



Merry Mobile Christmas

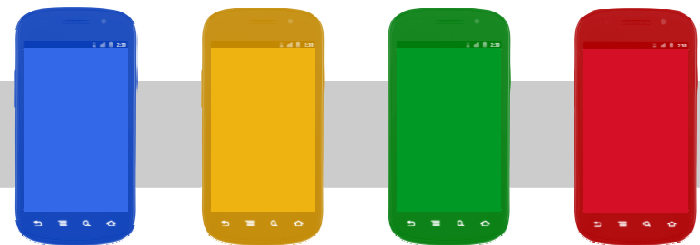
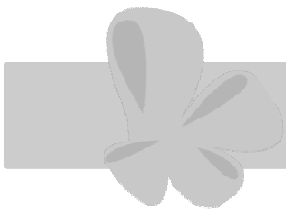
December 2011



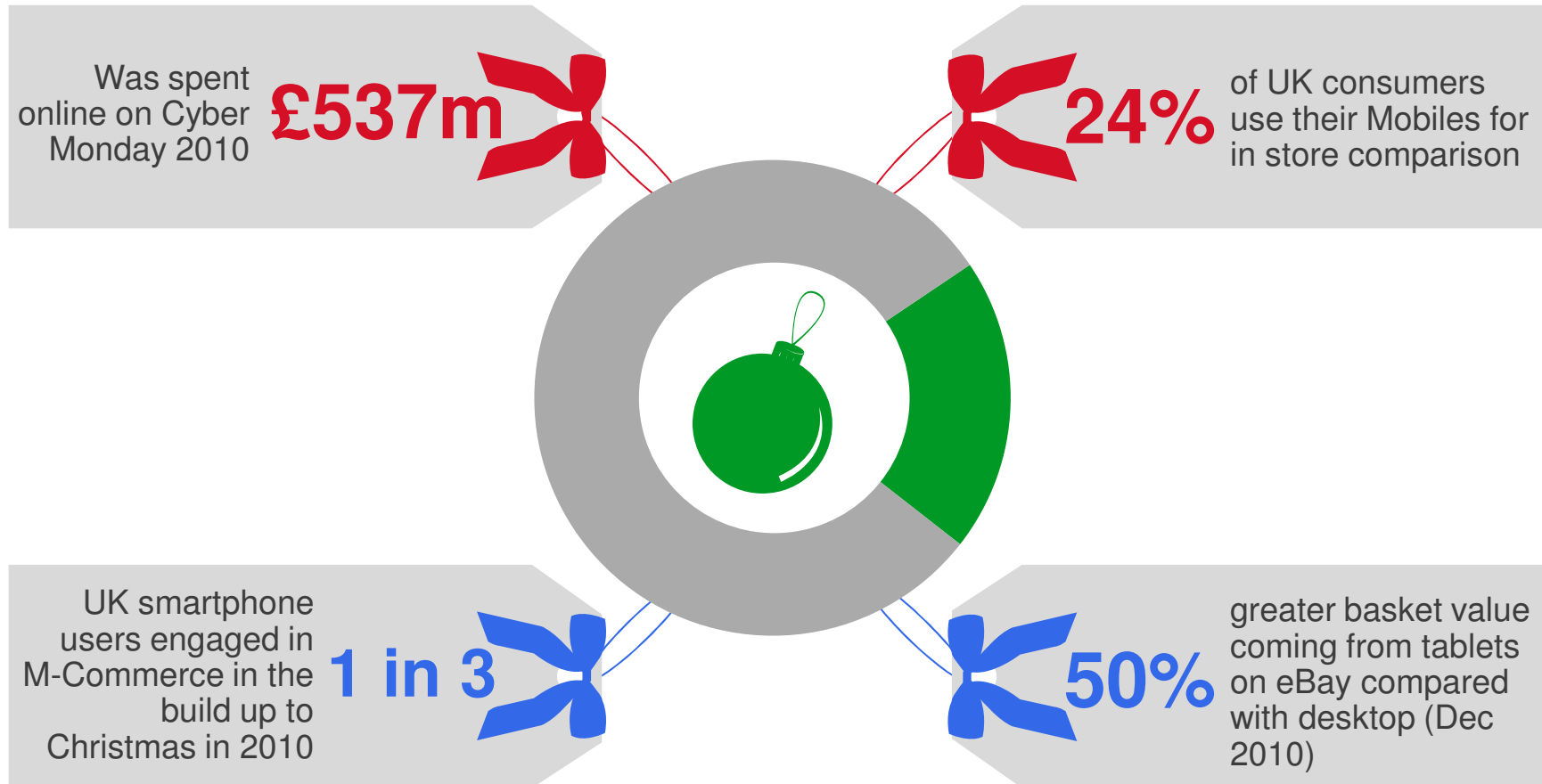
Google Confidential and Proprietary

Great ready for a Mobile Christmas

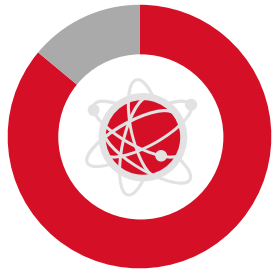
- 1 E-commerce will be more important than ever this Christmas. Mobile will make up a large proportion of this.
- 2 UK users will be online across three devices: Desktop, Tablets & Mobile. You need to be there too.
- 3 Mobile Search is becoming increasingly important in driving footfall to stores. Almost half of last minute shopping queries are on Mobile.
- 4 Mobile Display allows you to engage your brand with new smartphone owners from the day they take it out of the box.



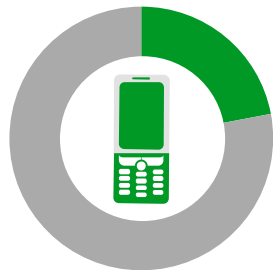
Over 20% of Christmas budgets will be spent online. Mobile connects online with offline.



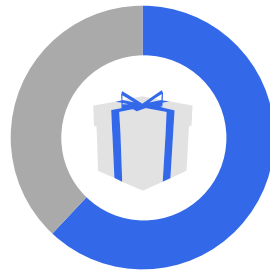
Post Christmas sales drive an increase in online activity...



86% of internet users went online on Christmas and Boxing Day last year...



22% were on Mobile devices



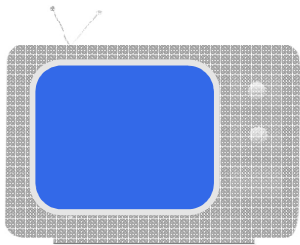
62% purchased online during the post Christmas sales

Mobile is connecting UK consumers across multiple forms of media



% of UK consumers who use their Smartphone while...

Watching TV

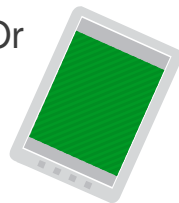


53%

Using a Tablet
or PC



Or



26%

Listening to
Music



49%

Reading
newspapers or
magazines



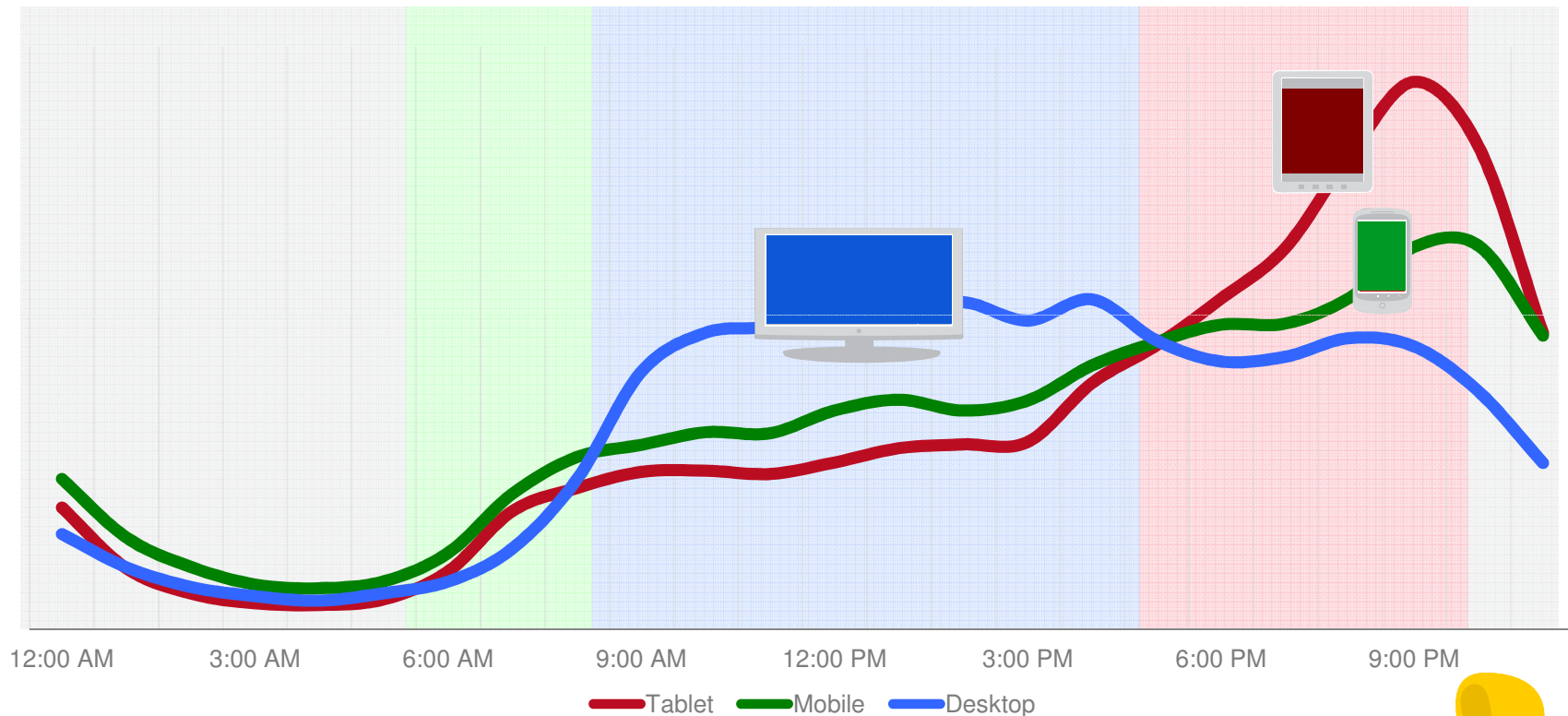
Or



18%

Mobile, tablet and desktop usage peaks at different points throughout the day...

Hourly Distribution of Searches by Platform (doesn't reflect absolute traffic volume)



...advertising across all three devices
will give you the greatest reach



Latest research demonstrates the incremental impact of advertising across multiple platforms



+24pt recall

+4pt reach

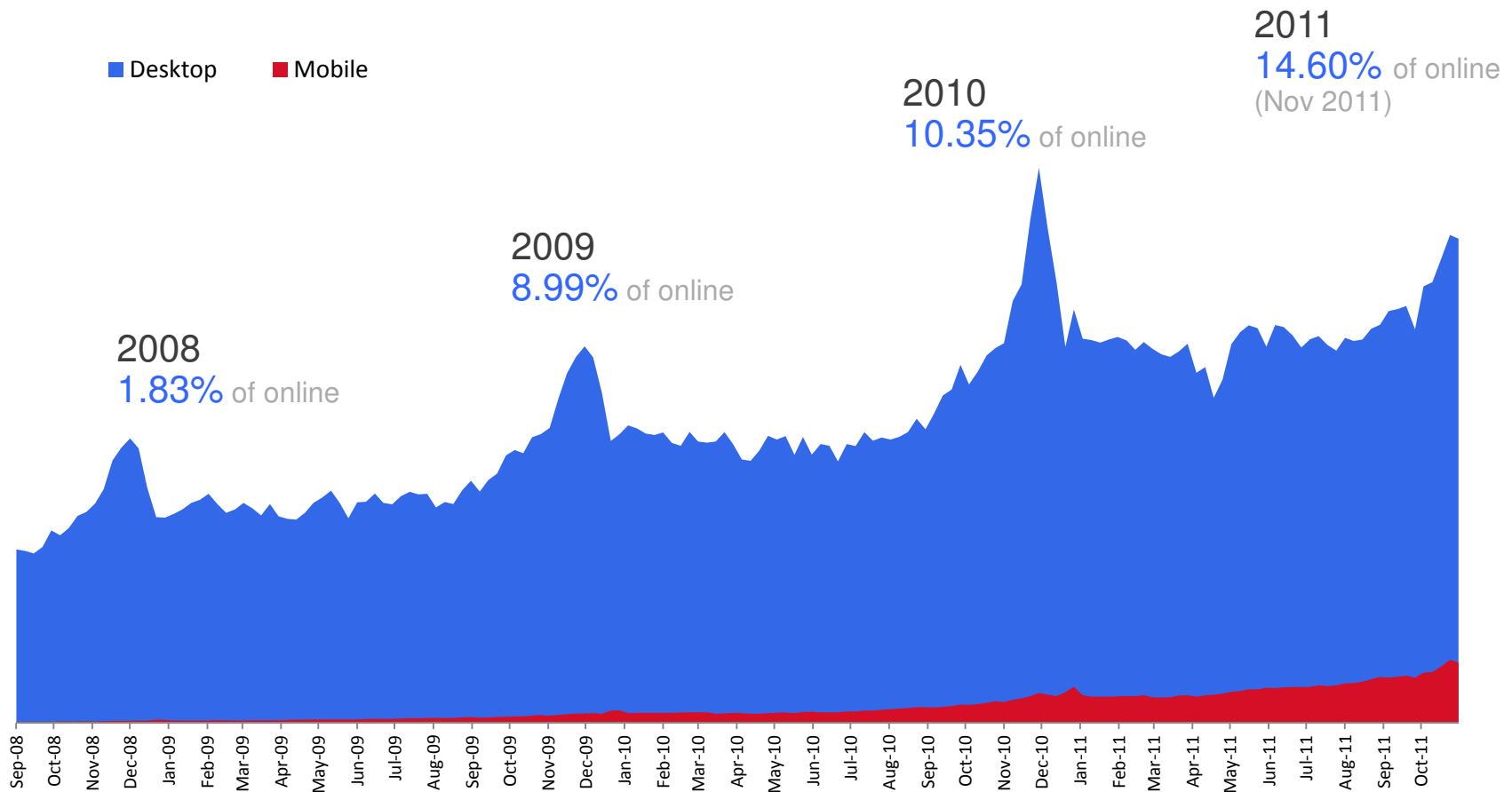
2X frequency

Source: Nielsen Multi-Screen Lab Study, Sept '11; Google Incremental Reach Preliminary Results from 6 US studies for total YT/GDN campaigns

nielsen
.....

Mobile is accounting for an increasingly larger proportion of online Christmas shopping

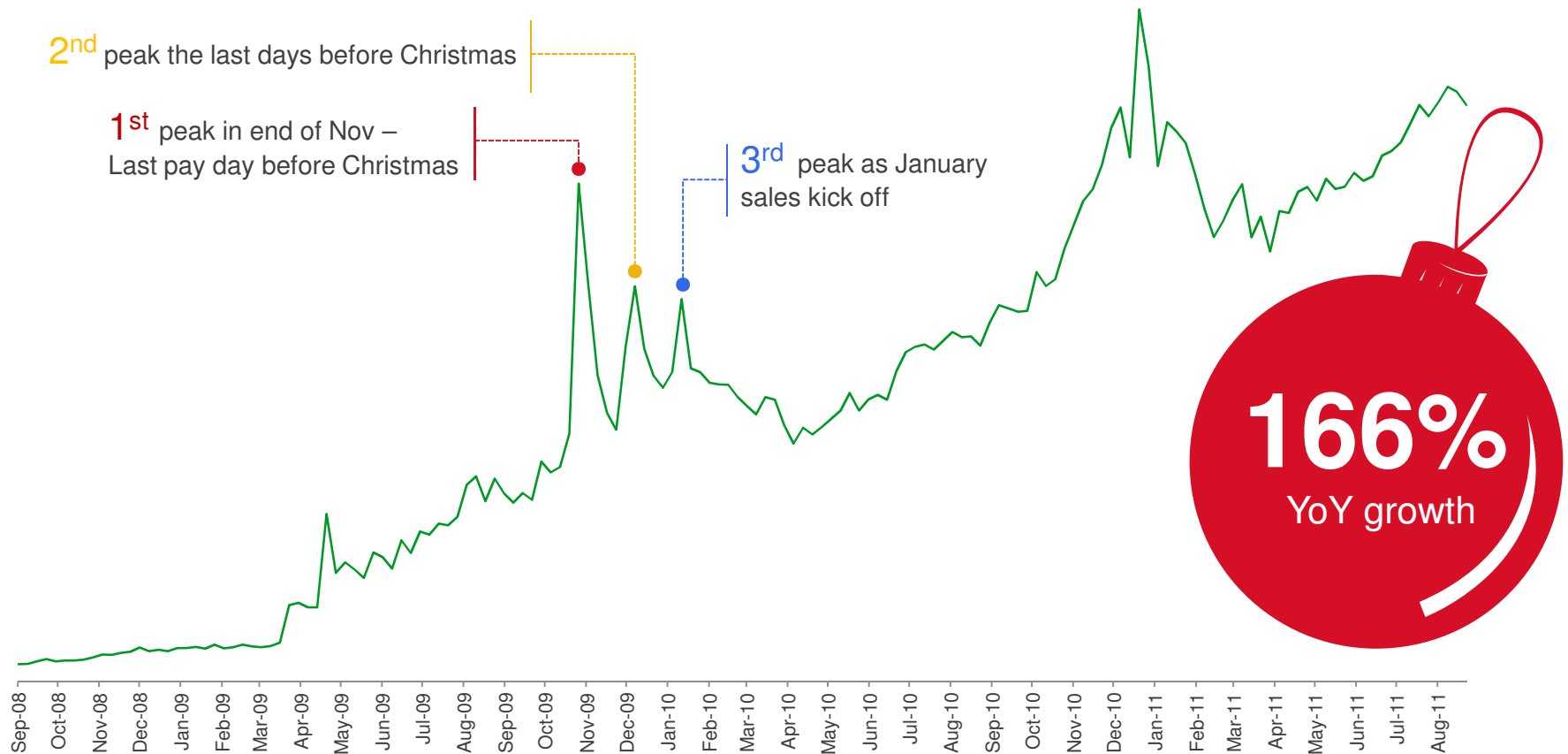
Desktop vs. Mobile search volume on popular Christmas gifts, 2008-2011



Source: Google Internal Data, 2009 - 2011

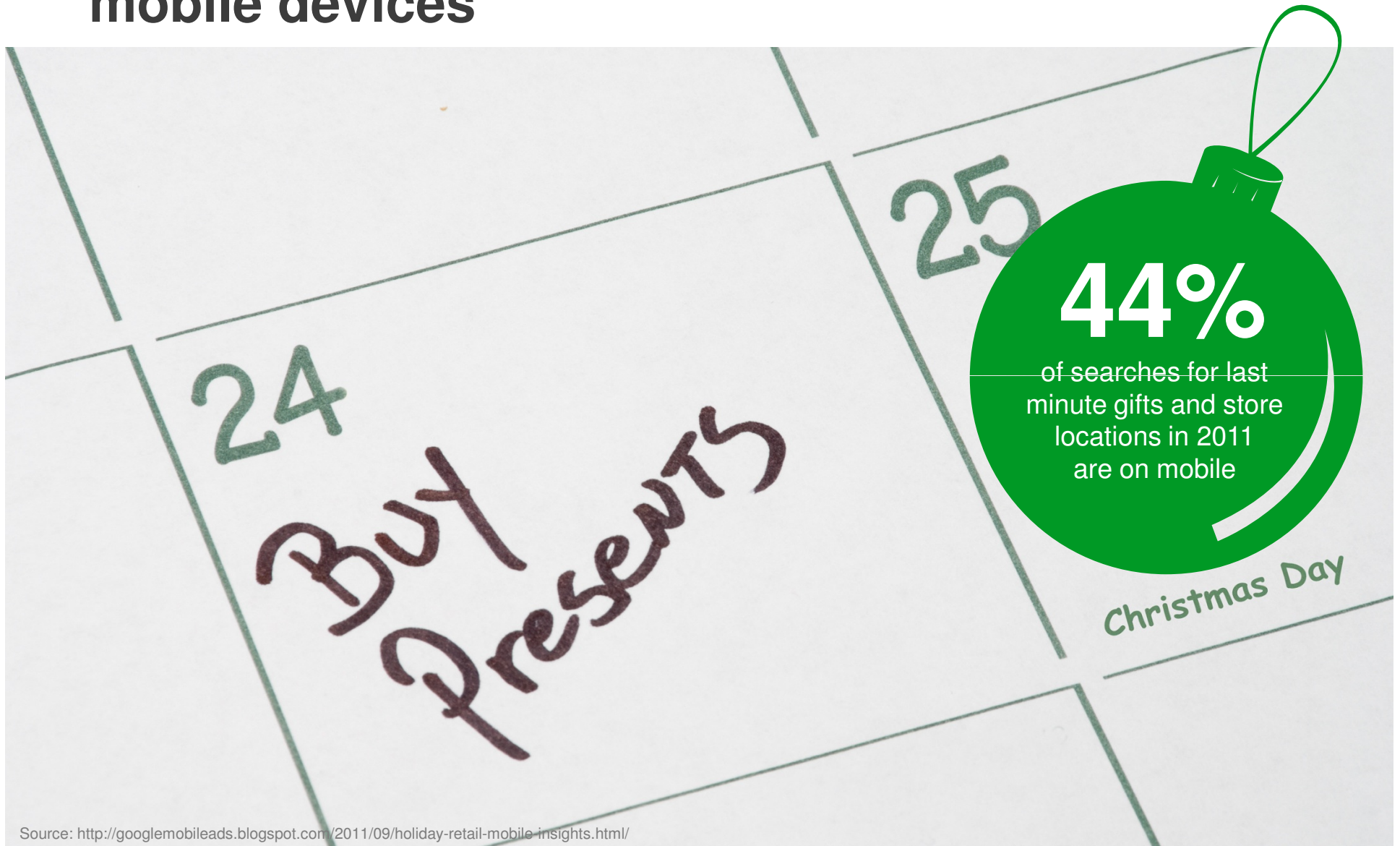
The triple peak opportunity on mobile is significant

UK Mobile queries for top **retail brand terms** holiday '09 & '10 (indexed)



Source: Google Internal Data, 2009 - 2011

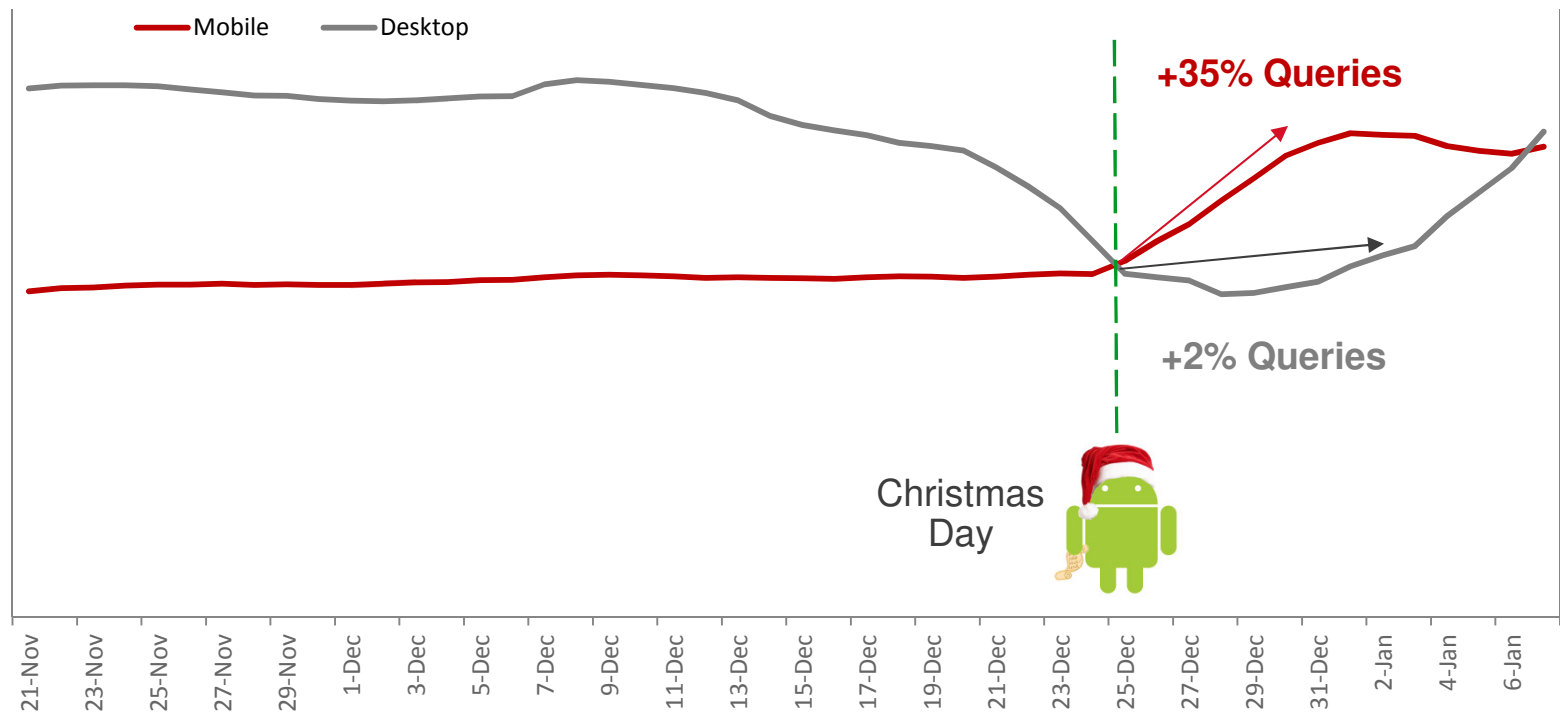
Last minute Christmas shoppers rely on their mobile devices



Source: <http://googlemobileads.blogspot.com/2011/09/holiday-retail-mobile-insights.html/>

Queries on Mobile recover quicker than desktop after Christmas

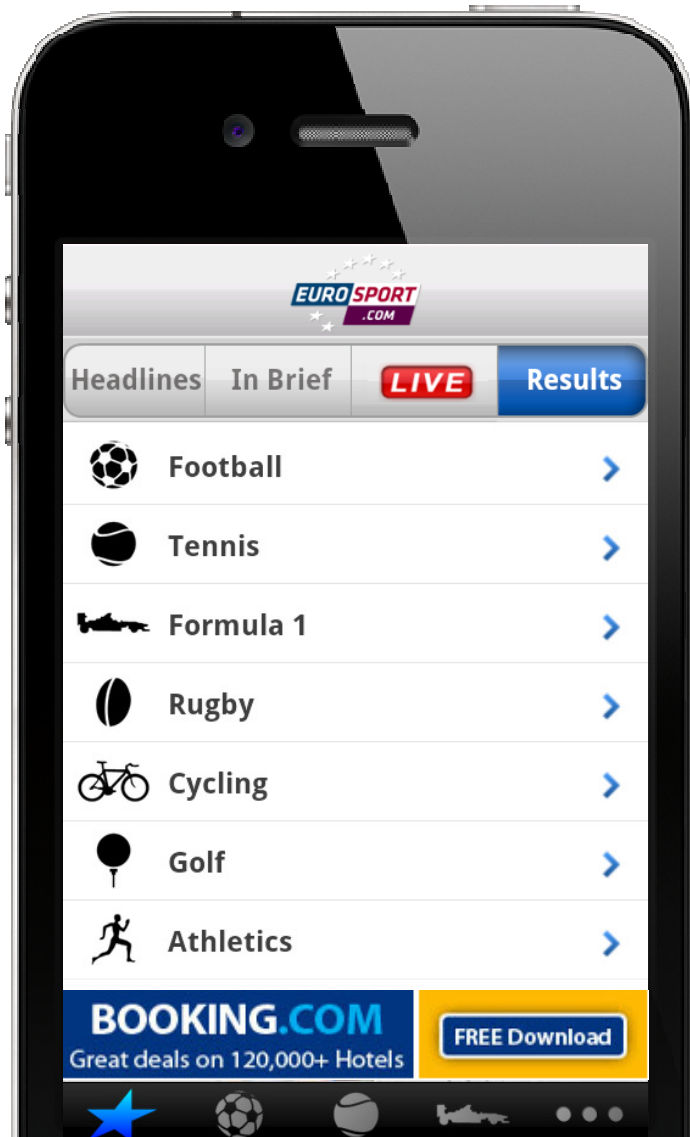
Total Desktop vs. Mobile search query volumes of Top 1000 commercial queries



The week after Christmas, mobile queries increase 35%, whereas desktop queries rise just 2%, as consumers are still on holiday.

Source: Google Internal Data, 2010 – 2011

Use the AdMob Network to target users across Apps and Sites on their new mobile devices



Size & Reach

- AdMob Network receives over 2.7 billion ad requests a day, globally.
- Over 100,000 sites and apps to advertise on

Target Brand New Mobile Devices

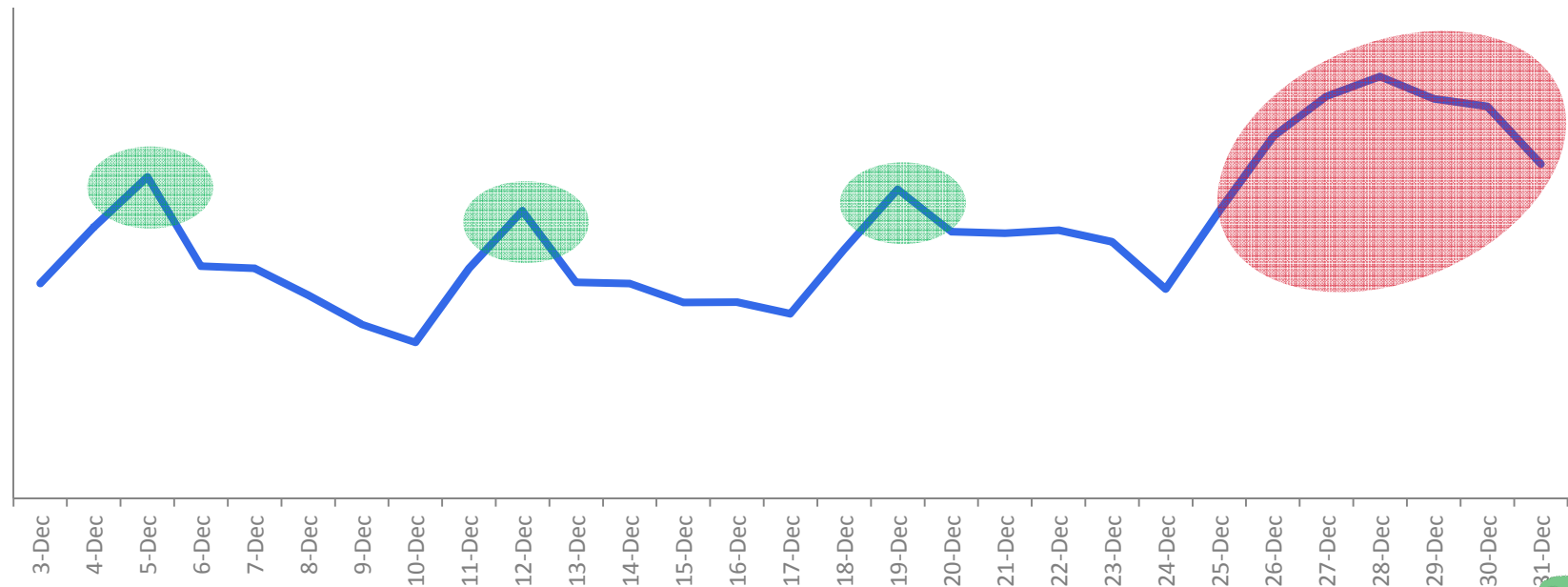
- Latest targeting options allow you to serve ads specifically to newly activated mobile devices
- Dec'10 – Jan'11 saw new Unique Users rise by **75% on tablets** and **19% on smartphones**.

New Rich Media Formats

- Much richer experiences for banners
- Utilize mobile-specific actions e.g. tilt & shake
- New creative opportunities to engage mobile users

Capture Pre & Post Christmas traffic peaks while consumers are looking for deals online

UK Daily AdMob Impressions (Dec 2010)



Pre-Christmas: AdMob impressions in December peak on the Sundays prior to the three big 'Cyber Mondays' – the busiest online shopping days of the year.

Post-Christmas: Impressions ramp up immediately after Christmas Eve, driven by the new purchases of smartphones and tablets.

Source: Google Internal Data

Get ready for a Mobile Christmas

- 1 Don't miss out on the Mobile advertising opportunity this Christmas. Mobile is the link between online and offline shopping.
- 2 Align your messaging across your TV, Desktop, Mobile and Tablet advertising for maximum impact.
- 3 Optimise your search campaigns for Mobile for greatest performance.
- 4 Use the AdMob network to engage users with your brand name, products and offers on their new Mobile devices.
- 5 Ensure your mobile search and display campaigns have sufficient budgets over the Christmas holidays when mobile usage will peak.



