

We surveyed a total of 453 consumers in the United States that use the web to research and/or purchase Home Furnishings, Appliances and Improvement items

- A custom survey instrument (i.e. questionnaire) was developed to measure respondents' use of the web, and search engines in particular, for researching and/or purchasing a variety of Home Furnishings, Appliances and Improvement items
- The survey was conducted online, through a web-based interviewing process, in April 2005
- Our sample is evenly distributed across all age groups, and includes slightly more women than men
- Respondents were recruited through a variety of methods: web advertising, permission-based databases, public relations, telephone recruitment, partner-recruited panels, and alliances with heavily trafficked portals
- The survey was designed and administered by Media-Screen, an independent strategic market research firm, with sample provided by GMI (Global Market Insite)

Use of Online for Researching and Purchasing Furniture and Home Appliances



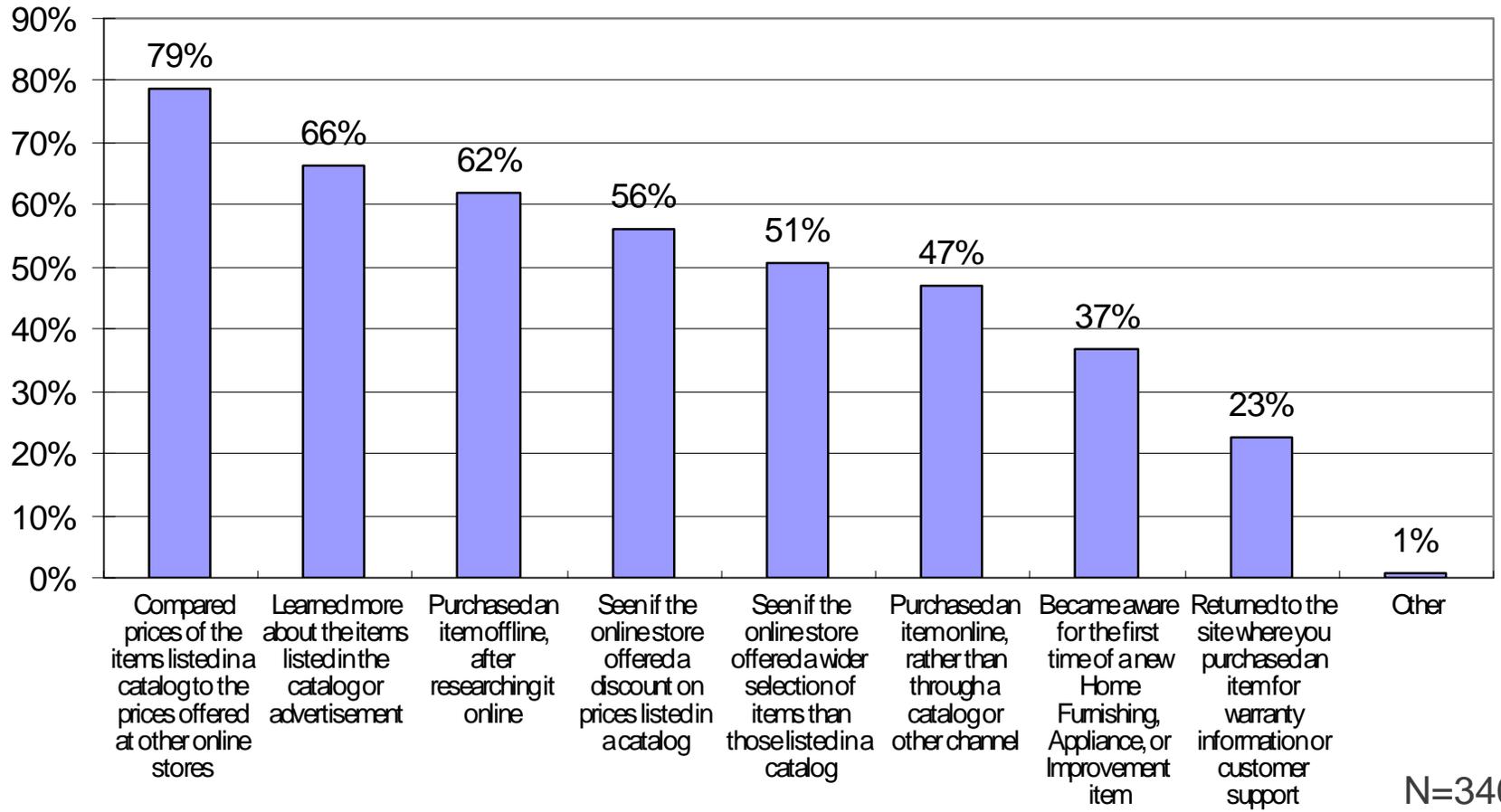
Executive Summary

- The vast majority of respondents (92%) **use a search engine** to help research and/or purchase appliances, furniture and/or home improvement items
- Search engine usage:
 - 76% of Google users use a search engine to **compare prices of the items listed in a catalog** to the prices offered at other online stores
 - 53% of Google users use a search engines to see if the online store offered a **wider selection** of items than those listed in a catalog.
 - 50% of Google users use a search engine to see if the online store offered a discount to the prices listed in the catalog.
- The vast majority (82%) **use Google** to search for these products
- 88% of Google users say search engine are **“very/somewhat important”** when making purchase decisions on home furnishings, appliances, or improvement items
- After using a search engine to help find online stores that sell home furnishings, appliances, or improvement items, 79% of Google users ultimately **purchased the items offline**, at a retail store location

Use of Online for Researching and Purchasing Furniture and Home Appliances



79% of Google users have used the web to compare prices of the items listed in a catalog to the prices offered at other online stores

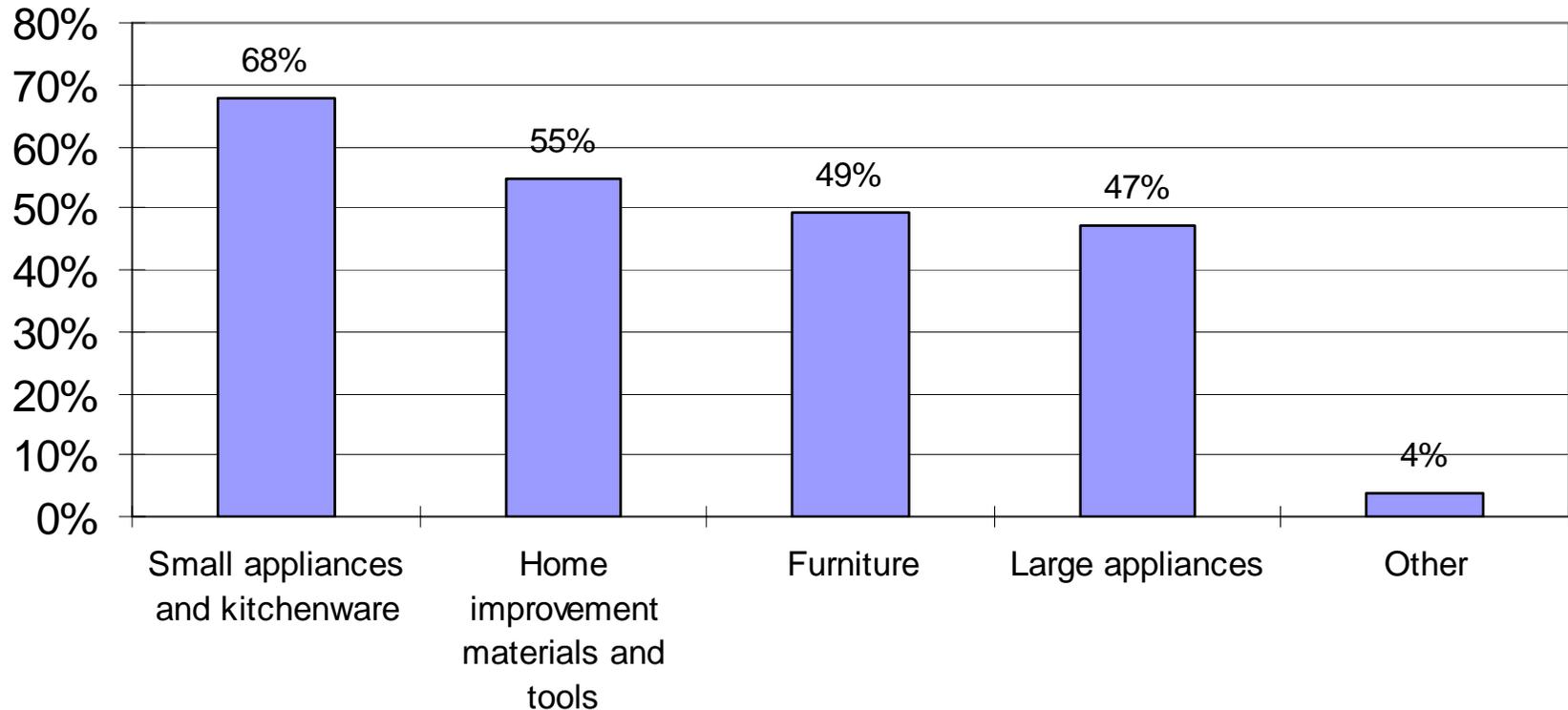


How have you used the web to help you research and/or purchase Home Furnishings, Appliances, or Improvement items? Select all that apply

Use of Online for Researching and Purchasing Furniture and Home Appliances



68% of Google users research/purchase small appliances and kitchenware, and 55% research/purchase home improvement materials and tools

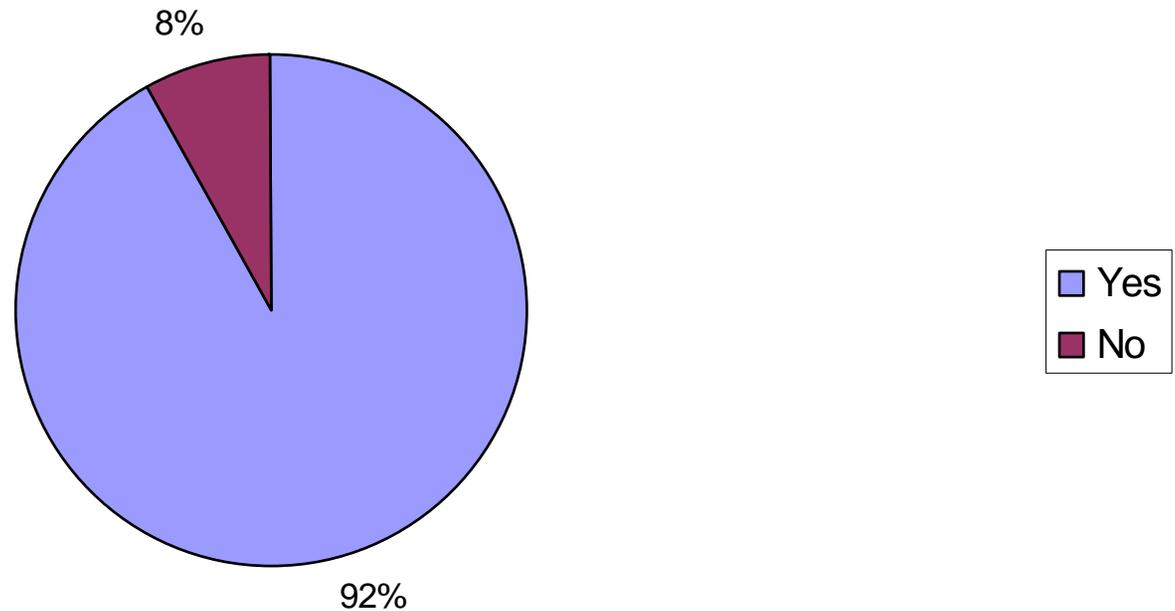


N=340

You indicated that you have researched or purchased Home Furnishings, Appliances, or Improvement items online. What kinds of items did you research or purchase? Please select all that apply

Use of Online for Researching and Purchasing Furniture and Home Appliances

92% of all respondents use a search engine when researching/purchasing home furnishings, appliances, or improvement items online



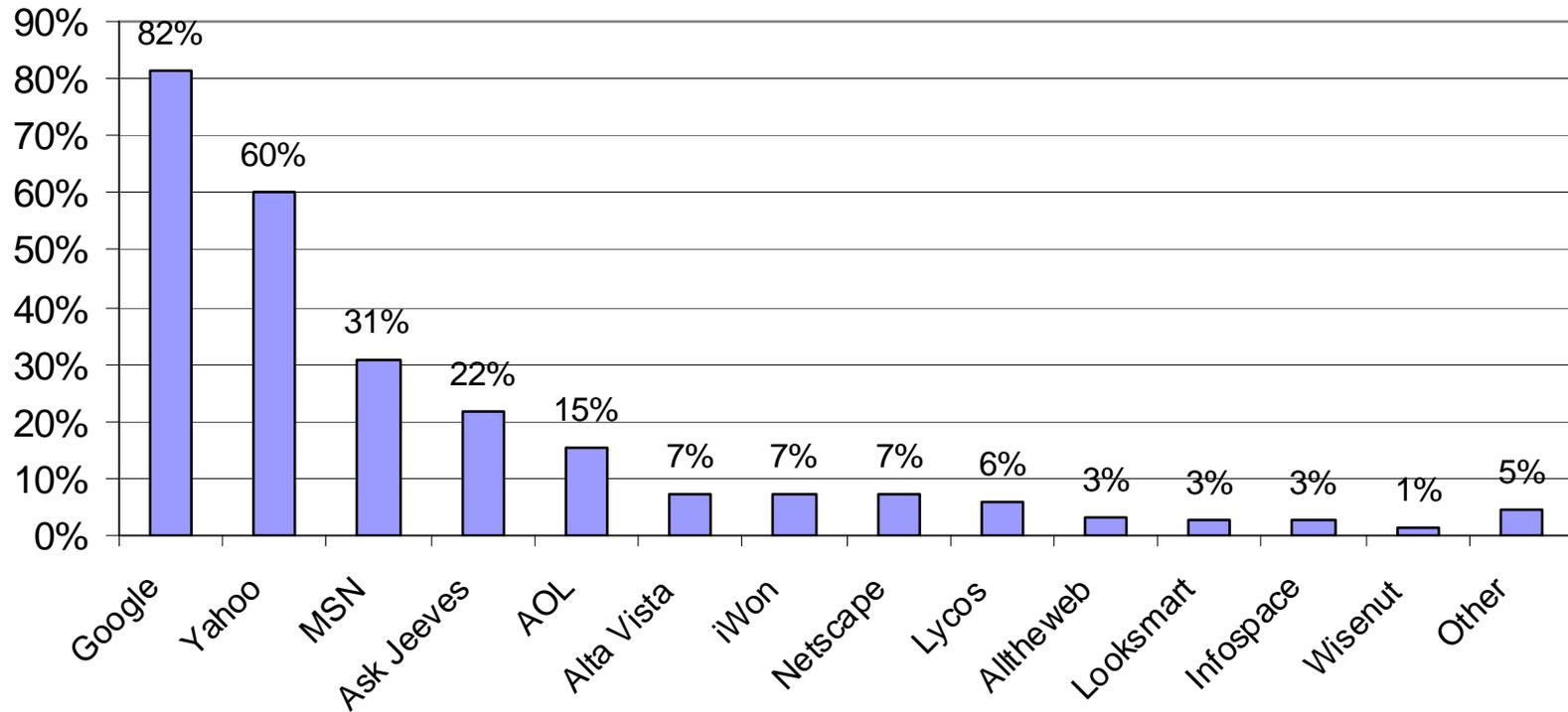
N=340

Do you ever use a search engine (such as Google, Yahoo, AOL, MSN or Ask Jeeves) when you research or purchase Home Furnishings, Appliances, or Improvement items online?

Use of Online for Researching and Purchasing Furniture and Home Appliances



Among all respondents, Google is the most popular search engine for researching and/or purchasing home furnishings, appliances, or improvement items online



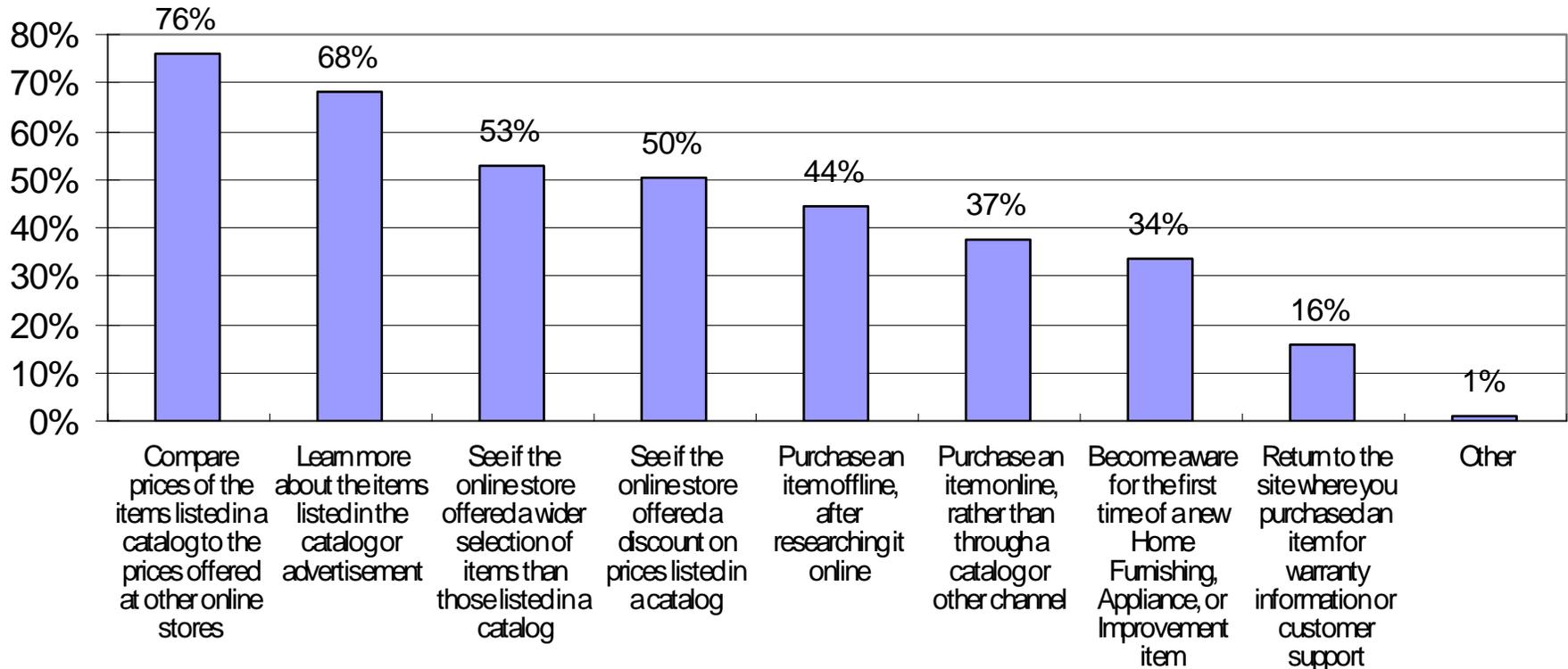
N=340

Which of the following search engines do you use when you research or purchase Home Furnishings, Appliances, or Improvement items online? Please select all that apply

Use of Online for Researching and Purchasing Furniture and Home Appliances



76% of Google users use a search engine to compare prices of the items listed in a catalog to the prices offered at other online stores

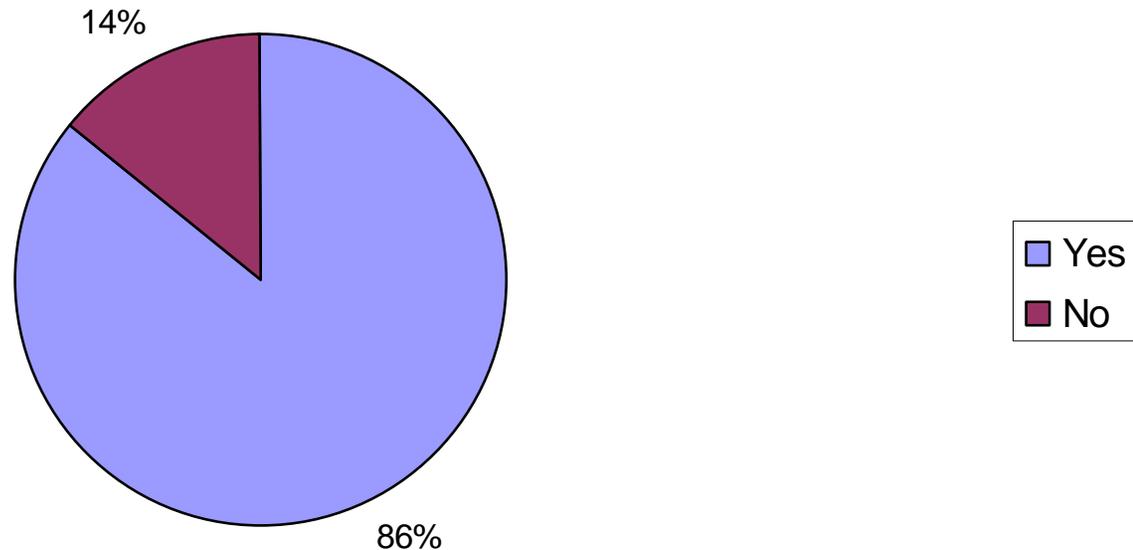


N=340

How do you use a search engine to help you research and/or purchase Home Furnishings, Appliances, or Improvement items? Select all that apply

Use of Online for Researching and Purchasing Furniture and Home Appliances

86% of Google users use search engines to find online stores that sell home furnishings, appliances, or improvement items



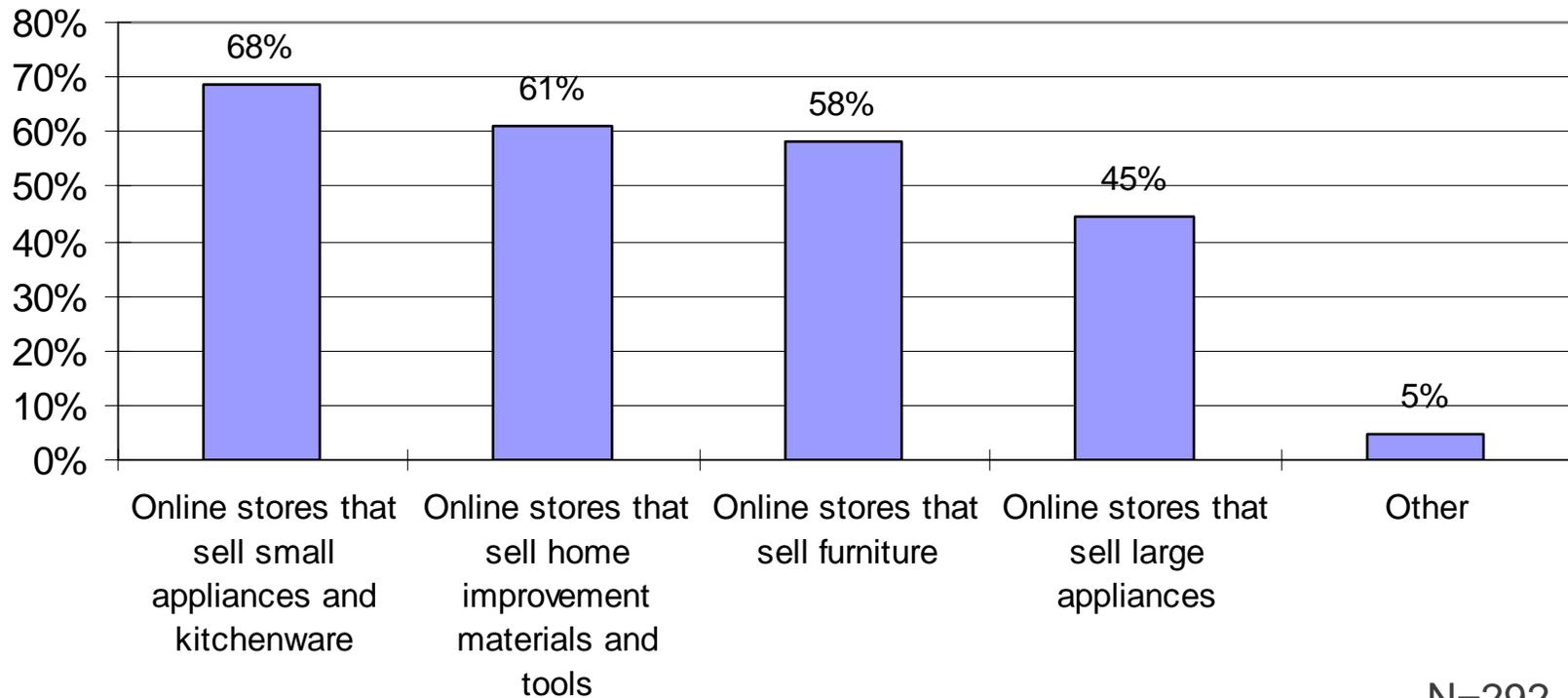
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Do you ever use search engines to find online stores that sell Home Furnishings, Appliances, or Improvement items?

Use of Online for Researching and Purchasing Furniture and Home Appliances



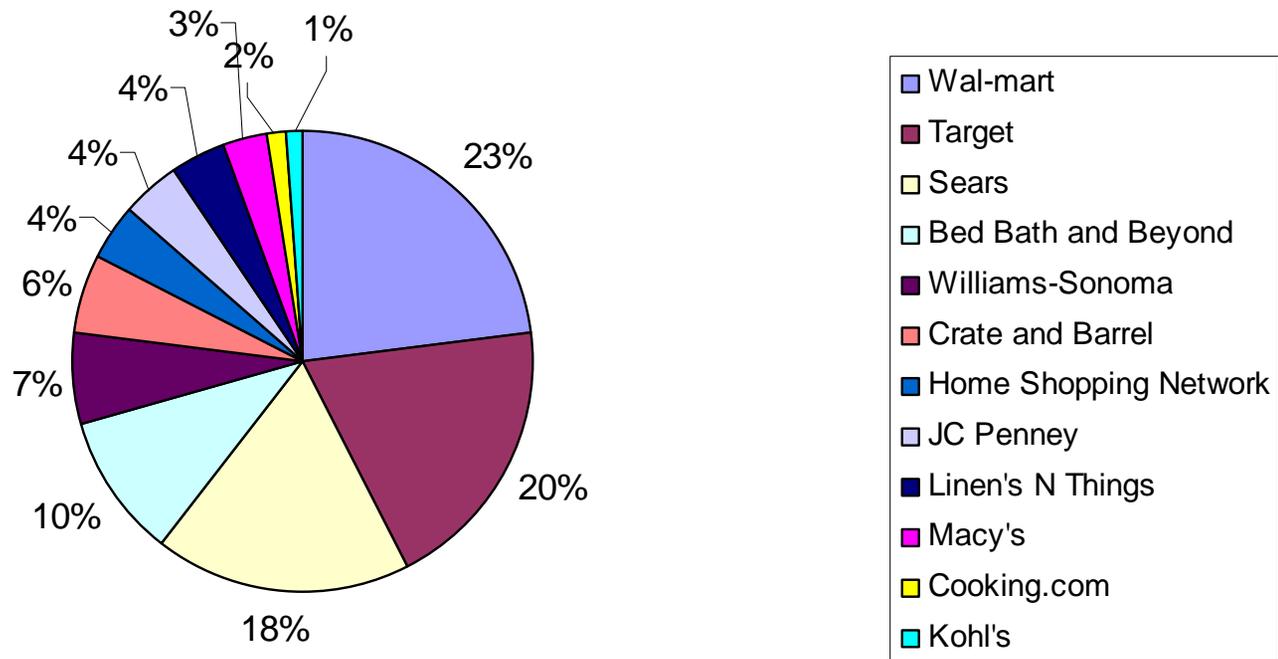
Among Google users who use a search engine to help find online stores for Home and Garden, 68% use a search engine to find online stores that sell small appliances and kitchenware



What kinds of online stores for Home and Garden have you used a search engine to help you find?
Select all that apply

Use of Online for Researching and Purchasing Furniture and Home Appliances

Among Google users who use search engines to locate online stores that sell small appliance and kitchenware items, 23% say they would use a search engine to find Wal-mart

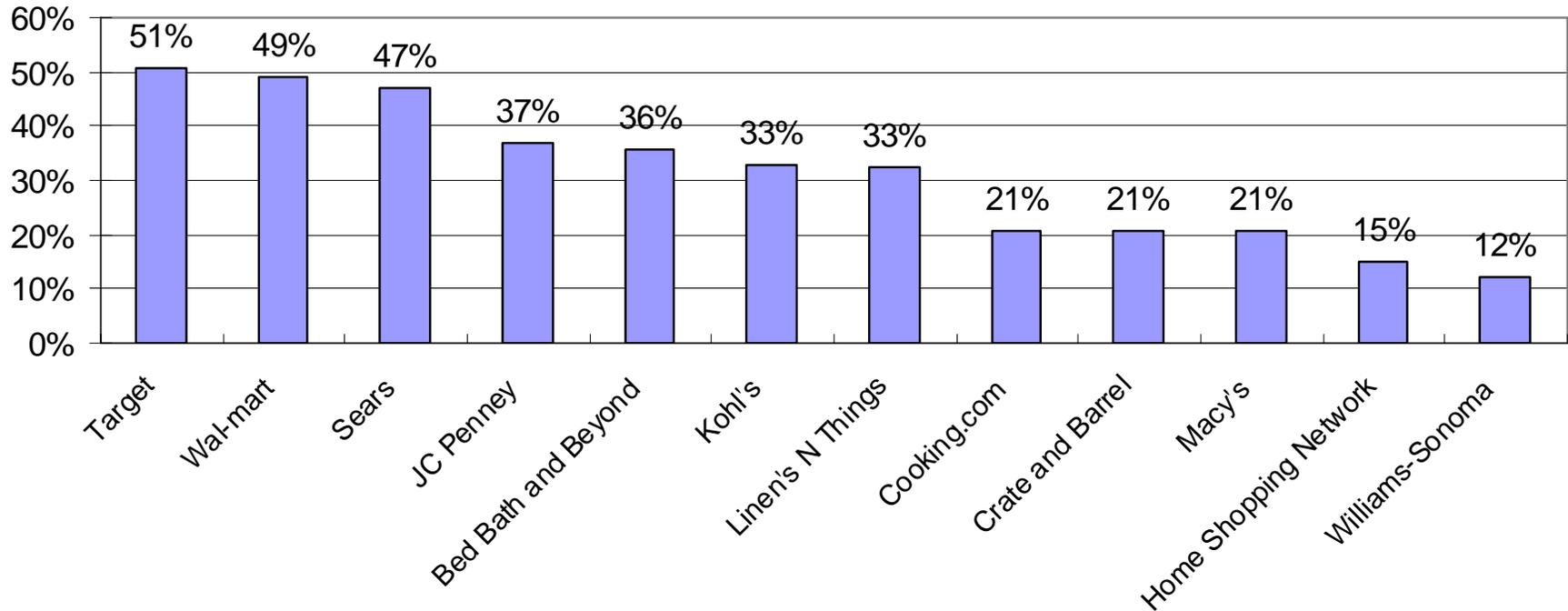


N=200

You indicated you use a search engine to help you find online stores that sell Small Appliance and Kitchenware items. Among the stores listed below, which one do you think you would use a search engine to help you find first? Please select one

Use of Online for Researching and Purchasing Furniture and Home Appliances

Among Google users who use search engines to locate sites that sell small appliances and kitchen items, 51% say they would also consider purchasing from Target

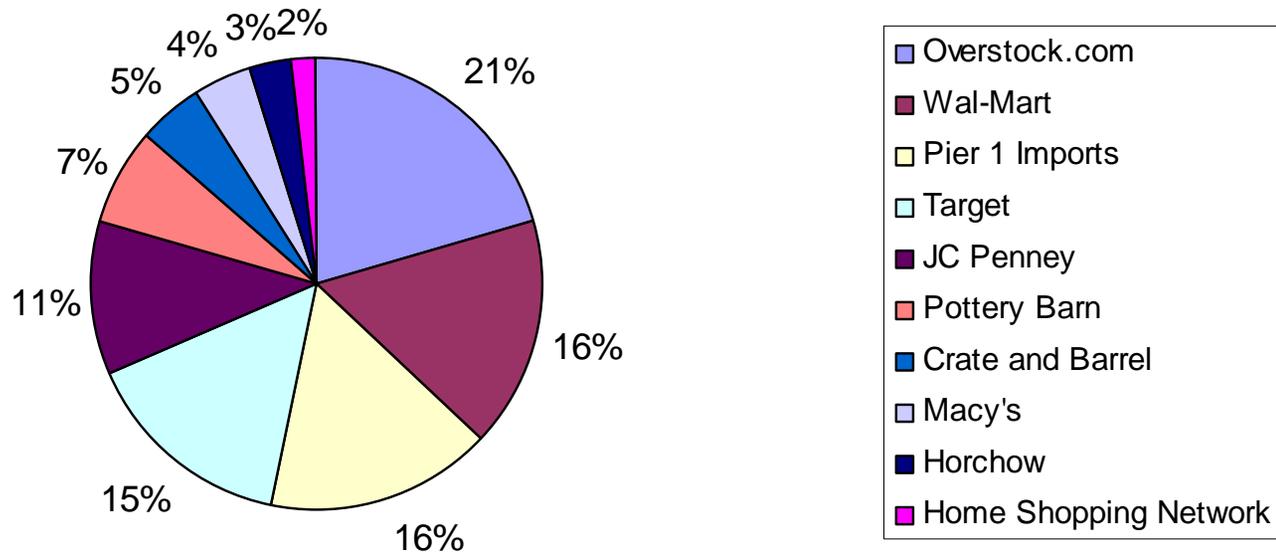


N=200

Imagine that the search engine suggested other stores in addition to (BRAND). Which of the following other online stores, if any, would you consider for purchasing a Small Appliance or Kitchenware item? Please select all that apply

Use of Online for Researching and Purchasing Furniture and Home Appliances

Among Google users who use search engines to locate online stores that sell furniture, 21% say they would use a search engine to find Overstock.com

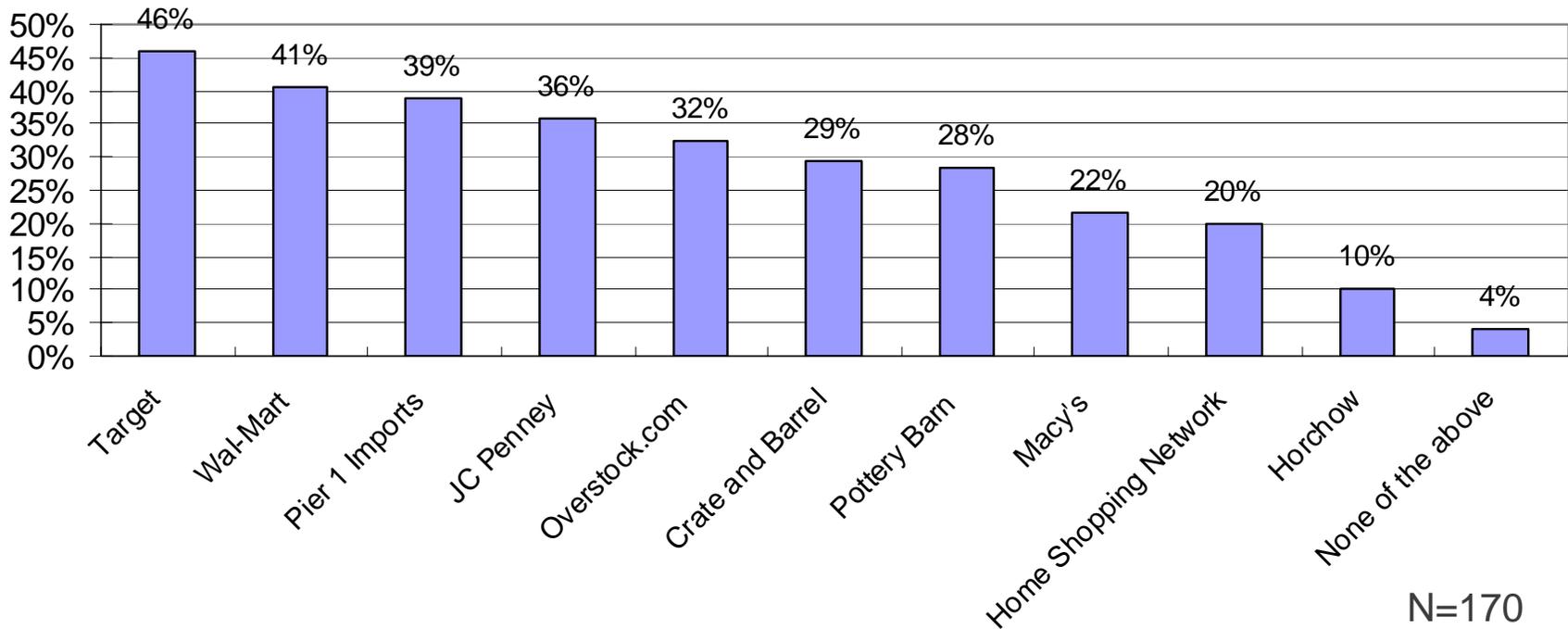


N=170

You indicated you use a search engine to help you find online stores that sell Furniture. Among the stores listed below, which one do you think you would use a search engine to help you find first? Please select one.

Use of Online for Researching and Purchasing Furniture and Home Appliances

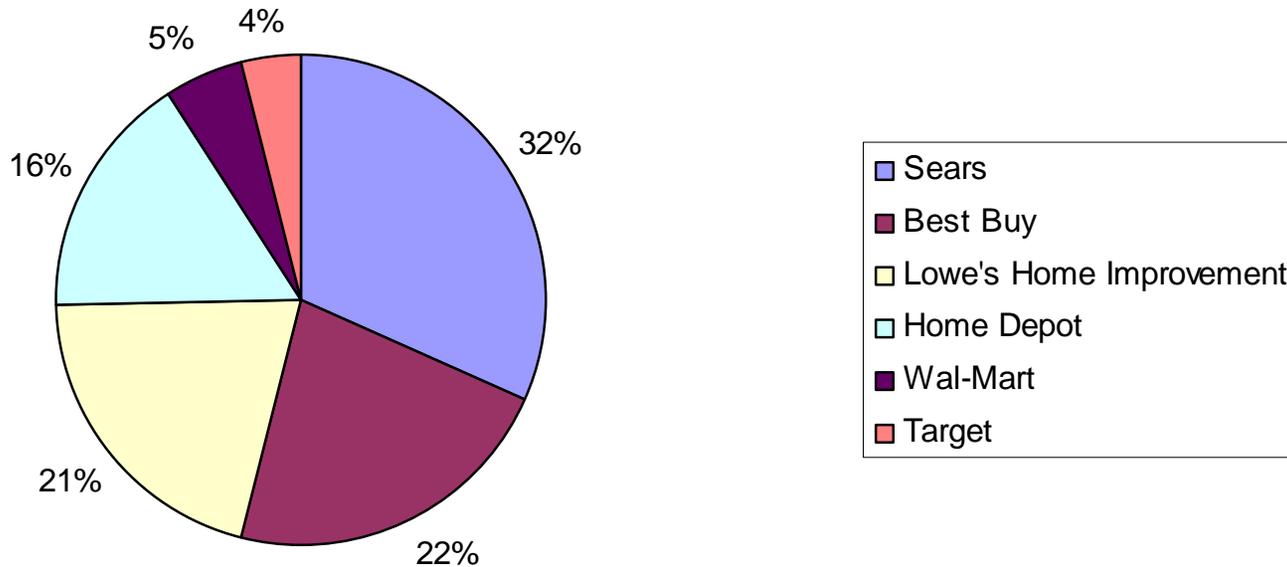
Among Google users who use search engines to locate sites that sell furniture, **46% say they would also consider purchasing from Target**



Imagine that the search engine suggested other stores in addition to (BRAND)? Which of the following other online stores, if any, would you consider for purchasing furniture? Please select all that apply

Use of Online for Researching and Purchasing Furniture and Home Appliances

Among Google users who use search engines to locate online stores that sell large appliances, 32% say they would use a search engine to find Sears



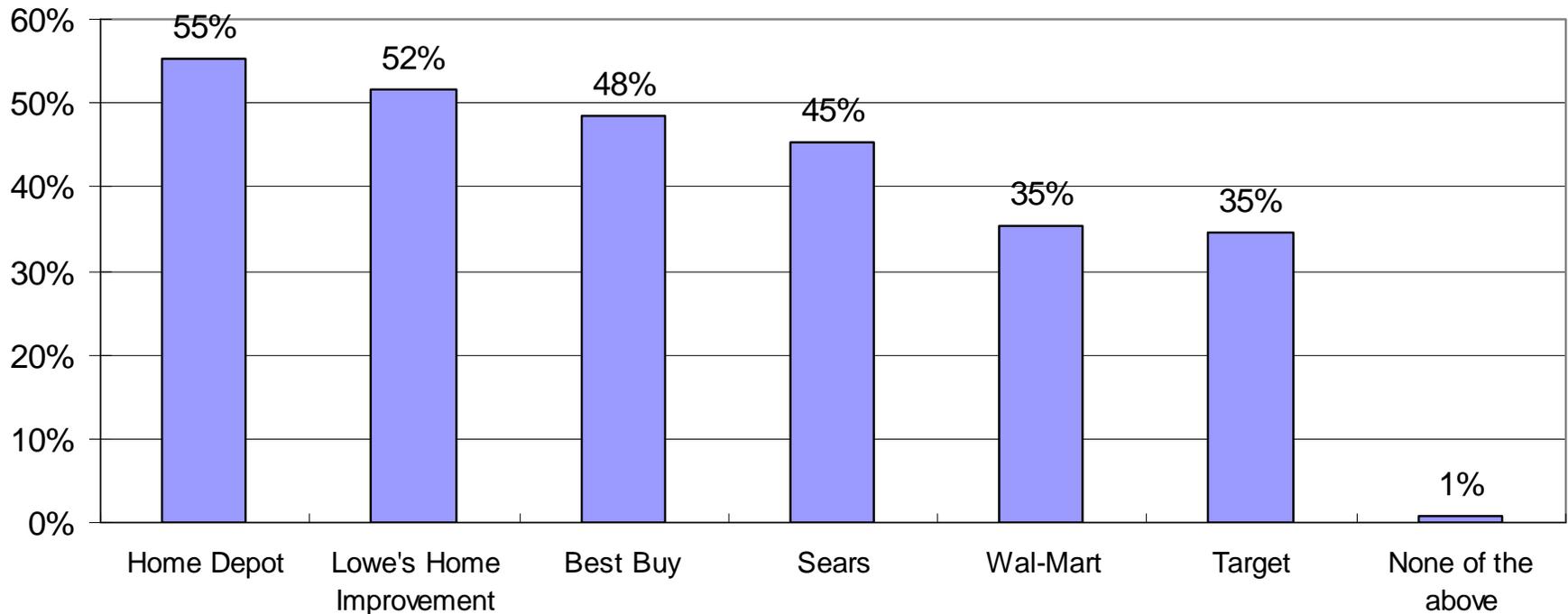
N=130

You indicated you use a search engine to help you find online stores that sell Large Appliances. Among the stores listed below, which one do you think you would use a search engine to help you find first? Please select one.

Use of Online for Researching and Purchasing Furniture and Home Appliances



Among Google users who use search engines to locate sites that sell large appliances, 55% say they would also consider purchasing from Home Depot

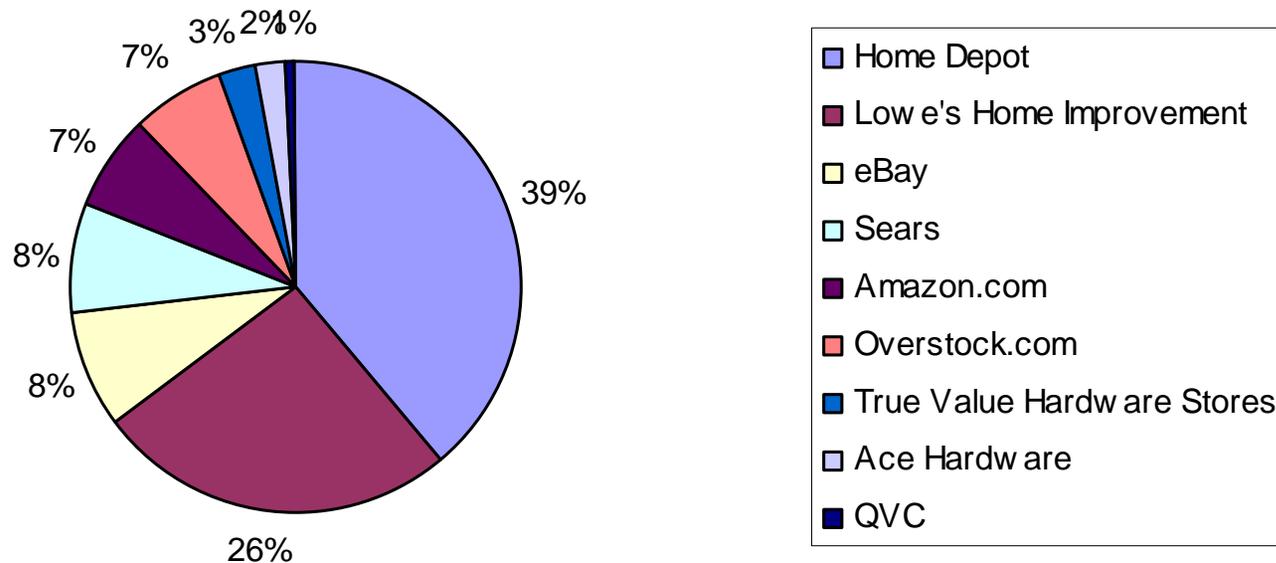


N=130

Imagine that the search engine suggested other stores in addition to (BRAND)? Which of the following other online stores, if any, would you consider for purchasing a Large Appliance? Please select all that apply

Use of Online for Researching and Purchasing Furniture and Home Appliances

Among Google users who use search engines to locate online stores that sell home improvement materials, 39% say they would use a search engine to find Home Depot

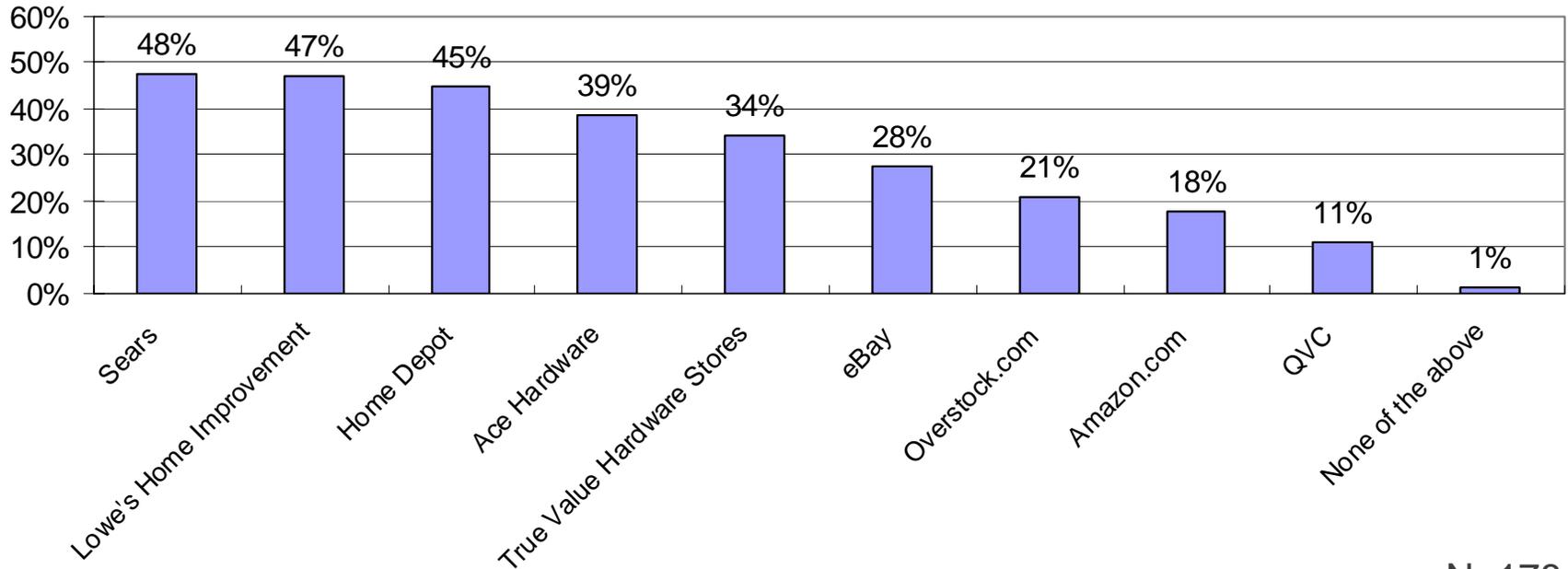


N=178

You indicated you use a search engine to help you find online stores that sell Home Improvement Materials and Tools. Among the stores listed below, which one do you think you would use a search engine to help you find first? Please select one.

Use of Online for Researching and Purchasing Furniture and Home Appliances

Among Google users who use search engines to locate sites that sell home improvement materials, 48% say they would also consider purchasing from Sears

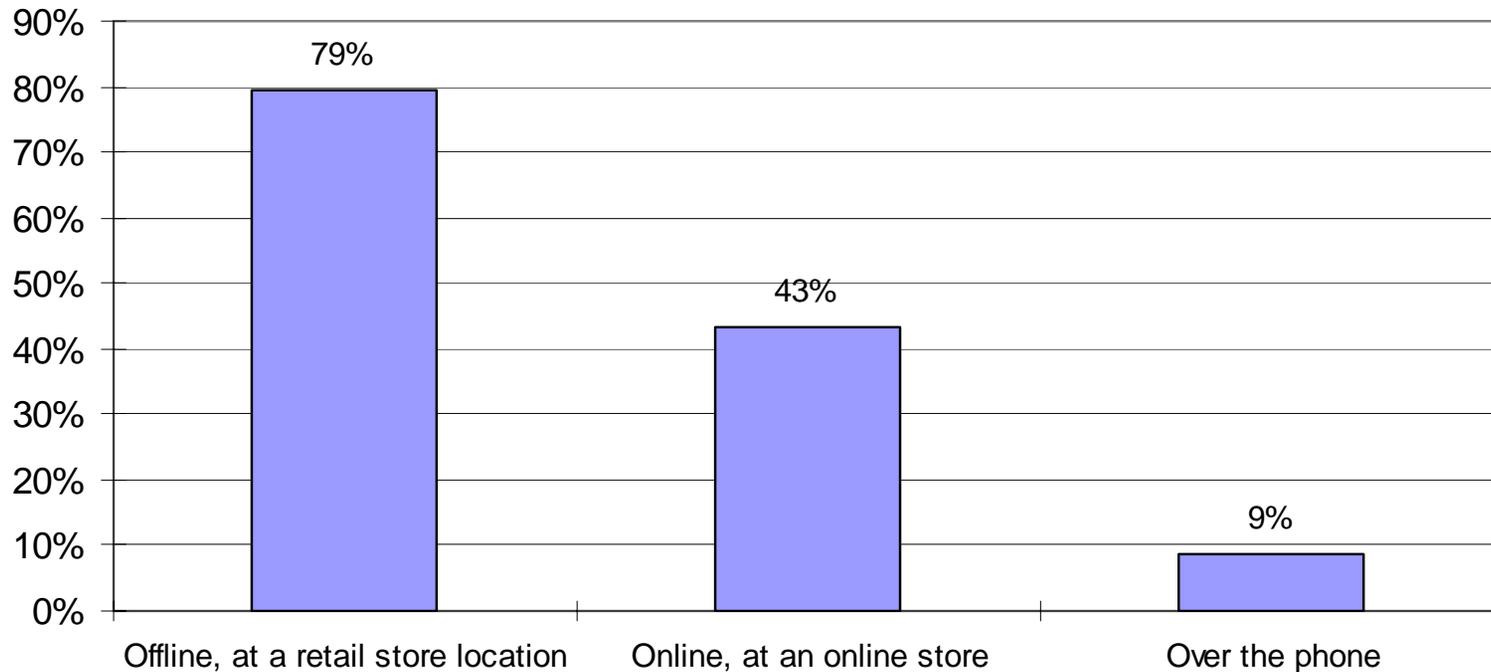


N=178

Imagine that the search engine suggested other stores in addition to (BRAND)? Which of the following other online stores, if any, would you consider for purchasing Home Improvement Materials or Tools? Please select all that apply

Use of Online for Researching and Purchasing Furniture and Home Appliances

After using a search engine to help find online stores that sell home furnishings, appliances, or improvement items, 79% of Google users ultimately purchased the items offline, at a retail store location

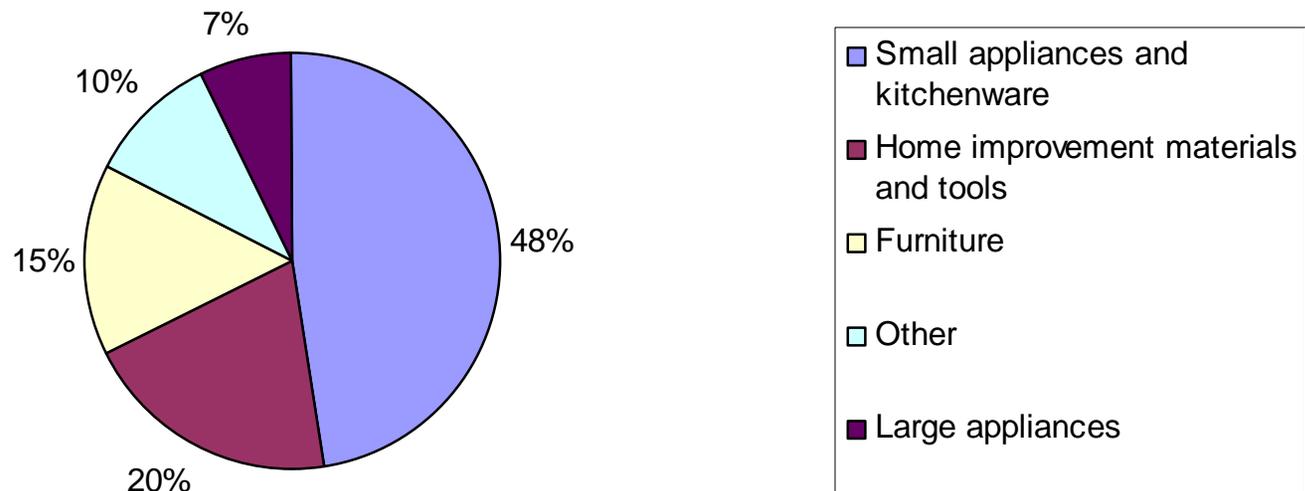


N=292

After using a search engine to help you find online stores that sell Home Furnishings, Appliances, or Improvement items, how did you ultimately purchase those items? Select all that apply

Use of Online for Researching and Purchasing Furniture and Home Appliances

48% of Google users purchased small appliances and kitchenware the last time they purchased something online

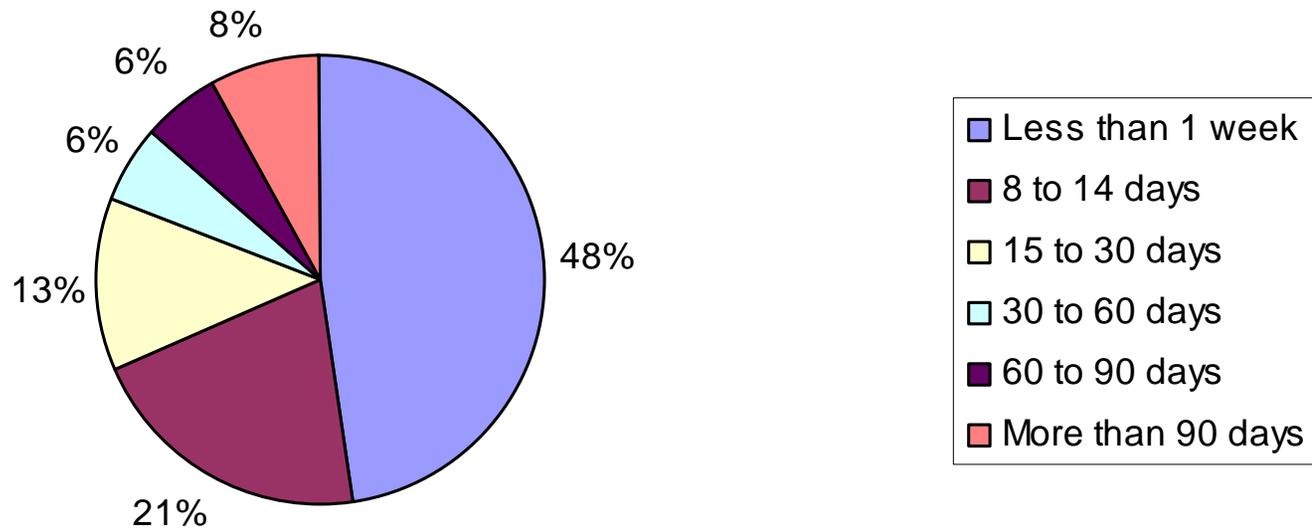


N=126

You indicated that you purchased Home Furnishings, Appliances or Improvement items online, at an online store. Please think of the last time you purchased an item online. What kind of item did you purchase online?

Use of Online for Researching and Purchasing Furniture and Home Appliances

For 48% of Google users, less than one week passed between the time a user visited an online store and then purchased an item from that online store

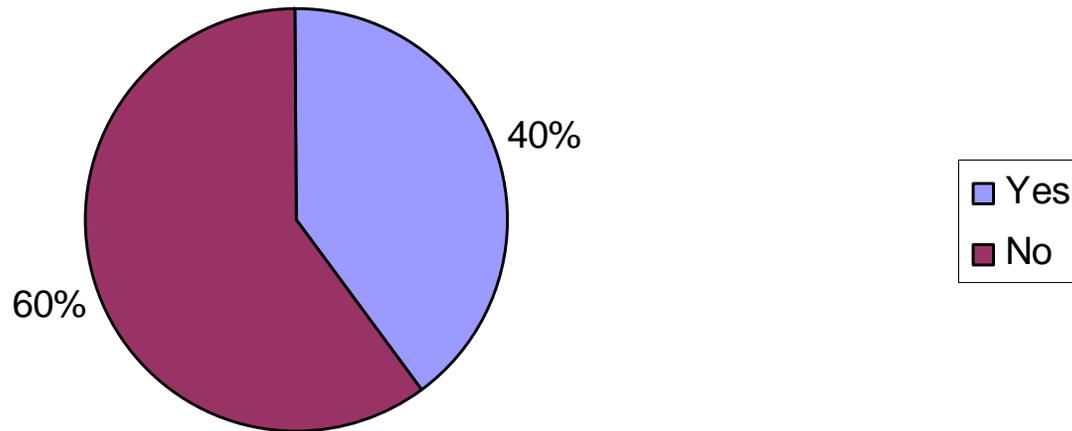


N=126

Now, please think of the online store you purchased the item from. Approximately how many days, weeks or months past between the first time you went to the site and the time you made the purchase at that site?

Use of Online for Researching and Purchasing Furniture and Home Appliances

40% of Google users have purchased a home furnishing, appliance, or improvement item at an online store and then picked the item up at the store

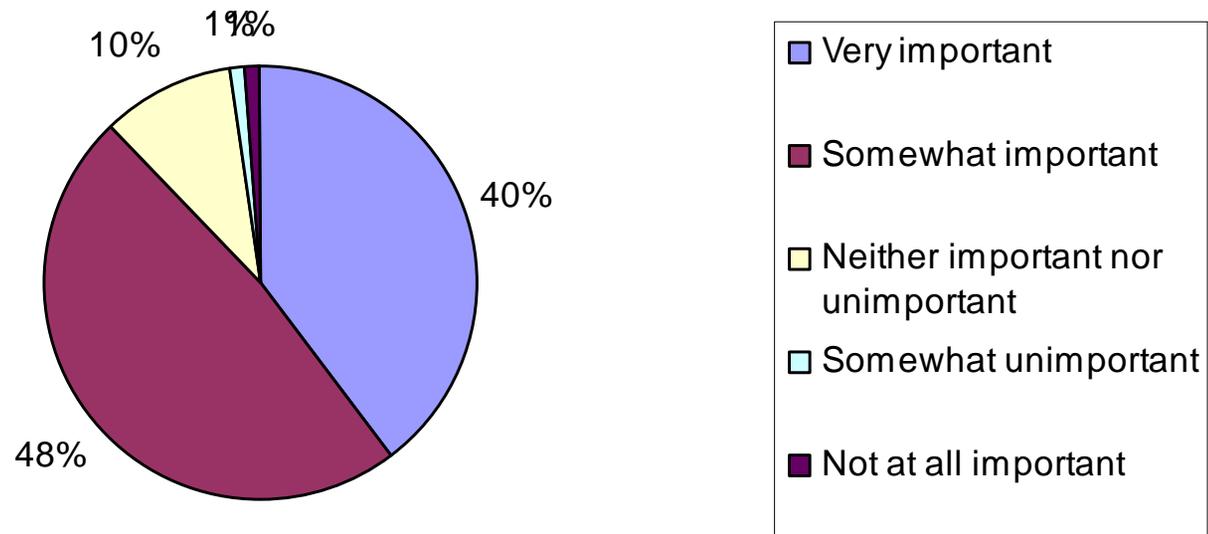


N=126

Have you ever purchased a Home Furnishing, Appliance, or Improvement item at an online store but then picked the item up at a store?

Use of Online for Researching and Purchasing Furniture and Home Appliances

88% of Google users say search engines are “very/somewhat important” when making purchase decisions on home furnishings, appliances, or improvement items

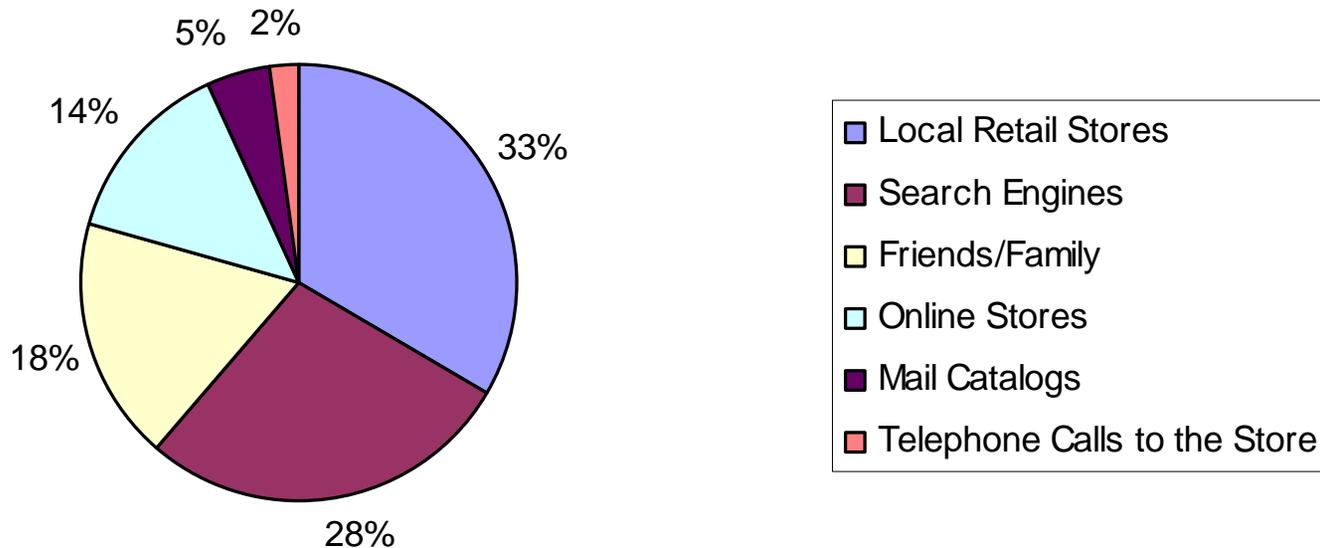


N=340

Overall, how important is using a search engine in making purchase decisions on Home Furnishings, Appliances, or Improvement items?

Use of Online for Researching and Purchasing Furniture and Home Appliances

28% of Google users rank search engines as “most influential” when considering the purchase of a home furnishing, appliance, or improvement item

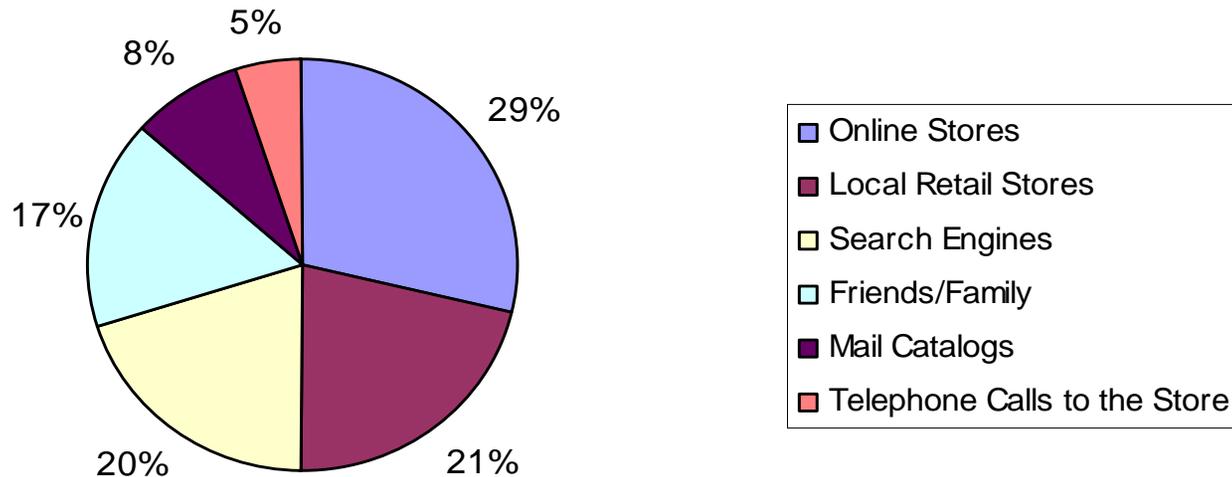


N=340

Thinking of offline as well as online resources, how influential is each of the following sources when you are considering a Home Furnishing, Appliance, or Improvement item? Please rank each of the following sources. (First rank choices indicated in graph above).

Use of Online for Researching and Purchasing Furniture and Home Appliances

20% of Google users rank search engines as ‘second most influential’ when considering the purchase of a home furnishing, appliance, or improvement item



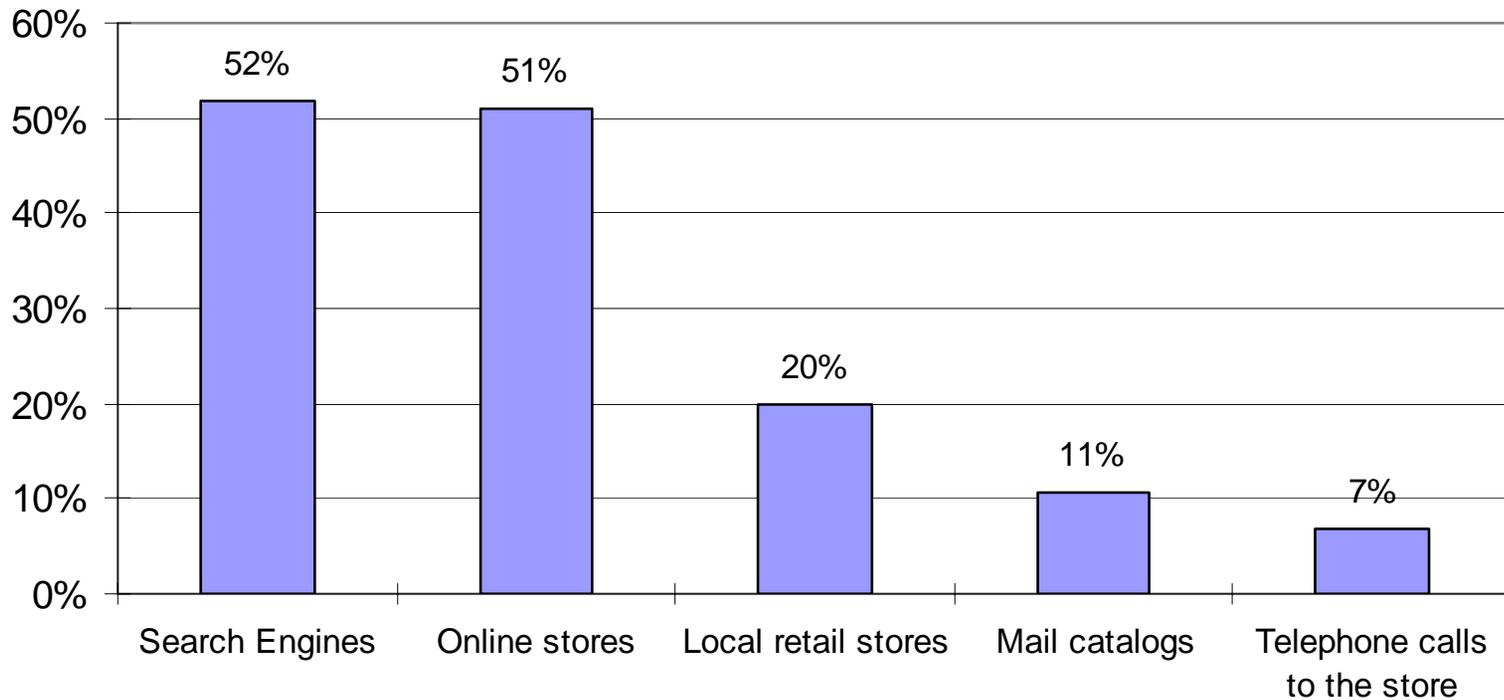
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Thinking of offline as well as online resources, how influential is each of the following sources when you are considering a Home Furnishing, Appliance, or Improvement item? Please rank each of the following sources. (Second rank choices indicated in graph above).

Use of Online for Researching and Purchasing Furniture and Home Appliances



52% of Google users believe they will be using search engines more in the future for researching/purchasing home appliance and improvement items

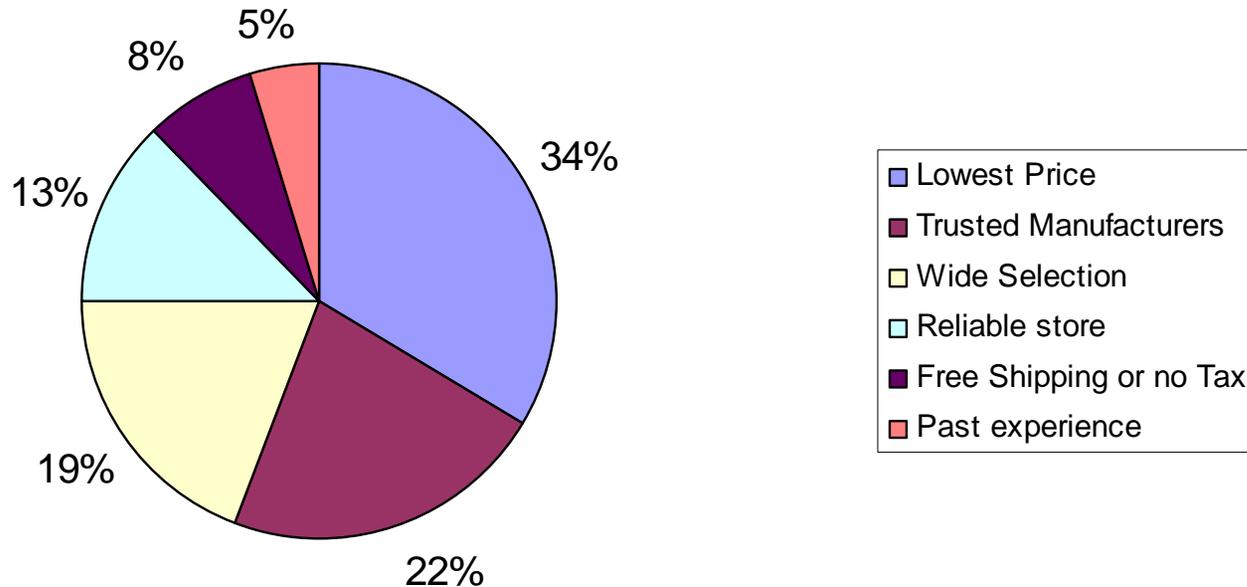


N=340

In the future, do you think you will be using each of the following channels “More,” “Less” or “About the Same” as you are now to help you research/purchase Home Appliance and Improvement items? Select one per each row. (Graph above indicates percent saying “More”).

Use of Online for Researching and Purchasing Furniture and Home Appliances

34% of Google users believe the lowest price is most important to them when purchasing a home furnishing, appliance, or improvement item

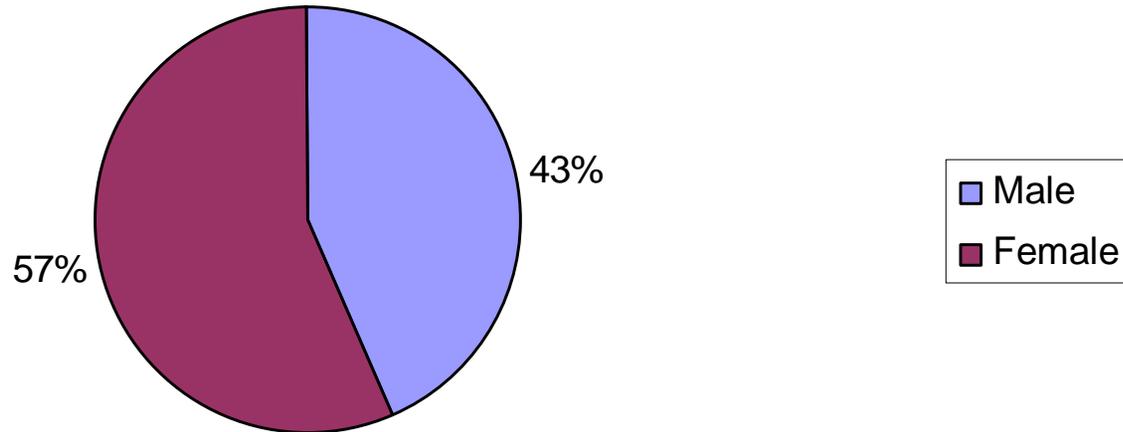


N=340

In general, which of the following factors is MOST IMPORTANT to you when purchasing a Home Furnishing, Appliance, or Improvement item?

Use of Online for Researching and Purchasing Furniture and Home Appliances

Women comprise 57% of the Google users in our sample

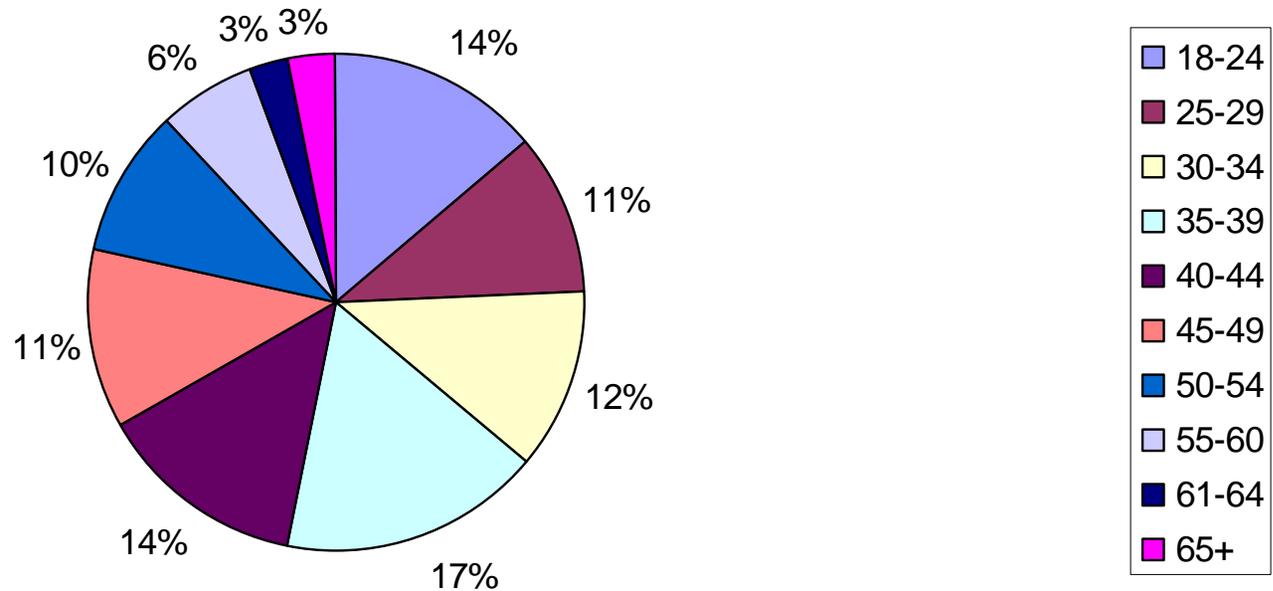


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Please indicate your gender.

Use of Online for Researching and Purchasing Furniture and Home Appliances

54% of Google users in our sample is aged 25-44

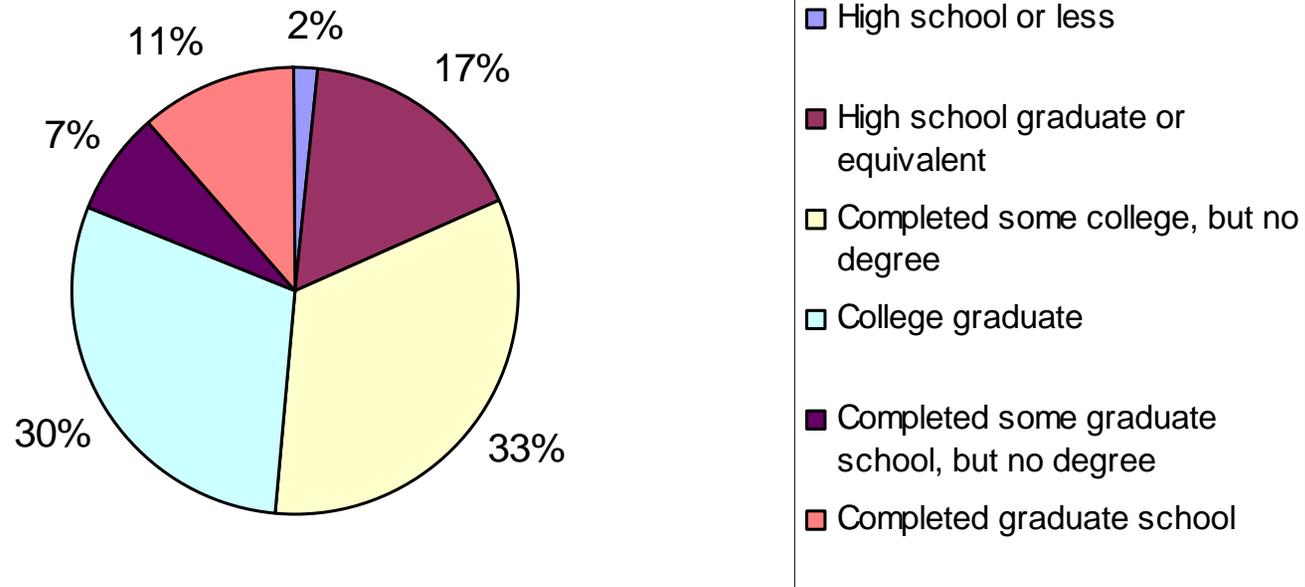


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Please indicate your age.

Use of Online for Researching and Purchasing Furniture and Home Appliances

48% of the Google users in our sample are college graduates or higher

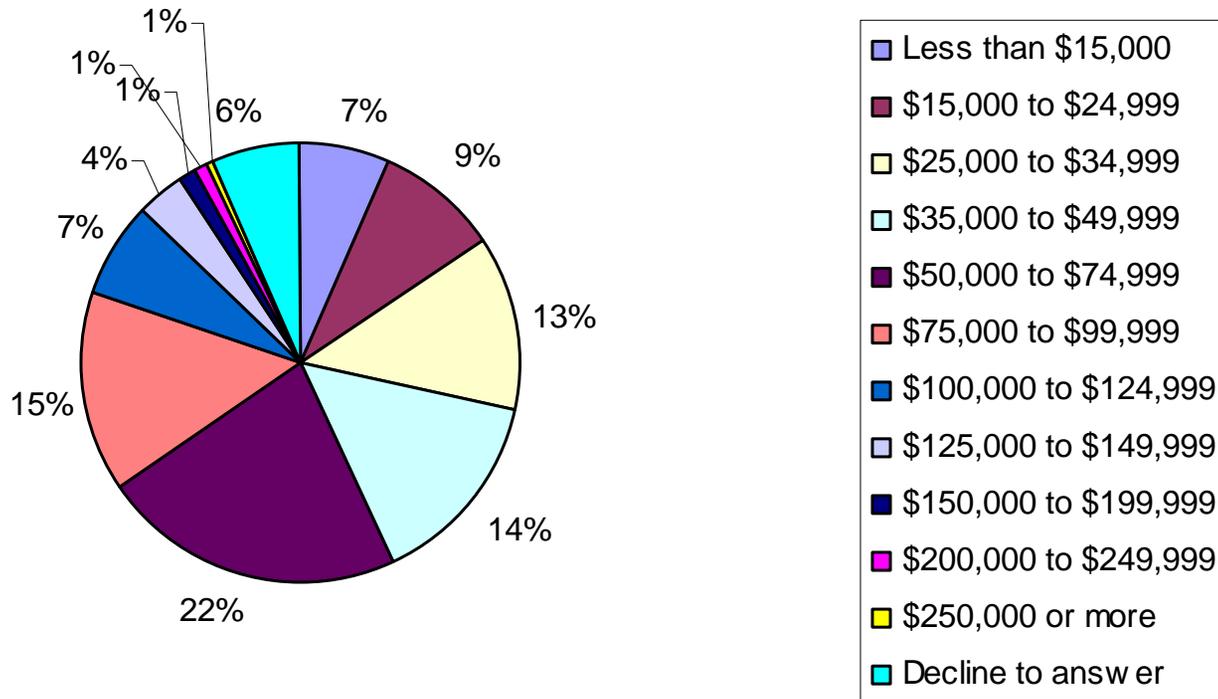


N=340

What is the highest level of education you have completed or the highest degree you have received?

Use of Online for Researching and Purchasing Furniture and Home Appliances

51% of Google users earn \$50,000 or more annually; 6% declined to answer



N=340

Which of the following income categories best describes your total 2004 household income before taxes?