



IT'S A SOCIAL WORLD

Top 10 Need-to-Knows About Social Networking and Where It's Headed

Introduction

With the widespread adoption of the Internet around the world came the rise of social networking as a global phenomenon. In March 2007, Social Networking as a category had a global audience of less than 500 million users, representing just 56 percent of the world's online population. In those days, as Thomas Friedman put it, "'Twitter' was a sound, the 'cloud' was in the sky, '4G' was the name of a parking space... and 'Skype' for most people was a typo."* Email reigned supreme as the king of communication channels online, and the word 'friend' was just beginning its metamorphosis from the rigid uni-dimensional noun it was to the ubiquitous, transformative verb it has become.

Since then, the digital landscape has changed immensely. Social networks, which provide platforms for online users to connect, share, and build relationships with others online, have forever altered the lives of individuals, communities and societies all over the world. The growth in popularity of social networking has also created and engendered new online consumer behaviors. The goal of this report is to frame the current state of social networks through the lens of how users around the world have grown to use them over time. A primer of sorts, this report addresses questions such as:

- *How extensive is consumer usage of social networking and how does it vary by country?*
- *What is the current rate of social networking adoption in different parts of the world?*
- *Which sites are driving this adoption in different markets?*
- *How are these consumer usage dynamics changing over time?*
- *Where do these trends appear to be headed in the future?*

This report offers a comprehensive summary of the current state of social networking activity, as measured via passively observed digital consumer behavior, providing essential background research and analysis for anyone trying to get a handle on the far-reaching topic of social networking and its implications.



Contents

A few notes about the data sources for this report:

All data in this report sourced to comScore Media Metrix is based on Internet usage from home and work-based computers from comScore's proprietary, opt-in research panel, consisting of 2 Million people sourced from 171 countries. Data is individually reported for 43 of those countries. Media Metrix data excludes activity from mobile phones, tablets and other connected devices. Data from mobile devices comes from two other products in the comScore mobile solutions suite which are available in a subset of these markets and are sourced accordingly. comScore MobilLens data is sourced from an intelligent online survey of nationally representative samples of mobile subscribers age 13+ in the U.S., UK, France, Germany, Spain, Italy, Canada, and Japan. comScore GSMA Mobile Media Metrics (MMM) provides a census-level solution for mobile media reporting in the UK, taking irreversibly anonymised mobile Internet usage data from 3 of the 4 UK mobile operators comScore Ad Metrix data sourced in this report refers to the U.S. market only.



TOP 10 NEED-TO-KNOWS ABOUT SOCIAL NETWORKING AND WHERE IT'S HEADED

- 1** Social networking is the most popular online activity worldwide
- 2** Social networking behavior both transcends and reflects regional differences around the world
- 3** The importance of Facebook cannot be overstated
- 4** Microblogging has emerged as a disruptive new force in social networking
- 5** Local social networks are making inroads globally
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Methodology & Definitions

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#1

Social networking is the most popular online activity worldwide

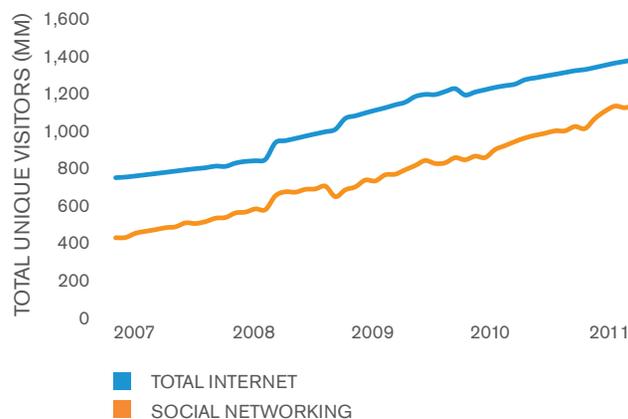


Social networking sites now reach 82 percent of the world's online population, representing 1.2 billion users around the world. The social networking adoption trend largely mirrored the global Internet adoption curve, and grew proportionately, showing that as people began to get connected, they immediately began connecting with one another.

Even more telling of social networking's emergence is the amount of time people currently engage with it. As a percentage of all the time people spend online, social networking activity has more than tripled in the last few years. In October 2011, Social Networking ranked as the most popular content category in worldwide engagement,

The Rise of the Global Social Networking Audience

Source: comScore Media Metrix, Worldwide, March 2007 – October 2011



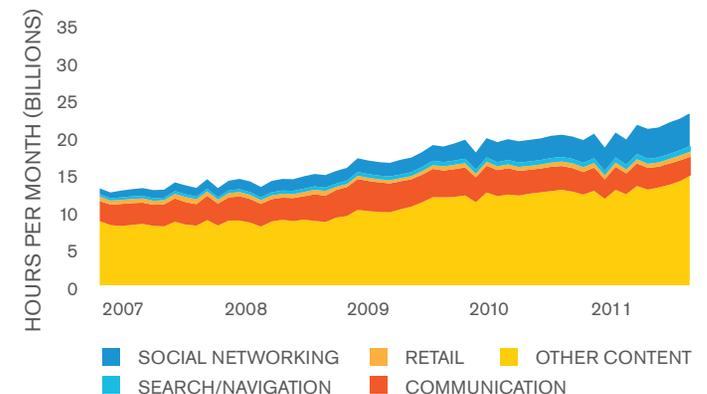
accounting for 19 percent of all time spent online. Nearly 1 in every 5 minutes spent online is now spent on social networking sites – a stark contrast from when the category accounted for only 6 percent of time spent online in March 2007.

Time spent on social networking sites gained ground during this time by taking share predominantly from web-based email and instant messengers, reflecting its emergence as another primary communication channel for users. Unmistakably, it has evolved over the years to become an integral part of the global online experience, in many ways both mirroring and augmenting the offline social experience.

Time Spent Online on Key Internet Categories

Source: comScore Media Metrix, Worldwide, March 2007 – October 2011

* Time spent on Communications includes time spent on web-based Email and Instant Messengers.



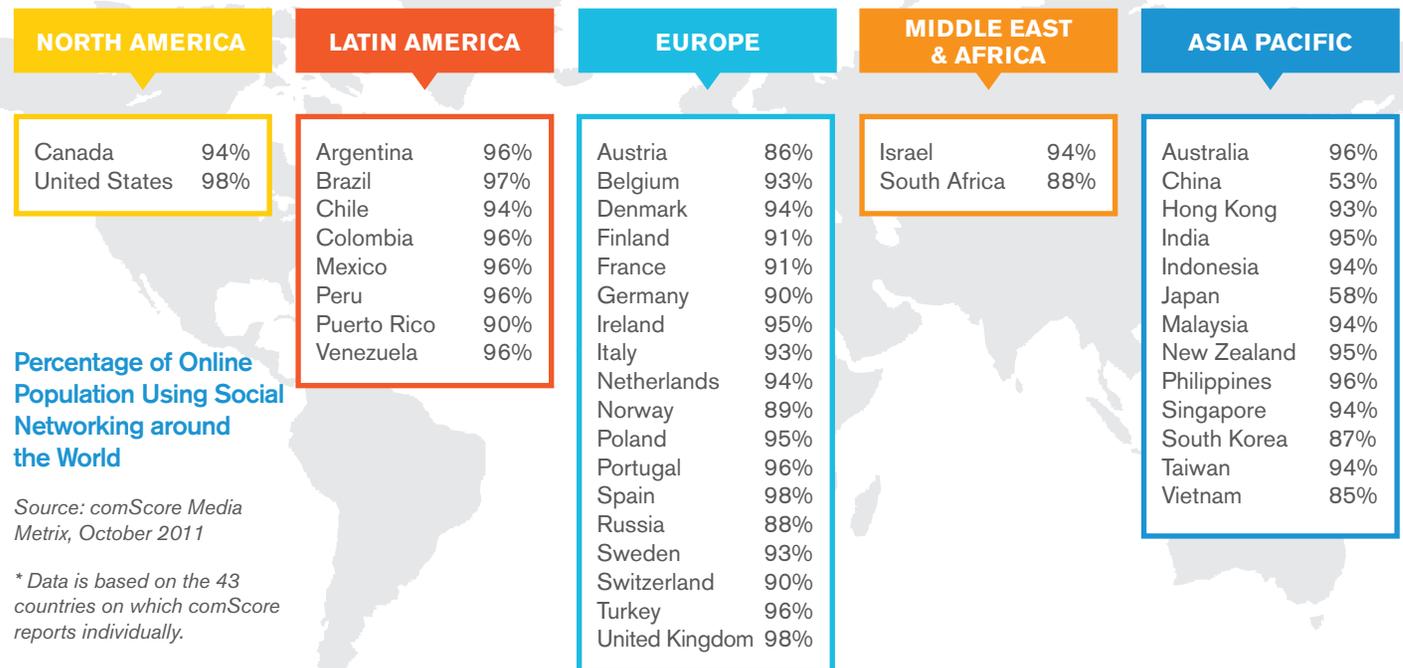
#2

Social networking behavior both transcends and reflects regional differences around the world

The growth of social networking is a global cultural phenomenon. Despite significant differences in government, infrastructure, availability of Internet access and cultural practices around the world, social networking is growing in every single country.* A look at individual markets shows the penetration of social networking sites, ranging from 53 percent in China to 98 percent in the United States, with 41 of the 43 markets individually reported by comScore seeing a market penetration of 85 percent or more. Regardless of how open or closed a society may be, it is safe to assume that more than half of local online populations are

engaging in online social networking, making the practice comparatively ubiquitous around the world.

The high user engagement on social networks across global regions demonstrates its universal appeal. For each region, the total time spent by users on Social Networking grew by at least 35 percent over the past year, reflecting its growing pervasiveness across the board. In Latin America, Europe, and the Middle East-Africa – three very culturally different regions – Social Networking accounted for at least 24 percent all time spent online.



Percentage of Online Population Using Social Networking around the World

Source: comScore Media Metrix, October 2011

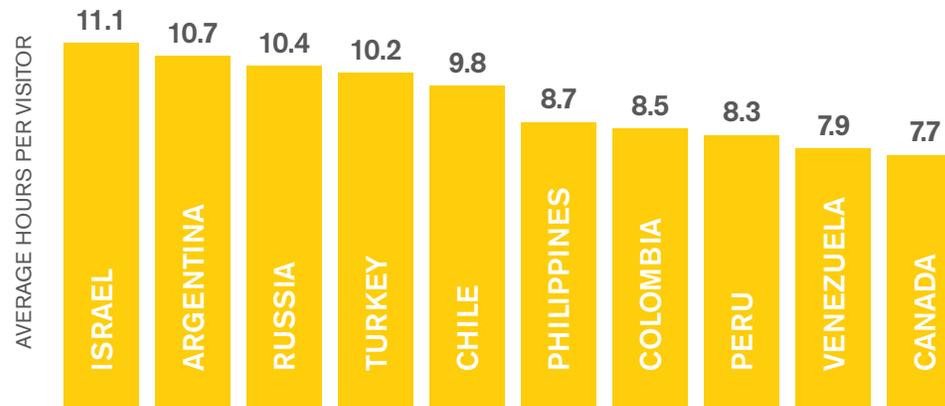
* Data is based on the 43 countries on which comScore reports individually.

#2

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Social networking behavior both transcends and reflects regional differences around the world

Despite such widespread adoption, there are significant disparities in social networking behavior across geographic and demographic groups. In a ranking of total time spent online, Israel emerges as the most active country, followed by Argentina and Russia. While some of this is driven by infrastructure (access to broadband, for example), it is also interesting to examine these differences vis-a-vis cultural norms. For instance, time spent on the Social Networking category accounted for only 11 percent of total time spent online in the Asia Pacific region compared to 28 percent in Latin America. Latin Americans also spent the most time on social networks at an average of 7.6 hours per user in October 2011. In contrast, those in the Asia Pacific region averaged slightly less than 3 hours. In our global ranking of Social Networking usage, 5 of the top 10 most socially-engaged markets were located in Latin America, underscoring a regional predisposition for social networking. Long the heaviest users of other communication channels, such as instant messaging and chat, Latin Americans have embraced the social web in a way that reflects an effusive social culture in the region.



Top 10 Most Engaged Markets for Social Networking

Source: comScore Media Metrix, October 2011

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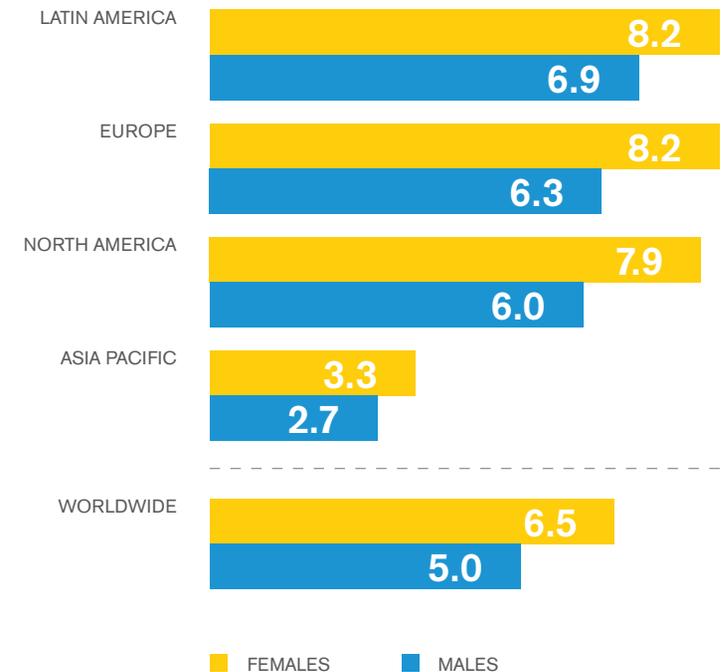
Social networking behavior both transcends and reflects regional differences around the world

In contrast, those in the Asia Pacific region, particularly East Asian countries, spend the least amount of time on social networks, which could in part reflect differences in cultural norms versus other parts of the world. Even within regions, however, there are exceptions. In a ranking of countries based on time spent on Social Networking as a percentage of total time online, the Philippines emerges as the most socially active country, followed by Russia and Argentina. In October, social networking accounted for an astounding 43 percent of total time spent online by Filipinos, and the typical Filipino spent a significantly higher than average 8.7 hours on social networks during the month.

Another interesting illustration is that consistently across all regions, women spend more time social networking than men. In North America and Europe, women spent an average of nearly two hours (30 percent) more than men on social networking sites in a month. All these variations in social behavior suggest that while social networking is indeed a significant and growing part of the global online experience, there are inherent cross-cultural and demographic differences that are important to understand.

Average Hours per Visitor on Social Networking by Region

Source: comScore Media Metrix, October 2011

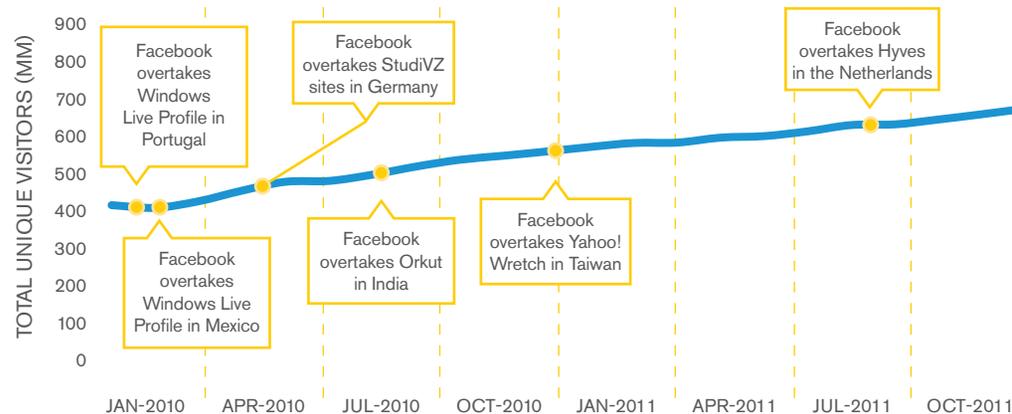


#3

The importance of Facebook cannot be overstated

To fully comprehend the state of social networking today, one must understand how Facebook – the largest player by virtually any metric – drives the behavior of the category as a whole. Consider that Facebook is the third largest web property in the world, trailing only Google Sites and Microsoft Sites. In October, Facebook reached more than half of the world's global audience (55 percent) and accounted for approximately 3 in every 4 minutes spent on social networking sites and 1 in every 7 minutes spent online around the world.

While Facebook is the leading social networking site in the vast majority of countries, it is not the leader everywhere – yet. In the beginning of 2010, Facebook was the category leader in 30 of the 43 markets that comScore reports on at the individual level. Since then, it has taken the lead in 6 additional markets, spanning Asia, Latin America and Europe.



Facebook's Ascent in Recent Years

Source: comScore Media Metrix, Worldwide, January 2010 – October 2011

Today, there are only 7 markets where Facebook does not have the largest audience in the category – Brazil, China, Japan, Poland, Russia, South Korea and Vietnam. Putting China aside, which currently blocks Facebook, the trend in audience growth suggests that Facebook will soon be the market leader in Brazil and potentially Poland; In Japan, it is second to Twitter, but is on the same growth trajectory. In a few of these countries, it even leads the category in engagement. In South Korea and Poland, for example, Facebook trails regional social networks in audience size but shows highest average engagement, as measured by time spent. While Orkut still leads in Brazil in terms of both audience and engagement, Facebook is quickly closing in according to both metrics. By and large, Facebook has proven to be a dominant global force in social networking that shows no immediate signs of slowing down.

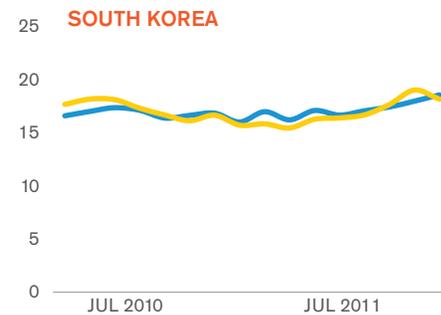
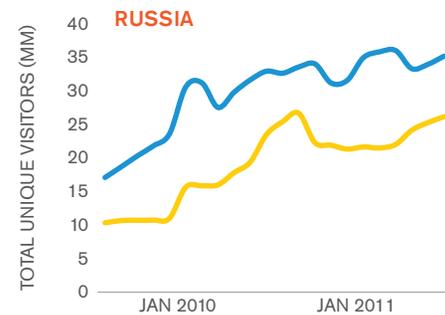
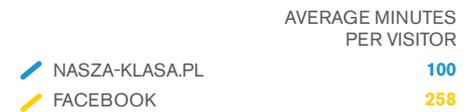
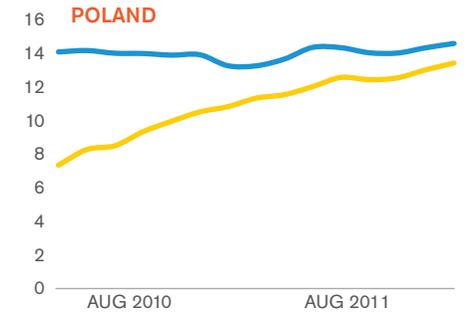
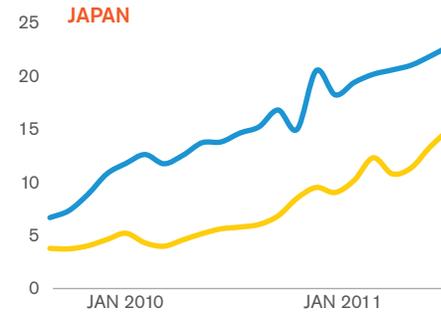
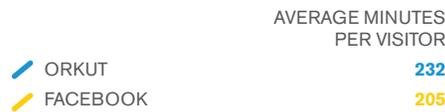
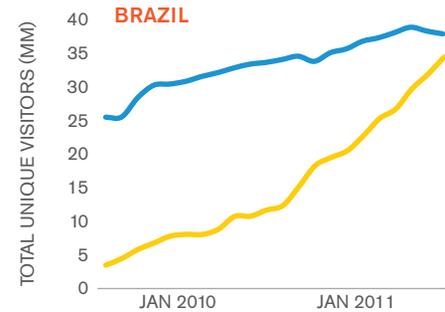
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The importance
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Top 2 Social Networks in Selected Markets

Source: comScore Media Metrix, January 2010 – October 2011



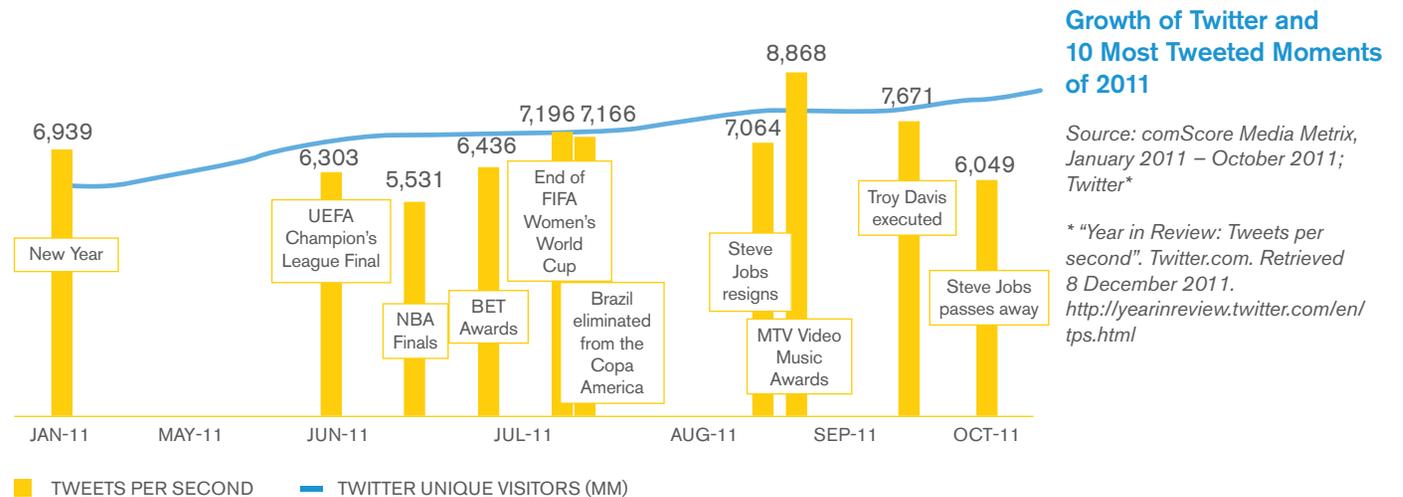
#4

Microblogging has emerged as a disruptive new force in social networking

Microblogging, a style of communicating through short-form content, has taken hold as a wildly popular social networking platform in recent years, due in large part to the emergence of Twitter – which saw its audience begin to erupt in the spring of 2009. To date, Twitter reaches 1 in 10 Internet users worldwide to rank among the top social networks, and posted an impressive growth rate of 59 percent over the past year. Interestingly, the use of Twitter around the world has not been limited to interpersonal communication among friends. In 2011, Twitter was used as a central means of communication during events of worldwide and national significance, ranging from political uprisings in the Middle East to disasters, such as the earthquake and tsunami in Japan. Among the most tweeted moments in 2011 according to Twitter were political events such as the death of Osama bin Laden, celebratory moments such as New Year, and news about Steve Jobs’

resignation from Apple and consequent passing. The announcement of the singer Beyonce’s pregnancy at the Video Music Awards broke Twitter records as users generated 8,868 tweets per second around the event.

Other microblogging services beginning to gain significant traction are Tumblr and Sina Weibo (Sina Microblogging). Sina Weibo, the leading Chinese microblogging site which ranks as the tenth largest social network globally, has posted an increase of 181 percent in the past year. Tumblr, ranking twelfth globally, followed suit with a similarly strong growth rate of 172 percent. Notably, Sina Weibo and Tumblr have posted the highest growth rates of the Top 20 global social networks. With both sites on the rise in addition to Twitter, it is likely we will see microblogging emerge even further in the near future.



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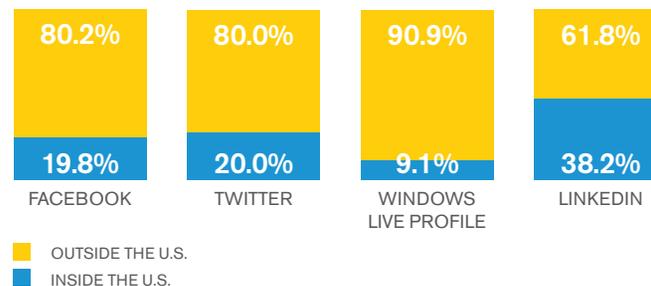
Local social networks are making inroads globally

As global social networking usage continues to expand, there is another trend worth noting, which is a shift in geographic footprint of some of the major sites. The top tier (i.e. Top 20) global social networks have been traditionally dominated by U.S.-based sites, but the markets where these networks have the greatest reach today are no longer limited to the U.S., or in some cases, even to English-speaking countries.

LinkedIn, which overtook Myspace in 2011 to become the fourth largest global network, is an example of a top U.S.-based social network attracting legions of users outside of its local base. Similar to Facebook and Twitter, the majority of LinkedIn's audience now resides outside the U.S. While LinkedIn continues to generate the most traffic from the U.S., it shows its highest market penetration in the Netherlands, where it reached more than a quarter (27 percent) of the Dutch online population in October 2011. Western European countries also comprise five of the top ten markets for LinkedIn, showing promise for further expansion for the professional social network in Europe.

Geographic Composition of Site Visitors of Top 4 Global Social Networks

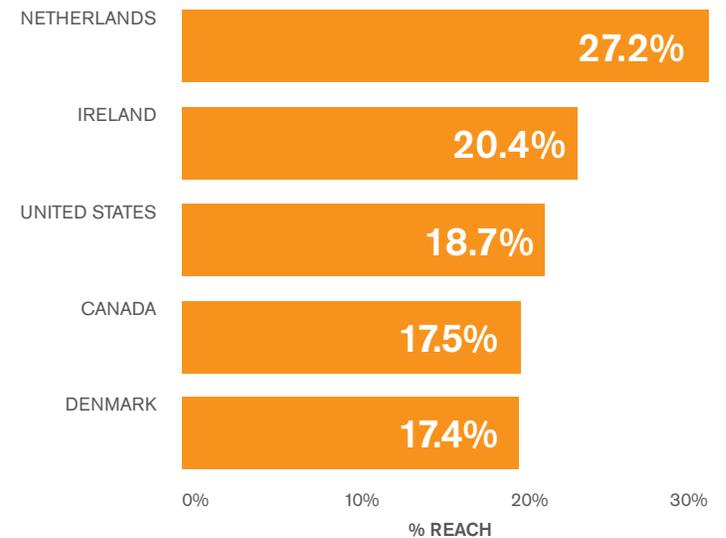
Source: comScore Media Metrix, Worldwide, October 2011



In the same vein, other local social networks around the world are beginning to break into the top tier of global networks while attracting a sizeable share of traffic outside their native markets. VKontakte, which currently ranks seventh worldwide, traditionally catered to a Russian audience, but now attracts 43 percent of its traffic from outside Russia – an increase of nearly 10 percentage points from the previous year. Odnoklassniki, another Russian social network, also currently attracts 41 percent of its traffic from outside Russia.

Markets with Highest LinkedIn Penetration

Source: comScore Media Metrix, October 2011



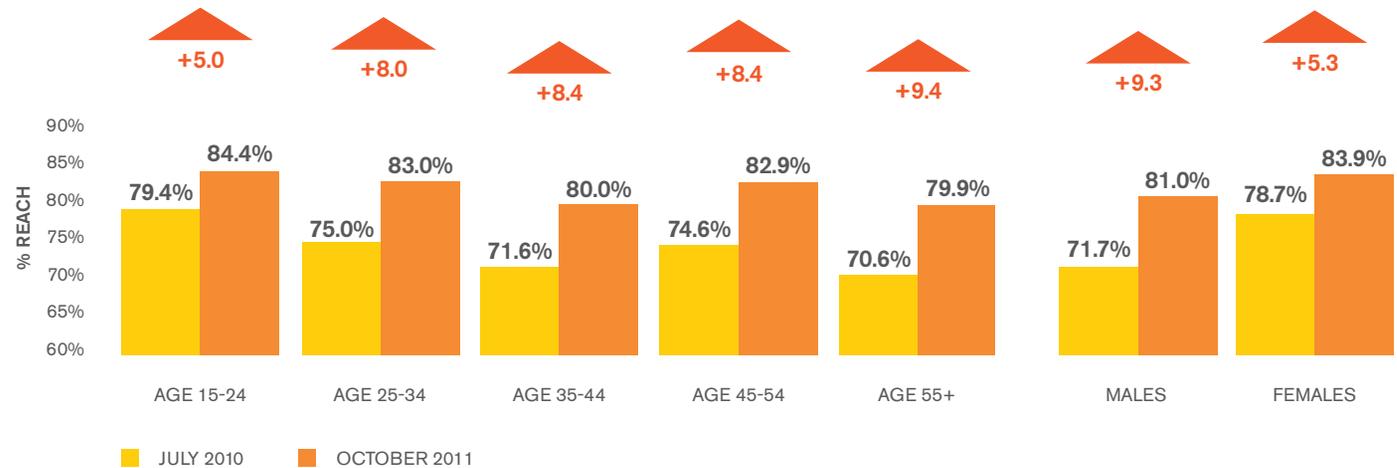
#6

It's not just young people using social networking anymore – it's everyone

Anyone with children might be under the impression that social networking is a “kids’ activity.” Several years ago, there was some truth to that. However, in the last 18 to 24 months, that has changed completely. Social networking reach in older segments has all but caught up, to the point where it's now quite similar across age groups. In fact, users 55 and older represent the fastest growing segment in social networking usage.

Social Networking Penetration Among Worldwide Demographic Groups

Source: comScore Media Metrix, Worldwide, October 2011 vs. July 2010



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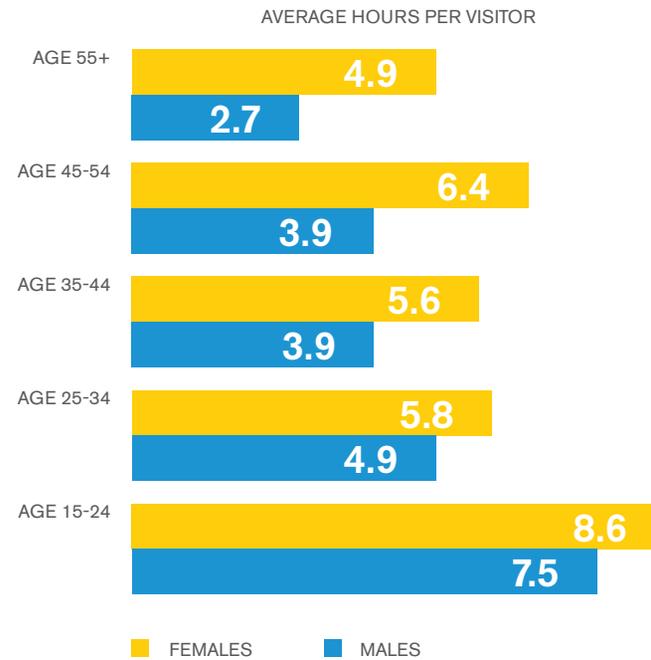
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It's not just young people using social networking anymore – it's everyone



Social Networking Engagement Among Worldwide Demographic Groups

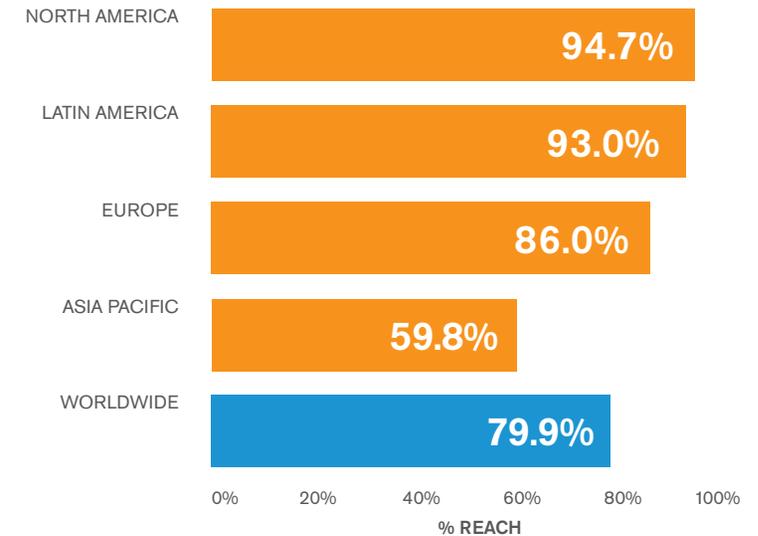
Source: comScore Media Metrix, Worldwide, October 2011



Even more striking, in regions such as North America and Latin America, Social Networking reached at least 93 percent of online users age 55 and older. Another group showing significant gains are males. Although males still lag in terms of reach and engagement with social networking, they exhibited a nearly 10-percentage point increase in reach from July 2010. As social networking is integrated into other online behaviors such as online video viewing, the slight differences we see today may completely evaporate.

Social Networking Penetration Among Users Age 55+

Source: comScore Media Metrix, October 2011



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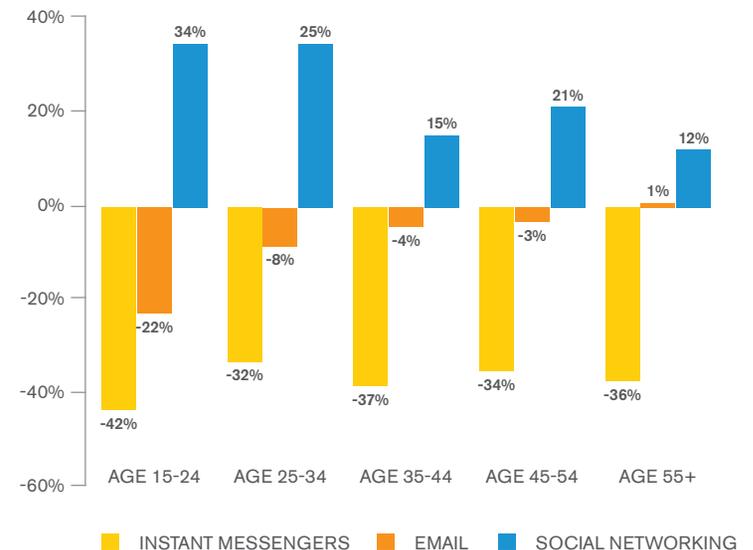
'Digital natives' suggest communications are going social

Today's generation of teenagers and young adults age 15-24 represent a new breed of Internet users, often called "digital natives"* for growing up alongside computers, the Internet and digital media. Looking at the future through the lens of a digital native, social networking is the norm.

Analysis of the communication habits of these users offers a clue as to what the future might look like in terms of how we communicate. From July 2010 to October 2011, 15-24 year olds saw the largest decline in their use of Instant Messengers and Email, outpacing overall declines in average time spent on these categories across other age groups. Simultaneously, 15-24 year olds also saw the biggest increase in average time spent on Social Networking. To date, this demographic shows the highest average engagement with Social Networking worldwide. These data collectively suggest that much of the communication going on between 15-24 year olds happens via social networks. As this generation matures, carrying these highly social behaviors into the future, it is possible that social networking, or its natural successor, could become the most important communication channel across all age groups.

Change in Average Time Spent with Content Category by Age Segment

Source: comScore Media Metrix, Worldwide, October 2011 vs. July 2010



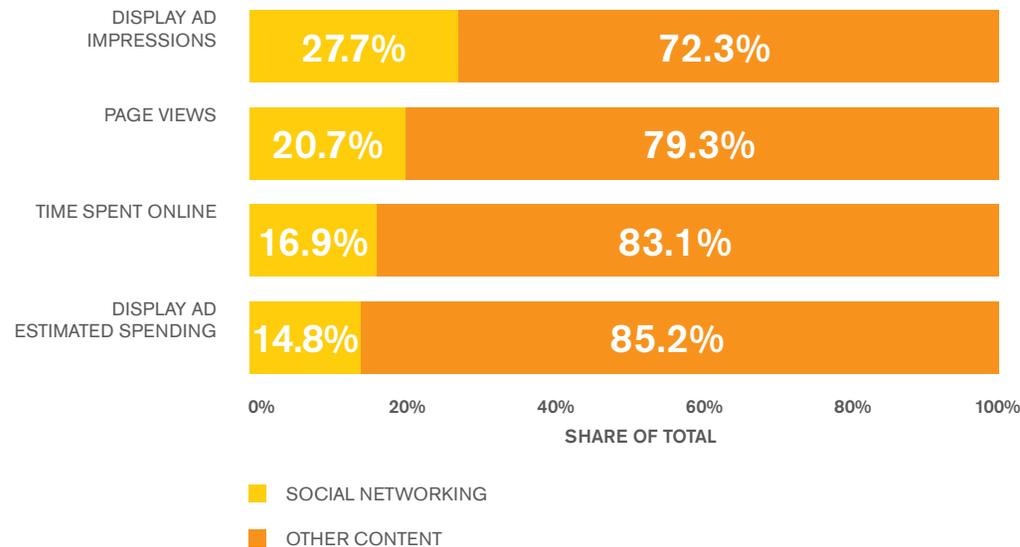
* Prensky, Marc. "Digital Natives: Digital Immigrants".
On the Horizon (MCB University Press, Vol. 9 No. 5, October 2001).
<http://www.marcprensky.com/writing/Prensky - Digital Natives, Digital Immigrants - Part1.pdf>

#8

Social networking leads in online display advertising in the U.S., but lags in share of dollars

Social Networking strongly leads all content categories in the number of display ads delivered, accounting for more than 1 in 4 U.S. display ad impressions (28 percent) in October. In addition, 5 percent of all ad impressions viewed in the U.S. were “socially-enabled,” allowing users to click through to Facebook or other social-networking sites. As the Social Networking category continues to account for an ever-increasing share of page views and time spent online by users, it comes as no surprise to see such a favorable shift for advertising on social networks.

Social Networking has maintained a significant lead over other categories in the past year, even outpacing Portals – which spans multiple content categories including News, Sports and Email – with its 19 percent share of display ad impressions. However, despite Social Networking’s leadership in the display ad market, it is not yet attracting its fair share of online ad dollars. Although more than a quarter of ads are seen on social networking sites, the category only attracts 15 percent of U.S. display ad dollars.



Social Networking Share of Key Metrics

Source: comScore Ad Metrix and Media Metrix, U.S., October 2011

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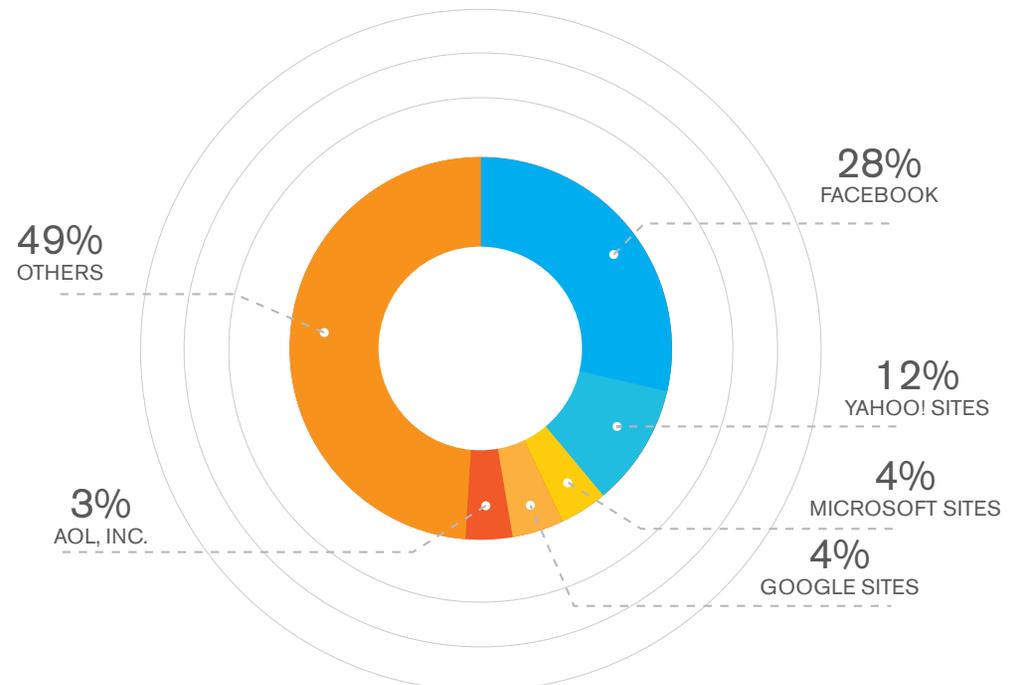
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Social networking leads in online display advertising in the U.S., but lags in share of dollars

One cannot discuss display advertising on social networks without mentioning Facebook – currently the single largest publisher of all U.S. display ad impressions. While this metric does not account for the size of ads (ads on Facebook are generally small as compared to other premium publishers), based on the sheer number of impressions, Facebook is by far the largest publisher. In the third quarter of 2011, Facebook delivered 28 percent of display ad impressions – more than the other four major portals combined. A key reason Facebook took over the leadership position in delivering ads was its early focus on delivering targeted ads for 'long tail,' or smaller advertisers. In the last few years, it has focused on attracting dollars from large brand advertisers. This has contributed to their success, as many of them have begun to embrace online advertising and social advertising in particular as a serious element of their marketing strategy. Time will tell if other social networking leaders will emerge as major players in the ad market, and if so, how this will ultimately impact the display advertising landscape. For now, the remainder of the market is quite fragmented.

Publisher Share of Display Ad Impressions

Source: comScore Ad Metrix, U.S., Q3 2011



#9

The next disrupters have yet to be decided

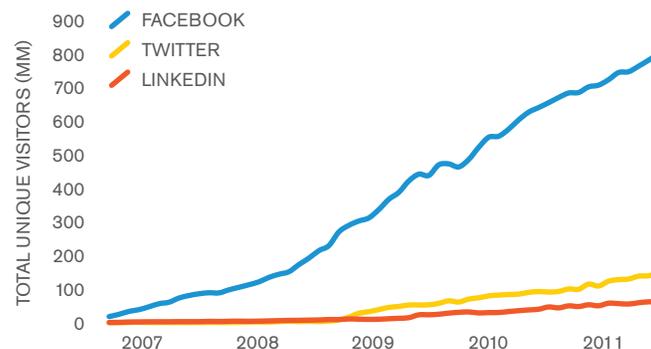
When Facebook launched in 2004, it faced stiff competition from Myspace and other leading social networks across various regions. Not even five years later, it would go on to surpass these leaders to become the indisputable global leader in social networking. In many markets where Facebook is now the industry leader, users who once might have favored other social networks switched to Facebook when a critical mass of their friends did, reflecting the inherent volatility that exists in an industry that thrives on the power of the network effect. Just as Facebook has today established itself as the nearly universal social network, new social networks could very well emerge and disrupt the existing fabric of social networking as we currently know it.

Google's release of its own social networking platform, Google+, earlier this year showed some of this ambition,

as it introduced novel features allowing users to have greater control and flexibility over their the content they could share with specific circles of friends. Once released, Google+ quickly generated buzz and excitement, as users clamored to try it out. The site surged to 25 million global unique visitors faster than any other social network in history, reaching this impressive number in less than a month. To put that audience growth in perspective, it took Facebook 36 months and Twitter 33 months to achieve similar heights. At present, Google+ reaches 65 million global visitors, accounting for 5 percent of the global social networking audience. While this early adoption bodes well for Google+, whether or not the network can sustain this growth and a strong level of engagement among users will be better indicators of its success in the future. Google+ might emerge as a social networking leader in its own right in the years to come, but exactly how big it will be remains to be seen.

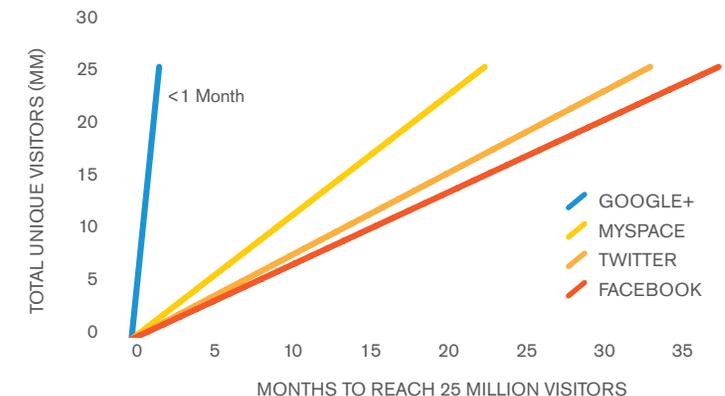
The Growth of Today's Social Networking Leaders

Source: comScore Media Metrix, Worldwide, March 2007 - October 2011



The Race to 25 Million Visitors

Source: comScore Custom Analytics, July 2011



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The next disrupters have yet to be decided

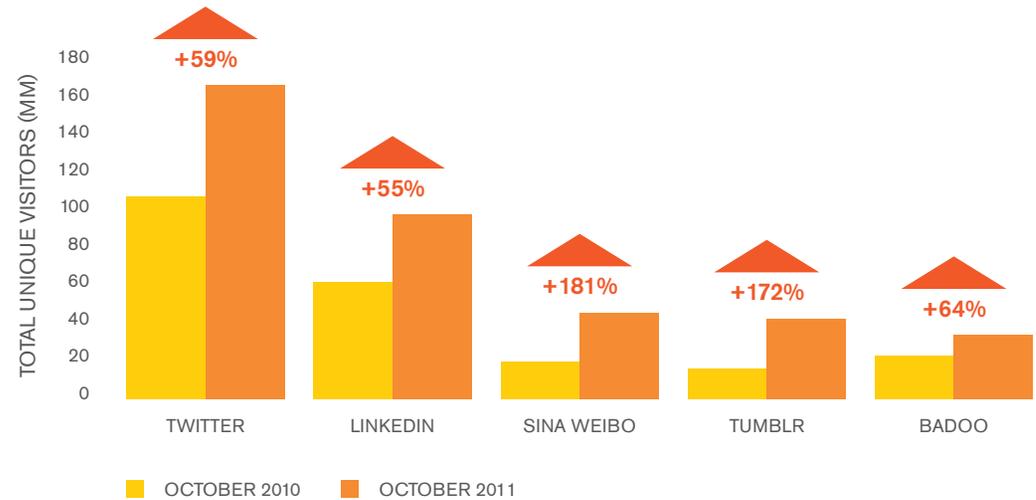
Which other social networks should we be keeping an eye on in the coming year? Among the top five global networks, Twitter and LinkedIn have posted two of the highest growth rates for audience size over the past year, positioning them as formidable players in the global marketplace. Other top-tier social networks on the rise are microblogging sites Sina

Weibo (Sina Microblogging), which exhibited the highest growth at 181 percent, and Tumblr, with a 172-percent increase. European-based Badoo also posted strong gains at 64 percent. If these fast-growing sites are any indication, microblogging could emerge as a pivotal force shaping the future of social networking behavior.

Fastest Growing Top-Tier* Global Social Networks in Terms of Audience Size

Source: comScore Media Metrix, Worldwide, October 2011 vs. October 2010

*Top-tier social networks rank among the Top 20 sites in the Social Networking category.



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The next disrupters have yet to be decided

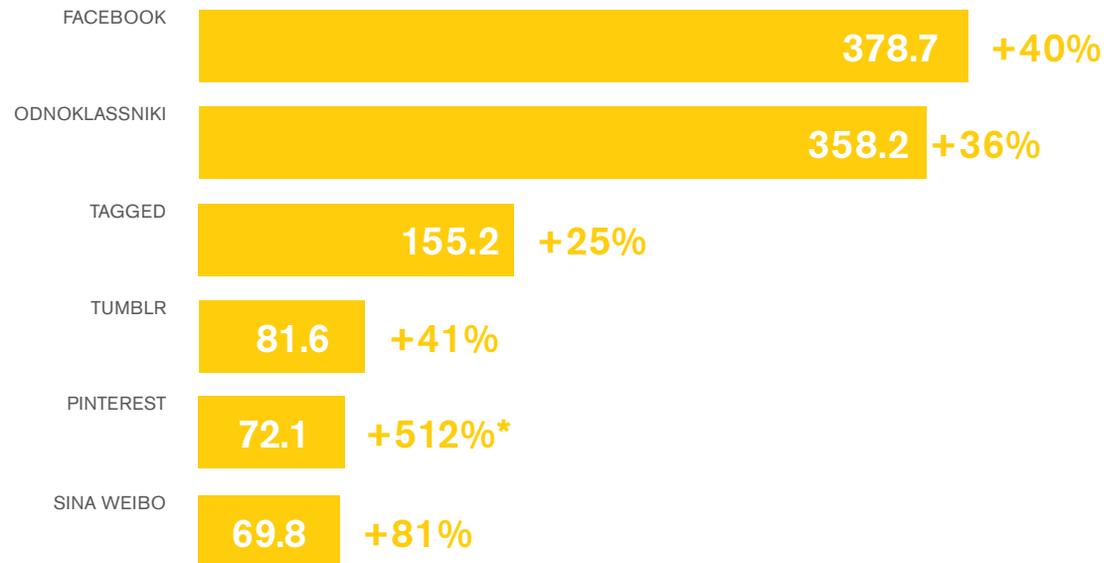
In terms of engagement, Facebook and Russian social network Odnoklassniki were among the leading global social networks continuing to exhibit significant growth in 2011. The average Facebook user spent 6.3 hours on the site in October 2011, up 40 percent from a year ago. The typical Odnoklassniki visitor also spent 6 hours on the site, up 36 percent.

Sina Weibo also showed one of the highest growth rates year-over-year, as the typical visitor engaged with the microblogging site for more than an hour in October, showing an increase of 81 percent from the previous year. Social content-sharing site Pinterest's global engagement measures skyrocketed in 2011, showing a dramatic 512 percent increase over the course of six months. As new social networks continue to spring up in a market already saturated with players, the ones that not only continue to attract new users but also experience network effects through increased user engagement and participation will prove interesting to watch over the longer term.

Selected Global Social Networks Showing Highest Growth in Engagement

Source: comScore Media Metrix, Worldwide, October 2011.

* Growth in engagement for Pinterest is measured from May 2011, when comScore began reporting on the site.



AVERAGE MINUTES PER VISITOR

#10

Mobile devices
are fueling
the social
addiction

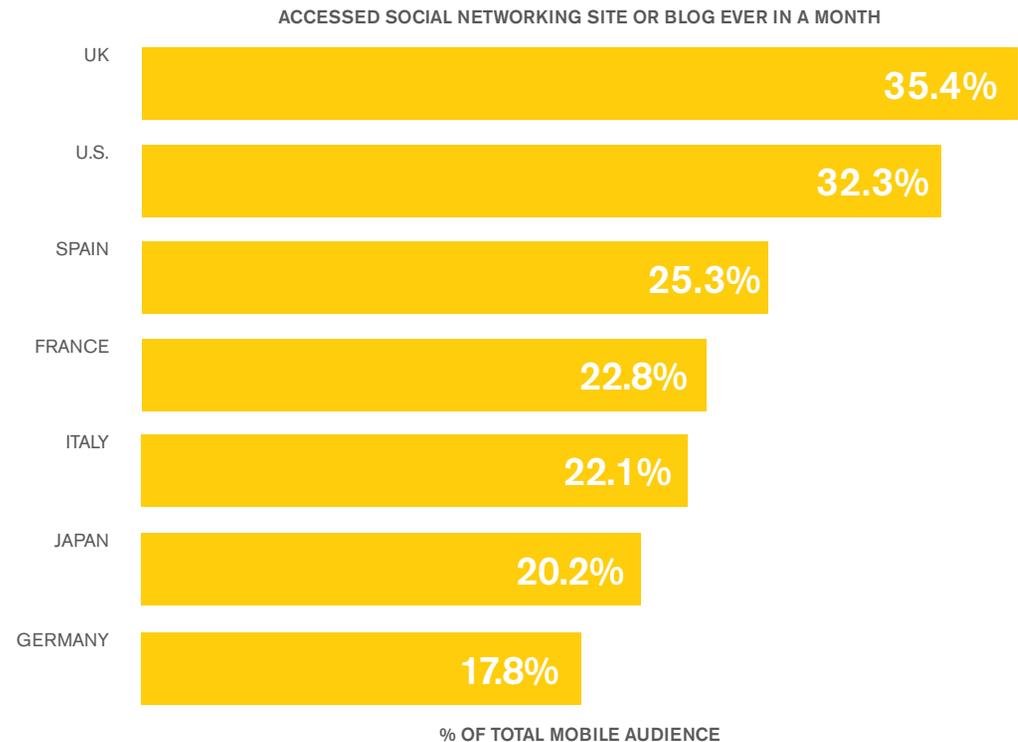
From a technology standpoint, mobile devices represent the future of social networking as they provide the means for users to connect on-the-go, facilitating real-time interaction. In October 2011, nearly one-third (32 percent) of the total U.S. mobile population age 13 and older reported accessing social networking sites on their phone at least once in the past month. Across five leading

European markets (France, Germany, Italy, Spain, United Kingdom), nearly a quarter (24 percent) of the total mobile population reported engaging with their social networks on their mobile devices. Among these EU5 markets, the UK showed the highest social networking penetration among mobile users at 35 percent.

Social Networking Penetration in Selected Mobile Markets

Source: comScore MobiLens, 3 Month Average Ending October 2011*

*MobiLens data for all markets is sourced from the 3 month average period ending in October 2011, except for Japan, which is sourced entirely from October monthly data.



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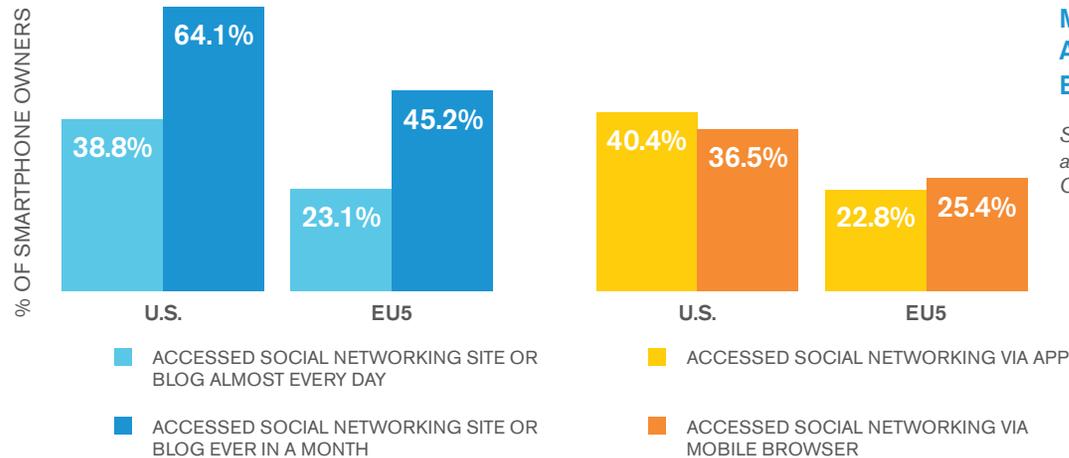
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Mobile devices
are fueling
the social addiction

Smartphones Drive Mobile Social Networking Use

The growth in mobile social networking use can be attributed largely to the growth in popularity of smartphones. In both the U.S. and EU5, mobile social networking use mirrored smartphone adoption, showing similar growth rates over the previous year. Among smartphone users in the U.S., the use of social networking is even more pronounced, as 64 percent of smartphone users reported accessing social networking sites once in the previous month and nearly 40 percent reported doing so almost every day. 22 percent

of smartphone users also reported using location-based check-in services, such as Foursquare and Facebook Places, compared to only 10 percent of all mobile users in the U.S. The prevalence of these behaviors on smartphones can be attributed to the influence of smartphone apps, as social networks have invested in the development of mobile apps to provide a better user experience and extend the reach of their brands. A greater percentage of U.S. smartphone owners reported using apps to access social networking sites compared to browsers (40 percent vs. 37 percent).



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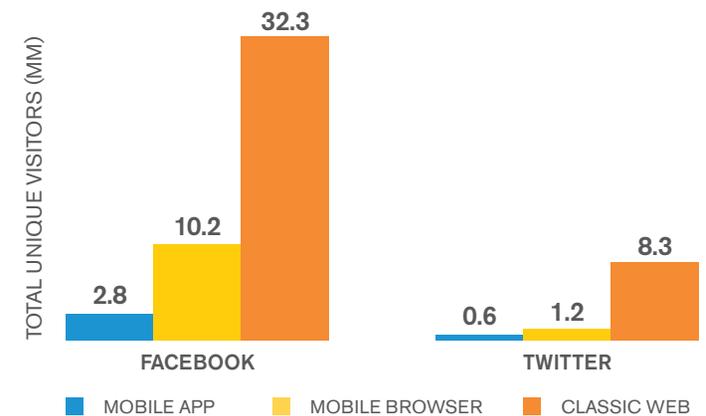
Mobile devices
are fueling
the social addiction

Sizing the Mobile Social Networking Audience

It is important to note that the mobile audience for social networking is still only a fraction of the audience accessing social networks via a classic web interface through a fixed-line Internet connection. To put things in perspective, a comparison of classic web, mobile browser, and mobile app access in the UK using comScore GSMA Mobile Media Metrics (MMM) data shows that mobile browser and app audiences for Facebook and Twitter still account for less than a third of the classic web audience. comScore GSMA MMM is a mobile measurement solution unique to the UK market that provides a census-based view of mobile activity through irreversibly anonymised mobile Internet usage data from 3 of the 4 UK mobile operators. Compared to the 32 million unique visitors accessing Facebook in the UK via a classic web interface, 10 million mobile users accessed Facebook via a mobile browser. The mobile app audience for Facebook is even smaller with 3 million users accessing it via this channel.

Facebook and Twitter Audiences Across Classic Web, Mobile Browser, and Mobile App Channels

Source: comScore GSMA MMM and Media Metrix, UK, October 2011



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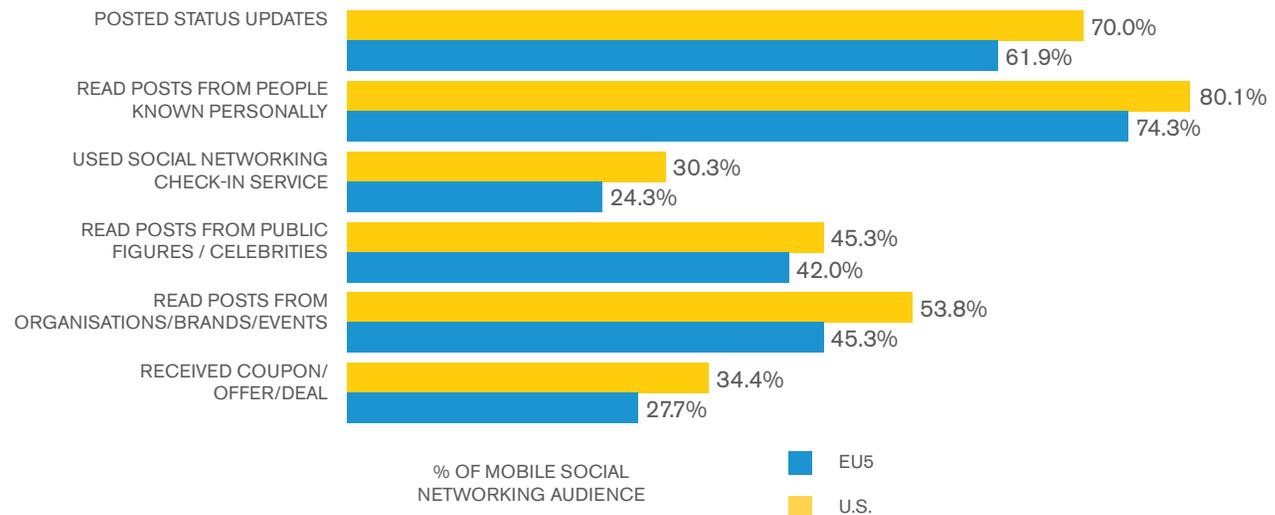
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Mobile Social Networking Activity On-the-Go

How are mobile users engaging with their social networks on the go? Analysis of mobile social networking activity in the U.S. and EU5 reveals that most mobile users who reported accessing social networks on their devices at least once in the previous month did so to connect with their personal networks. In the U.S., 70 percent of mobile social networkers reported using their phones to post a status update, while 80 percent read posts from people they know personally. Mobile social networkers in the EU5 showed similar levels of engagement in these activities. Less than one-third of mobile social networkers in both regions reported "checking in" via location-based services. Interestingly, a significant percentage of mobile social networkers reported using their devices to engage with brands, organizations, and public figures. More than 40 percent of U.S. and EU5 mobile social networkers reported reading posts from celebrities and public figures, and a slightly higher percentage reported reading posts from organizations, brands and events.

Mobile Social Activities Among Mobile Social Networking Users

Source: comScore MobiLens, 3 Month Average Ending October 2011



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Tablets and Connected Devices: The Future of Mobile Social Networking?

As devices representing the intersection of mobile phones and computers, tablets have rapidly gained popularity in recent years by offering Internet connectivity and computing capability in a robust but portable platform. In the U.S. alone, more than 150 new tablet models were launched over the last two years, reflective of a market growing to meet rapidly escalating consumer demand for these devices. Could the popularity of tablets and other web-enabled connected devices further encourage social networking on-the-go? Initial data on tablet use from September 2011 suggests as much. According to a comScore survey, 59 percent of tablet owners reported having updated their social networking status on their devices during the month, while 46 percent also reported sharing their location using location-based check-in services on their tablets.

An analysis of digital media consumption across a sample of U.S. iPhone and iPad owners further illustrates the impact that mobile, tablets, and other connected devices have had on social networking thus far. When factoring in these owners' usage of certain categories across all their devices relative to their usage on computers, there was an evident incremental effect on reach and duration.

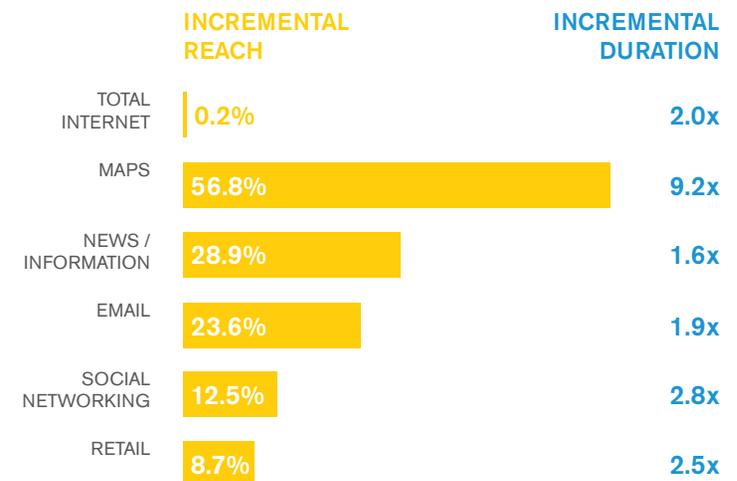
The Social Networking category in particular saw an incremental audience reach of 13 percent via mobile, while time spent in the category nearly tripled. Because smartphones and tablets offer portability and constant connectivity, they have given users a greater ability to satisfy

their desires to connect on-the-go. Users who once might have waited to post status updates on their computers now have the ability to post updates in real-time wherever they may be.

What we are witnessing is the dawn of a truly connected era, where social networking platforms integrate more seamlessly with our lives through mobile technology. As tablets and other connected devices gain even more popularity, bringing portability into our lives, we can expect them to further push the boundaries on the way we interact with each other socially in the digital environment.

Incremental Reach and Duration of Time Spent on Selected Categories Relative to Computer Use for iPhone and iPad Owners

Source: comScore Custom Analytics, U.S., September 2011



Methodology & Definitions

This report utilizes data from the comScore Media Metrix suite of syndicated products, including comScore Ad Metrix, comScore MobiLens, and comScore GSMA Mobile Media Metrics (MMM).

COMSCORE MEDIA METRIX

The comScore Media Metrix suite of syndicated products sets the standard for digital audience measurement and media planning. Powered by Unified Digital Measurement™, the revolutionary measurement approach that bridges panel-based and website server-based metrics to account for 100 percent of a site's audience, Media Metrix delivers the most accurate and comprehensive suite of audience metrics, providing valuable demographic measures, such as age, gender, household income and household size. Media Metrix reports on more than 70,000 entities, with audience measurement for 43 individual countries and 6 global regions, as well as worldwide totals.

For more information, please visit: www.comscore.com/Products_Services/Product_Index/Media_Metrix_Suite

COMSCORE AD METRIX

comScore Ad Metrix provides competitive intelligence for tracking display advertising, reporting on key person-based metrics and uncovering unique contextual insights. Using patented proprietary technology, Ad Metrix is able to track all ads delivered to panelists, offering visibility into category, company and brand level advertisements. Ad Metrix also provides details on creative messages used in specific campaigns and reports on the full range of advertising metrics, such as expenditures, share of voice, ad clutter,

exposed unique visitors, frequency, reach, GRPs and publisher-level demographics.

For more information, please visit: www.comscore.com/Products_Services/Product_Index/Ad_Metrix

COMSCORE MOBILENS

MobiLens provides market-wide insight into mobile digital media consumption, brand-level audience metrics, and details of device ownership and technology penetration. Using proprietary data collection methods, we survey nationally representative samples of mobile subscribers age 13+ in the U.S., UK, France, Germany, Spain, Italy, Canada, and Japan. The MobiLens sample is substantial enough to provide projected data for sub-segments as small as 1 percent of mobile subscribers. The MobiLens' sampling and survey methods undergo extensive analysis and market validation including comparisons to known network operator market shares, leading handset model shares, downloading activity, and other usage metrics. For 2011, the estimated monthly survey completes utilized for this report are 10,000 mobile phone owners in the U.S. For the following analysis, the three-month average figures amount to a sample of 30,000 mobile users.

For more information, please visit: www.comscore.com/Products_Services/Product_Index/MobiLens

Methodology & Definitions

COMSCORE GSMA MOBILE MEDIA METRICS (MMM)

GSMA Mobile Media Metrics (MMM) is a partnership between the GSM Association (GSMA), comScore, and the UK's 4 mobile operators: O2, Vodafone, EverythingEverywhere and 3UK. MMM provides a census-level solution for mobile media reporting, taking irreversibly anonymised mobile Internet usage data from 3 of the 4 UK mobile operators. The census data collected from the operators is ascribed with demographic data collected from a permission-based sample of mobile users. MMM delivers key market-level mobile web visitation and engagement metrics, as well as usage figures for connected apps.

For more information, please visit: www.comscore.com/Products_Services/Product_Index/GSMA_Mobile_Media_Metrics_MMM

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behavior. comScore services, which now include the product suites of recent acquisitions AdXpose, Nedstat, Nexius XPLORE, ARSGroup and Certifica, are used by more than 1,800 clients around the world, including global leaders such as AOL, Baidu, BBC, Best Buy, Carat, Deutsche Bank, ESPN, France Telecom, Financial Times, Fox, Microsoft, MediaCorp, Nestle, Starcom, Terra Networks, Universal McCann, Verizon Services Group, ViaMichelin and Yahoo!.

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