



**REDES SOCIALES
EN LATAM - II**



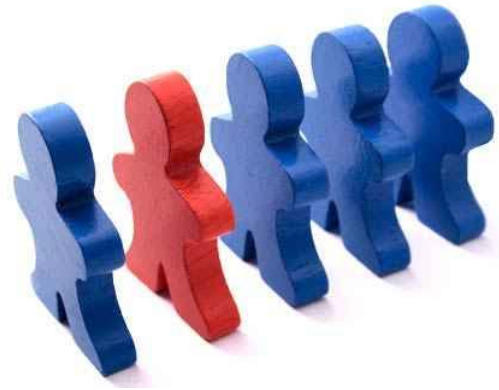
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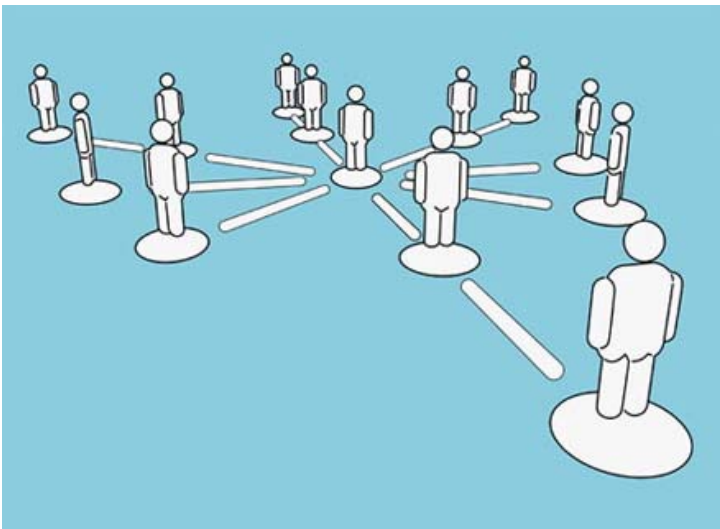
Social Networks in Latam (Second part)

According comScore estimations- March 2008 - the number of internet users in the 5 major countries of the region (Argentina, Brazil, Chile, Colombia and Mexico) are 47.5 million. If we also consider the Internet users in Puerto Rico and US Hispanics the number reach the 67.5 million.

During the month of March the number of unique visitors from 9 social networks we analyzed (bebo, Facebook, Friendster, hi5, myspace, Netlog, Orkut, Sonic and tagged) sum 37 million in these five countries in Latin America.



More than 65 million internet users in Latam, Puerto Rico and US Hispanics markets.



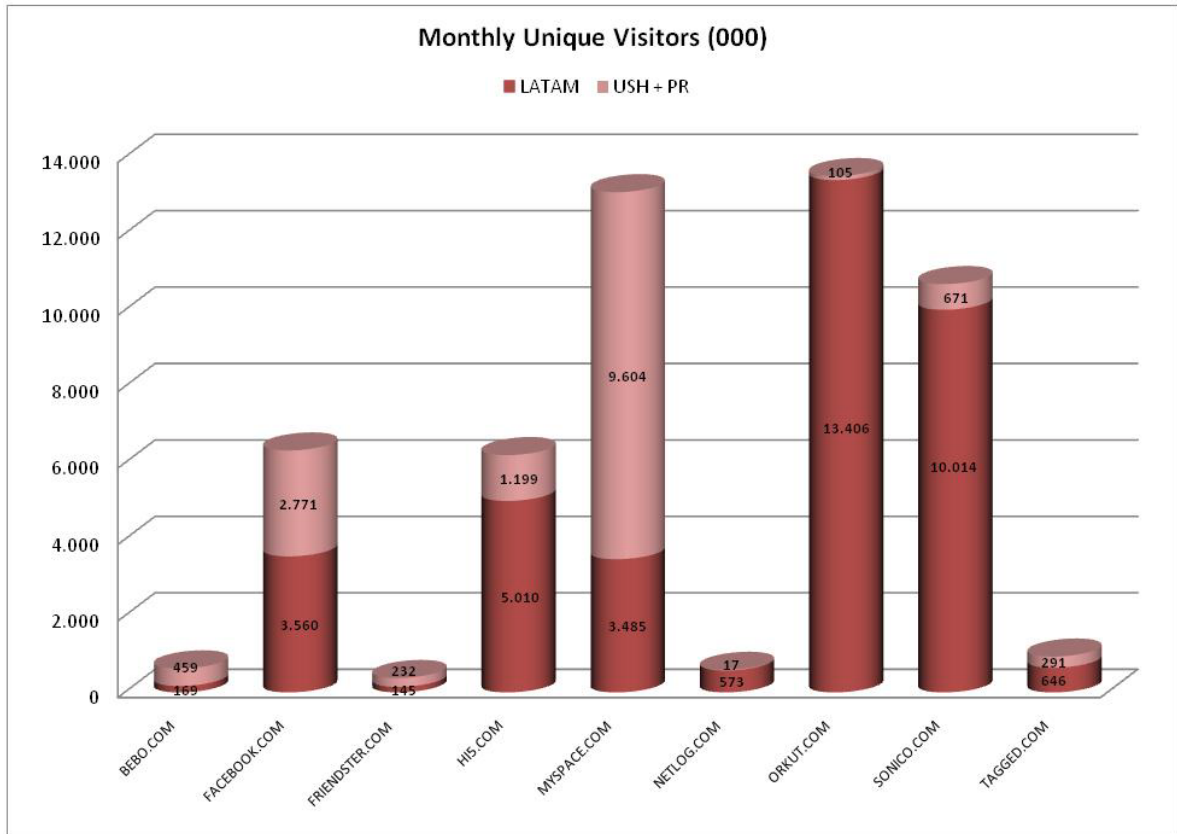
More than 37 million Social Networks users (image from Business week).

It is important to point out that persons that are using more than one of the above mentioned Social Networks are being counted several times, which means that if we had the chance of measuring "Social Networks" as a whole, the figure may be lower than 37 millions. Anyways we estimated that the penetration of Social Networks in

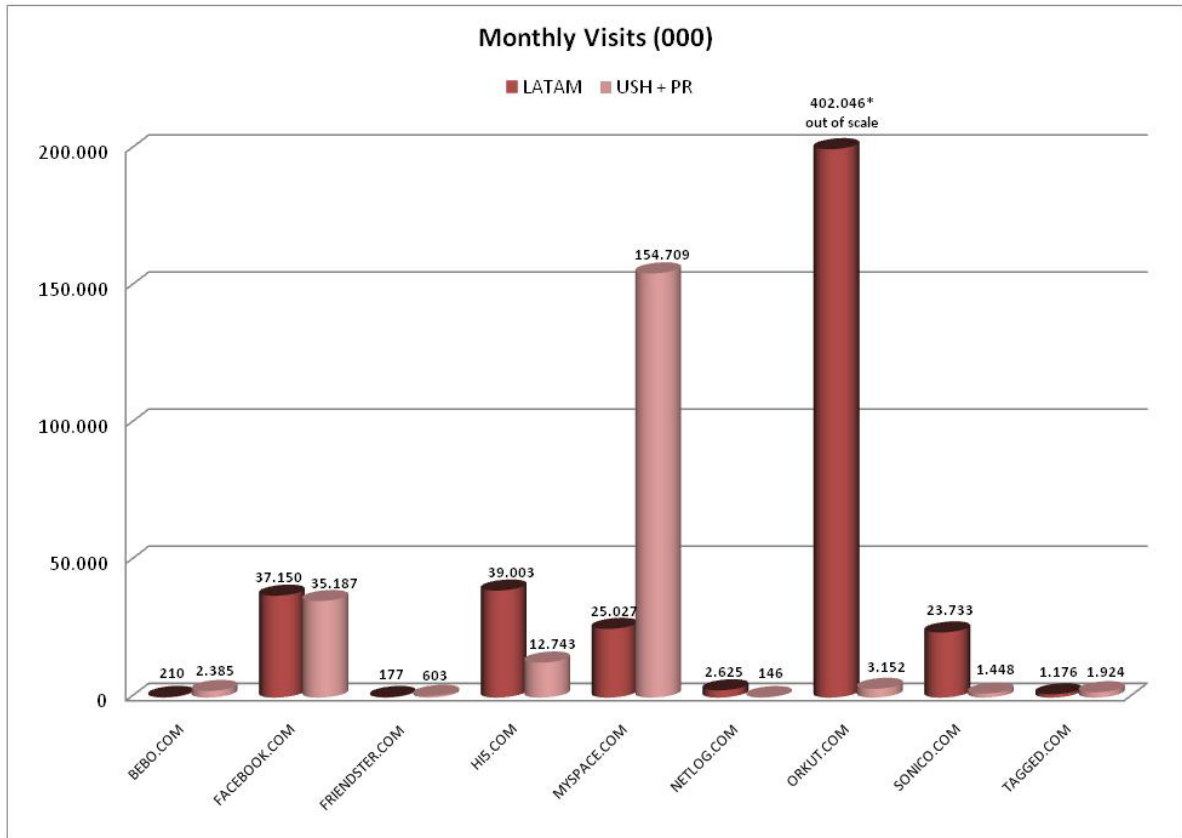
the above mentioned countries is nearly 78%.

Besides, the audience of these 9 Social Networks among US Hispanics and Puerto Ricans is 15.3 million (77%).

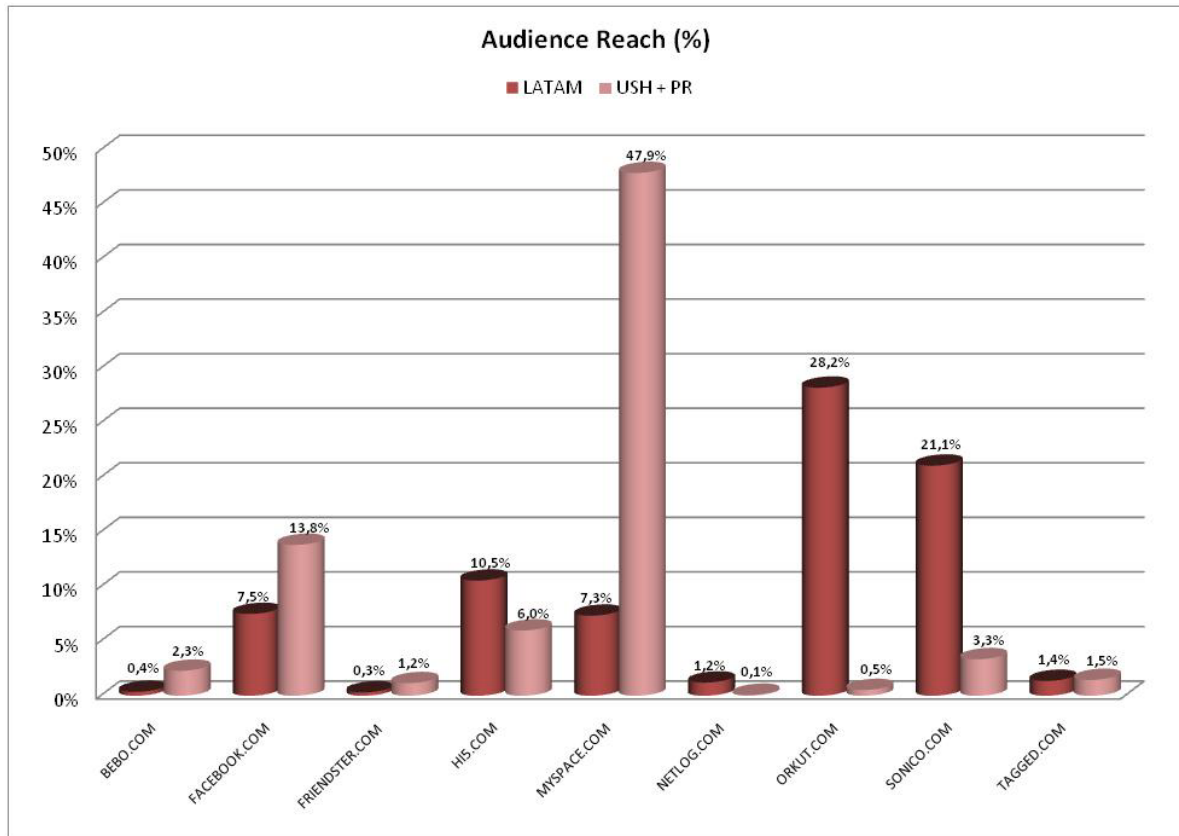
It is important to point out that since January 2008 Social Network users in Latin America increased by over 1.2 million (2.5%) while the US Hispanics and Puerto Rican markets slowed down.



Regarding the number of visits who received these social networks should be pointed out that Orkut received more than 400 million in March (more than two times higher than the second) followed by MySpace with 180 million visits. Fairly behind in terms of visits we find facebook with 72 million visits and hi5 with about 52 million.

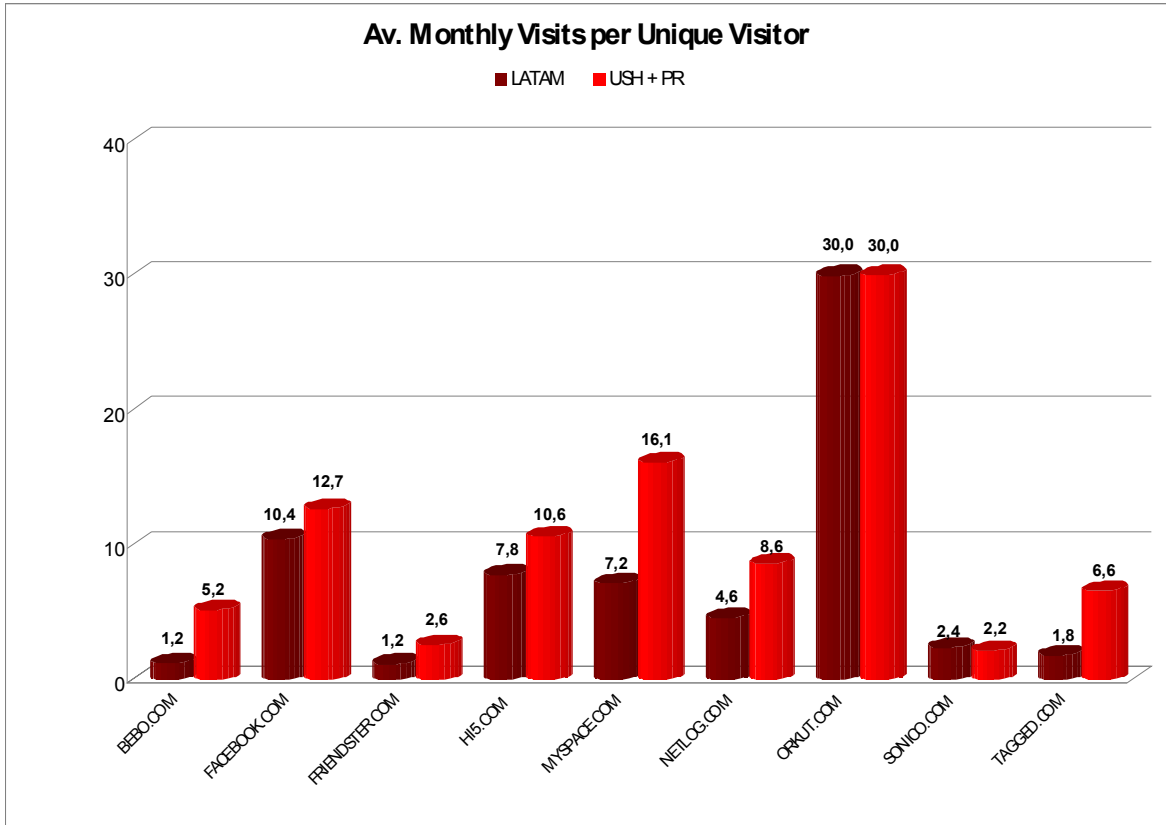


It is important to mention that not all the social networks have the same penetration among the analyzed markets; MySpace is preferred by US Hispanics and Puerto Ricans (48%). Some others are performs better in the analyzed Latin American markets (Argentina, Brazil, Chile, Colombia and Mexico) like Orkut (28%), and Sonico (21%).



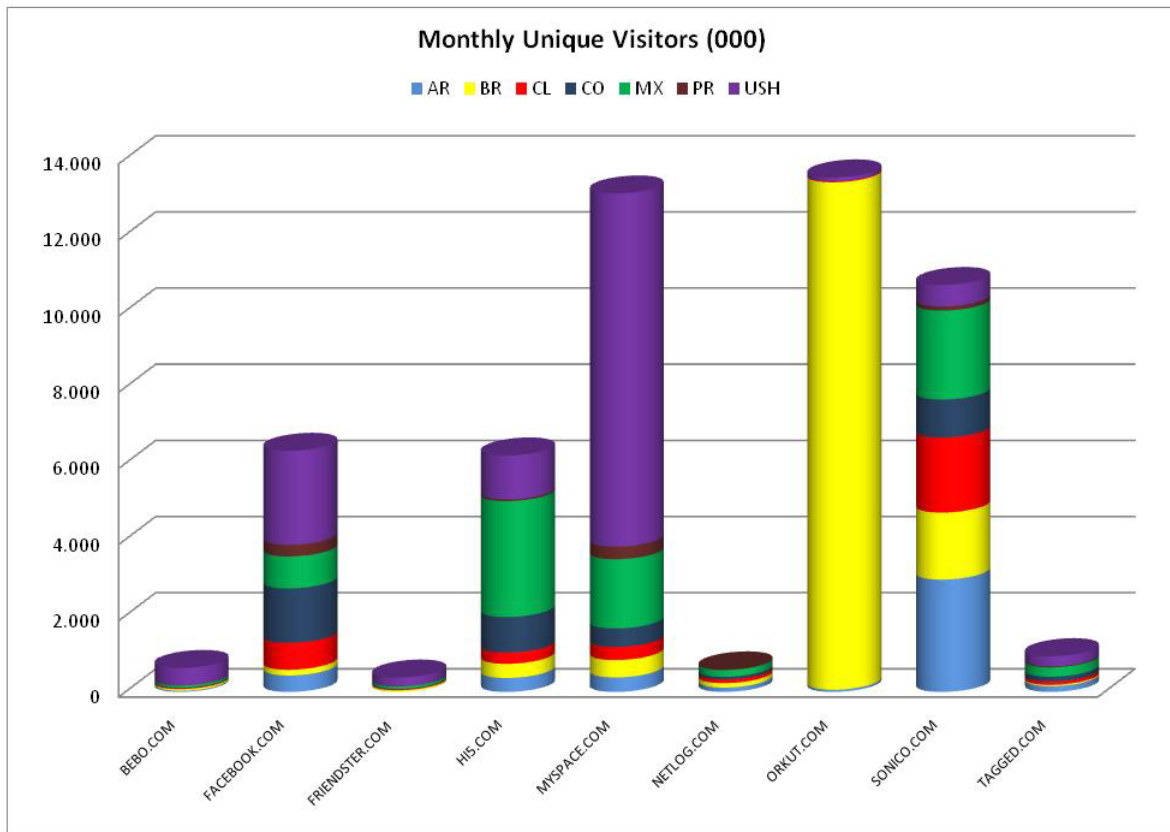
Another important aspect to be considered is that not all networks have a similar level of users interactivity, whereas the Latin American users of Orkut are the most active ones, with a monthly average of 30 visits, facebook (10.4), hi5 (7.8) and MySpace (7.2) have a three times lower interactivity level.

Even when the picture among US Hispanics and Puerto Ricans is quite similar the interactivity levels of Facebook and MySpace users is slightly higher than in Latin America. Orkut users visits the social network about 30 times a month (in average) while MySpace 16.1, facebook 12.7 and hi5 7,8 times.



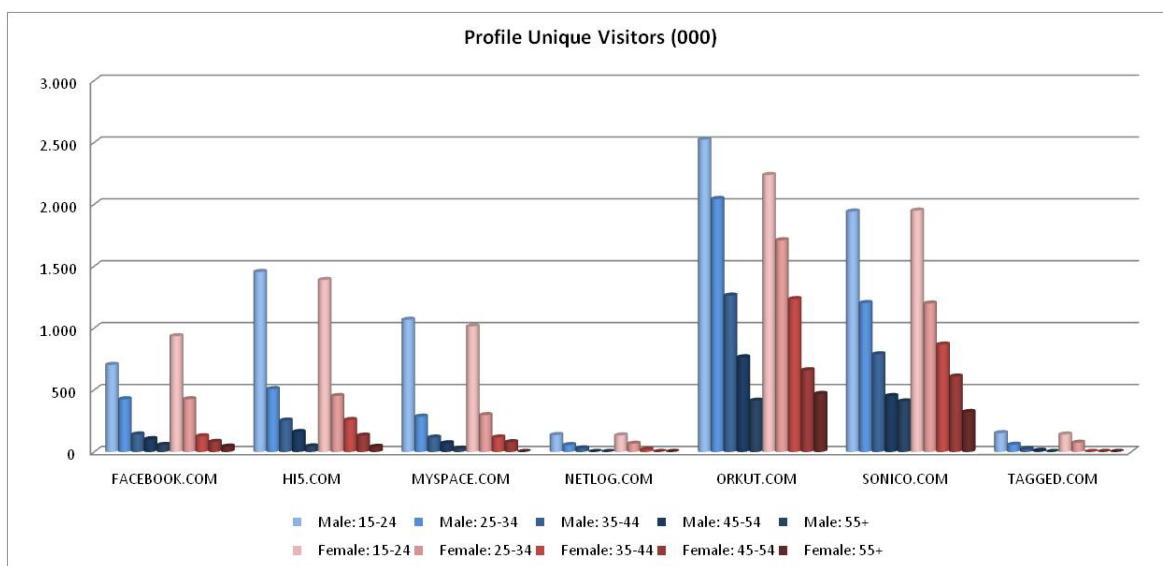
Social Networks Audience profile in Latam

As we noted in our previous Whitepaper, audiences used a Socio Cultural and Idiomatic criteria when choosing their social network, something that is mirrored in each social network user profile. Comparing with our previous report there is no change in the user distribution; Orkut dominates the Brazilian market, MySpace is the leader among US Hispanics, and Sonico is the social networks with highest South American traffic. Even when Mexicans have a stronger presence in hi5, they have also an important in MySpace and Sonico.



If we analyze the audience of each Social Network (internally, not comparing each other) we can emphasize that Orkut has an homogeneous geographical traffic since almost 99% of users are Brazilians. Bebo and MySpace users are also concentrated in one Geographical segment (even when less than Orkut) since their users are mainly US Hispanic (72% and 70% respectively). Finally it is also importante to point out that more than 50% of hi5 users are Mexicans.

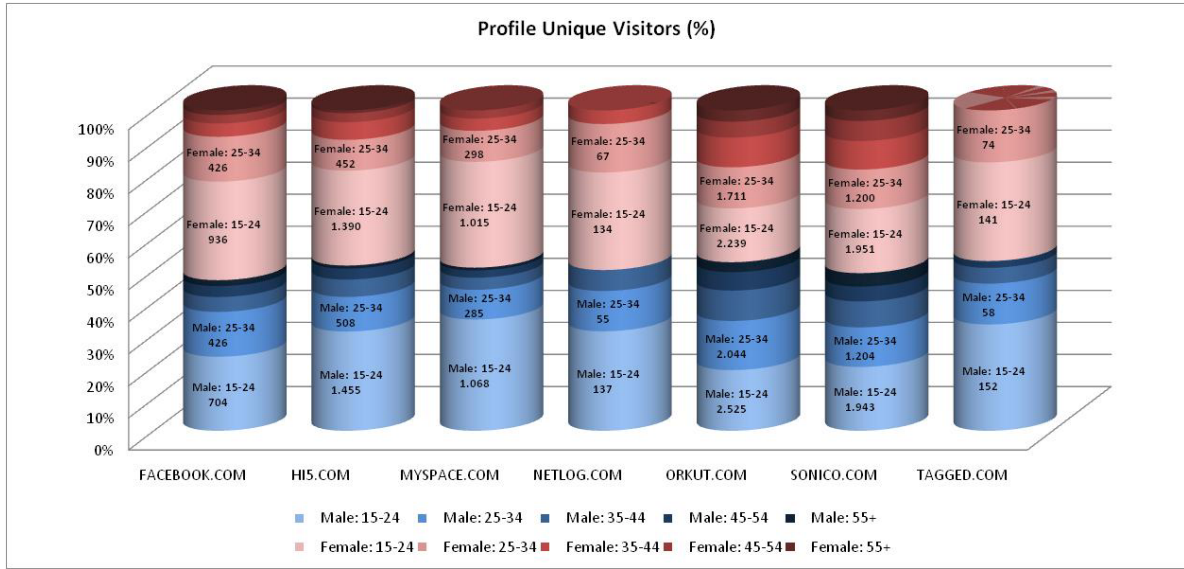
Sonico and Netlog are the Social Networks with a most heterogenuous distribution of traffic.



Another key aspect to be mentioned is the sex and age composition of Social Network users, but unfortunately it is not possible to have accurate data from Bebo and Friendster and therefore are not included in this analysis.

hi5.com and MySpace are networks with high prevalence of youth aged users (15-24) while Orkut and Sonico are more mature (in terms of age of its users) with users of over 55 years.

If we analyze the relative importance of these segments in each network we see that in every case Facebook, Netlog and Tagged have an important penetration of women aged 15-24 (over 30% in its audience), while men aged 15-24 have high presence among users from MySpace and Tagged (more than 33% of its users).



It is vital to mention that the percentage of users from which we have information about sex and age varies considerably among different networks as follows; hi5, Orkut and Sonico have the 95% of information; Facebook and MySpace between 85% -90%, and Netlog and Tagged between 70% -75%.