

2005 Online Holiday Shopping Update

November 27, 2005

Source: comScore Networks

2005 Season to Date

2005 Holiday Season to Date vs. Corresponding Days in 2004 Non-Travel Online Consumer Spending			
Excludes Auctions and Large Corporate Purchases			
Source: comScore Networks			
	2004	2005	Percentage
	(in billions)	(in billions)	Change
November 1 - November 25	\$5.60	\$6.96	24%

- Non-travel online spending during the first 25 days of the holiday season (ended Nov. 25) totaled \$6.96 billion, representing a 24-percent increase over the \$5.6 billion posted during the corresponding period in 2004.
- Non-travel online sales during the week ending Friday, November 25 ("Black Friday") were \$1.89 billion, an increase of 22 percent compared to the corresponding days in 2004.
- Sales were strongest during the Thanksgiving week on Tuesday, November 22, a day in which online retail sales reached nearly \$441 million, an increase of 55 percent versus the same Tuesday in 2004.
- While Thanksgiving Day remains a comparatively light shopping day, online spending reached \$144 million, an increase of 12 percent over the \$128 million spent online on Thanksgiving Day 2004.
- Americans spent \$305 million online on "Black Friday," up 22 percent compared to the \$250 million spent online in 2004.

2005 Online Shopping: Work vs. Home during the Week before Thanksgiving

Percent of Online Consumer Spending by Hour of Day from 11/14/05 - 11/18/05

Home and Work Locations

Excluding Weekends

Aligned to Local Time		
	Percent of Total At Work Spending	Percent of Total At Home Spending
Midnight - 8 AM	2%	7%
8 AM - Noon	38%	21%
Noon - 1 PM	9%	7%
1 PM - 5 PM	47%	24%
5 PM - Midnight	5%	40%
Total	100%	100%

- During the five days from Monday, November 13 through Friday, November 18, 2005 (i.e. the week before Thanksgiving), consumers using the Internet at work accounted for 58 percent of all online non-travel spending, a marginal drop from a level of 59 percent a year ago.
- Despite the substantial increase in the number of home high speed Internet connections (+25 percent over the past year), consumers have not reduced their proclivity to buy online from work locations.
- Consumer online buying at work occurs throughout the workday, with 38 percent occurring between the hours of 8:00 a.m. and Noon and 47 percent occurring between the hours of 1:00 p.m. and 5:00 p.m.
- Only 9 percent of online buying at work occurs during the lunch hour.
- Purchases from home-based Internet connections accounted for 41 percent of all online buying during the analysis period.
- Home users favor evenings and late night for buying, with 40 percent of all online home spending occurring from 5 p.m. to Midnight.

Recap of 2004 Thanksgiving Weekend and "Black Monday"

Thanksgiving Weekend and "Black Monday" Non-Travel Online Consumer Spending			
Excludes Auctions and Large Corporate Purchases			
Source: comScore Networks			
	2003	2004	
	(in millions)	(in millions)	Percentage Change
Thanksgiving Weekend (Thurs-Sun)	\$553	\$737	33%
"Black Monday"	\$300	\$386	29%

- Last year, U.S. consumers spent more than \$730 million online during the Thanksgiving weekend, an increase of 33 percent over the same period in 2003.
- While the first major spike in holiday spending in the offline retail world occurs on "Black Friday," the spending spike in online buying occurs on "Black Monday," the Monday after the Thanksgiving weekend. This is driven primarily by consumers returning to work, where a significant percentage of e-commerce is transacted because of the ready availability of high speed

Internet connections.

- Last year, consumers spent more than \$380 million on "Black Monday." This represented an increase of 29 percent over the 2003 period.

NOTE: Data for Thanksgiving Weekend (Thursday - Sunday) and "Black Monday" 2005 will be released on Wednesday, November 30.

Please contact press@comscore.com to receive the data behind the above charts for use in graphical representations.

2005 Holiday Season Forecast

- comScore estimates that consumer spending on non-travel (retail) goods at U.S. Internet sites will exceed \$19 billion during the 2005 November/ December holiday season, representing approximately 24 percent growth over the 2004 season.

FORECAST: Non-Travel Online Consumer Spending			
Excludes Auctions and Large Corporate Purchases			
Source: comScore Networks			
	2004	2005	Percentage
	(in billions)	(in billions)	Change
Holiday Season (November/December)	\$15.8	\$19.6*	24%*
Q4	\$21.4	\$26.5*	24%*
Full Year	\$66.5	\$82.7*	24%*

*comScore Networks forecast

Contact:
Andrew Lipsman
comScore Networks
(312) 775-6510
press@comscore.com