping the Lights On

December 18 – January 15

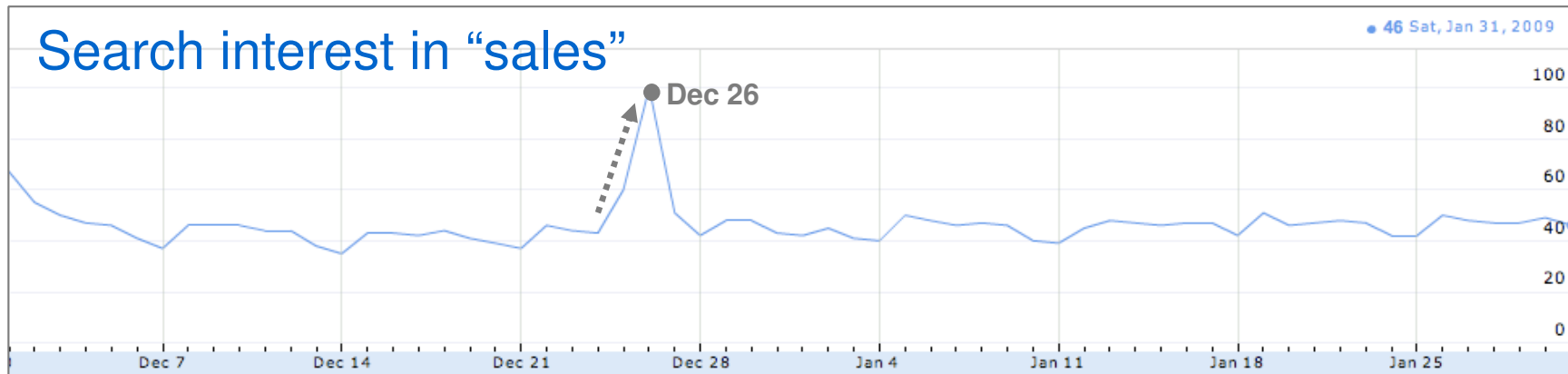
20% of Holiday Sales Happened in the Week before Christmas



Consumers Continue to Shop After Dec 25



62% of shoppers plan to take advantage of post-holiday sales this year.

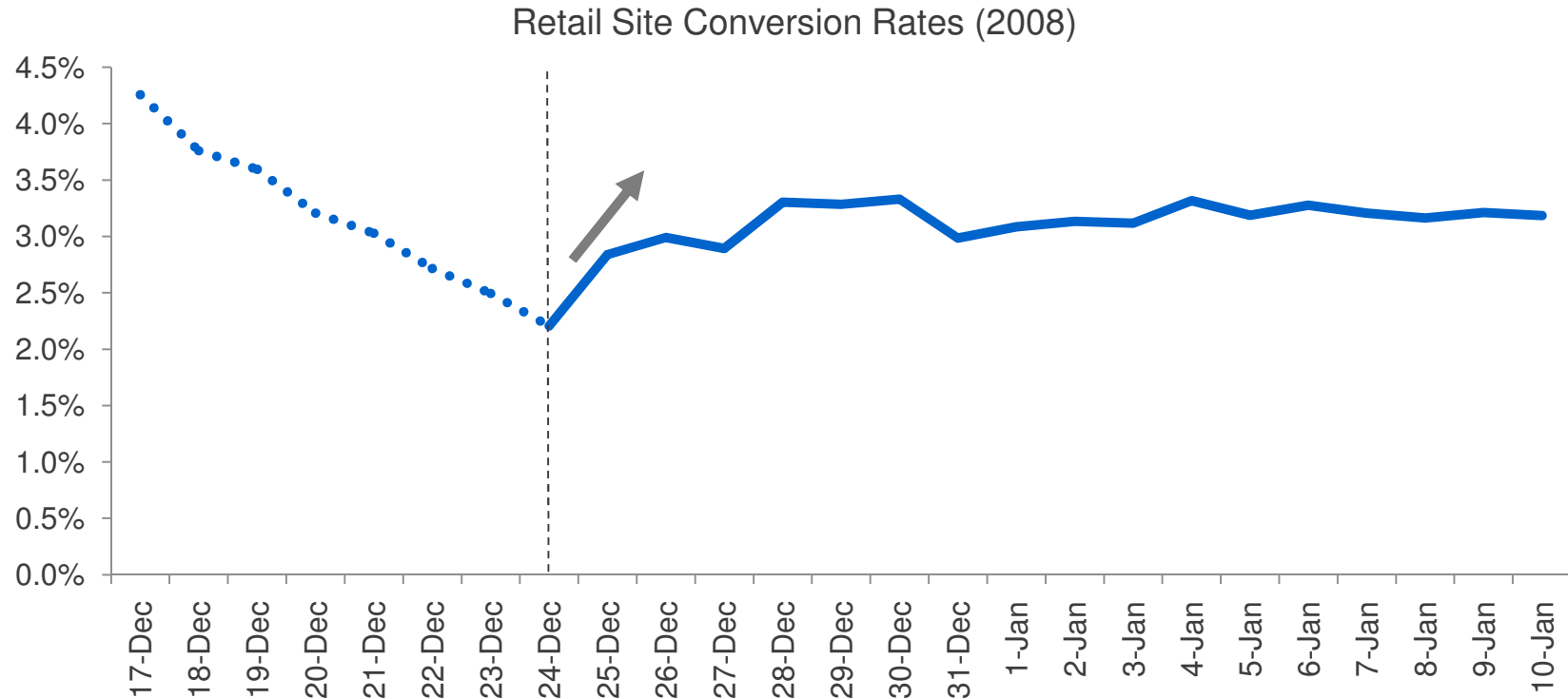


Source: [1] Google/OTX Consumer Intentions for Holiday 2009, September 2009. (Q16) Using the scale below please tell us how much you agree or disagree with the following statements about shopping during the holiday season. n= 2002. [2] Google Insights for Search, 2009.

Conversions Rates Rebound Post-Holiday



Post-holiday conversion rates rebound to around **3.1%**, on par with November holiday conversion rates.

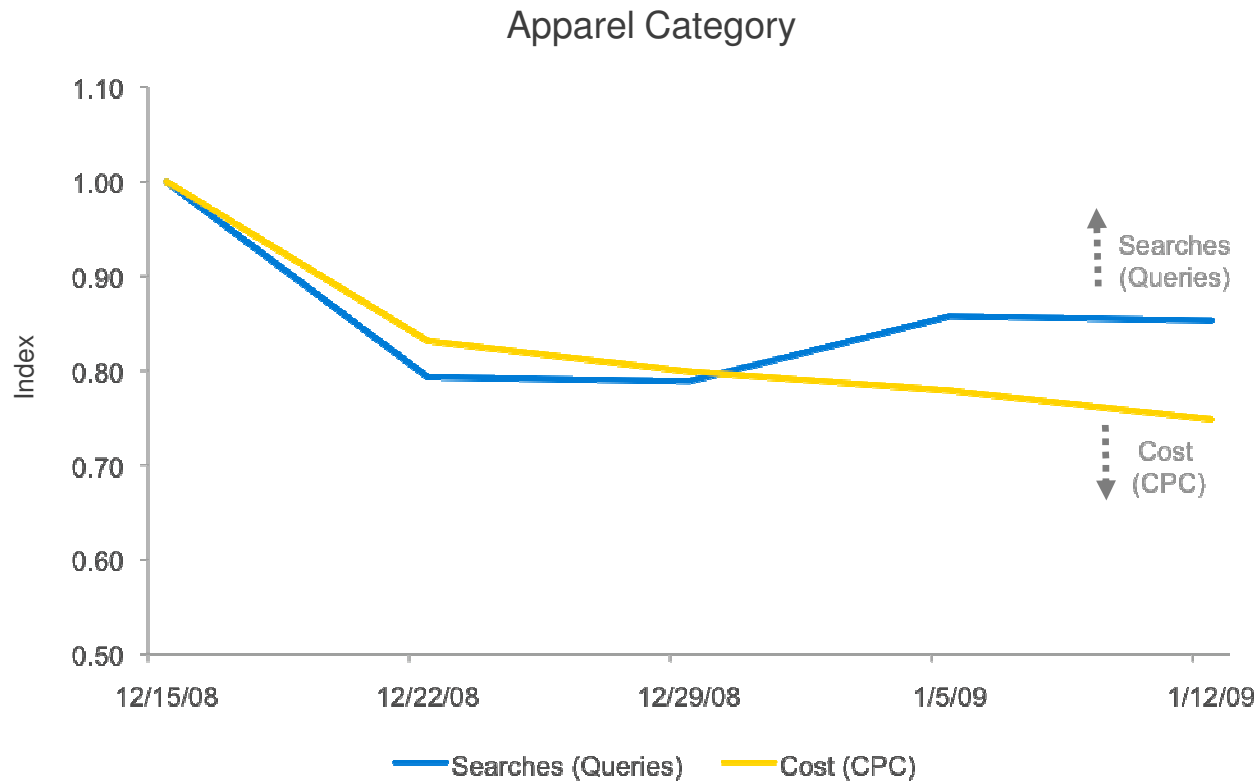


Source: [1] Google/Compete Daily Search Barometer, 11/2009. Based on visits to Top 450 Retail Sites.

Search Is On Sale



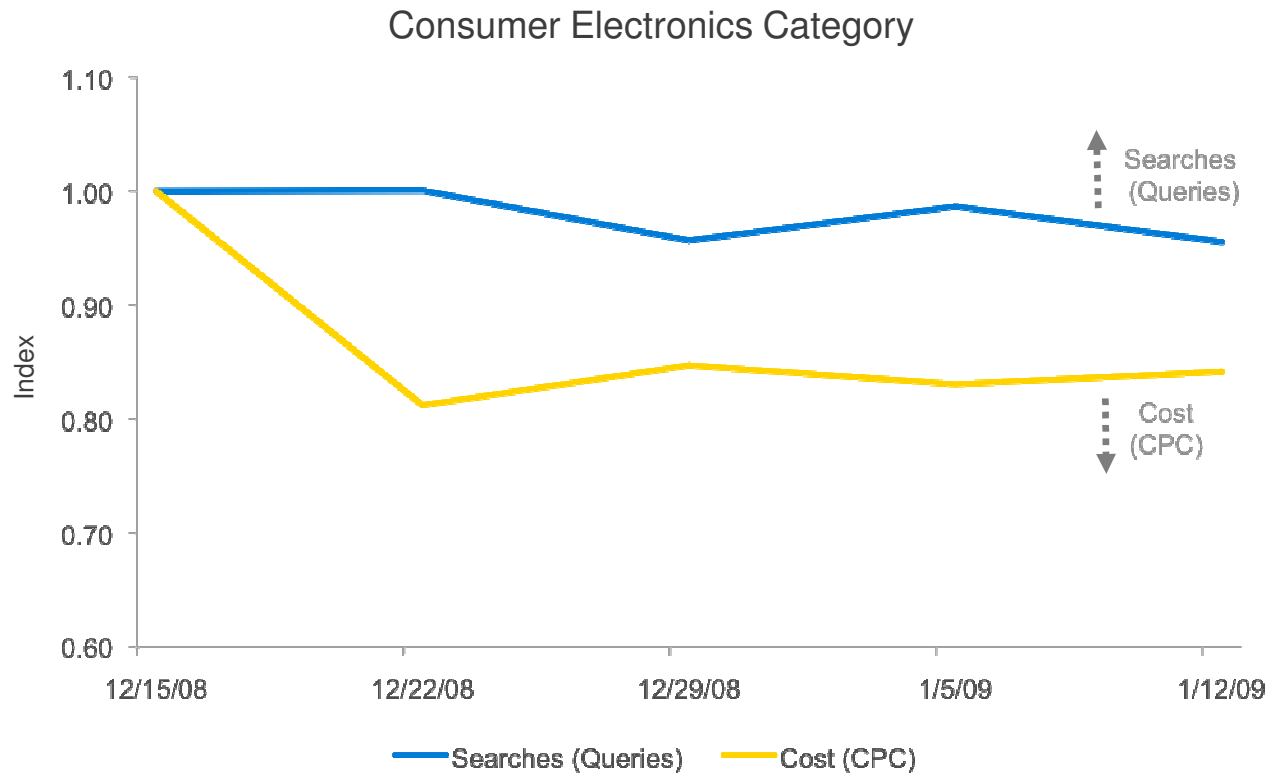
Consumer interest in apparel rebounds after the holidays, while cost to capture this demand decreases.



Search Is On Sale



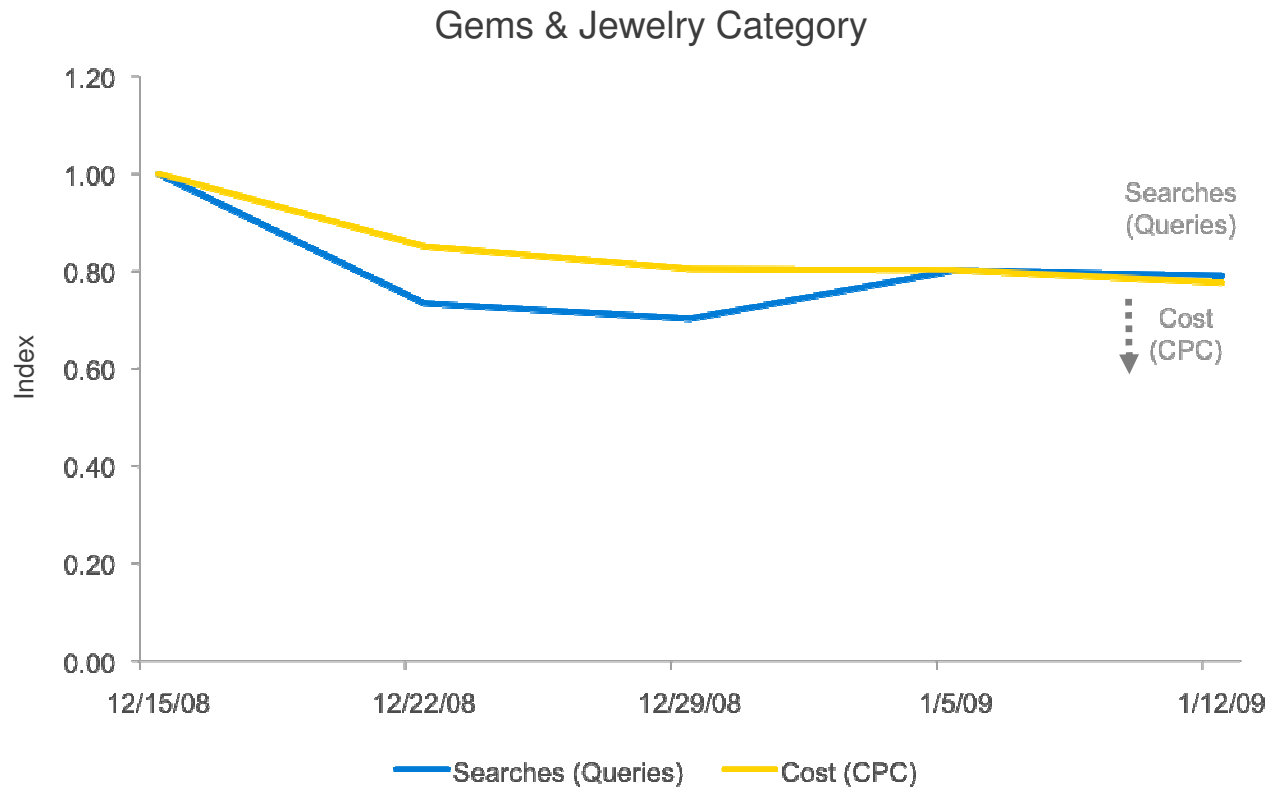
Consumer interest in consumer electronics rebounds after the holidays, while cost to capture this demand decreases.



Search Is On Sale



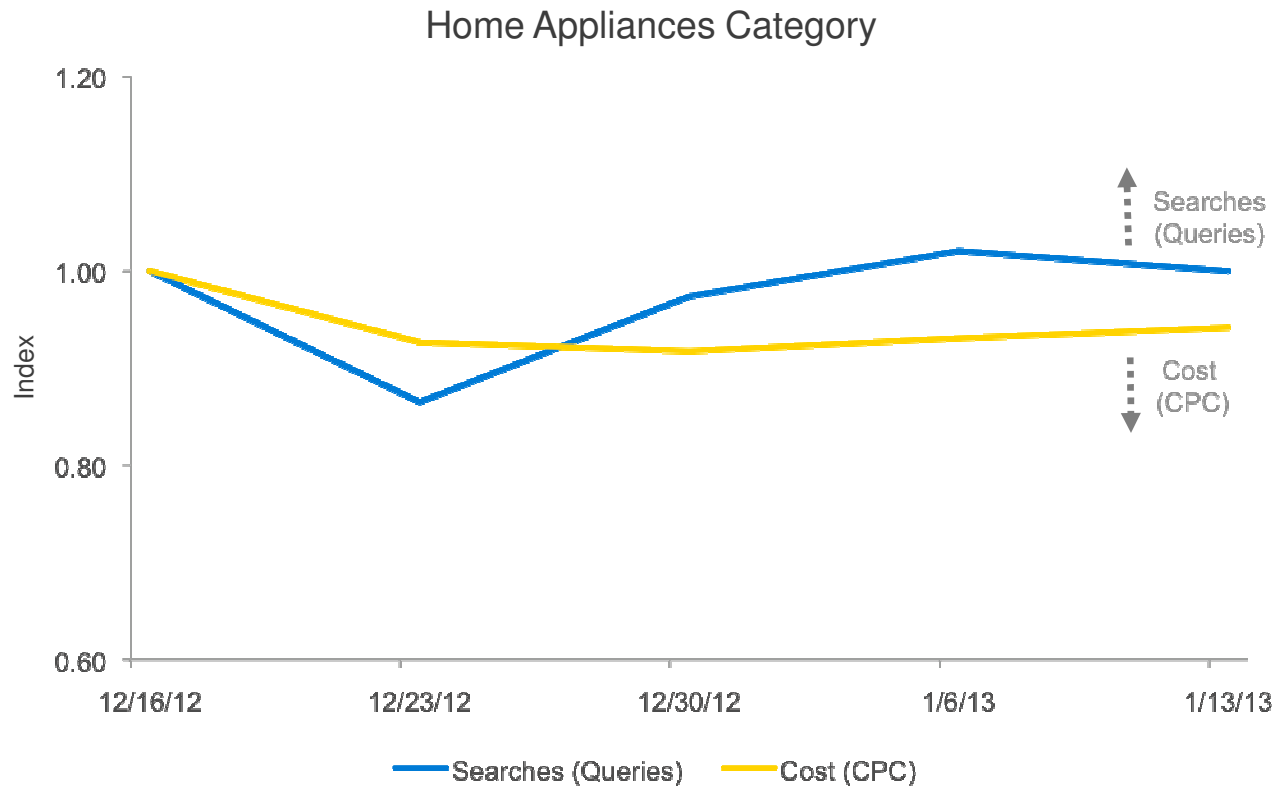
Cost to capture gems and jewelry demand decreases after the holidays.



Search Is On Sale



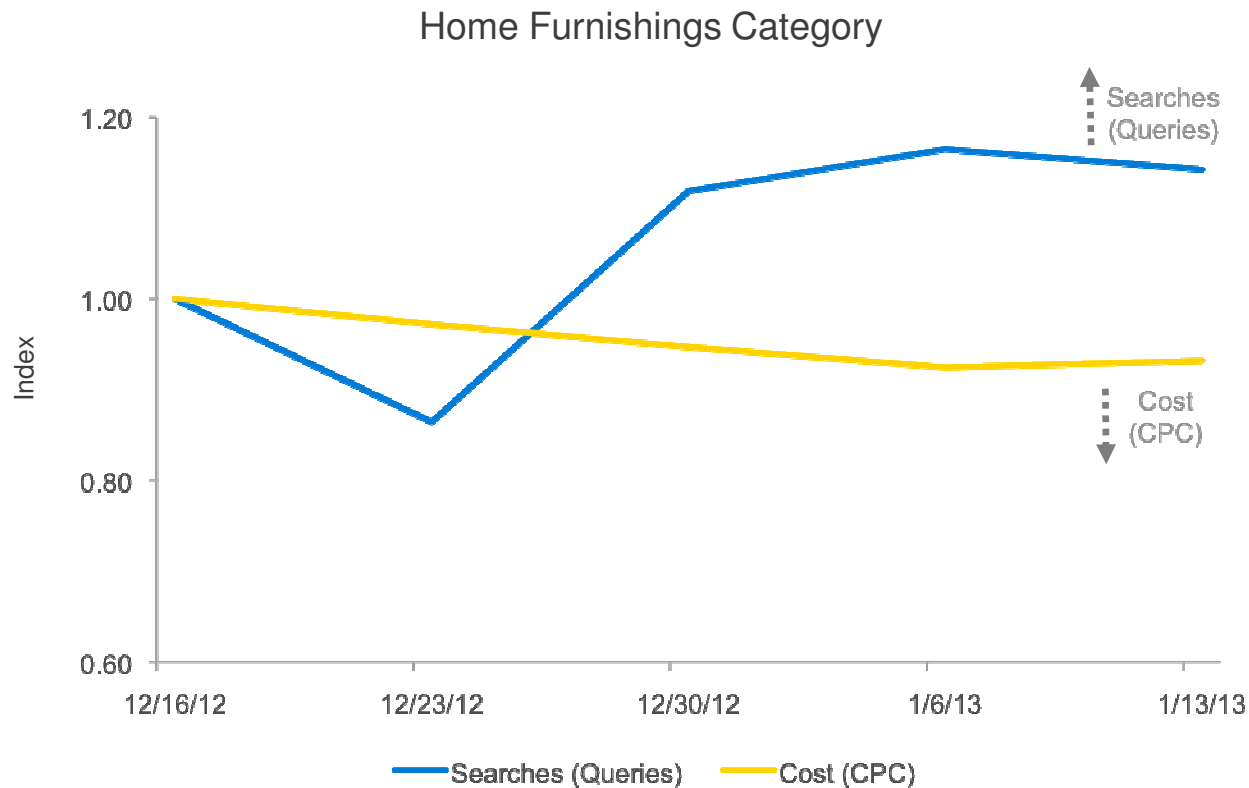
Consumer interest in home appliances rebounds after the holidays, while cost to capture this demand decreases.



Search Is On Sale



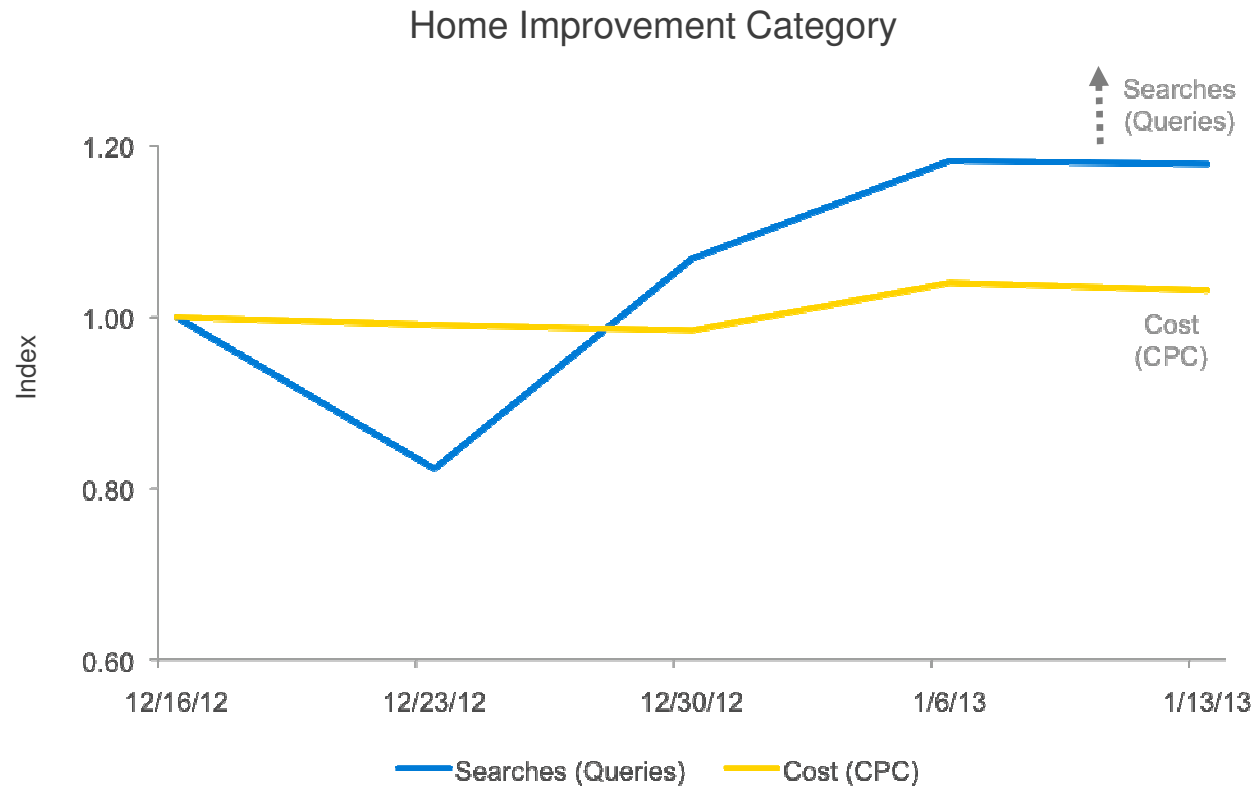
Consumer interest in home furnishings rebounds after the holidays, while cost to capture this demand decreases.



Demand is High



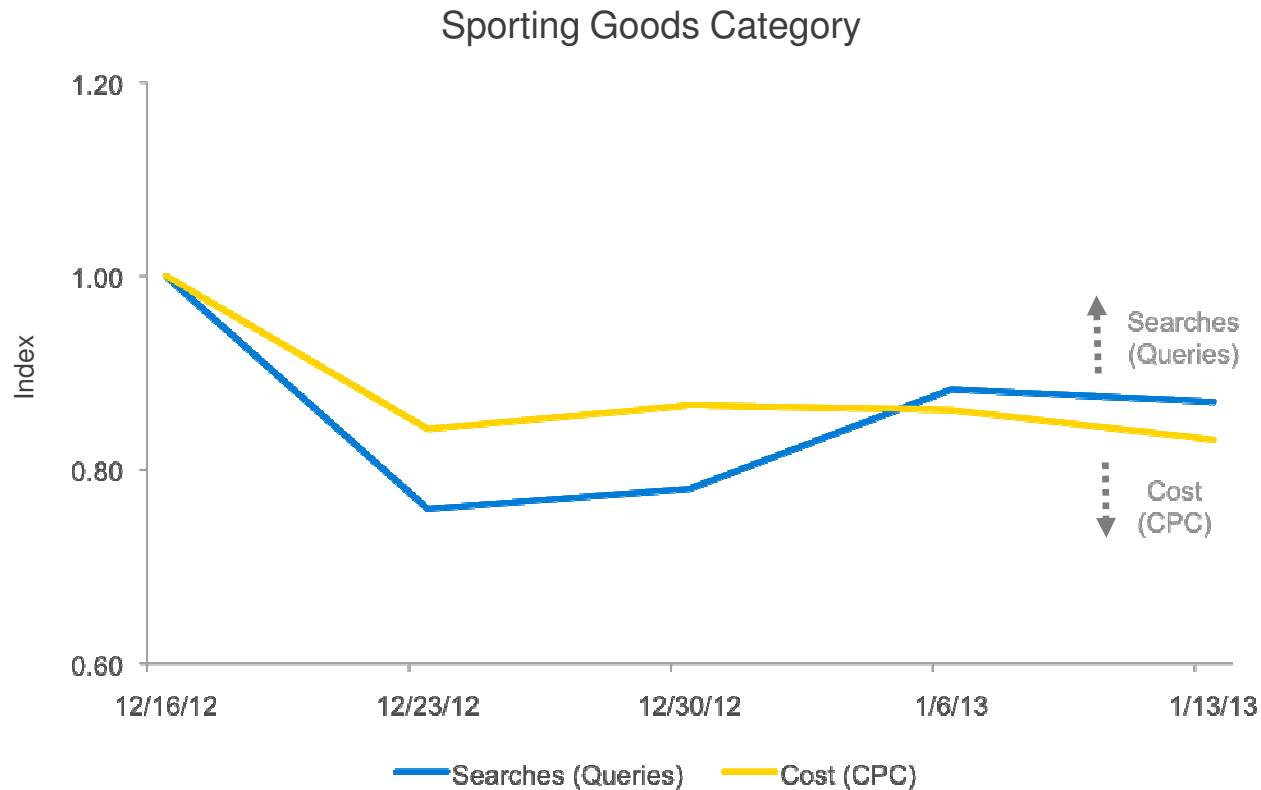
Consumer interest in home improvement rebounds after the holidays.



Search Is On Sale



Consumer interest in sporting goods rebounds after the holidays, while cost to capture this demand decreases.



Search Is On Sale



Cost to capture toys demand decreases after the holidays.

