

The Rise of Social Networking in Latin America

How Social Media is Shaping Latin America's Digital Landscape



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Executive Summary:

Social networking is central to the online experience across Latin America, reaching millions of people and providing a level of engagement that is rarely matched by any other online activity. Tapping into people's innate need to interact and communicate, social networking provides an opportunity for consumers to actively connect to one another while also creating a channel that brands can utilize to engage with consumers in a two-way relationship.

This report examines the state of Latin America's dynamic social networking landscape, providing insights into trends at a global, regional and market level. The report also analyzes how social media has shaped the larger digital environment through its influence on other social web activities and its role in the dissemination of marketing messages. Several of the report's key findings are summarized below:

- In June 2011, 114.5 million people in Latin America visited a social networking site, representing 96.0 percent of the entire online population in the region. Social networking is not only big in Latin America, it is also growing -- with the audience climbing 16 percent in the past year.
- Latin Americans are strongly engaged with social networking. Half of the top 10 worldwide markets by time spent on social networking sites are in Latin America with Argentina leading the region at 10 hours per month in June 2011.
- The Latin American social networking audience is nearly equal in its composition of males and females, but females account for a larger share of social networking time spent (53.6 percent) compared to males (46.4 percent). This trend was most significant in Brazil where females accounted for 58.7 percent of all social networking time spent.
- Facebook.com strongly led the social networking market in Latin America reaching more than 91 million visitors. Windows Live Profile ranked #2 with more than 35.5 million visitors in the region. Orkut held the #3 spot with 34.4 million visitors, largely driven by the site's popularity in Brazil, while Twitter.com ranked #4 with 24.3 million visitors.
- Five of the top 10 markets by Facebook.com reach are in Latin America. Facebook reached 90.9 percent of all online users in Chile, ranking as the most penetrated market in Latin America.
- In Brazil, Orkut ranked as the most-visited social networking destination, reaching 35.7 million visitors, an increase of 20 percent from June 2010. Facebook.com, which is the second largest social networking site in Brazil, witnessed strong growth increasing 192 percent to 24.5 million visitors.

- Orkut visitors in Brazil are far more engaged than their Facebook counterparts. An average visitor to Orkut spent 4.3 hours on the site in June 2011, while a visitor to Facebook.com spent 1.6 hours during the month.
- In Mexico, video viewing on Facebook more than doubled since the beginning of 2011 to 33 million videos viewed on the site in June 2011.
- Venezuela is the only country in Latin America in which Twitter.com rises to the second place in the social networking ranking. One in four online users in Venezuela visited Twitter.com in June (26.5 percent reach).
- Recently launched Google+ reached 28 million visitors worldwide in the first 33 days of its public existence (June 29, 2011 to July 31, 2011). Brazil ranked as the sixth largest market for the site globally, contributing 793,923 visitors.
- Slideshare.net, the presentation sharing site, is incredibly popular among Latin American markets. Peru led all markets across the globe with 15.5 percent of its online audience visiting the site in June 2011, followed by Venezuela and Colombia, which both saw upwards of 10 percent of their online populations take to the site during the month.
- The social aspect of Latin America's online environment is not only apparent through the popularity of social networking, but also through other socially-based categories such as blogs, personals, group-buying and classifieds, which are also helping to shape the online experience.
- Social media has emerged over the past several years to redefine the way we think about the dissemination of marketing messages. In particular, Facebook has facilitated the ability for consumers to identify brands of interest and connect with them has enabled sharing between brands and consumers in new ways: brands and their consumers can now create two-way relationships and share content, news, and feedback.

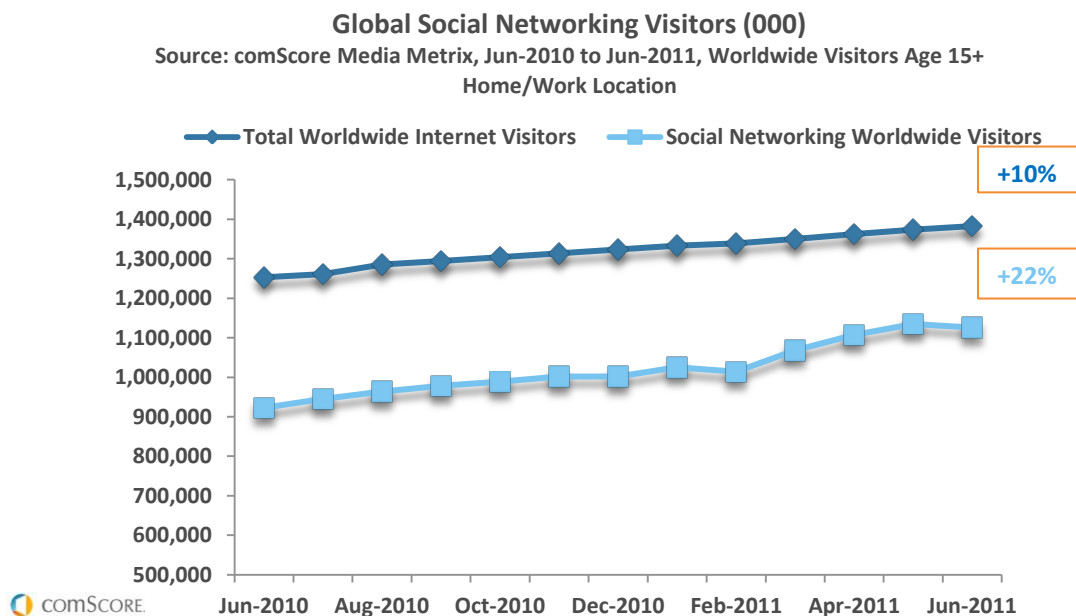
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Social Networking – A Global Phenomenon

Worldwide Social Networking Audience Surpasses 1 Billion People

Across the globe, social networking continues to grow as new users adopt the activity as a routine part of their online experience. In June 2011, 1.1 billion people (age 15 and older accessing from a home or work location) visited a social networking site worldwide, an increase of 22 percent from June 2010. Globally, 81.4 percent of all Internet users visit social networking destinations, representing one of the top online activities worldwide.



Facebook Reigns as Top Global Social Network

A look at the top social networking brands worldwide revealed that, perhaps unsurprisingly, Facebook.com ranked as the top social network by a wide margin. In June 2011, 734.2 million people visited Facebook.com globally, an increase of 33 percent from the previous year. Meanwhile Twitter.com climbed its way to the #2 position reaching 144.4 million visitors (up 56 percent), followed by Windows Live Profile at 119.5 million visitors. Professional social network LinkedIn.com reached more than 84 million visitors globally to secure the #4 spot, followed by Chinese site QQ.com Microblogging with 74.8 million visitors.

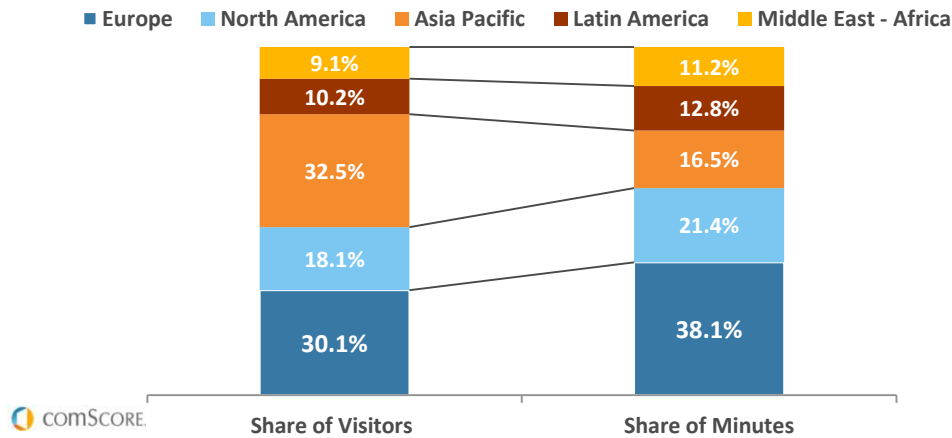


Latin America Ranks among Most Engaged Social Networking Markets

The regional analysis of visitors to the Social Networking category revealed that Asia Pacific, home to the largest online audience of the five global regions, contributed 32.5 percent of worldwide visitors to the category. Europe followed with 30.1 percent of social networkers, while North America accounted for 18.1 percent. Latin America represented 10.2 percent of all social networking visitors in June 2011, while the Middle East – Africa was home to 9.1 percent of the category’s audience. When looking at the share of time spent on social networks, Europe accounted for 38.1 percent of all social networking minutes, followed by North America where 21.4 percent of all social networking minutes emerged. Although Asia Pacific is home to the largest social networking population by visitors, the region accounted for just 16.5 percent of all social networking minutes, while Latin America accounted for 12.8 percent of all social networking minutes globally.

% Share of Social Networking Visitors and Minutes by Region

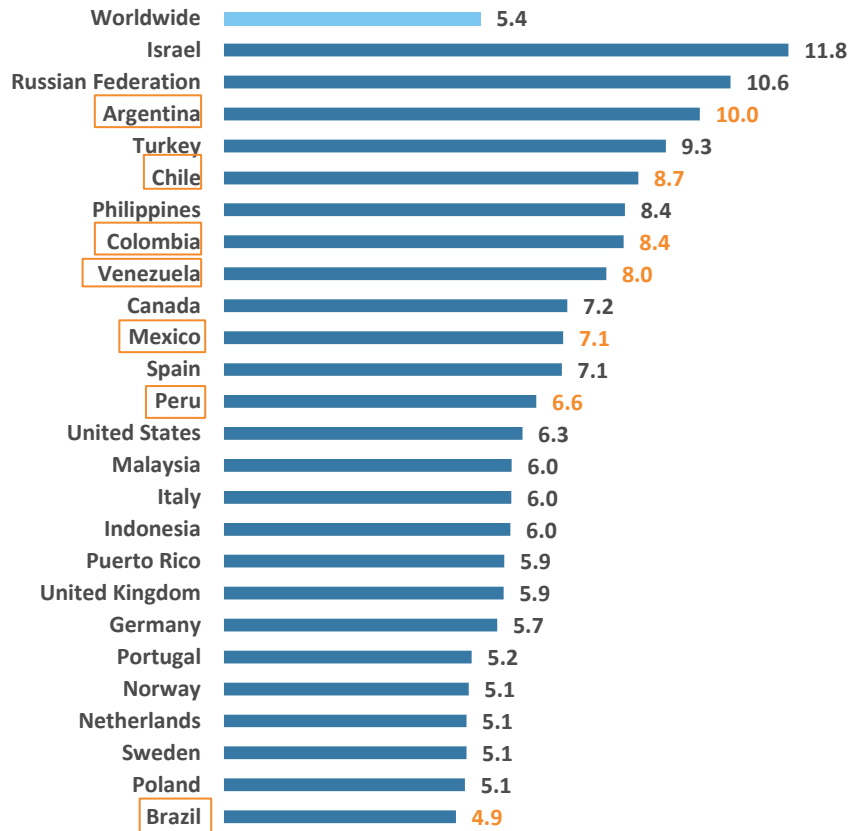
Source: comScore Media Metrix, Jun-2011, Worldwide Visitors Age 15+ Home/Work



Globally, Internet users averaged 5.4 hours on social networking sites during the month of June. A look at the top markets based on the average number of hours spent social networking revealed that half of the top 10 markets were Latin American countries, demonstrating the vast engagement visitors in these markets have with social networks. Argentina's online users averaged 10 hours on social networking sites in June to rank third overall, while Chileans averaged 8.7 hours. Colombians ranked seventh with 8.4 hours per visitor in the Social Networking category, while Venezuelans ranked eighth at 8.0 hours. Visitors in Mexico (7.1 hours) and Peru (6.6 hours) also ranked among the top tier. Brazilians exhibited relatively lower engagement than its Latin American neighbors at 4.9 hours, ranking as the #25 market overall.

Top 25 Global Markets by Average Hours per Visitor Spent on Social Networking Sites

Source: comScore Media Metrix, Jun-2011, Worldwide Visitors Age 15+ Home/Work



Latin America – A Closer Look at Regional Trends

Latin American Social Networking Audience Grows 16.5 Percent in Past Year

In June 2011, 114.5 million people in Latin America visited a social networking site, representing 96.0 percent of the entire online population in the region. Social networking is not only big in Latin America, it is growing -- with the audience climbing 16 percent from the previous year.

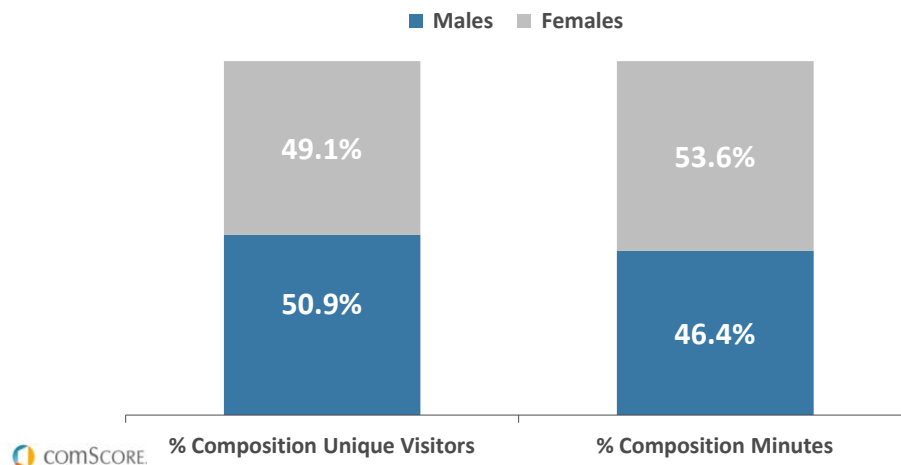


Demographic Profile of Social Networking Users in Latin America

Analysis of the audience composition of social networkers in Latin America revealed that males and females are almost equally likely to utilize social networking sites, with males accounting for 50.9 percent of site visitors and females representing 49.1 percent. When looking at engagement, however, females account for a larger share of minutes (53.6 percent) than males (46.4 percent). This trend was most significant in Brazil where females accounted for 58.7 percent of all time spent on social networking sites during the month of June.

Gender Profile of Social Networking Users in Latin America

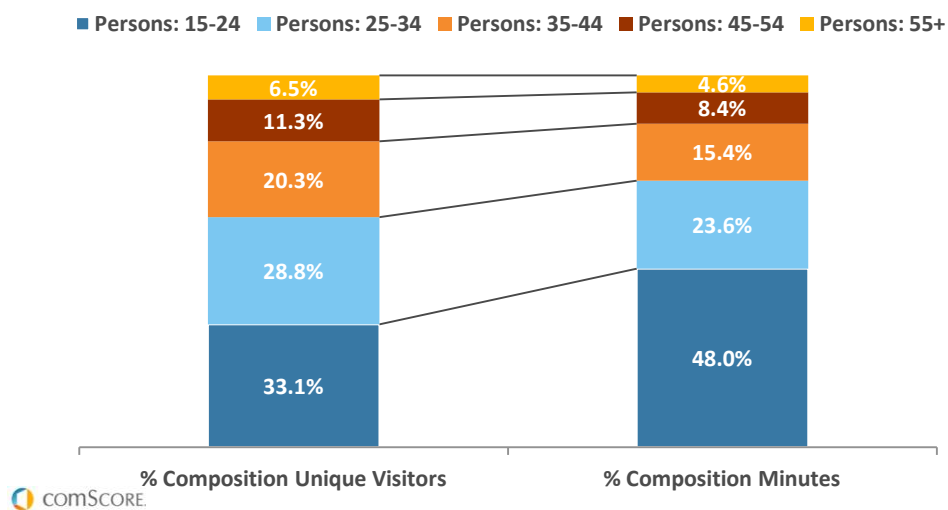
Source: comScore Media Metrix, Jun-2011, Latin America Visitors Age 15+ Home/Work



Further analysis of visitors by age segment, revealed that those age 15-24 accounted for the largest share of social networking visitors at 33.1 percent, while those age 25-34 accounted for 28.8 percent and visitors age 35-44 represented 20.3 percent of social networkers. Visitors age 15-24 clearly demonstrated the strongest engagement on social networks, accounting for nearly half (48.0 percent) of all time spent on these sites during the month. This trend was most significant in Venezuela where visitors age 15-24 accounted for 3 of every 5 social networking minutes (58.2 percent).

% Composition Visitors & Minutes Social Networking by Age

Source: comScore Media Metrix, Jun-2011, Latin America Visitors Age 15+ Home/Work

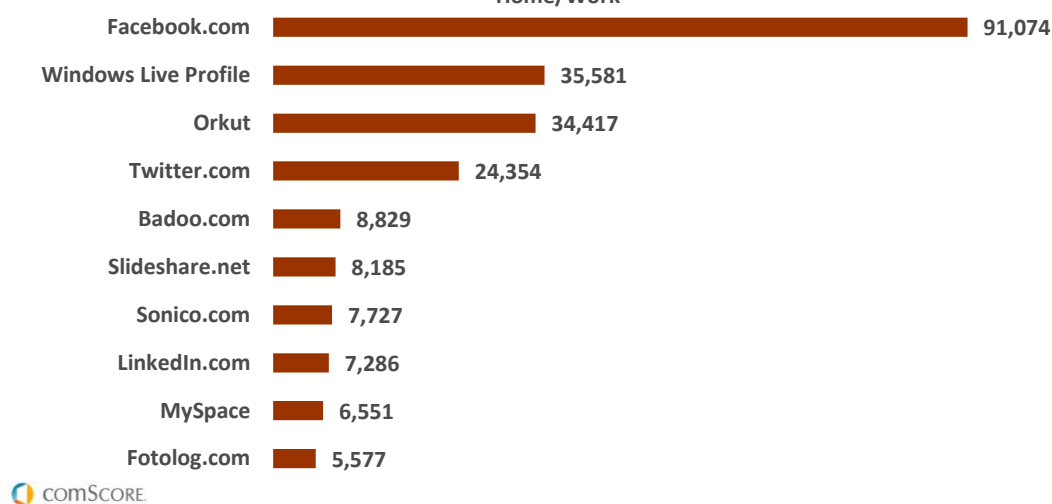


Latin Americans Embrace Facebook as Top Social Networking Destination

Facebook.com is a strong leader in the Latin American social networking market reaching more than 91 million visitors in June, up 52 percent in the past year. The Facebook.com audience was nearly three times the size of the next largest site, Windows Live Profile, which reached 35.6 million visitors in the region. Orkut held the #3 spot with 34.4 million visitors, driven largely by the site’s popularity in Brazil. Meanwhile, Twitter.com ranked as the fourth largest site with 24.3 million visitors (up 59 percent) as Latin Americans continued to embrace tweeting.

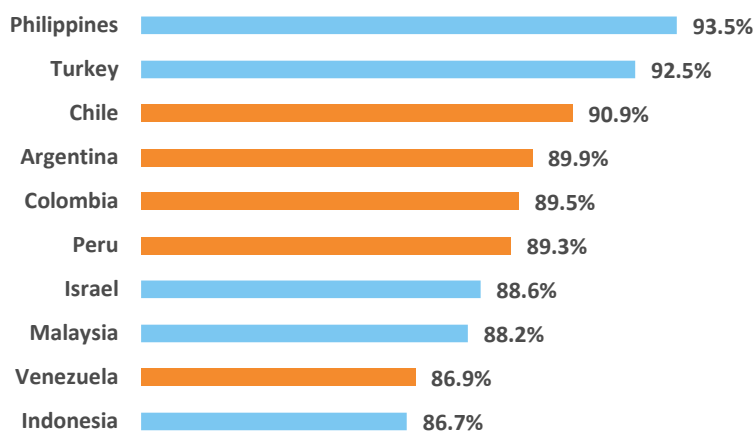
Top 10 Social Networking Sites by Visitors (000) in Latin America

Source: comScore Media Metrix, Jun-2011, Latin America Visitors Age 15+ Home/Work



Although the largest Facebook.com markets by audience size are the United States, Germany and India, many of the most highly penetrated markets for the social networking giant are in Latin America. In fact, five of the top 10 markets for Facebook.com penetration are in the region. Facebook.com reached 90.9 percent of all online users in Chile, ranking as the third most highly penetrated market globally behind the Philippines and Turkey. Argentina, Colombia and Peru immediately followed Chile, with all markets seeing Facebook.com reach more than 89 percent of their Internet populations, while the site reached 86.9 percent of online users in Venezuela.

Top 10 Markets for Facebook.com by % Reach of Visitors
 Source: comScore Media Metrix, Jun-2011, Argentina Visitors Age 15+ Home/Work Location



Market Highlights

In this section we will examine the leading social networking trends across individual markets in Latin America with analysis for Brazil, Mexico, Argentina, Chile, Venezuela, Peru and Colombia.

Brazil: Orkut Leads the Market, but Facebook Growing Fast

Brazil is home to 43.9 million social networking visitors (June 2011), reaching 90.8 percent of the entire online population. A total of 12.5 billion minutes were spent on social networking sites in June, accounting for 18.3 percent of all online minutes during the month. A social networker averaged 4.7 hours on these sites during the month, ranking as one of the most engaging online activities.



Brazil Social Networking Snapshot

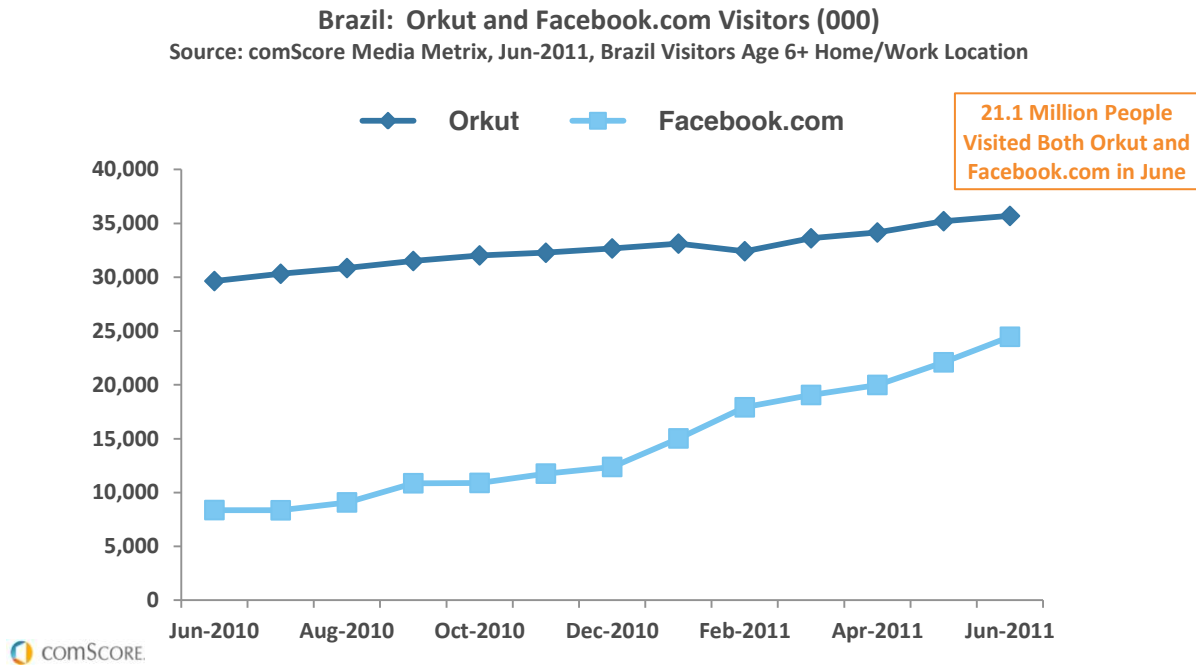
Source: comScore Media Metrix, Jun-2011, Brazil Visitors Age 6+ Home/Work Location

43.9 Million	Total Social Networking Audience
90.8%	Online Population Visiting Social Networks
12.5 Billion	Total Minutes for Social Networking Category
18.3%	Percent of all Online Minutes
4.7 Hours	Average Time Spent per Visitor during Month
Orkut	Top Social Networking Site

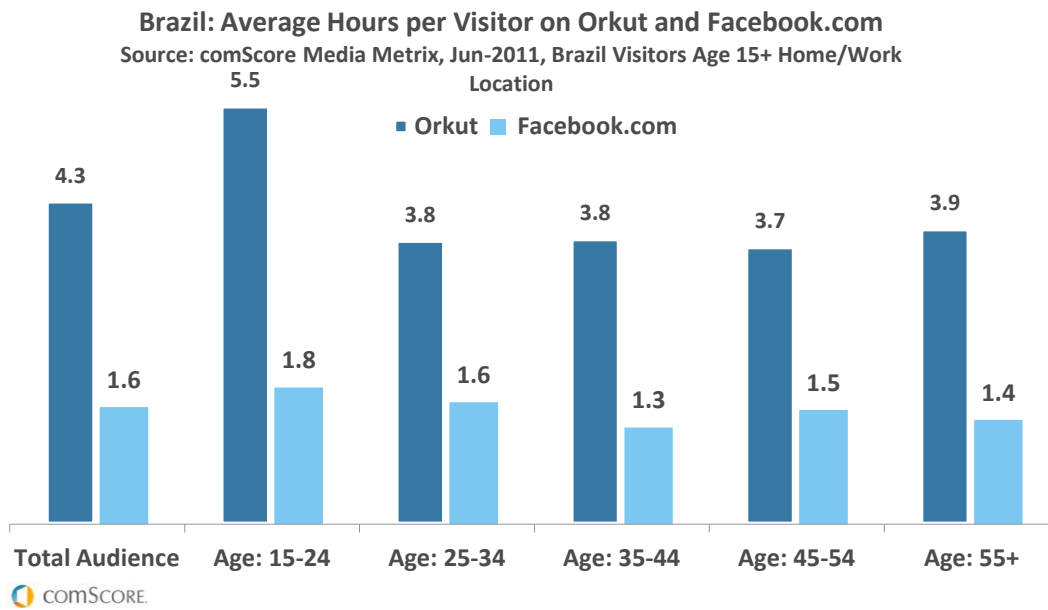
Brazil is home to one of the most unique social networking environments in the world – and one of the few market where Facebook.com does not lead the Social Networking category. This leading position has been held by Orkut, a Google-owned social networking destination that built large audiences bases both in Brazil and India. Orkut ranked as the most-visited social networking destination in June 2011 with 35.7 million visitors, an increase of 20 percent from last year. Facebook.com, which is the second largest social networking site in Brazil, witnessed exceptionally strong growth as it surged 192 percent to 24.5 million visitors in June 2011. Windows Live Profile secured the #3 spot with 14.6 million visitors, while Twitter.com reached 12 million visitors as the fourth largest social networking site.



Although Orkut still maintains a relatively wide lead ahead of Facebook.com in Brazil, Facebook.com is quickly gaining on the market’s leading brand. In the past year, Facebook.com has seen its Brazilian audience grow from just 8 million visitors to more than 24 million visitors. An analysis of cross visitation between the two sites shows that 21.1 million people visited **both** Orkut and Facebook.com during June 2011. This demonstrates that many consumers are adding Facebook.com to their existing social networking portfolio, but may not be ready to choose one brand over the other as their primary social network.



When looking at engagement in Brazil, Orkut visitors are still far more engaged compared to Facebook visitors, highlighting Orkut's history as the social networking leader in this market. An average visitor to Orkut spent 4.3 hours on the site in June 2011, while a visitor to Facebook.com spent 1.6 hours during the month. Visitors age 15-24 averaged the most time on both Orkut (5.5 hours) and Facebook.com (1.8 hours).



Mexico: Online Video Plays a Role in Social Networking

Mexico is home to 20.7 million social networking visitors, representing 90.8 percent of the entire online population. A total of 8.8 billion minutes were spent on social networking sites in June, accounting for 27.1 percent of all online minutes, with an average visitor spending 7.1 hours on these sites during the month.



Mexico Social Networking Snapshot

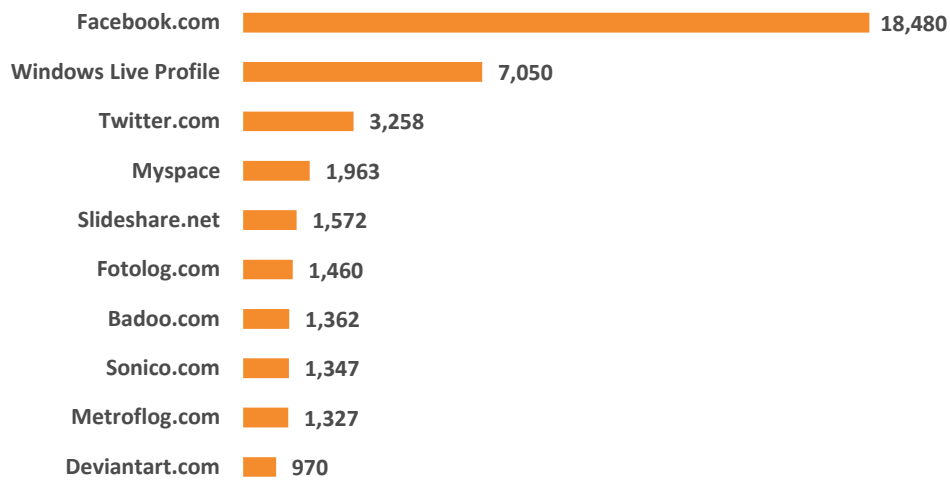
Source: comScore Media Metrix, Jun-2011, Mexico Visitors Age 6+ Home/Work Location

20.7 Million	Total Social Networking Audience
90.8%	Online Population Visiting Social Networks
8.8 Billion	Total Minutes for Social Networking Category
27.1%	Percent of all Online Minutes
7.1 Hours	Average Time Spent per Visitor during Month
Facebook	Top Social Networking Site

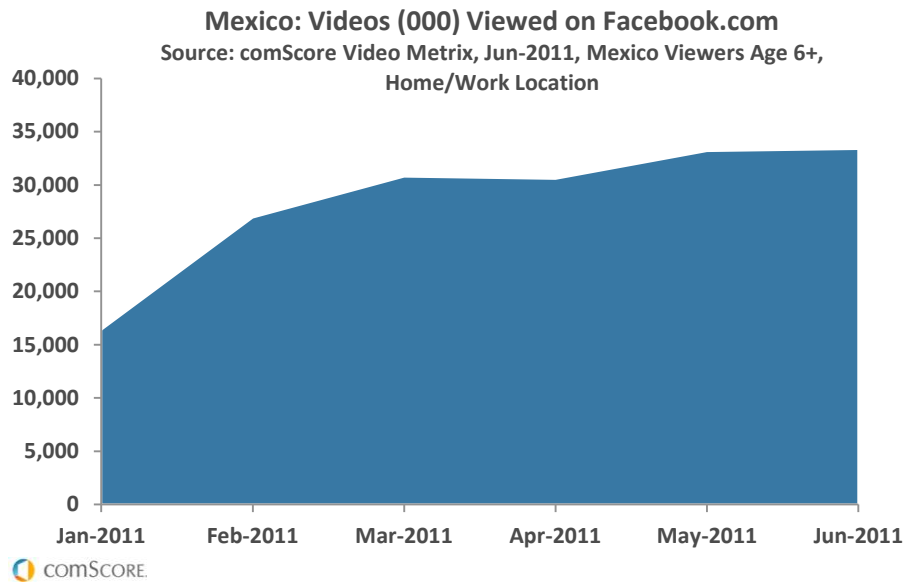
The Social Networking category was led by Facebook.com in Mexico, which grew 62 percent in the past year to 18.5 million visitors in June 2011. Windows Live Profile ranked as the second largest site in the market with 7 million visitors, followed by Twitter.com which reached nearly 3.3 million visitors (up 37 percent).

Mexico: Top 10 Social Networking Sites by Visitors (000)

Source: comScore Media Metrix, Jun-2011, Mexico Visitors Age 6+ Home/Work Location



Video viewing continues to be a popular and growing activity across Mexico with four out of five online users viewing online video during June at an average of 10 hours of viewing during the month. One of the top properties for video viewing in Mexico is Facebook.com, which saw viewers watch a total of 33 million videos on the site during June 2011, more than doubling since January 2011 as visitors grew increasingly engaged with video content on the social networking site.



Argentina: The Most Engaged Social Networking Market in Latin America

An average social networking visitor in Argentina averaged 10 hours per month on social networks, making it the most engaged population of social media users in the region and the third most engaged market in the world. In June, 12.5 million people visited a social networking destination in Argentina, reaching 95.4 of the entire online market.



Argentina Social Networking Snapshot

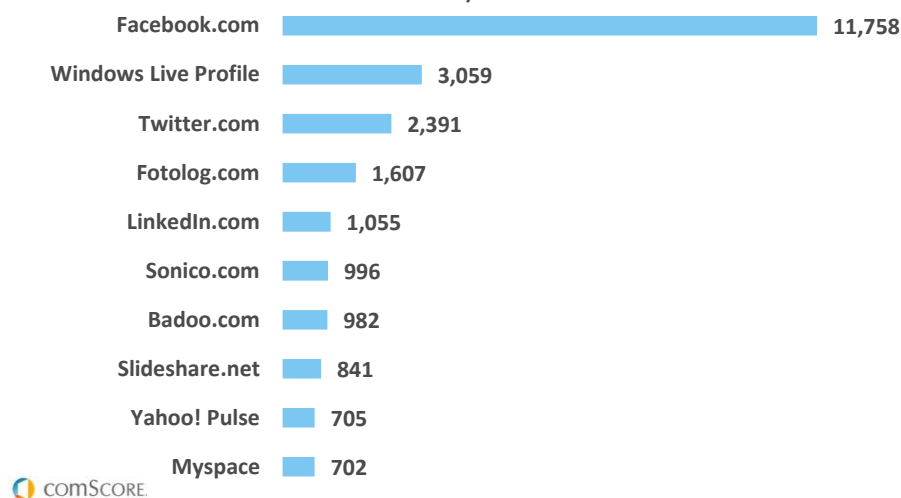
Source: comScore Media Metrix, Jun-2011, Argentina Visitors Age 15+ Home/Work Location

12.5 Million	Total Social Networking Audience
95.4%	Online Population Visiting Social Networks
7.5 Billion	Total Minutes for Social Networking Category
32.2%	Percent of all Online Minutes
10.0 Hours	Average Time Spent per Visitor during Month
Facebook	Top Social Networking Site

Facebook.com topped the list as the most-visited social network in Argentina with 11.8 million visitors in June 2011, followed by Windows Live Profile with 3 million visitors. Twitter.com ranked third with 2.4 million visitors, while Fotolog.com reached 1.6 million visitors and professional social networking site LinkedIn topped 1 million visitors during the month.

Argentina: Top 10 Social Networking Sites by Visitors (000)

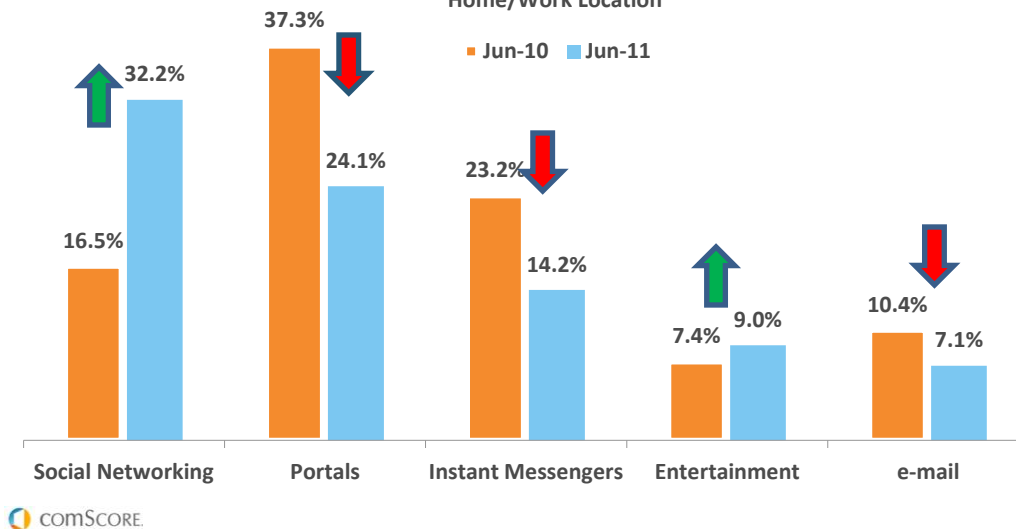
Source: comScore Media Metrix, Jun-2011, Argentina Visitors Age 15+ Home/Work Location



In Argentina, social networking accounted for the largest share of online minutes at 32.2 percent in June 2011, nearly doubling from its share from last year. The growth in share of minutes for the Social Networking category has largely come at the expense of Portals, which were the top category by total minutes last year, but have sharply declined in share in the past year, currently accounting for 24.1 percent of total time spent online. Instant Messengers also saw their share of minutes decline from 23.2 percent in June 2010 to 14.2 percent share in June 2011. As more online users continue to seek leisure content online, the Entertainment category grew to 9.0 share of total minutes, while E-mail witnessed a slight decline to 7.1 percent share.

Argentina: Top Categories by Share of Total Online Minutes

Source: comScore Media Metrix, Jun-2011, Argentina Visitors Age 15+ Home/Work Location



Chile: The Most Highly Penetrated Market in Latin America for Facebook

In June 2011, 6.9 million Chileans visited a social networking site, representing 94.0 percent of the online population. Social networking accounted for 32.2 percent of time spent online during the month with visitors averaging 8.7 hours social networking in this highly engaged market.

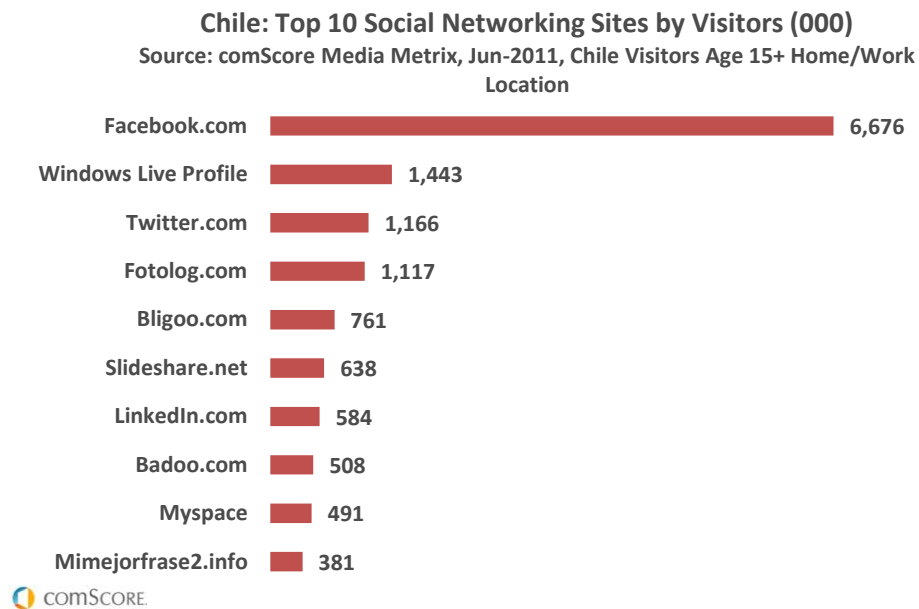


Chile Social Networking Snapshot

Source: comScore Media Metrix, Jun-2011, Chile Visitors Age 15+ Home/Work Location

6.9 Million	Total Social Networking Audience
94.0%	Online Population Visiting Social Networks
3.6 Billion	Total Minutes for Social Networking Category
32.2%	Percent of all Online Minutes
8.7 Hours	Average Time Spent per Visitor during Month
Facebook	Top Social Networking Site

The social networking markets in Chile and Argentina closely resemble one another. In Chile, Facebook.com led the category with 6.7 million visitors, up 8 percent from the previous year. The social networking giant reached 90.9 percent of all Chileans online, ranking as the most highly penetrated market in Latin America and #3 market globally for Facebook.com penetration. Windows Live Profile secured the #2 position with 1.4 million visitors, while Twitter reached nearly 1.2 million visitors to rank as the third largest social networking destination in the market. Fotolog.com’s audience hit 1.1 million visitors, reaching 15.2 percent of Chileans online, the top market globally for penetration of this photo-blogging site.



Venezuela: Twitter Usage Continues to Soar

Venezuela is home to one of the most highly penetrated social networking markets in the region with 96.0 percent (3.1 million people) visiting social networks in June 2011. Social networking accounted for 34.7 percent of all online minutes in Venezuela with visitors averaging 8 hours on these sites during the month.



Venezuela Social Networking Snapshot

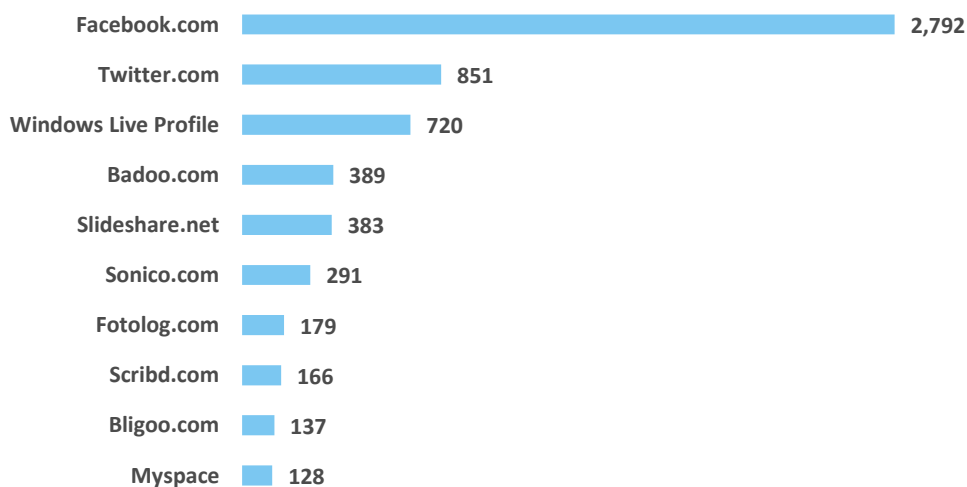
Source: comScore Media Metrix, Jun-2011, Venezuela Visitors Age 15+ Home/Work Location

3.1 Million	Total Social Networking Audience
96.0%	Online Population Visiting Social Networks
1.5 Billion	Total Minutes for Social Networking Category
34.7%	Percent of all Online Minutes
8.0 Hours	Average Time Spent per Visitor during Month
Facebook	Top Social Networking Site

Facebook led the Venezuelan social networking market with 2.8 million visitors, growing 38 percent from the previous year. Twitter.com ranked as the second largest social networking site in the country, reaching 851,000 visitors. Venezuela is the only country in Latin America in which Twitter.com rises to the second place in the social networking ranking. Windows Live Profile ranked third with 720,000 unique visitors, followed by Badoo.com (389,000) and Slideshare.net (383,000).

Venezuela: Top 10 Social Networking Sites by Visitors (000)

Source: comScore Media Metrix, Jun-2011, Venezuela Visitors Age 15+ Home/Work Location

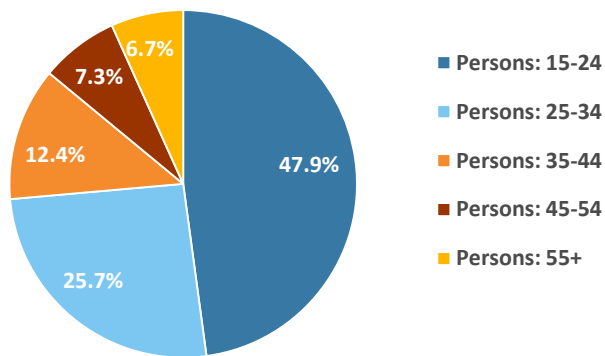


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One in four online users in Venezuela visited Twitter.com in June (26.5 percent reach), as Venezuelans exhibited a strong propensity to engage on the site. Venezuela ranked as the third most highly penetrated Twitter market worldwide behind the Netherlands and Brazil. Venezuela is home to a relatively young online audience (more than 70 percent of the online population is under age 35) and Twitter.com visitors resemble these age characteristics. Those age 15-24 accounted for nearly half (47.9 percent) of visitors to Twitter.com in June 2011, while persons age 25-34 accounted for 25.7 percent of visitors.

Venezuela: Twitter Demographic Percent Composition by Unique Visitors

Source: comScore Media Metrix, Jun-2011, Venezuela Visitors Age 15+ Home/Work Location



Peru: The Importance of Sharing

Peru’s social networking audience reached 4.0 million in June, or 96.0 percent of the online population. Nearly one in four online minutes was spent in the Social Networking category, representing 1.5 billion minutes in total.



Peru Social Networking Snapshot

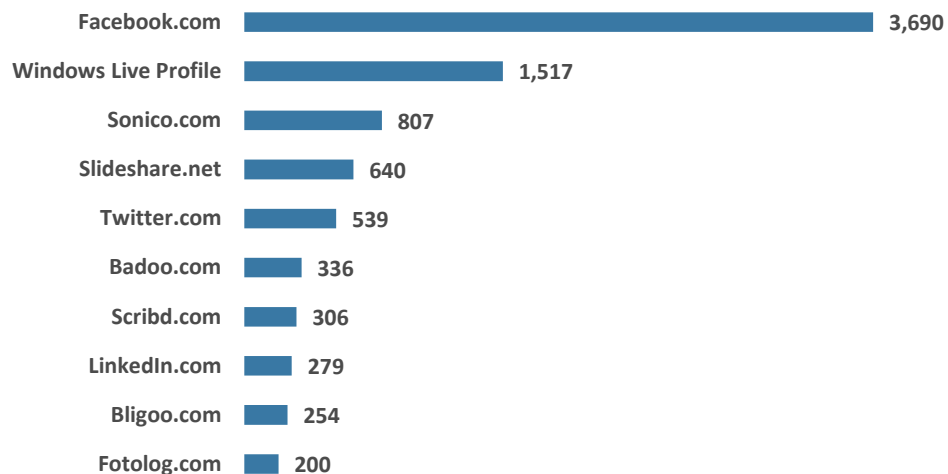
Source: comScore Media Metrix, Jun-2011, Peru Visitors Age 15+ Home/Work Location

4.0 Million	Total Social Networking Audience
96.0%	Online Population Visiting Social Networks
1.5 Billion	Total Minutes for Social Networking Category
22.3%	Percent of all Online Minutes
6.6 Hours	Average Time Spent per Visitor during Month
Facebook	Top Social Networking Site

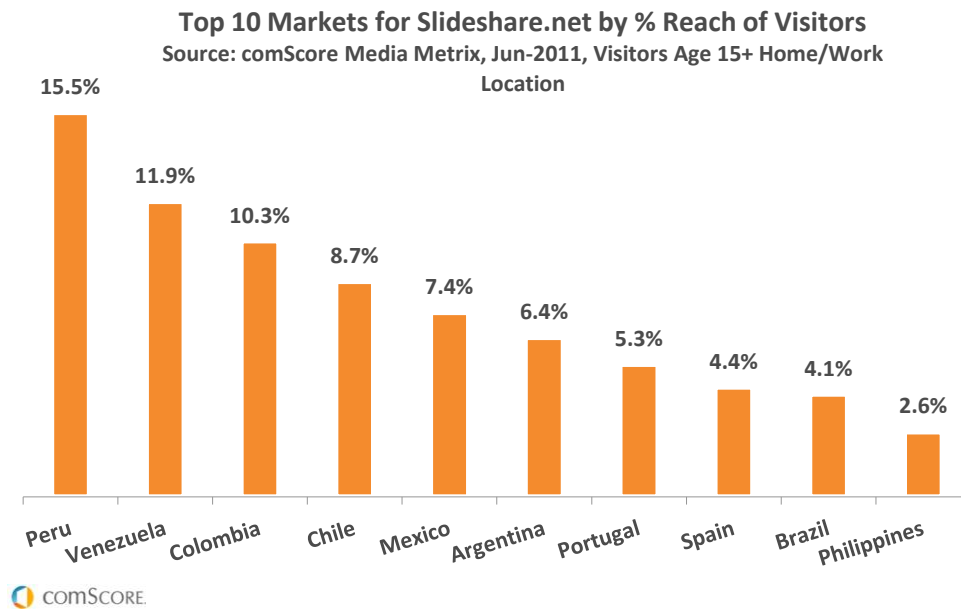
Facebook.com led the Peruvian market with 3.7 million visitors, followed by Windows Live Profile with 1.5 million visitors and Sonico.com with 807,000 visitors. Sonico reached nearly 20 percent of the online population in Peru, ranking as the top global market for the social networking brand in terms of penetration.

Peru: Top 10 Social Networking Sites by Visitors (000)

Source: comScore Media Metrix, Jun-2011, Peru Visitors Age 15+ Home/Work Location



Slideshare.net, the presentation sharing site, is incredibly popular among Latin American markets. Of the 10 most penetrated markets for Slideshare.net by percent reach of unique visitors, seven of the markets are in the Latin American region. Peru led all markets across the globe with 15.5 percent of its online audience visiting the site in June 2011, followed by Venezuela and Colombia, which both saw upwards of 10 percent of their online populations visit the site during the month.



Colombia: One-Third of Online Time Spent on Social Networks

In June, Colombia’s social networking audience reached 12.7 million visitors (96.0 percent) with users averaging 8.4 hours on these sites during the month. Social networking ranked as the top content category by share of minutes in Colombia with 32.1 percent of web time spent on social networking sites.



Colombia Social Networking Snapshot

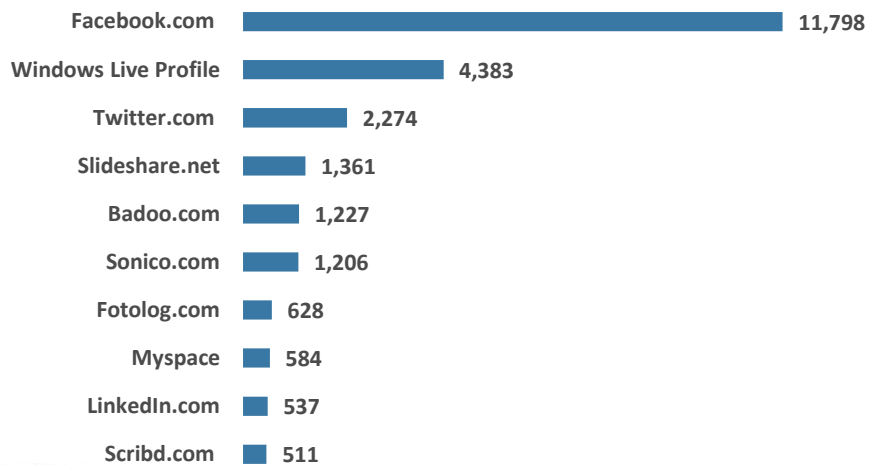
Source: comScore Media Metrix, Jun-2011, Colombia Visitors Age 15+ Home/Work Location

12.7 Million	Total Social Networking Audience
96.0%	Online Population Visiting Social Networks
6.4 Billion	Total Minutes for Social Networking Category
32.1%	Percent of all Online Minutes
8.4 Hours	Average Time Spent per Visitor during Month
Facebook	Top Social Networking Site

In June, 11.8 million Colombians visited Facebook.com, growing 26 percent from the previous year. Windows Live Profile followed as the second largest social network with 4.4 million visitors, while Twitter.com ranked third with 2.3 million visitors, more than doubling in the past year as more Colombians embraced interacting in 140 characters or less.

Colombia: Top 10 Social Networking Sites by Visitors (000)

Source: comScore Media Metrix, Jun-2011, Colombia Visitors Age 15+ Home/Work Location



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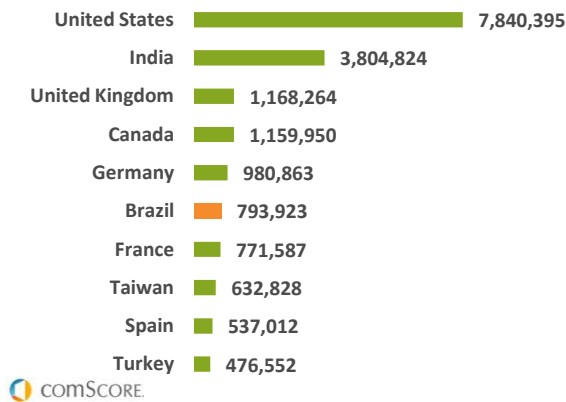
Google+ Makes a Splash Worldwide

Analysis of the social networking market would not be complete without a look at the latest edition to the global social networking stage: Google+. Google’s recently launched social networking site has been met with positive reception across many global markets. In the first 33 days of its public existence (June 29, 2011 to July 31, 2011) nearly 28 million people worldwide visited Google+, an impressive number for its first month on the market. The U.S. led all markets for visitors to Google+ with 7.8 million visitors, followed by India with 3.8 million visitors and the UK with more than 1.1 million visitors. Brazil ranked as the sixth largest market for the site, contributing 793,923 visitors.

Looking across Latin America, Mexico saw the largest audience for Google+ behind Brazil with 308,369 visitors, followed by Argentina (213,362 visitors) and Chile (201,572 visitors). Audience adoption of Google+ will be an important trend to watch for the remainder of the year and into 2012, as the site attempts to break into the well-established social networking market.

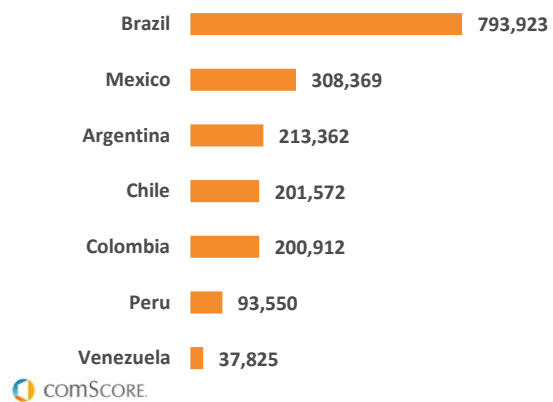
Top 10 Markets for Google+ by Visitors

Source: comScore, Worldwide Home and Work Computers, June 29, 2011 - July 31, 2011



Google+ Visitors in Latin America

Source: comScore, Worldwide Home and Work Computers June 29, 2011 - July 31, 2011

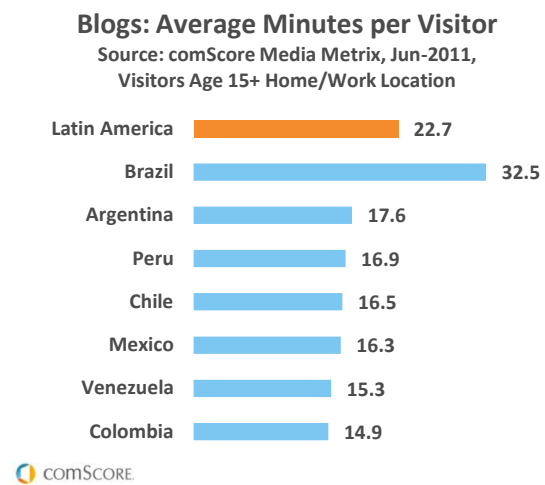
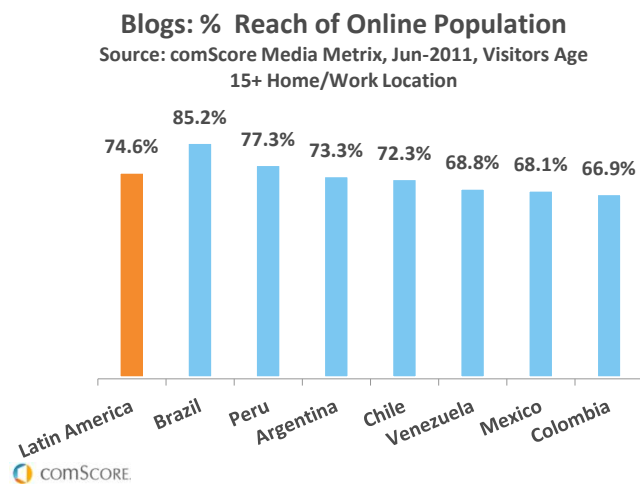


A Social Web

The social aspect of Latin America’s online environment is not only apparent through the popularity of social networking, but also through other socially-based categories such as blogs, personals, group-buying and classifieds, which are also helping to shape the online experience.

3 of 4 Latin American Online Users Visit Blogs

Blogs, which are the closest relative of social networking in terms of their conversational nature, are readily embraced in Latin America. In June 2011, nearly 75 percent of the regional audience accessed the Blogs category, averaging 22.7 minutes during the month. By far, Brazil was the most prolific market for Blogs with 85.2 percent of its audience visiting the category for an average of 32.5 minutes per visitor in June.

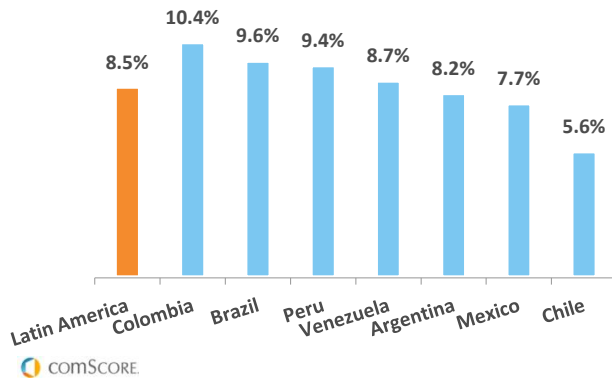


Colombians Lead Region in Online Dating

Seeking a connection on a more romantic level, 8.5 percent of Latin Americans online turned to Personals sites during June 2011. Colombians demonstrated the greatest adoption of Personals sites with 10.4 percent of the country’s online population visiting the category during the month, spending an average of 48.1 minutes.

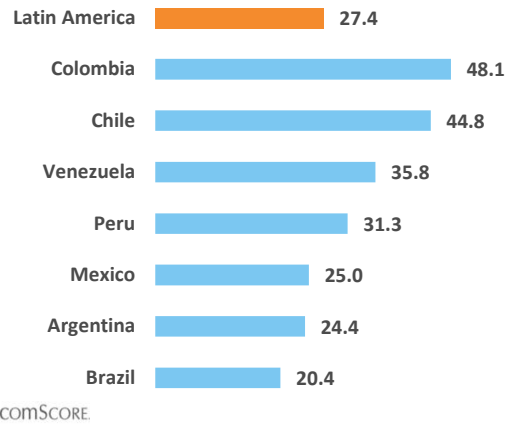
Personals: % Reach of Online Population

Source: comScore Media Metrix, Jun-2011, Visitors Age 15+ Home/Work Location



Personals: Average Minutes per Visitor

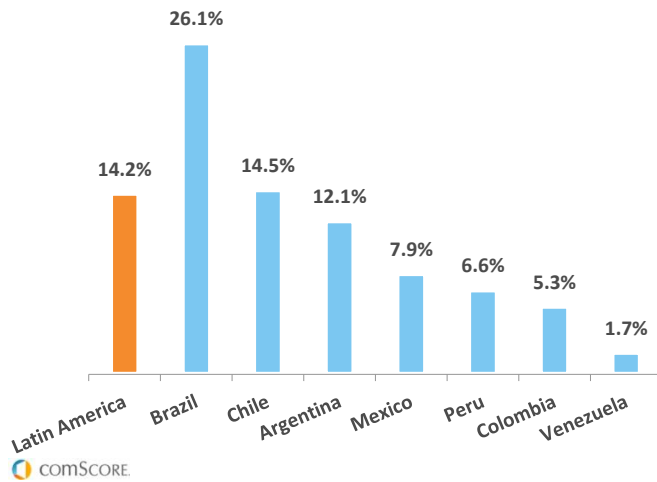
Source: comScore Media Metrix, Jun-2011, Visitors Age 15+ Home/Work Location



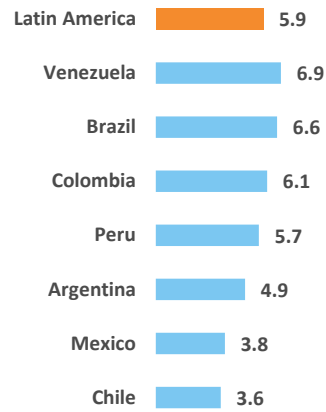
Brazilians Most Likely To Access Coupon Sites

Coupon sites, specifically group-buying/daily deal sites, have started to take off across Latin America adding a social angle to online shopping and deal-hunting. In June, 14.2 percent of regional visitors accessed the Coupon category, with Groupon leading the region with 4.7 million visitors. Brazil far surpassed all markets in the region with one-fourth of its audience turning to coupon sites during the month. Although Groupon leads as the top coupon destination in Brazil by visitors, the strong category usage in the market is fueled by a large number of local deal sites such as Clickon.com.br, Apontaofertas.com.br and Peixurbano.com.br to name a few, which are providing multiple options for the deal savvy consumer.

Coupons: % Reach of Online Population
 Source: comScore Media Metrix, Jun-2011, Visitors Age 15+ Home/Work Location



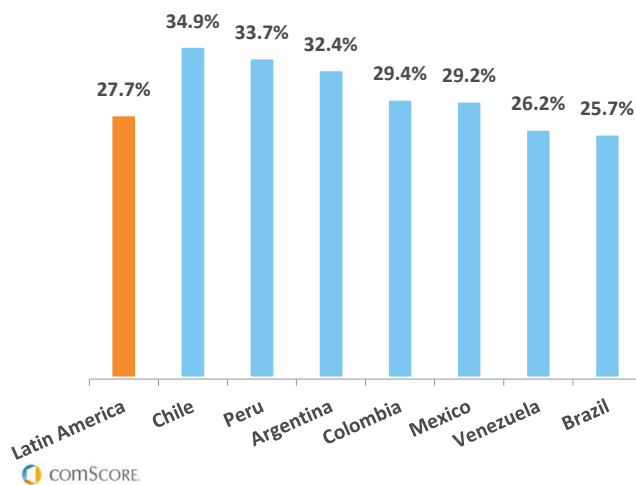
Coupons: Average Minutes per Visitor
 Source: comScore Media Metrix, Jun-2011, Visitors Age 15+ Home/Work Location



Chileans Connect via Classifieds

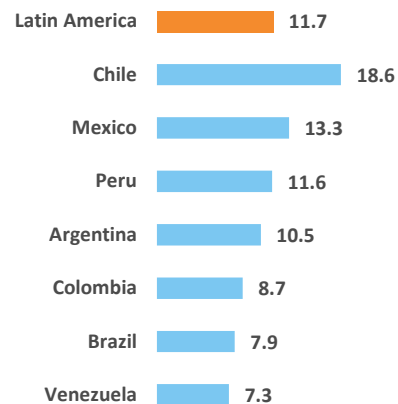
In June, 27.7 percent of the region’s online population connected via Classifieds sites at an average of 11.7 minutes per visitor during the month. OLX, Inc. led the category with nearly 19 million visitors. Chileans displayed the strongest interest in Classifieds with nearly 35 percent of country’s online audience visiting these sites during the month, at an average of 18.6 minutes per visitor.

Classifieds: % Reach of Online Population
 Source: comScore Media Metrix, Jun-2011, Visitors Age 15+ Home/Work Location



Classifieds: Average Minutes per Visitor

Source: comScore Media Metrix, Jun-2011, Visitors Age 15+ Home/Work Location



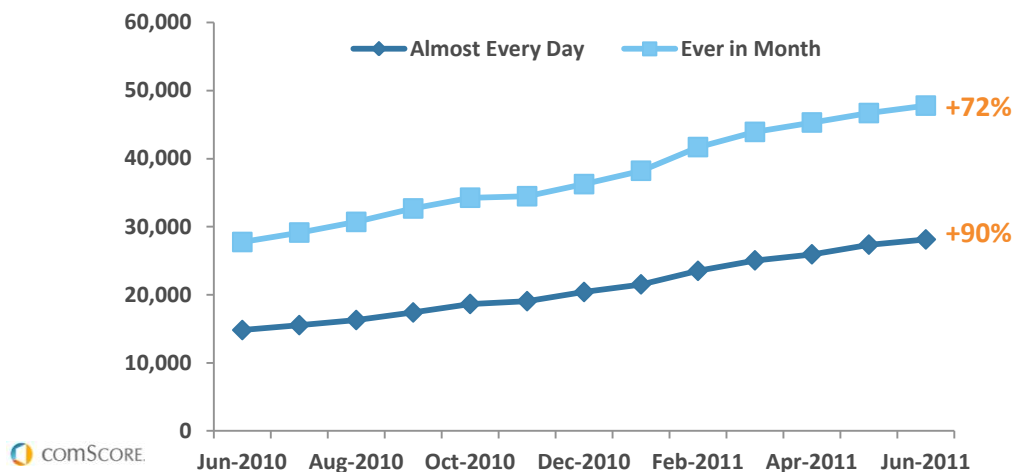
Social Networking On-The-Go

Mobile Users Adopt Social Networking on their Handheld Devices

With the growth in smartphone adoption, mobile social networking has seen substantial growth in the past year as consumers stay socially connected while on-the-go. While comScore does not currently measure mobile usage in Latin America through its MobiLens product, analysis of relevant behaviors in the U.S. and Europe are likely to reflect the broader global trends in mobile social networking adoption.

In the U.S., three of every five smartphone owners accessed social networking or blog destinations on their mobile for the three-month average period ending June 2011, ranking as one of the most popular mobile activities. The number of smartphone users accessing social networking or blog destinations on their mobile (both browser and app) has grown 72 percent in the past year to reach an audience of 47.8 million visitors. Those users accessing social network or blogs almost daily meanwhile nearly doubled, growing 90 percent to 28.1 million smartphone users.

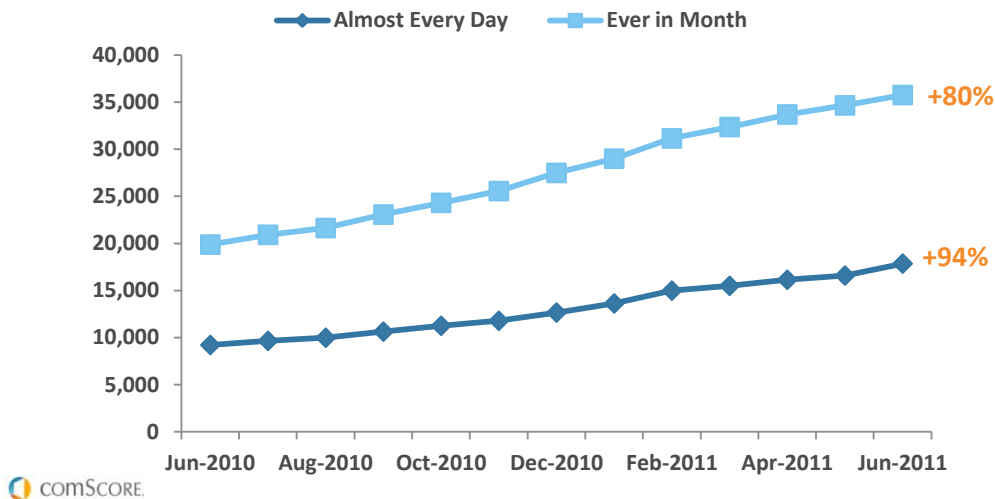
U.S. Smartphone Users (000) that Accessed Social Networking/Blog
 Source: comScore MobiLens, 3 mon. avg. ending Jun-2010 to Jun-2011, Smartphone Audience Age 13+ U.S.



In Europe, which includes the UK, France, Germany, Italy and Spain for this analysis, mobile social networking usage displayed similar trends to the U.S. with 2 of every 5 smartphone owners accessing these sites during the month. More than 35.7 million smartphone owners in Europe accessed social networking or blog destinations on their mobile, an increase of 80 percent from the previous year. Daily usage surged as well with 17.9 million smartphone users accessing social sites on their device almost daily in Europe, climbing 94 percent.

Europe Smartphone Users (000) that Accessed Social Networking/Blog

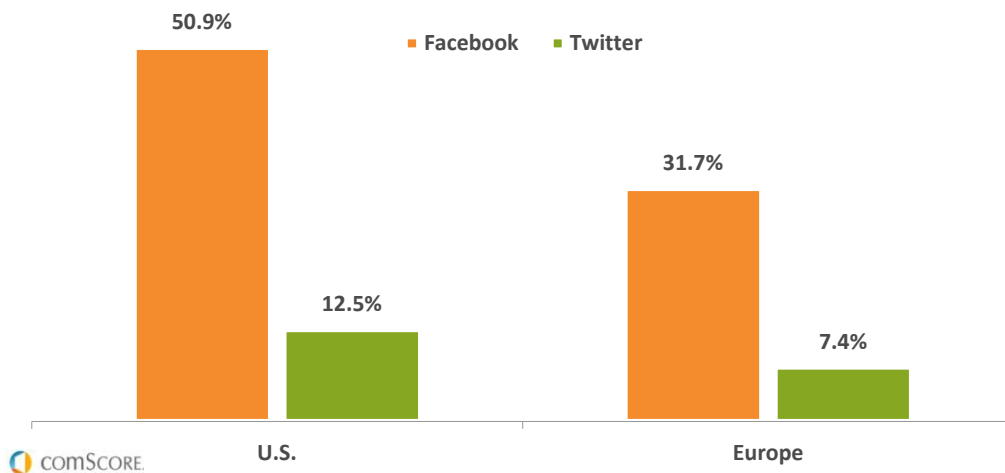
Source: comScore MobiLens, 3 mon. avg. ending Jun-2010 to Jun-2011, Smartphone Audience Age 13+ Europe



Facebook and Twitter are among the largest social networking sites globally and both brands have developed a growing mobile audience as well. Half of U.S. smartphone owners and 31.7 percent of European smartphone owners accessed Facebook on their device in June 2011, demonstrating the brand’s wide reach across digital platforms. Meanwhile, Twitter reached 12.5 percent of the smartphone audience in the U.S. and 7.4 percent of the European smartphone audience

% Reach of Facebook and Twitter Among Smartphone Audiences

Source: comScore MobiLens, 3 mon. avg. ending Jun-2011, Smartphone Audience Age 13+ U.S. and Europe



The Role of Social Networking in the Marketing Mix

Facebook Offers Global Marketing Channel for Brands

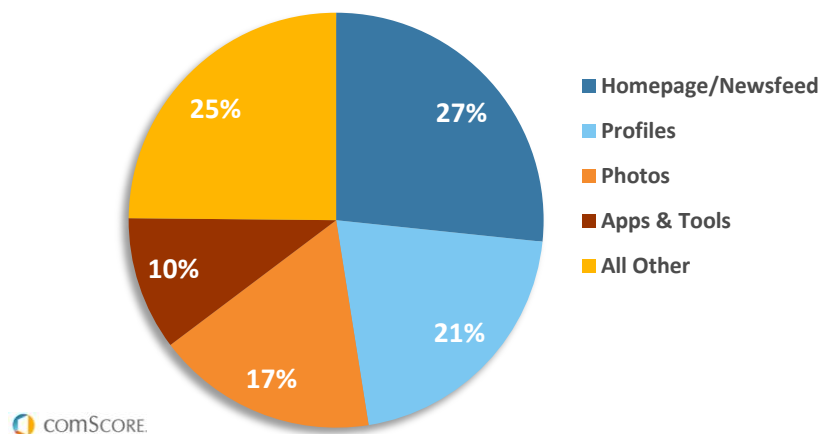
Social media has emerged over the past several years to redefine the digital media landscape and, in the process, has changed the way we think about the dissemination of marketing messages.

In particular, Facebook has facilitated two unique consumer experiences of interest to brand marketers. First, the ability for consumers to identify brands of interest and connect with them has enabled sharing between brands and consumers in new ways: brands and their consumers can now create two-way relationships and share content, news, and feedback. Social media has also facilitated innovative ways of sharing information *about brands* between friends.

comScore recently released the study *The Power of Like: How Brands Reach and Influence Fans Through Social Media Marketing*, which provides an in-depth analysis of how social media brand impressions reach Fans and Friends throughout Facebook, as opposed to just on brand Fan pages. The study utilizes **comScore Social Essentials**, a breakthrough social measurement service that helps marketers quantify the value of social media in their marketing mix.

In the U.S., the largest portion of users' time spent within Facebook is on the individual's homepage which features the Newsfeed. In May 2011, 27 percent of engagement on Facebook.com occurred on the homepage and Newsfeed, followed by profile viewing (21 percent), photo viewing (17 percent) and usage of apps and tools (10 percent).

Share of Time Spent on Facebook.com by Content Section
Source: comScore Mediabuilder, U.S., May 2011



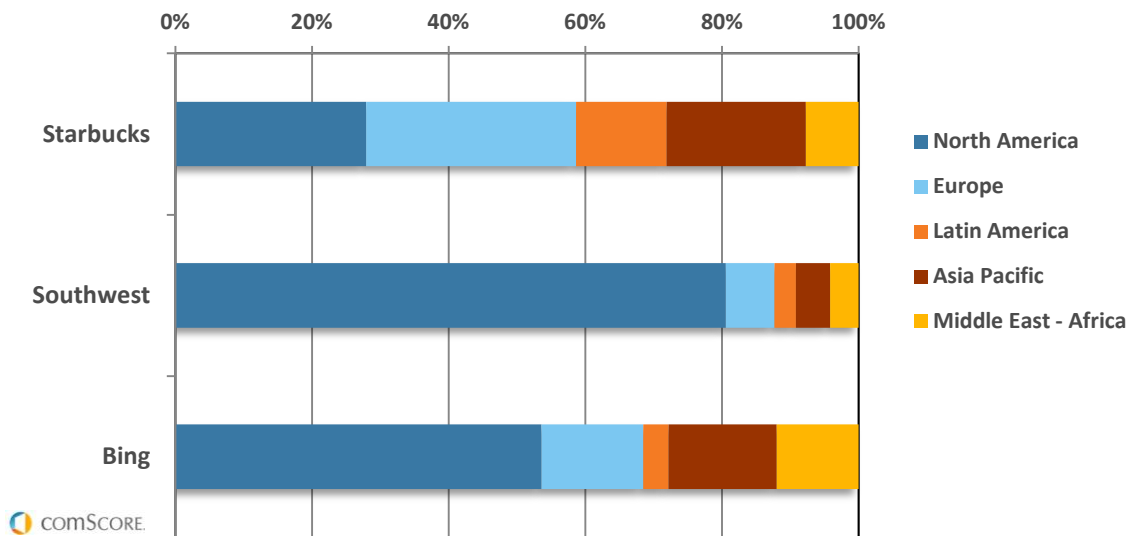
Understanding the importance of the Newsfeed to the Facebook user experience helps illustrate how and where users are likely to see and digest information on the site. This implication is especially important for brands with a presence on Facebook, since the Newsfeed offers the greatest opportunity to reach and engage with current and potential customers.

Facebook users demonstrate their affinity for brands through use of the “like” button. By “liking” a brand (also known as “becoming a Fan”) followers can affirmatively express their interest in a particular brand for reasons that may include self-expression, communicating positive associations of that brand to others, staying in communication with that brand, or receiving deals and promotions.

The chart below clearly illustrates how brands may be reaching Fans across the world with brand impressions on Facebook. Of the three brands analyzed, Starbucks had the most diverse base of exposed Fans across all five global regions, with Latin America accounting for 13.3 percent of the total. Southwest has a more concentrated Fan base, which is understandable as it is a U.S. airline. Bing – a global brand – enjoys a fairly diverse Fan base, though to a lesser extent than Starbucks. Starbucks, which boasts 5,500 coffee houses in more than 50 countries, is clearly capitalizing on Facebook as a global marketing channel. In May, Starbucks’ social media brand impressions reached more than 53 million people worldwide.

Starbucks, Southwest & Bing: Percentage of Exposed Fans by Worldwide Region

Source: comScore Social Essentials, U.S., May 2011



The Future of Social Networking in Latin America

Without a doubt, social networking is a key online activity across Latin America, demonstrated by its wide reach among online populations and its highly engaging nature. Consumer usage of social networking to interact with people and content across the web shows no signs of slowing any time in the near future and continues to weave itself more tightly into the fabric of the web.

For brands, social media provides a channel where they can actively engage with current and potential customers. Yet integrating social media into a brand's marketing strategy is not a one-size-fits-all solution and requires businesses to evaluate if social media is the ideal channel to reach their audience and achieve its marketing objectives, and if so, which social media channels are most valuable to their strategy. For many brands, social media affords an unprecedented opportunity to develop a two-way relationship with customers that can be a key source in building brand awareness, loyalty and even sales.

Only time will tell how the social networking landscape will develop in Latin America as new players enter the market and established brands seek to maintain audiences with new tools and features. It can safely be assumed though that social networking will remain an integral part of the digital environment for the foreseeable future as people continue to seek social connections on the web.

Data Notes and Sources

This report uses data from several comScore services including [comScore Media Metrix](#), [comScore Video Metrix](#), [comScore MobiLens](#), and [comScore Social Essentials](#).

The majority of data used in this report is sourced from comScore Media Metrix for the data period June 2011. Unless otherwise noted, all data pertains to Internet users age 15 and older, accessing the Internet on a PC or laptop from a Home or Work location. Data sourced from other comScore products are clearly noted in the relevant charts.

comScore accurately measures worldwide consumer behavior through its proprietary panel design, patented data capture technology, online data retrieval network and Unified Digital Measurement™ methodology. For more information on comScore's methodology, please visit: www.comscore.com.

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