

Mobile-izing Commerce

Amsterdam
23rd November 2011

Florence Diss
Strategic Partner Development Manager
flodiss@google.com



Agenda



1 Commerce Mission

2 Google Wallet

3 US Announcement and Next Steps

Mobile Growth is transforming Commerce



1 in 2 Europeans own
a smartphone

79%

of consumers use a
smart-phone while
shopping

But....

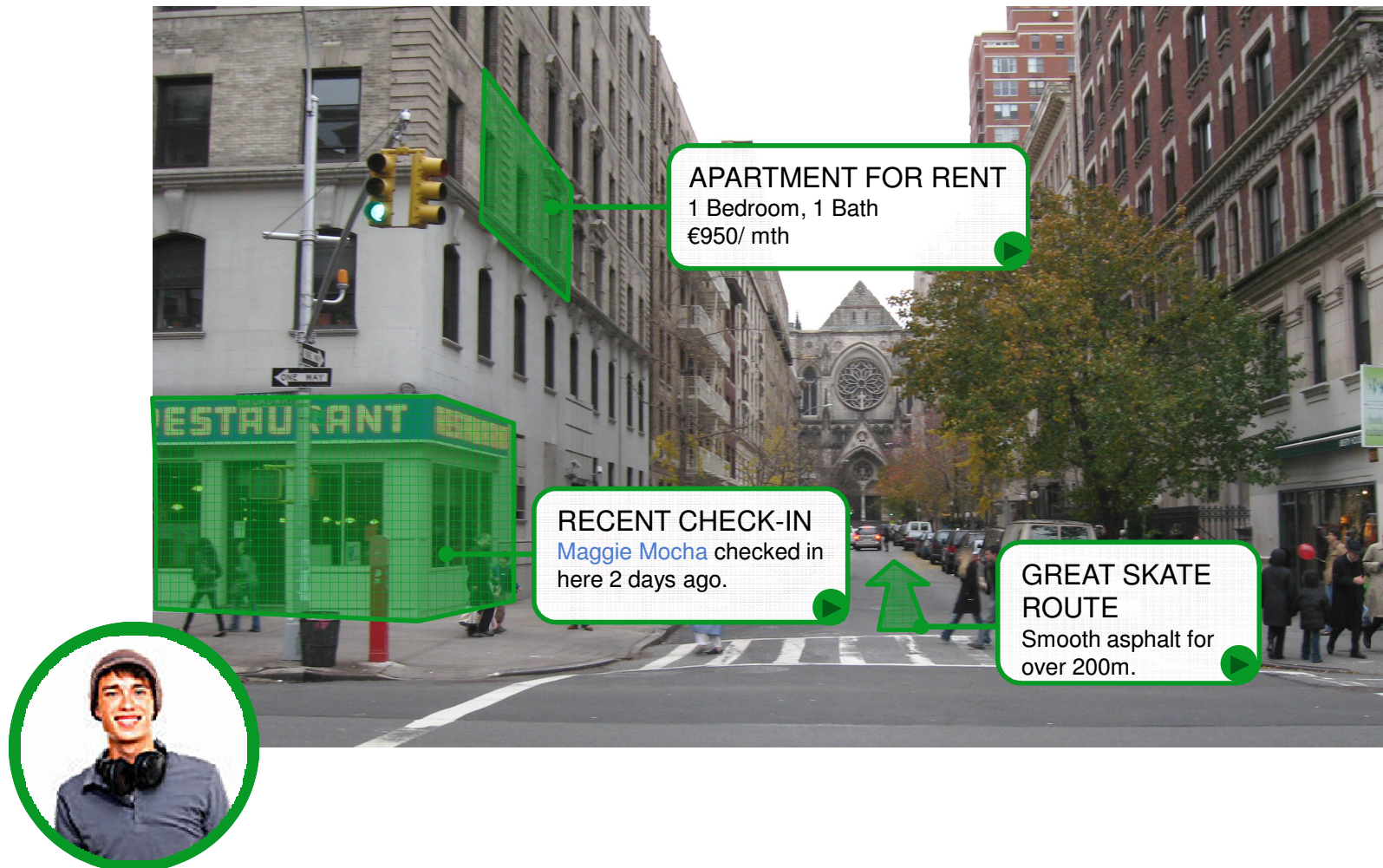
92%

of spend is still offline
in brick and mortar
stores

The Opportunity: Social, Local and Mobile



The Opportunity: Social, Local and Mobile



Commerce: Mission

To *close the loop* between online and offline while delivering a rich and seamless *multi-channel experience*

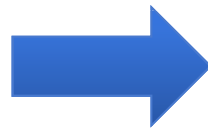


Wallet Vision

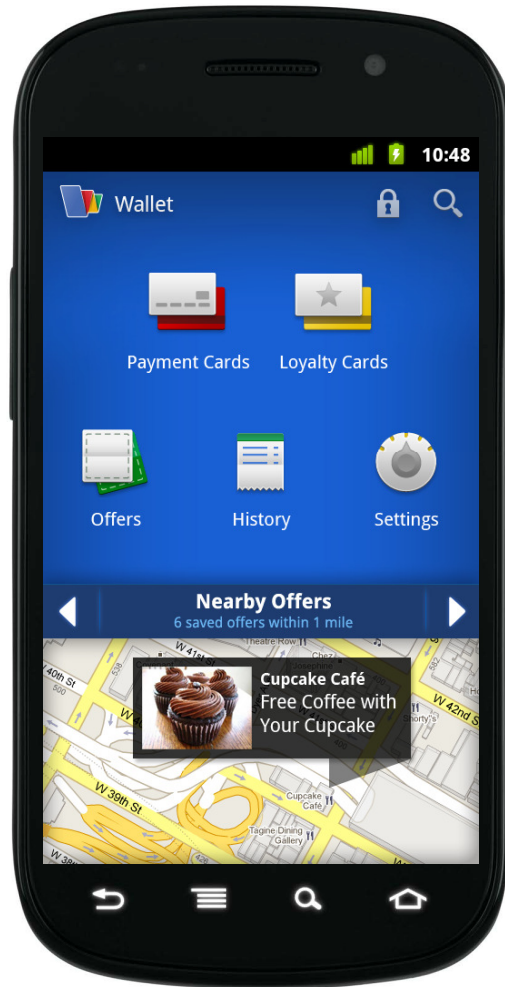
Payments: Mobile Wallet



Mobile Wallet: Vision



Future: Mobile Wallet



PAYMENTS

Credit
Debit
Stored Value
Metro



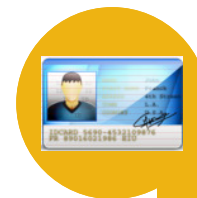
LOYALTY

Rewards
Punch Cards



TRANSACTIONAL

Offers
Movie Tickets
Event Tickets
Boarding Pass

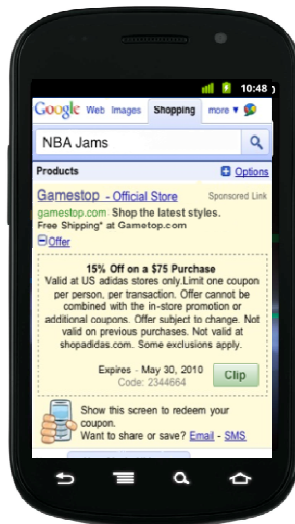


IDENTITY

Gov Issued
Student ID
Medical ID
Membership

User Flow

SEARCH



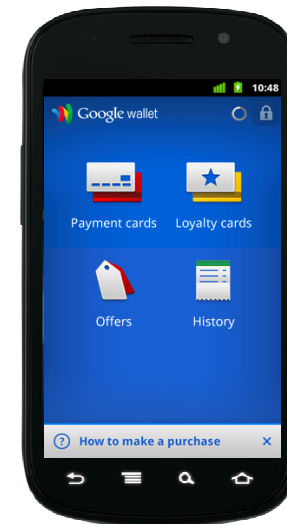
Discover offers online or in-app, and save

PAY



Tap to pay and redeem offer at POS

SAVE



Manage and redeem offers, gift cards and loyalty

Google's Role in the Ecosystem



Bridging the online and offline experiences ... Product Discovery



... for all products (hard goods and soft goods) ... local, targeted, user focused

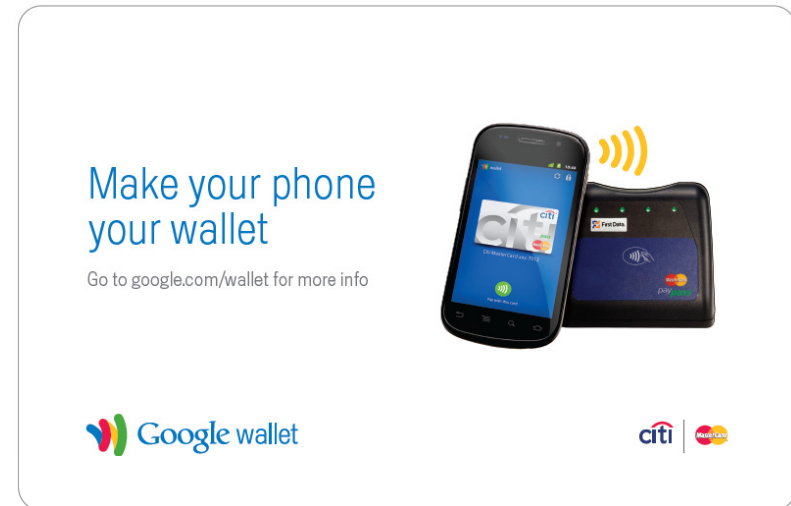


... on any device, anywhere.

US Google Wallet launch and next steps

Consumer Launch in September 2011

- **5 Initial Cities**
 - NYC, CHI, SF, LA, DC
- **NFC-enabled Phones**
 - Google Wallet generally available via Sprint Nexus S 4G as of 9/19/2011; handset marketing by Samsung/Sprint
- **Merchant Participation**
 - In-store marketing and training materials provided by Google
- **Marketing**
 - Broad based, digital and social campaigns from Google, Citi, MasterCard and Sprint



Our Partners

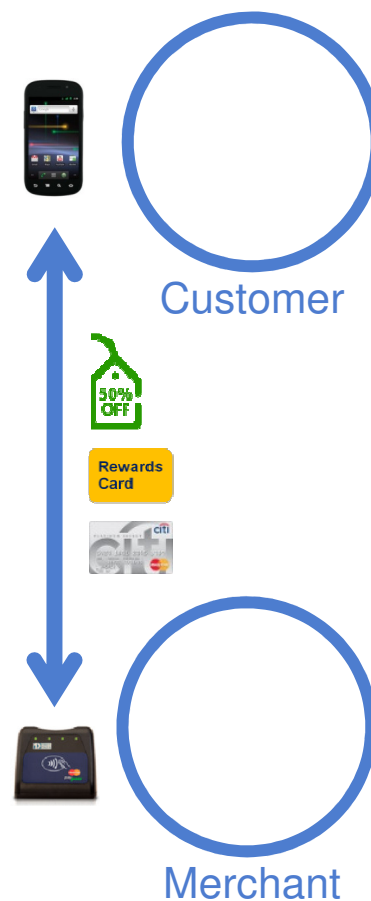
Financial Ecosystem



Mobile Ecosystem



Retail Ecosystem



Creating the Buzz so far

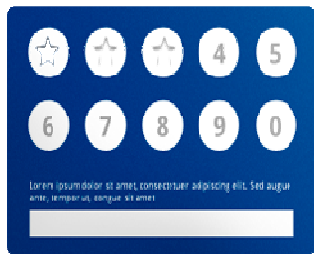
- Merchant in-store promotion
 - American Outfitters (Time Square)
 - Random acts of Wallet
- You Tube
 - [How Wallet works](#)
 - Constanza [Wallet Clip](#)
- Blogs, articles and news coverage.
- Initial \$10 pre paid balance on the installation of the Wallet to introduce users to tap and pay.



Bringing it all together to create the SingleTap™ experience



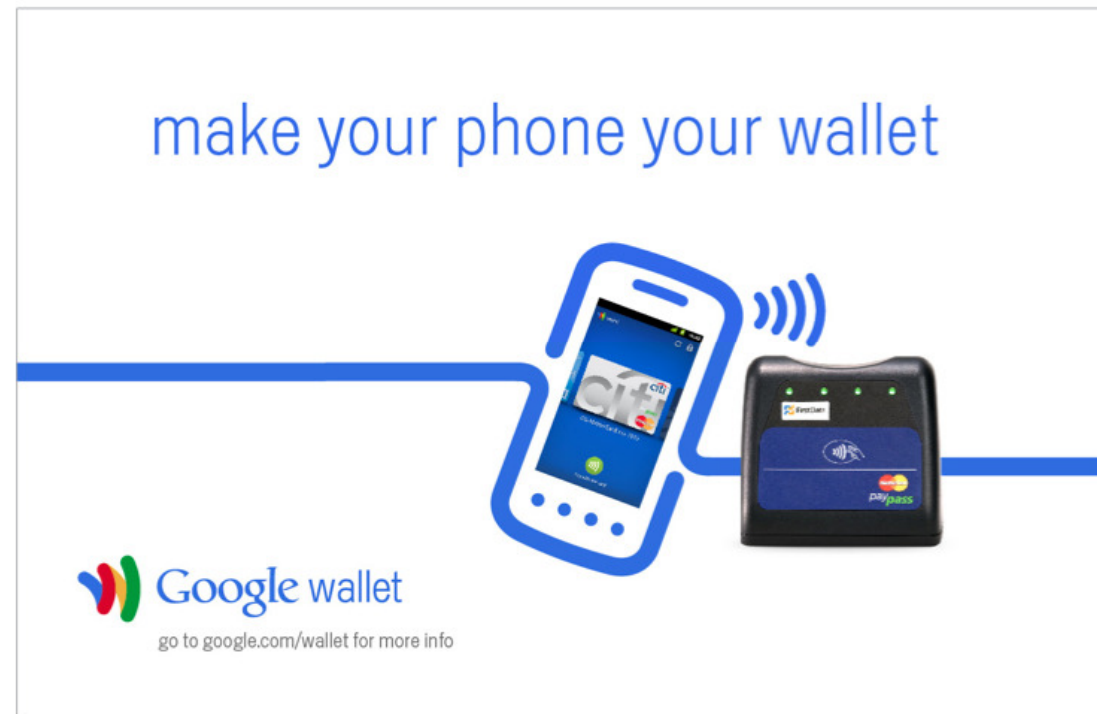
Credit
Cards



Loyalty
Programs



Offers



The future of Commerce is seamless

