

PLEASE NOTE: This data is strictly confidential and need-to-know, and may be deemed to be material nonpublic information. Please see [Alphabet's Policy Against Insider Trading](#) as well as these [FAQs](#), for additional information on material nonpublic information.

Google Amazon App Usage and Impact

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EXHIBIT
PSX00562

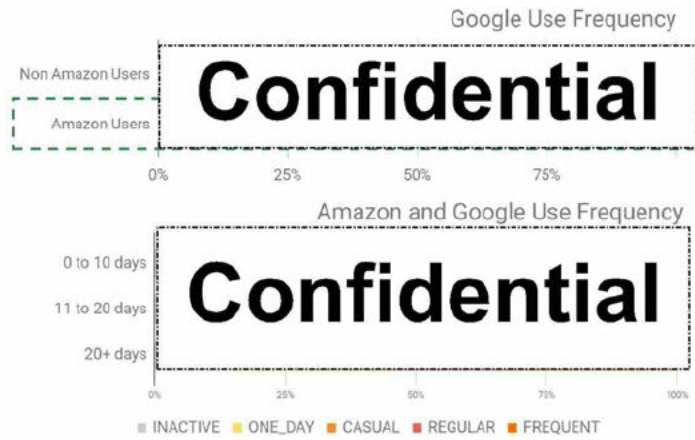
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App users are more frequent Google Users

As expected, Amazon users are also more likely to be regular and frequent Google users.

There is a slight correlation of higher Amazon App use to higher G.com frequency. But in general all Amazon App users see high G.com usage.



GOOGLE
CONFIDENTIAL

Usage tiers are taken from **Confidential**

Data is sourced from **Confidential**
US, Android devices only.
Signed in users
GSA or Chrome.

Do users alter their Google usage after adopting shopping apps?

- 6 apps were analyzed:
 - 3 retail focused apps
 - 3 non retail focused apps
- Adoption is defined as the first use of the app in question.
- Study is at user level, using **Confidential**
 - Mobile Android devices
 - Signed in Users
 - US only
 - Search Revenue
- Users are tracked for all of their available history
 - Revenue data has 830 days of history
 - Query data has 600 days of history

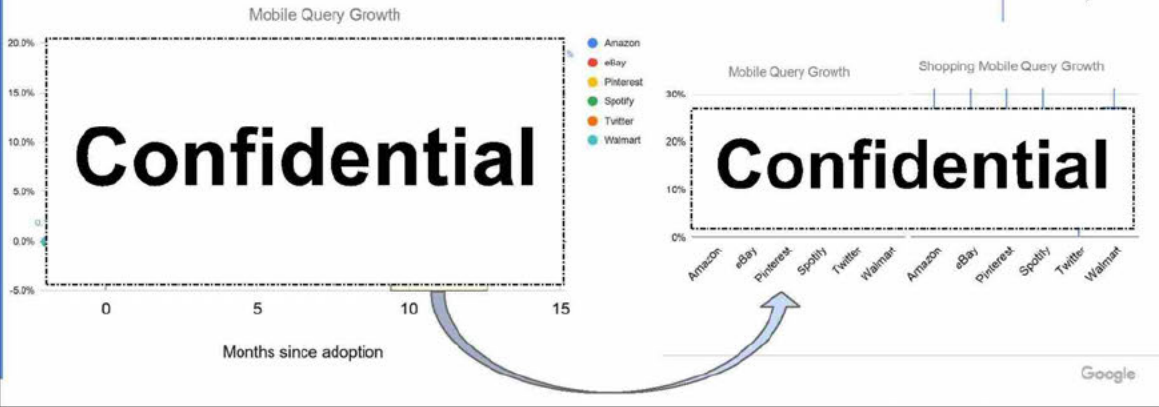
Confidential is used to identify a causal inference.



Google

No evidence of negative impact on G.com from app adoption

- App adopters are correlated with increased revenue and queries on mobile.
- No significant change in desktop activity.
- No clear difference between retail and non retail apps.
- Lift occurs immediately after adoption, and continues past 15 months.
- Shopping Queries also saw a higher lift.



No negative impact seen when controlling for new phone adoption

Amazon app adopters were analyzed to determine if/when they also acquired a new mobile device. The users were split into 4 groups depending on when they adopted the phone.

Looking at the "No new phone" cohort, there is a significant mobile activity increase. By removing the phone from the impact as a variable, we see that Amazon adoption (or app adoption in general) is strongly correlated with increased mobile activity.

