About This Data Passport

From emerging markets to converging media, comScore is the global source of digital market intelligence that truly measures the digital world. This data passport offers a brief glimpse into the vast array of vital insights that only comScore can reveal.
01. GLOBAL INTERNET POPULATIONS

The Worldwide Internet Audience Has Grown and Shifted Dramatically in the Past Decade

Majority of global Internet users are in Asia. China alone comprises 19% of the global Internet population, and is continuing to grow rapidly.

In 1996, two-thirds of the world’s Internet population was in the United States. Today, Asia Pacific is the largest region, with China and India demonstrating particularly high growth. In most of Asia, Internet penetration is still relatively low, leaving significant growth potential over the coming years. Latin America, the Middle East and Africa have also experienced rapid growth and similarly low penetration. Central Europe and Russia are also high-growth areas.

Source: comScore Media Metrix

02. HOW THE WORLD USES THE WEB

Instant Messengers, Social Networking, Entertainment and Email Take Up Most of the Average Web User’s Time, But Proportions Vary Greatly by Region

Emerging regions’ Internet usage tends to be heavy on communication, while mature Internet markets spend more time on categories which demand high-bandwidth connections.

Instant messenger usage takes up almost a third of all online time in Middle East-Africa, and more than a quarter of all online time in Latin America. Higher available bandwidth in Europe, North America, and parts of Asia allow users in those regions to spend more time on Entertainment, News/Info, and Sports, categories which typically include media and content that require faster connections.

Share of time spent on Retail sites is highest in North America, unsurprising during the holiday season. Though they are far less likely to make purchases online, web users in Asia Pacific nonetheless spend an above-average share of their time on Retail sites, underscoring the importance of online research and comparison shopping even when the actual purchase takes place offline.

Source: comScore Media Metrix
03. GLOBAL TOP PROPERTIES

Facebook Continues to Climb Upward in Global Ranking; Mozilla, Glam and NetShelter Technology Make Impressive Gains

Facebook continues to extend its global reach and is now fourth, just behind the major portals. With China now comprising a fifth of the global online population, it is unsurprising that a number of Chinese sites have quickly gained firm footholds among the top web properties in the world. However, two of the entities showing the most upward momentum in the top 20 are content aggregators—Glam Media (#14), specializing in women’s content, and NetShelter Technology Media (#19), an aggregator of technology content. Mozilla is also climbing, illustrating the increasing global popularity of Firefox.

Top 20 Properties by Global Reach
Internet Users Ages 15+ Accessing the Internet from a Home or Work Computer
December 2009

<table>
<thead>
<tr>
<th>Rank</th>
<th>Property</th>
<th>% Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Google Sites</td>
<td>73.6</td>
</tr>
<tr>
<td>2</td>
<td>Microsoft Sites</td>
<td>59.5</td>
</tr>
<tr>
<td>3</td>
<td>Yahoo! Sites</td>
<td>48.6</td>
</tr>
<tr>
<td>4</td>
<td>Facebook.com</td>
<td>38.3</td>
</tr>
<tr>
<td>5</td>
<td>Wikimedia Foundation Sites</td>
<td>28.4</td>
</tr>
<tr>
<td>6</td>
<td>AOL LLC</td>
<td>21.9</td>
</tr>
<tr>
<td>7</td>
<td>eBay</td>
<td>21.5</td>
</tr>
<tr>
<td>8</td>
<td>Amazon Sites</td>
<td>19.7</td>
</tr>
<tr>
<td>9</td>
<td>Ask Network</td>
<td>17.7</td>
</tr>
<tr>
<td>10</td>
<td>CBS Interactive</td>
<td>17.3</td>
</tr>
<tr>
<td>11</td>
<td>Apple Inc.</td>
<td>17.1</td>
</tr>
<tr>
<td>12</td>
<td>Fox Interactive Media</td>
<td>14.3</td>
</tr>
<tr>
<td>13</td>
<td>The Mozilla Organization</td>
<td>13.7</td>
</tr>
<tr>
<td>14</td>
<td>Glam Media</td>
<td>13.1</td>
</tr>
<tr>
<td>15</td>
<td>WordPress</td>
<td>13.1</td>
</tr>
<tr>
<td>16</td>
<td>TENCENT Inc.</td>
<td>12.5</td>
</tr>
<tr>
<td>17</td>
<td>Baidu.com Inc.</td>
<td>12.5</td>
</tr>
<tr>
<td>18</td>
<td>Adobe Sites</td>
<td>11.5</td>
</tr>
<tr>
<td>19</td>
<td>NetShelter Technology Media</td>
<td>10.0</td>
</tr>
<tr>
<td>20</td>
<td>Alibaba.com Corporation</td>
<td>9.2</td>
</tr>
</tbody>
</table>

Facebook continues to extend its global reach and is now fourth, just behind the major portals.

With China now comprising a fifth of the global online population, it is unsurprising that a number of Chinese sites have quickly gained firm footholds among the top web properties in the world. However, two of the entities showing the most upward momentum in the top 20 are content aggregators—Glam Media (#14), specializing in women’s content, and NetShelter Technology Media (#19), an aggregator of technology content. Mozilla is also climbing, illustrating the increasing global popularity of Firefox.

Source: comScore Media Metrix

04. WEBSITES TO WATCH

Free Entertainment is Always Popular; New Social Networks Challenge Established Players

Percent Reach of Selected Sites and Regions
Internet Users Ages 15+ Accessing the Internet from a Home or Work Computer
Dec 2009 vs. Dec 2008

New Entertainment and Social Networking sites are still emerging; Low-cost air carriers see a jump as economy slows.

Television Broadcasts Limited is a Chinese-language network that provides video streams of its popular TV series on its website. Argentinian site Taringa.net is a discussion site that has rapidly gained popularity throughout Latin America. Mudah.my bills itself as “Malaysia’s Marketplace”, where users can buy and sell new and used goods. Kaixin001.com and Ibibo are social networks that continue to post significant growth in markets (China and India, respectively) that are not dominated by Facebook. Though most low-cost carriers in the region (e.g. JetStar, SilkAir, Cebu Pacific Air) have seen traffic growth in the past year, Tiger Airways’ is the most significant. We7.com is a music site in the U.K. featuring both free and paid content.

Source: comScore Media Metrix
05. **SHARE Gainers**

Facebook and YouTube are the Largest Share Gainers of Global Online Usage Over the Past 3 Years

Share of Global Minutes on Top Sites
Internet Users Ages 15+ Accessing the Internet from a Home or Work Computer
June 2006 to October 2009

Top sites’ total share of time is increasing—consumer share of online time is consolidating, not diffusing to the long tail.

Facebook.com currently comprises 7% of total online consumption globally. Along with YouTube, these two sites are the largest share gainers of global online usage over the past 3 years. In comparison, Amazon Sites, CBS Interactive, Turner Network and Viacom Digital each command only 0.2% of total online time. Another recent, major market entrant, Twitter, has enjoyed high reach and fast growth, but time spent on the site is minimal—only 0.1% of global Internet time is spent on the site.

Source: comScore Media Metrix

06. **SOCIAL NETWORKING**

Social Networking Remains One of the Web’s Top Activities in 2009

Growth of Global Unique Visitors to Facebook, MySpace, Twitter
Internet Users Ages 15+ Accessing the Internet from a Home or Work Computer
December 2008 to December 2009

Two out of 3 global web users visited a social networking site in December 2009.

After bypassing MySpace as the global leader among social networks in 2008, Facebook has continued its rapid growth, more than doubling (+111%) its global Unique Visitors in 2009. Twitter’s global growth in the past year has been nothing short of phenomenal, posting a 14-fold increase globally, and ending the year with 65 million visitors.

Globally, social networking accounts for 12% of the average user’s time spent online. In Europe, however, social networking takes up 16.1% of all time online, and 15.6% in Latin America. The average social networking user in Europe spends almost five hours a month on social networking sites.

Source: comScore Media Metrix
SOCIAL NETWORKING – MOBILE EU5

17% of Facebook Users in EU5 are Accessing Via Mobile

Unique Users of Facebook on PC vs. Mobile, EU5
Three Month Average Ending November 2009

Europeans are among the heaviest users of Social Networking sites on PCs, and their usage is spilling over onto Mobile

Among the countries in EU5, there are significant differences in Facebook mobile usage, with 22% of U.K. Facebookers accessing via mobile, compared to just 10% of German Facebook users.

Facebook usage is surprisingly similar on mobile and PC. Mobile users spend 24 minutes on Facebook and average 3.3 visits per day. PC users spend 27 minutes per day and average 2.3 visits.

SOCIAL NETWORKING – EMERGING REGIONS

Indonesia, Chile and Colombia Lead All Countries in Facebook Penetration, With More Than 84% of Web Users in Those Countries Using the Social Network

Countries with Highest Facebook Penetration, December 2009

Social Connections and Communication are key components of online usage in Latin America.

Latin Americans spent 15.6% of their total online time on Social Networking sites, and an additional 34.9% on Email and IM. In addition to high reach for Facebook in most Latin American countries under measurement, the social network Orkut (a Google property) enjoys a large and extremely loyal following in Brazil.

Facebook has overtaken Friendster to capture the avid social networkers of Southeast Asia. Indonesia and the Philippines are among the top 5 countries for Facebook reach. Friendster was the early leader among social networks in Southeast Asia, but Facebook is now the top social networking in every country in the region.

Source: comScore Media Metrix, comScore MobiLens
**More Than Half of Time Spent Viewing Video Occurs on Long Tail Video Sites**

An analysis of where Americans spend their time viewing online video content revealed that top-ranked video site YouTube accounted for more than a quarter (26%) of total time spent viewing video, more than the combined time spent of video content sites ranked between #2 and #25 (22%). Meanwhile, the majority of online video viewing (52%) occurred at video sites ranked outside of the top 25, suggesting the increased fragmentation of online video and the emergence of sites in the long tail.

Source: comScore Video Metrix

---

**Entertainment is the most popular online category in Asia.**

Entertainment reach is highest in South Korea and Singapore, countries with broadband penetration rates that are on par with Western Europe. We also see that Indonesia and India, countries with broadband penetration in the single digits, have below average Entertainment reach. However, several countries show high demand for Entertainment content despite low broadband penetration rates. In the Philippines and Vietnam, Entertainment reach is above the global average. As broadband coverage increases in those areas, we expect to see even higher rates of penetration and consumption of Entertainment content.

Source: comScore Media Metrix
08. VIDEO CROSS-MEDIA SURVEY

The Online-Only TV Viewer Represents an Opportunity for Incremental Audiences in the Valuable 18-34 Category

The opportunity in online video as a distribution platform cannot be ignored. There is a new breed of digital consumer who is choosing to tune in to his/her favorite shows online.

In terms of demographics, the online-only TV viewer skews dramatically younger than the general video audience. 72% of those who only watch TV online are between the ages of 18 and 34. That age group comprises only 57% of the general online video audience.

Online is preferred by consumers for its convenience; the ability to select specific shows and watch them on their own time ranked high among consumers’ reasons for choosing to watch TV online. TV is preferred for sound and video quality and overall experience.

Source: comScore Video Cross-Media Study

09. GLOBAL SEARCH

Google Sites Accounts for Two-Thirds of 131 Billion Searches Worldwide; Introduction of Bing Helps Microsoft Post Significant Gains During the Year

The global search market grew by 46% in the past year, with both highly developed and emerging markets contributing to the strong growth worldwide.

Google Sites ranked as the top search property worldwide with 87.8 billion searches in December, or 66.8% of the global search market, and a 58% increase in search query volume over the past year. Yahoo! Sites ranked second globally with 9.4 billion searches (up 13%), followed by Chinese search engine Baidu with 8.5 billion searches (up 7%). Microsoft Sites saw the greatest gains among the top five properties, growing 70% to 4.1 billion searches, on the strength of its successful introduction of new search engine Bing. Russian search engine Yandex also achieved considerable gains, growing 91% to 1.9 billion searches.

Top Ten Search Properties by Searches Conducted, Total Worldwide, Ages 15+ Accessing the Internet from a Home or Work Computer, December 2009 vs. December 2008

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Worldwide</td>
<td>89,708</td>
<td>131,354</td>
<td>46%</td>
</tr>
<tr>
<td>Google Sites</td>
<td>55,638</td>
<td>87,809</td>
<td>58%</td>
</tr>
<tr>
<td>Yahoo! Sites</td>
<td>8,389</td>
<td>9,444</td>
<td>13%</td>
</tr>
<tr>
<td>Baidu.com Inc.</td>
<td>7,963</td>
<td>8,534</td>
<td>7%</td>
</tr>
<tr>
<td>Microsoft Sites</td>
<td>2,403</td>
<td>4,094</td>
<td>70%</td>
</tr>
<tr>
<td>eBay</td>
<td>1,327</td>
<td>2,102</td>
<td>58%</td>
</tr>
<tr>
<td>NHN Corporation</td>
<td>1,892</td>
<td>2,069</td>
<td>9%</td>
</tr>
<tr>
<td>Facebook.com</td>
<td>992</td>
<td>1,892</td>
<td>91%</td>
</tr>
<tr>
<td>Ask Network</td>
<td>1,053</td>
<td>1,507</td>
<td>43%</td>
</tr>
<tr>
<td>Alibaba.com Corporation</td>
<td>1,118</td>
<td>1,102</td>
<td>-1%</td>
</tr>
</tbody>
</table>

Searches based on “expanded search” definition, which includes searches at the top properties where search activity is observed, not only the core search engines.

Source: comScore qSearch
10. DISPLAY ADVERTISING

Social Networks and Blogs Account for More Than 23% of All Display Ad Impressions

Top Content Categories by Share of Total Display Ad Impressions

December 2009

Almost one quarter of all display ad impressions in December 2009 were in the Conversational Media category, which consists of social networking and blogging sites.

Social networking and blogging sites, primarily Facebook and MySpace, account for more ad impressions than the sum of the major portals. This underscores the importance of understanding the effectiveness of ads in the social networking ecosystem.

Source: comScore Ad Metrix

11. ADVERTISING EFFECTIVENESS

Cross Media Synergy Effect Helps Campaigns Drive Brand Value For Many Categories of Advertisers

Lift Effects for Ad Awareness Metrics in Cross Media Campaigns

<table>
<thead>
<tr>
<th>Metrics</th>
<th>Digital Only</th>
<th>Print Only</th>
<th>TV Only</th>
<th>Digital + Print</th>
<th>Digital + TV</th>
<th>Cross Media (TV + Print + Digital)</th>
<th>Entertainment</th>
<th>Consumer Electronics</th>
<th>Financial Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awareness (Unaided)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall Opinion</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Likely to Recommend</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase / Usage Intent</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Message Association</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Results of Cross Media Campaign for Top PC Manufacturer

Cross Media Campaign Results for Multiple Industries

When consumers are exposed to a campaign in multiple channels, it appears to be everywhere. This sense of omnipresence drives up not only awareness measures but also moves consumers to higher interest and intent to purchase the brand.

Data from the comScore AdEffx™ norms database clearly shows that cross media campaigns, which utilize multiple marketing channels, can deliver significant increases in brand metrics for many industries. As an example, a major PC manufacturer saw using multiple mediums in combination provided significant lifts over using a single medium alone. This cross media synergy effect remains strong across many categories of advertisers. Marketers who want to take advantage of the power of this effect can spread budgets by selectively targeting a specific audience and blanketing them with messages in various media. Then advertising effectiveness can be measured for both attitudinal brand impacts as well as behavioral impacts such as sales, site visitation and search to quantify the contributions of each medium alone and in concert.

Source: comScore AdEffx Brand Survey Lift Cross Media Norms Database
However, 2009 on the whole fared significantly worse than the previous year with year-over-year growth rates remaining negative throughout most of the year.

The 2009 holiday season represented a bright spot in this predominantly negative year for e-commerce as it marked a return to positive growth rates with both November and December showing gains of a few percentage points. While some of this growth is attributable to more favorable year-over-year comparisons versus the disastrous 2008 holiday season, it does suggest that the tides of consumer sentiment are beginning to turn and that 2010 may be a healthier year for retail e-commerce.

Positive Growth U.S. Retail e-Commerce Categories in 2009

<table>
<thead>
<tr>
<th>Category</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Books &amp; Magazines</td>
<td>12%</td>
</tr>
<tr>
<td>Computer Software (excl. PC Games)</td>
<td>7%</td>
</tr>
<tr>
<td>Sport &amp; Fitness</td>
<td>6%</td>
</tr>
<tr>
<td>Jewelry &amp; Watches</td>
<td>4%</td>
</tr>
<tr>
<td>Video Games, Consoles &amp; Accessories</td>
<td>3%</td>
</tr>
<tr>
<td>Consumer Electronics</td>
<td>3%</td>
</tr>
<tr>
<td>Computers, Peripherals, &amp; PDAs</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: comScore e-Commerce Measurement

The U.S. e-commerce market in 2009 exhibited substantial softness in the face of the global economic recession, which exerted downward pressure on consumer discretionary spending reflected in the e-commerce market.

Total U.S. e-commerce spending reached $209.6 billion in 2009, down 2% versus the previous year and the first year on record with negative growth rates. Travel e-commerce spending dropped 5% to $79.8 billion, while retail (non-travel) e-commerce spending remained virtually flat at $129.8 billion.

Throughout most of the decade, retail e-commerce spending saw growth rates in excess of 20% annually, but 2008 showed signs of softness as the economy first began to weaken. While that year still saw retail e-commerce grow at a rate of 6%, it was the first time on record of single-digit growth rates.

In this recessionary year, only a handful of retail e-commerce categories experienced growth. Books & Magazines topped the list of gaining categories with 12% growth, bolstered by category-wide price-cutting and the release of numerous high-profile best-sellers. Computer software (up 7%) ranked second, followed by Sport & Fitness (up 6%) and Jewelry & Watches (up 4%), which rebounded from an especially weak 2008. Other positive growth categories included Video Games, Consoles & Accessories (up 3%), Consumer Electronics (up 3%) and Computers, Peripherals & PDAs (up 1%).

Source: comScore e-Commerce Measurement
13. MOBILE INTERNET USAGE

Mobile Internet Services Continue to Boom in EU5

Mobile Browsing Audience
November 2008 to November 2009

Though it has been over a year since the launch of the iPhone 3G and the resultant boom in mobile Internet services, the growth in new users shows no signs of waning.

Social Networking and News and Information via Application are showing the highest gains with 106% and 64% Y/Y growth, respectively. While News and Information via Browser and Email continue to be the most popular activities online, the rapid growth of Social Networking via mobile may soon overtake those categories.

Most apps users in EU5 play games. Games is the top genre for apps, followed by Functional Tools (e.g. Maps and Search), Communication Services (Email, IM, Social Networking, Photo Sharing) and News.

Source: comScore MobiLens

14. MOBILE INTERNET DEMOGRAPHICS

Mobile Internet Users Slightly Older Than PC Internet Users

Mobile Browsing Audience
Three Month Average Ending November 2009

Device and access costs keep mobile Internet usage from following ‘traditional’ early adopter age distributions.

Younger consumers are less likely to have the advanced devices and unlimited data plans that are key drivers for mobile Internet usage. Even for social networking, consumers who use their mobiles are more likely to be older than those who access social networks via PC.

Mobile social networkers are more evenly distributed by gender than mobile browsers for news and info. This provides an indication that mobile social networking is helping move mobile Internet services out of early adopter mode and into the mainstream.

Source: comScore MobiLens
ABOUT COMSCORE

Measuring the digital world.™

comScore is a global leader in measuring the digital world and the preferred source of digital marketing intelligence.

From the accuracy of comScore AdEffx™ online ad effectiveness solutions to the richness of Media Metrix® 360 panel-centric unified audience measurement, comScore reveals the granular dynamics that occur within a market as well as the total market views required to effectively navigate the digital world on a local, regional and international level.

Industry leaders turn to comScore for insight into the behaviors and attitudes of digital media consumers in order to design more powerful sales and marketing strategies. comScore maintains massive proprietary databases that provide a continuous, real-time measurement of the myriad of ways in which consumers use the PC and mobile Internet. Experienced comScore analysts work closely with clients to identify their business objectives and determine how they can best apply, and benefit from, comScore’s vast databases of Internet user behavior.

Whether your focus is online or multi-channel, direct response or long-term branding, domestic or global marketing, comScore provides the vital digital intelligence to succeed in today’s competitive marketplace.

CONTACT    learnmore@comscore.com    www.comscore.com
COMSCORE PRODUCT SUITES & SERVICES

Continued from previous page.

Mobile
Explore the “who, what and how” of mobile users. Gain insights into the competitive landscape. Learn about the various behaviors and demographics of mobile web audiences. comScore Mobile solutions offer unprecedented visibility into the mobile ecosystem.

Cross Media Measurement
Measure advertising effectiveness across platforms —Internet, mobile, TV, radio and print. Optimize marketing spend. Plan campaigns more efficiently. comScore Cross Media Measurement capabilities quantify the effectiveness of each media channel on an advertising campaign, including branding impact as well as online and offline behaviors.

Video & Distributed Media Measurement
Uncover the size, growth and composition of distributed web audiences. Identify the most attractive types of distributed content—widgets, videos, social applications or other emerging platforms. Understand how usage patterns change over time. comScore Video & Distributed Media Measurement solutions provide accurate and comprehensive measurement of distributed web content.

Marketing on the Internet
Design fully integrated marketing strategies. Drive qualified traffic to a content website. Boost sales by identifying and reaching new audiences online. comScore Marketing on the Internet solutions provide the superior digital intelligence and consumer insights needed to successfully achieve online objectives.

Technology Tracking
Analyze hardware and software configurations for thousands of devices. Understand how consumers’ technology-usage behaviors shift. Capitalize on trends in personal computer and mobile device technology. comScore Technology Tracking services combine device-level data with user demographics and online behavioral insights to deliver the most complete profile of technology usage.

Custom Research
Get tailored, accurate and actionable insights. Design studies geared toward actual business objectives. Measure the success of specific marketing efforts to improve future campaigns. comScore Custom Research studies leverage the massive comScore panel, sophisticated methodologies and expert analysts to deliver industry-leading marketing insights.

CONTACT  learnmore@comscore.com  www.comscore.com
Contact Information

To learn more about how comScore can help you compete and succeed in the digital world, please contact us today:

Online
www.comscore.com

Email
learnmore@comscore.com

United States
+1 866 276 6972

Canada
+1 416 646 9911

Latin America
+1 212 497 1764

Europe
+44 207 099 1760

Asia Pacific
+65 9478 2100

Japan
+81 3 5789 5555

The findings herein are based on data and insight gleaned exclusively from comScore services and solutions. Research data or a portion of text less than one paragraph in length may be cited provided that each is sourced to comScore; for example, “Source: comScore, Inc.” or “According to comScore, ...” Copies of graphs or data tables must include the following copyright notice affixed to all material: “Copyright © 2010 comScore, Inc.”
comScore cares about the environment. This passport is printed on Forest Stewardship Council (FSC) certified paper stock by a printer dedicated to green practices.