

2005 Online Holiday Shopping Update

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Source: comScore Networks

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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.

Non-Travel Online Consumer Spending Excludes Auctions and Large Corporate Purchases Source: comScore Networks			
	2004 (in billions)	2005 (in billions)	Percentage Change
Year-to-Date (through Nov. 20)	\$55.5	\$68.5	24%
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

2005 Season to Date

- Non-travel spending during the first 20 days of the holiday season (ended Nov. 20) totaled \$5.4 billion, representing a 22-percent increase over the \$4.4 billion posted during the corresponding period in 2004.

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 (in billions)	2005 (in billions)	Percentage Change
November 1 – November 20	\$4.41	\$5.40	22%

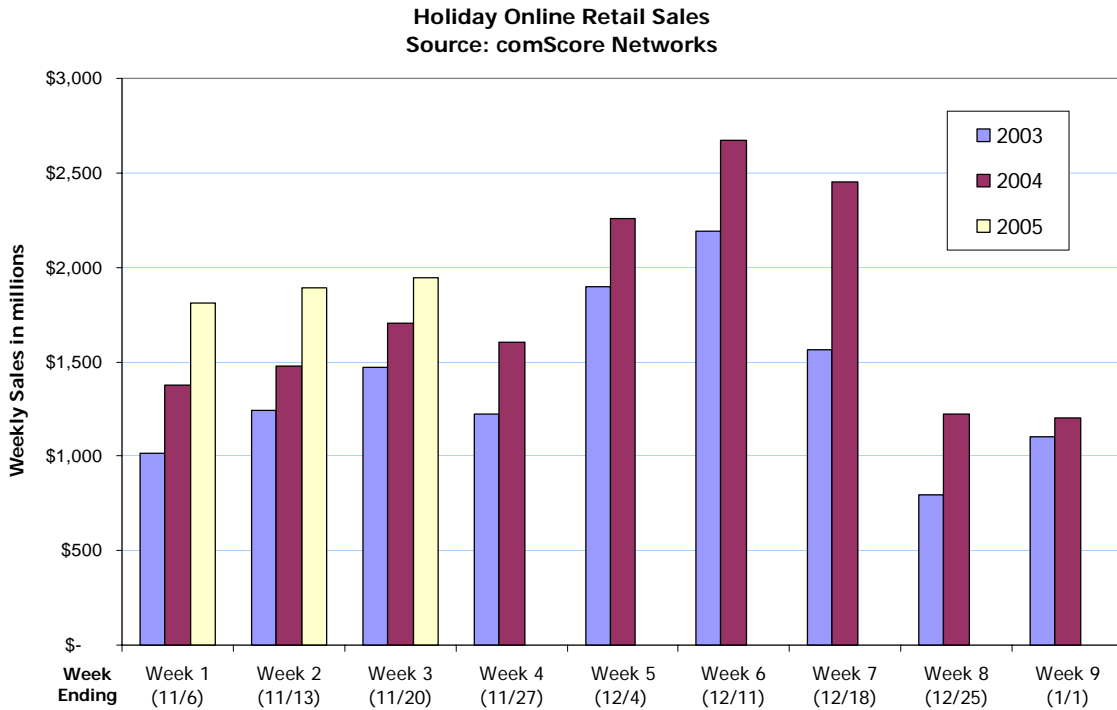
2004 Thanksgiving Weekend and "Black Monday"

- 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.

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



Please contact Jeremy Shermak to receive the data behind the above for use in graphical representations.