



# 2017 Digital Future in Focus: Latin America

August 2017, Miami, FL  
#DFIF17

# We make it valuable



**TOTAL VIEW  
OF THE CONSUMER**



**TRUSTED  
INDEPENDENT METRICS**

# comScore is a global cross-platform measurement leader

CLIENTS	3,200+ worldwide
EMPLOYEES	1,800+
HEADQUARTERS	Reston, Virginia, USA
GLOBAL COVERAGE	75 countries reported
BIG DATA	1.9 trillion global interactions per month



# Why comScore



## MASSIVE SCALE

Our scale through the comScore census network, mobile and desktop panels enables measurement of real consumer behaviour.



## MULTI-PLATFORM AUDIENCES

First to measure unduplicated audiences across desktops, smartphones and tablets.



## TRUSTED EXPERIENCE

Over 17 years measuring audiences around the world.

# The Team



**Alejandro Fosk**  
***SVP Latin America***



**Francisco Sanchez de Tagle**  
***Advertising Manager***  
***Latin America***



**Jessenia Garcia**  
***Client Service Manager***



**Rodrigo Ceron**  
***Marketing LATAM Senior***  
***Manager***



**Leandro Papone**  
***Regional Business***  
***Director***

# Agenda

- **2017 LATAM Digital Future in Focus**
- **comScore Out of the Box**
- **Mobile Hierarchy of Needs**
- **Illuminate What Matters in Digital Advertising**

# Global Overview

# Non-US has Soared in Significance

Source: comScore MMX, June 2017, Persons 15+

90%

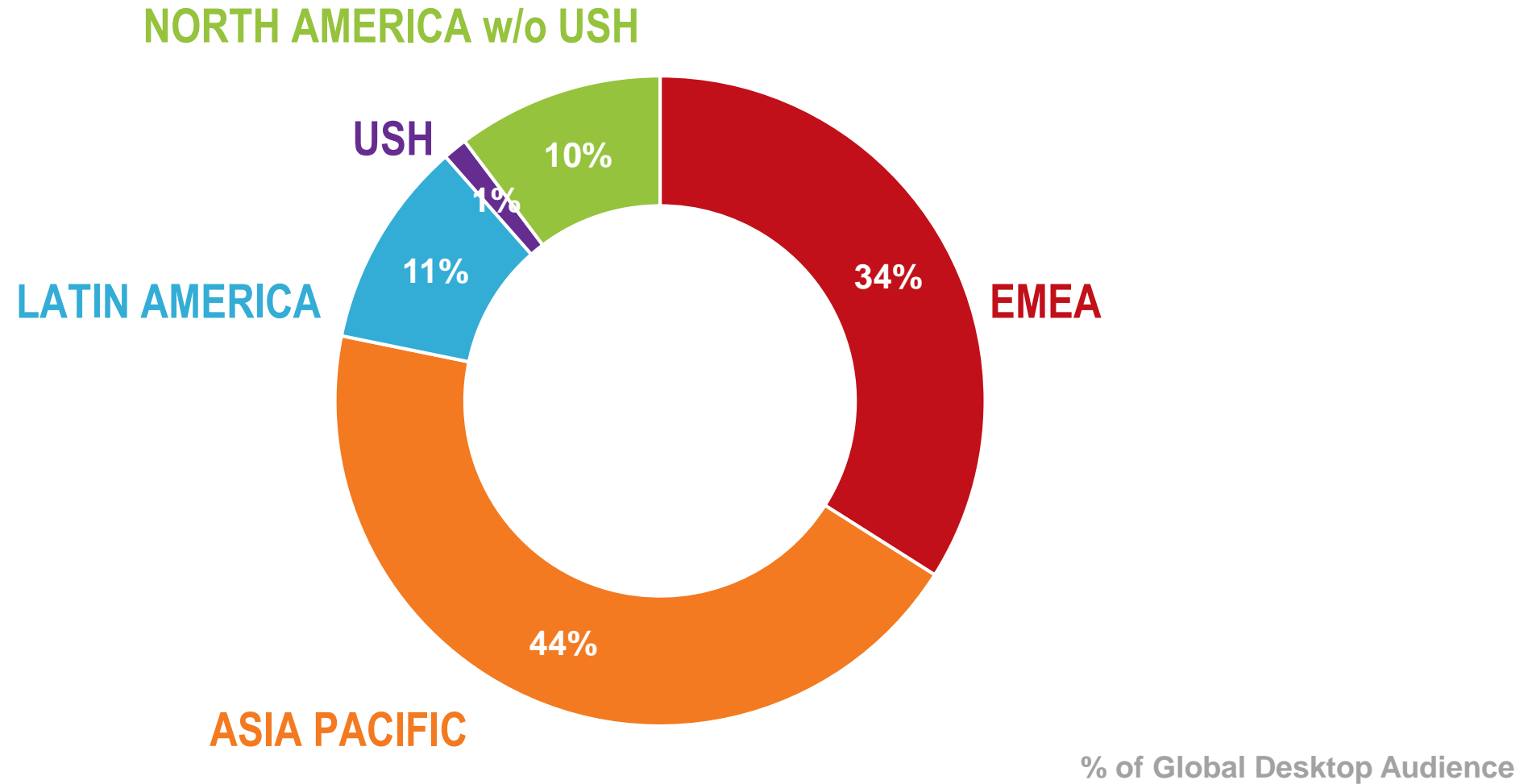
Since 1996, non-US internet users increased + 30% of the global desktop population.

Global non-US  
internet users



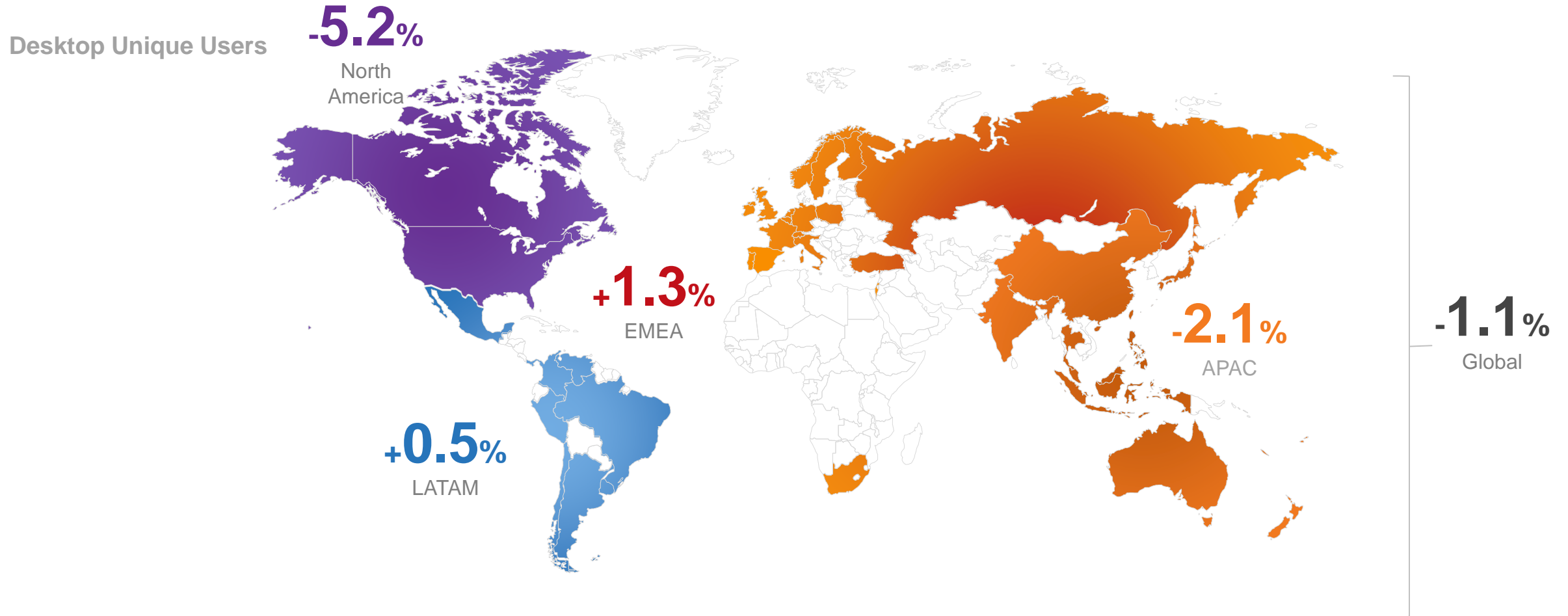
# LatAm & North America almost in parity with one another

Source: comScore MMX, June 2017, Persons 15+



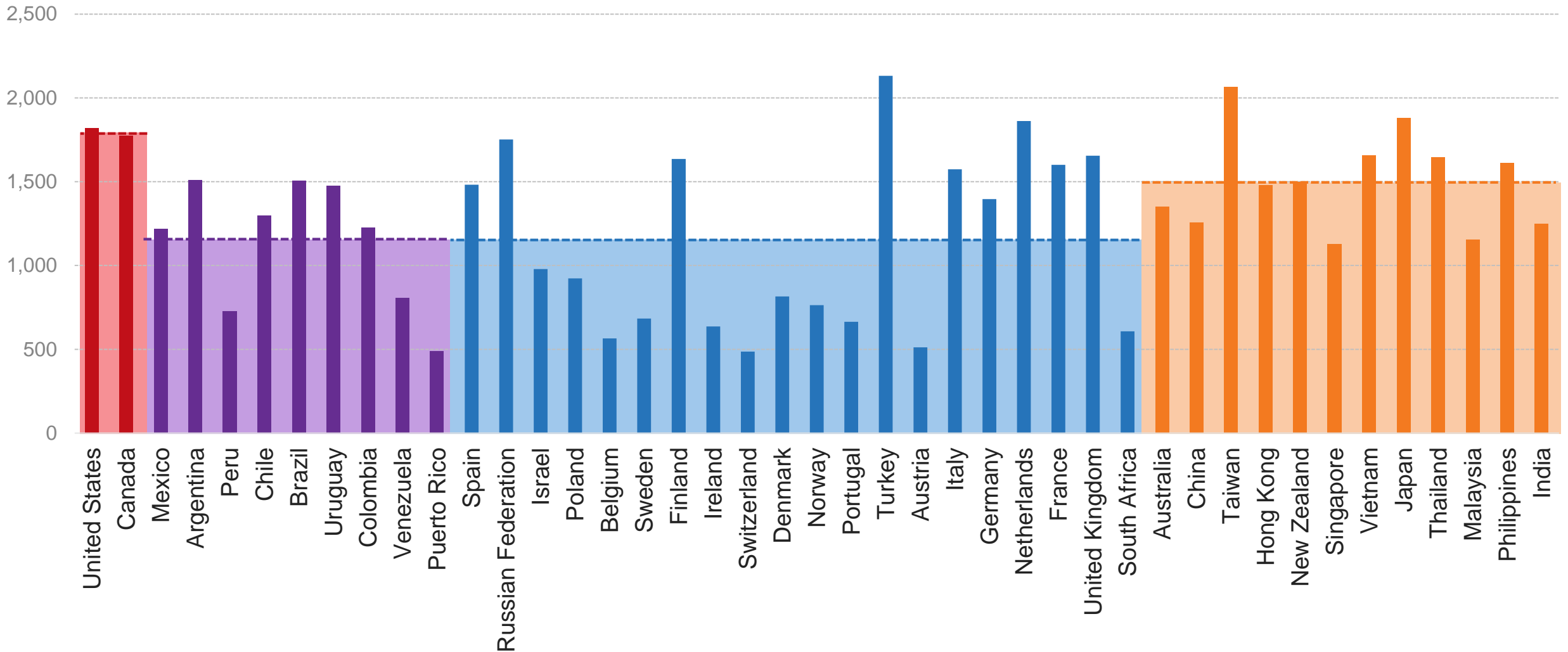
# Desktop Audiences in EMEA & LATAM are Still Growing

Source: comScore MMX, June 206 vs June 2017, Persons 15+



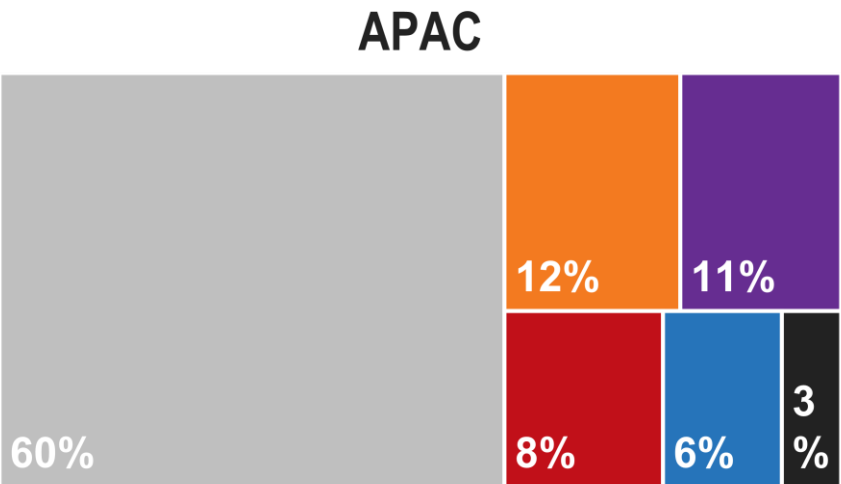
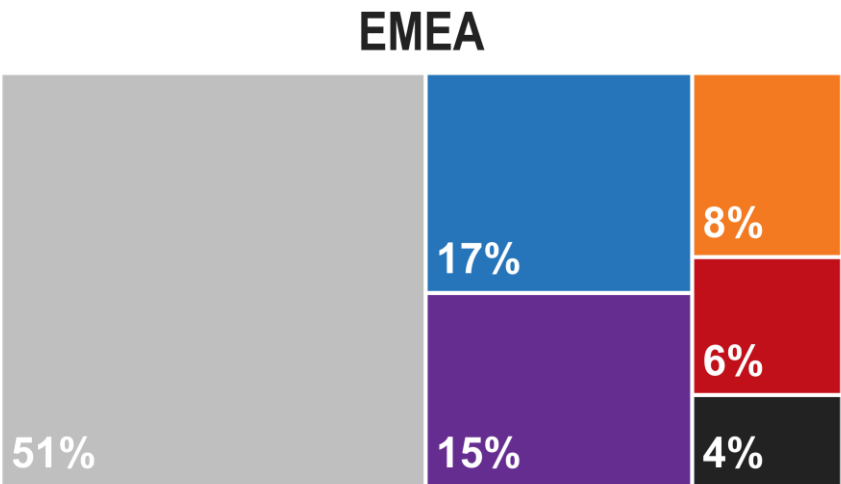
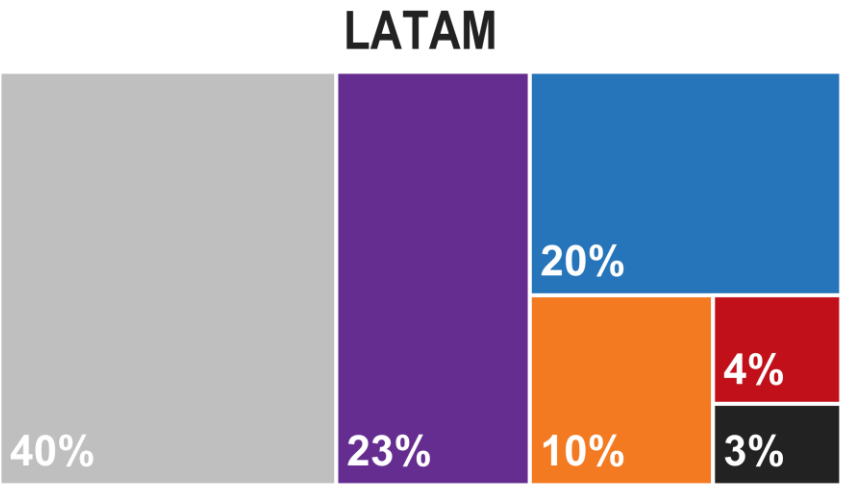
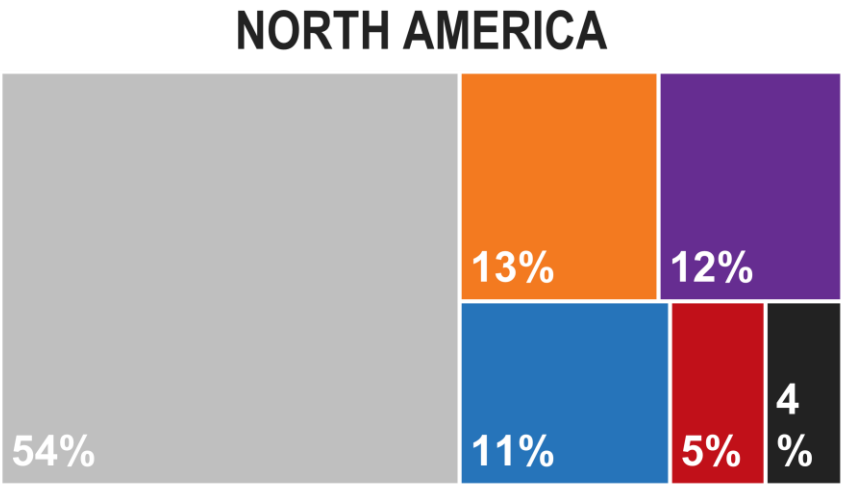
# Global average desktop minutes per user

Source: comScore MMX, June 2017, Persons 15+



# Categories' share of desktop minutes

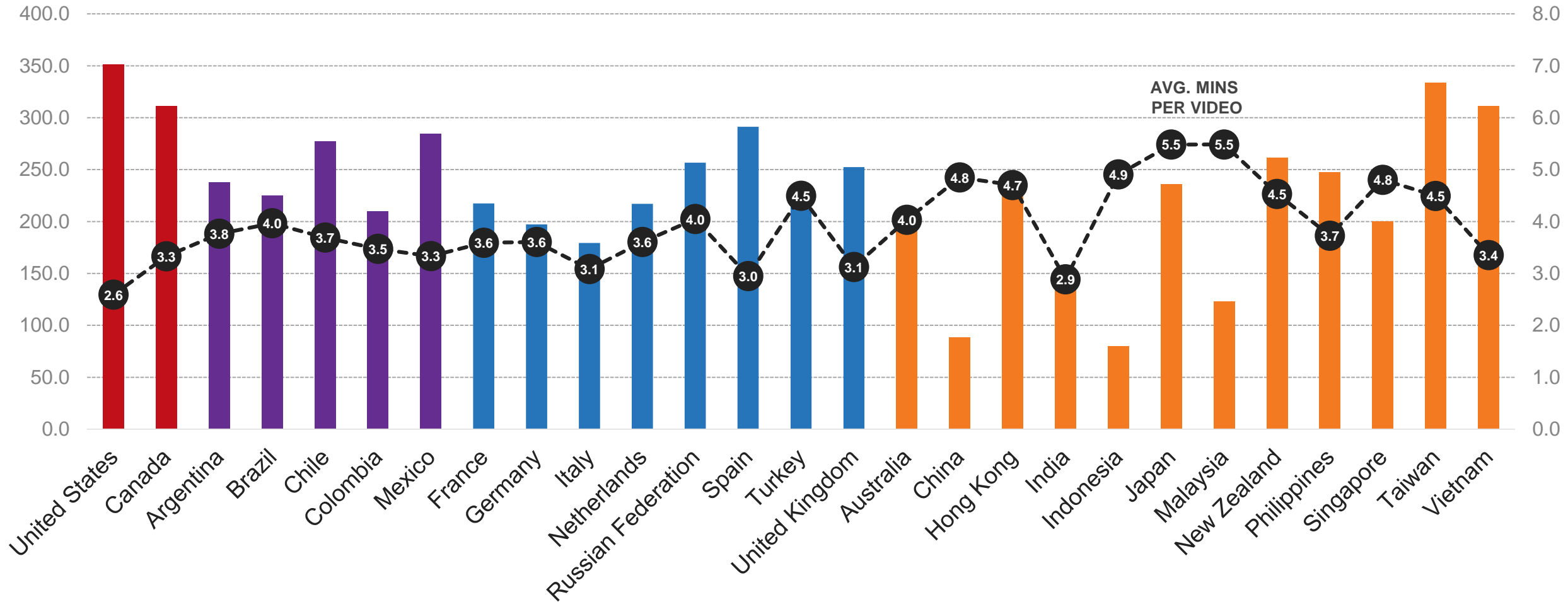
Source: comScore MMX, June 2017, Persons 15+



# Global average video minutes per user & per video

Source: comScore Video Metrix, June 2017, Persons 15+

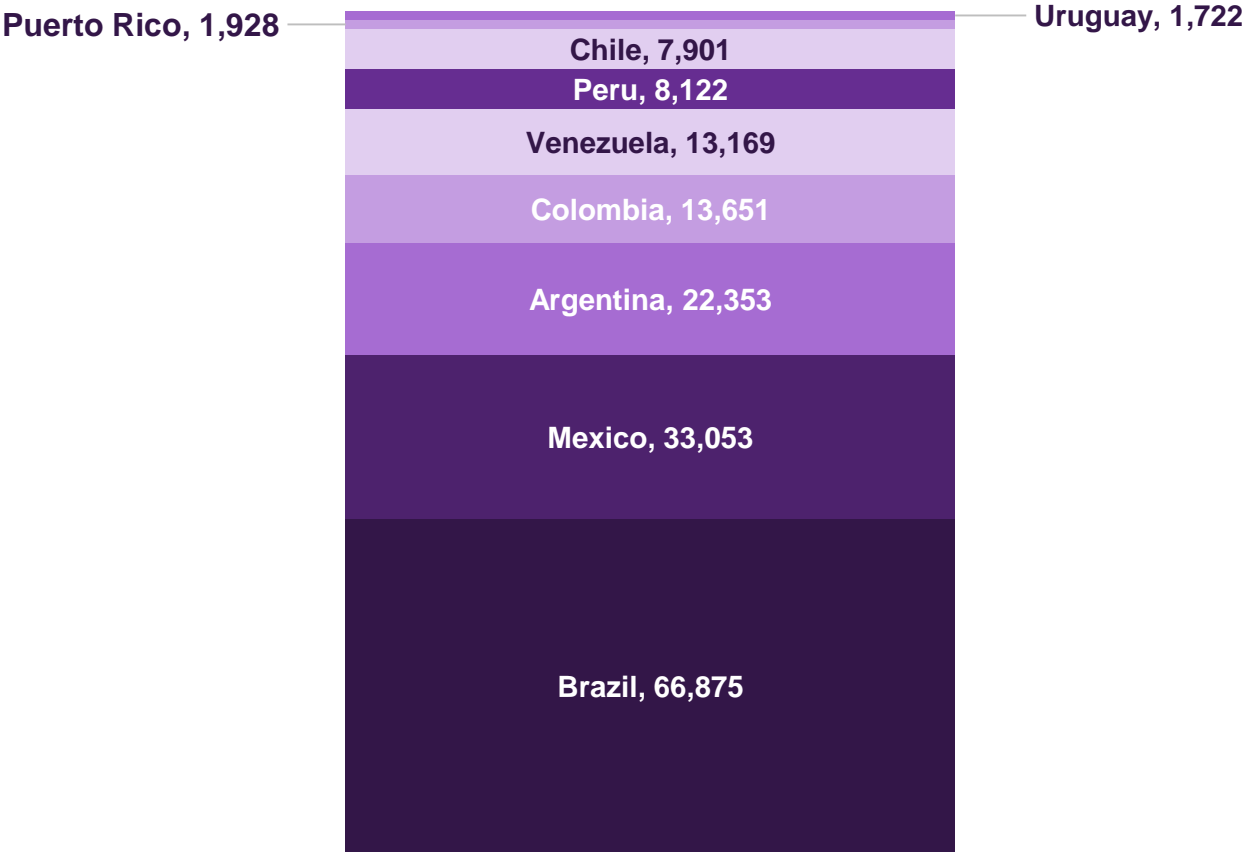
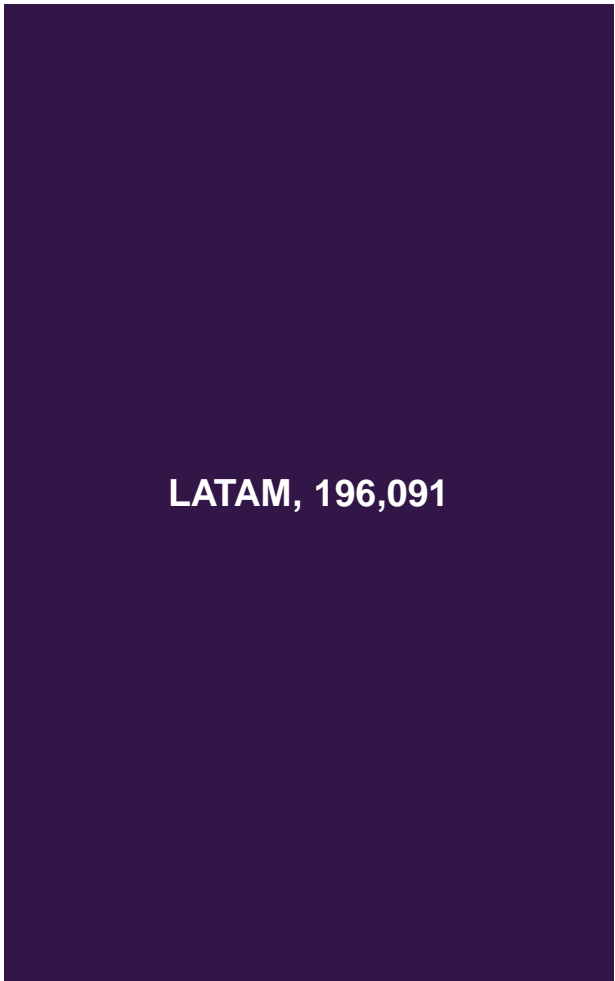
AVG. MINS PER USER



# LATAM Overview

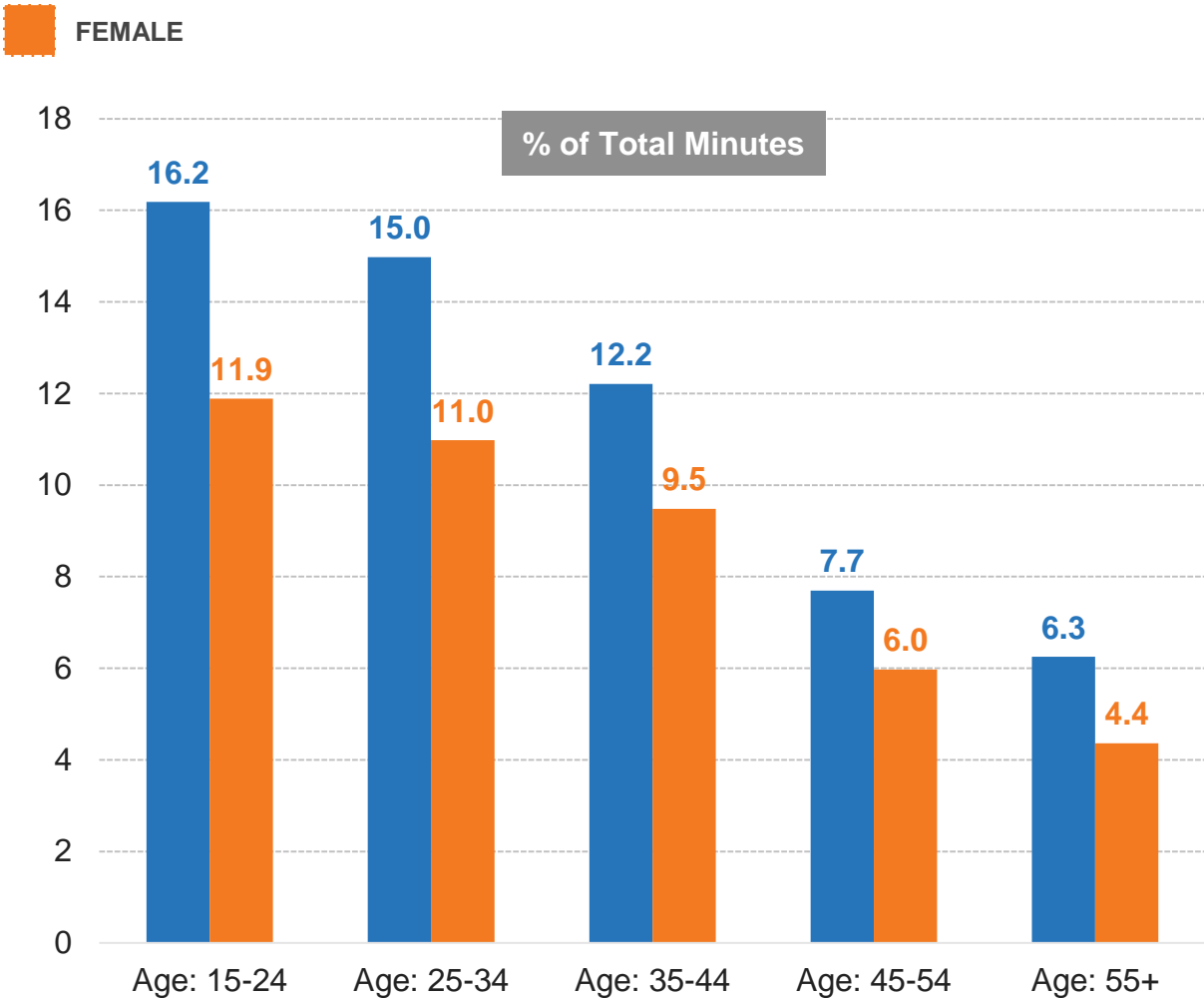
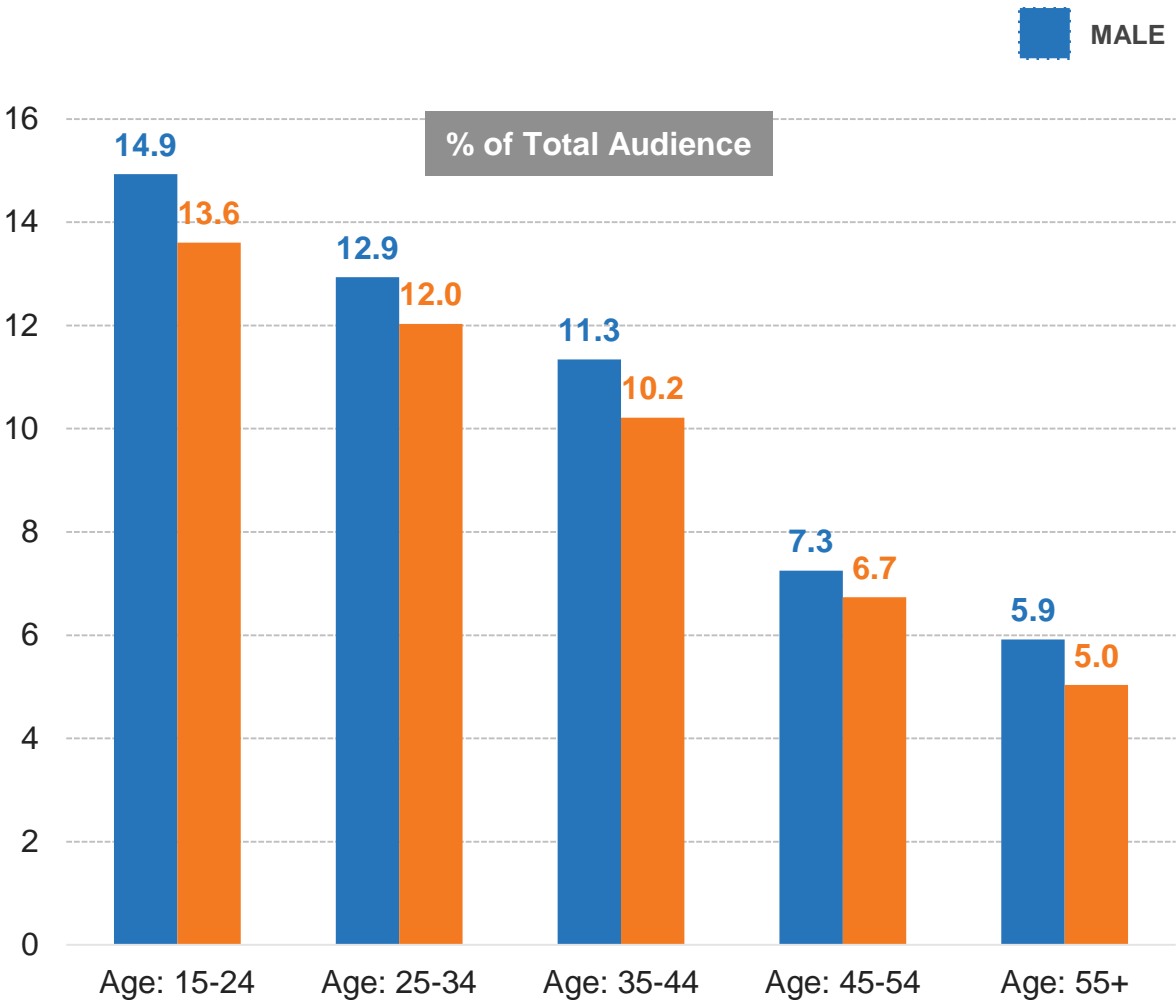
# LATAM desktop audiences

Source: comScore MMX, June 2017, Persons 15+, Users in thousands.



# Demographics and usage

Source: comScore MMX, June 2017, 'Latin America'

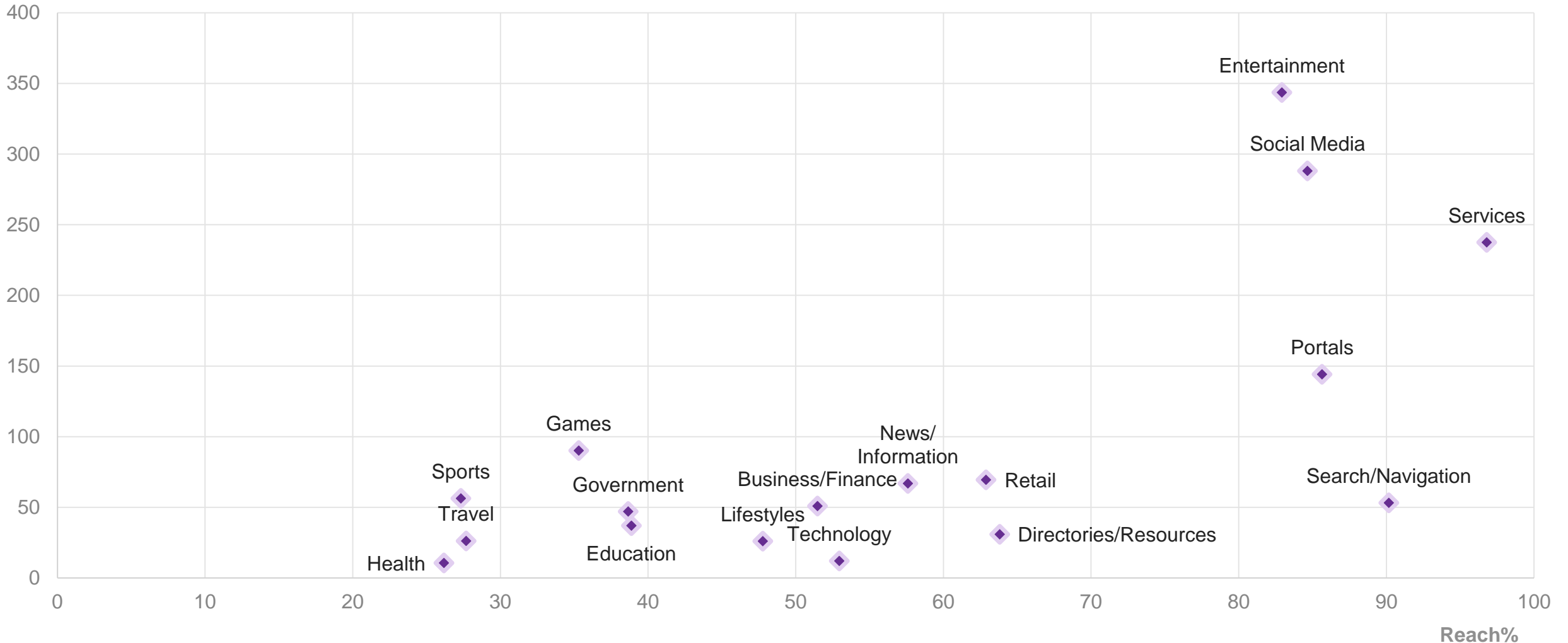




# Scale vs. engagement for key categories

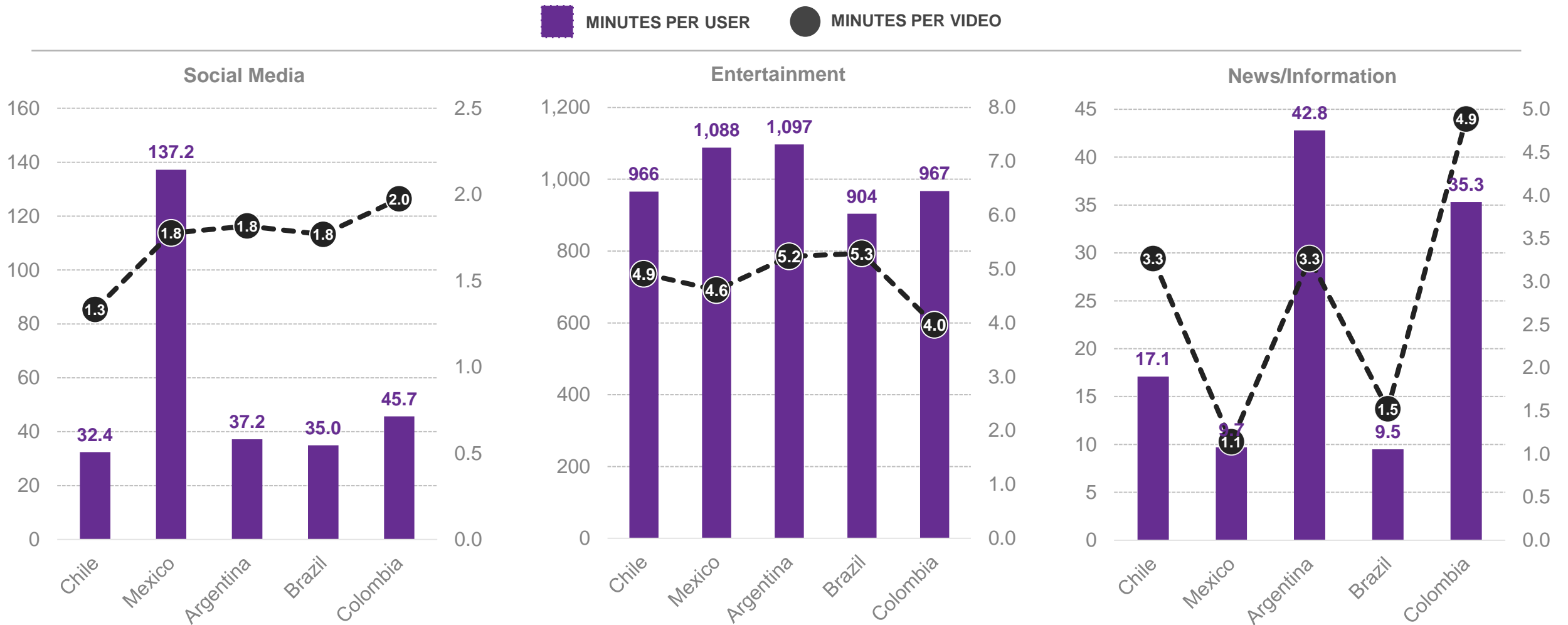
Source: comScore MMX, June 2017, 'Latin America'

Avg Mins / User



# Video Categories

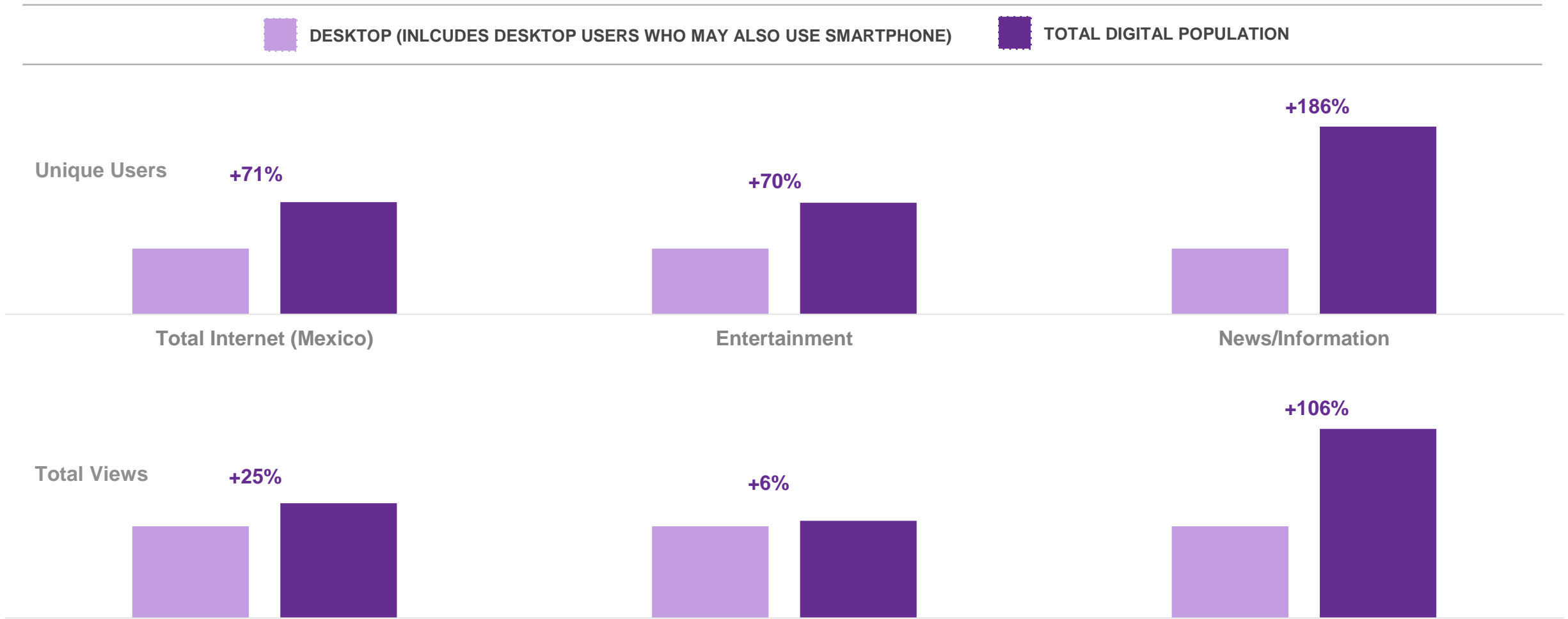
Source: comScore Video Metrix, June 2017



# Multi-Platform: Additional scale and engagement

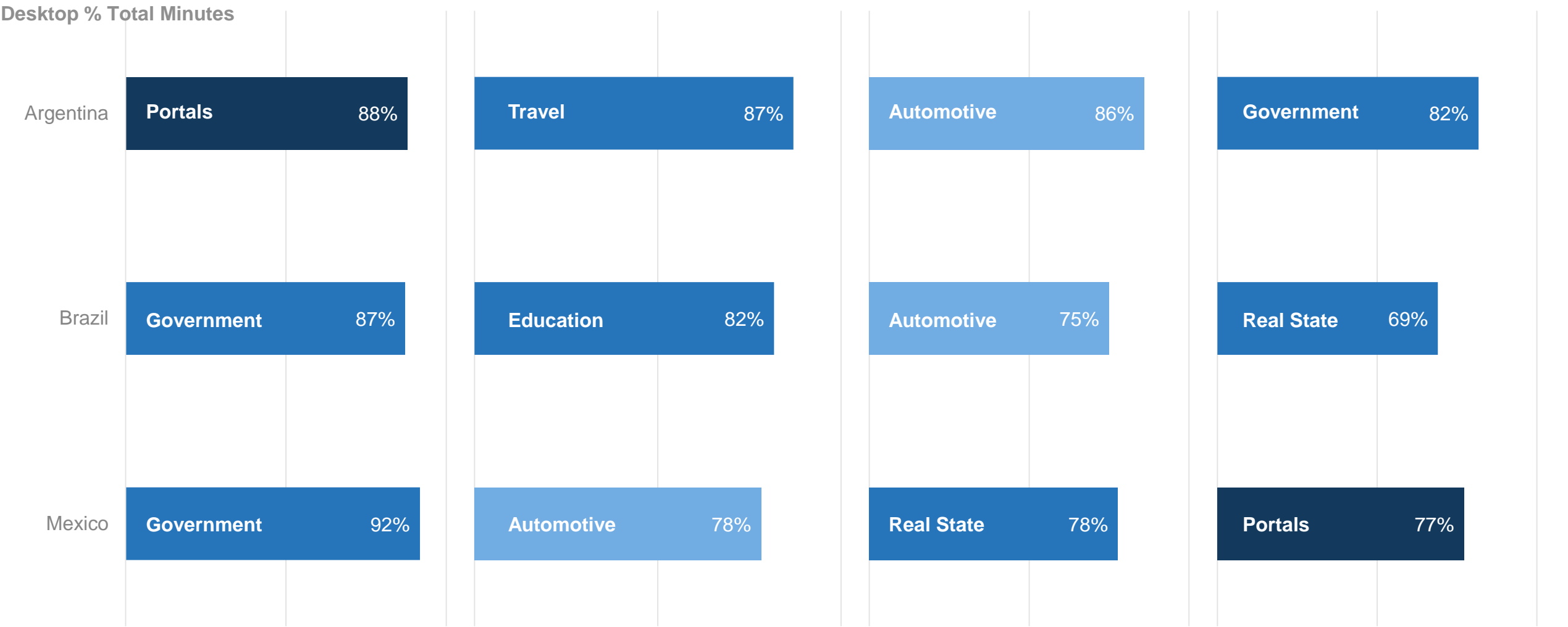
MEXICO

Source: comScore MMX Multi-Platform, June 2017, Mexico



# Desktop still dominates time for certain categories

Source: comScore MMX Multi-Platform, June 2017



# Mobile adds incremental time and audiences

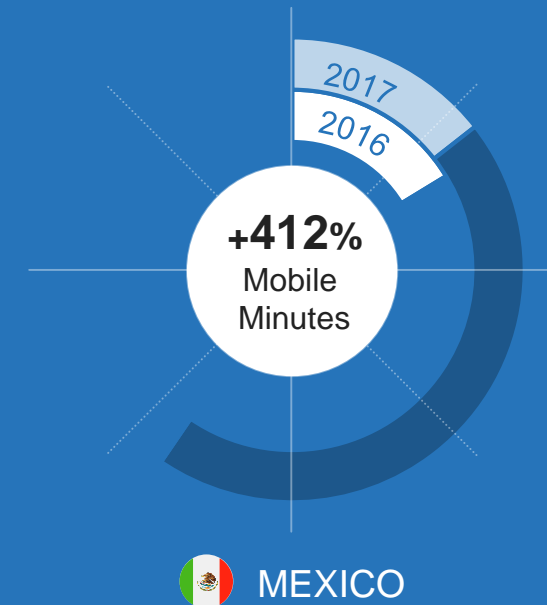
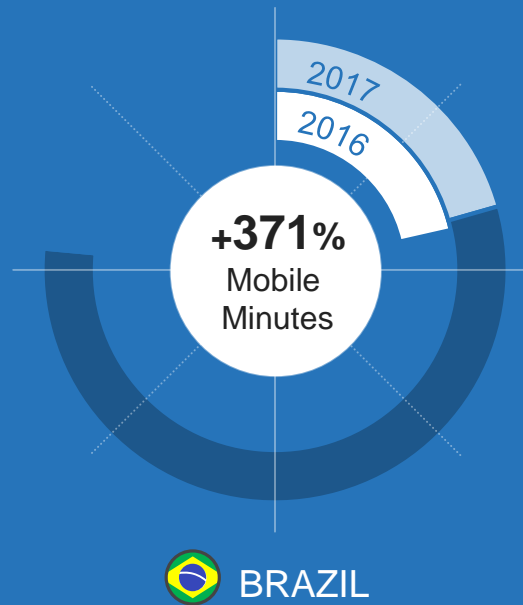
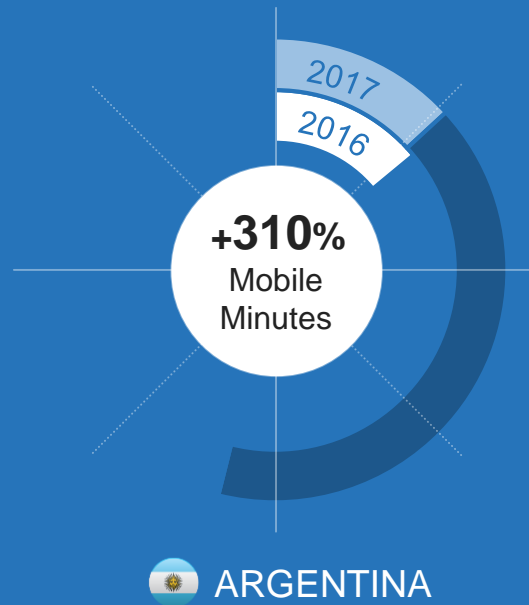
# Mobile boosts digital minutes

Source: comScore MMX Multi-Platform, June 2017

## Total minutes

○ Desktop

● Mobile



# Mobile impact on categories providing varying opportunity

Source: comScore MMX Multi-Platform, June 2017

Mobile mins as % of  
desktop mins

Desktop

Entertainment

Social Media

Portals

News/Information



Brazil

100%



Argentina

100%

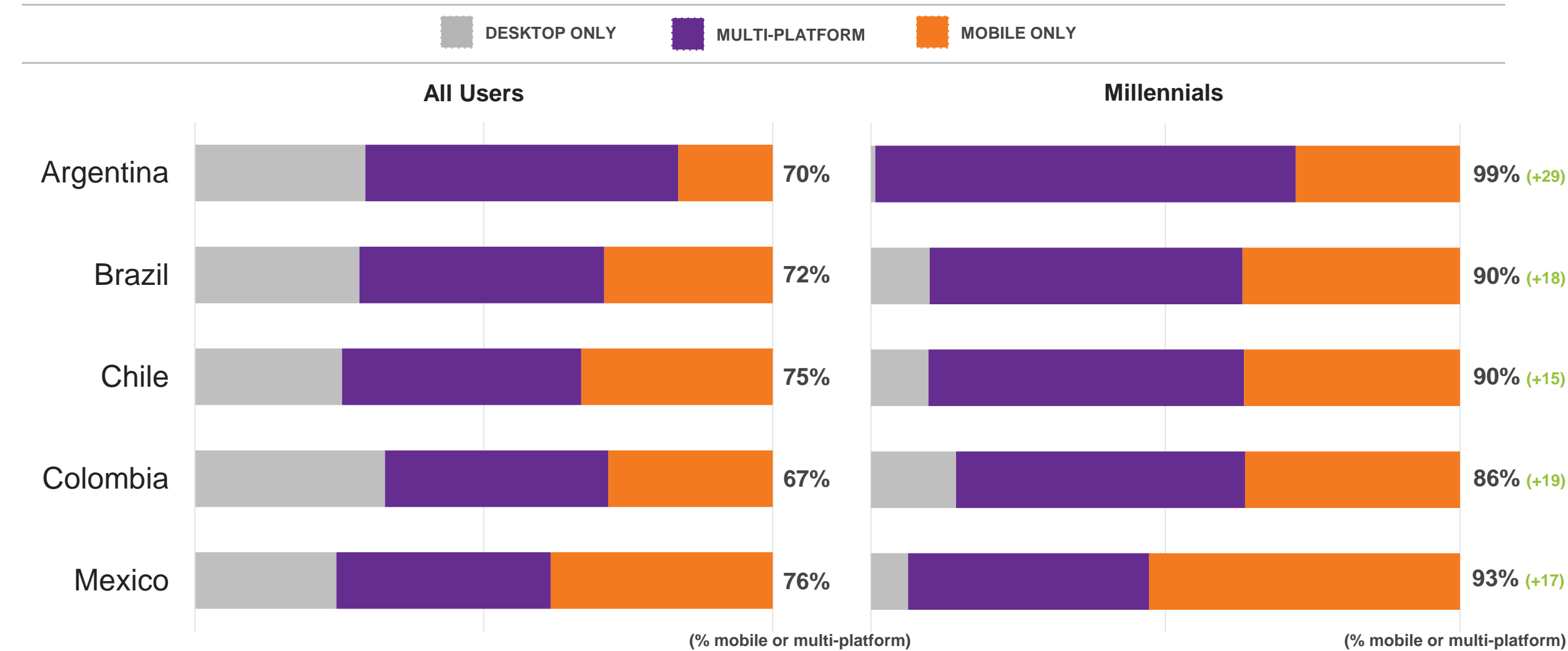


Mexico

100%

# Dominance of Multi-platform majorities

Source: comScore MMX Multi-Platform, June 2017



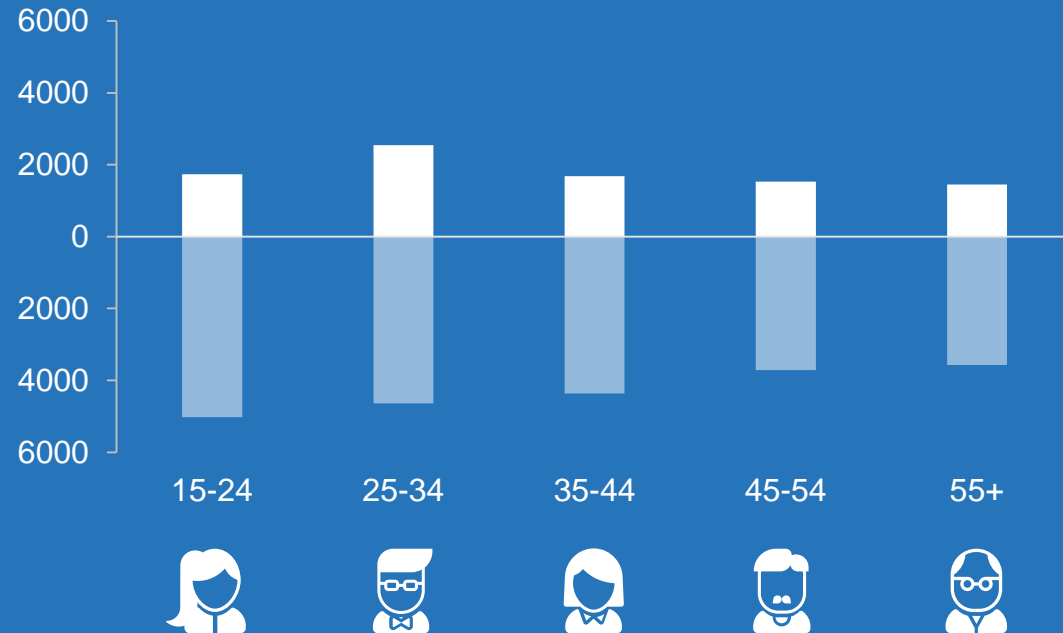


# Average minutes by platform are polarized by age group

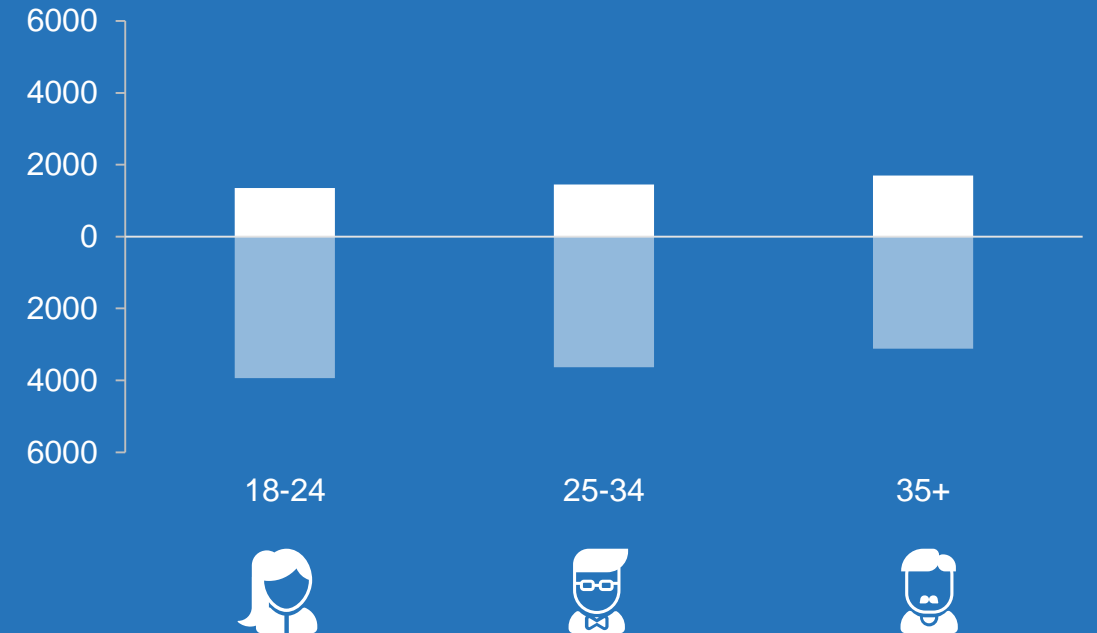
Source: comScore MMX Multi-Platform, June 2017

## Average mins per user

■ Desktop ■ Mobile



Brazil



Mexico

# Platform adoption has impacted demographic profiles

Source: comScore MMX Multi-Platform, June 2017

15–24  
years old

45%

MULTI PLATFORM (VS. 42% ALL USERS)

25–54  
years old

36%

MOBILE ONLY (VS. 29% ALL USERS)

55+  
years old

26%

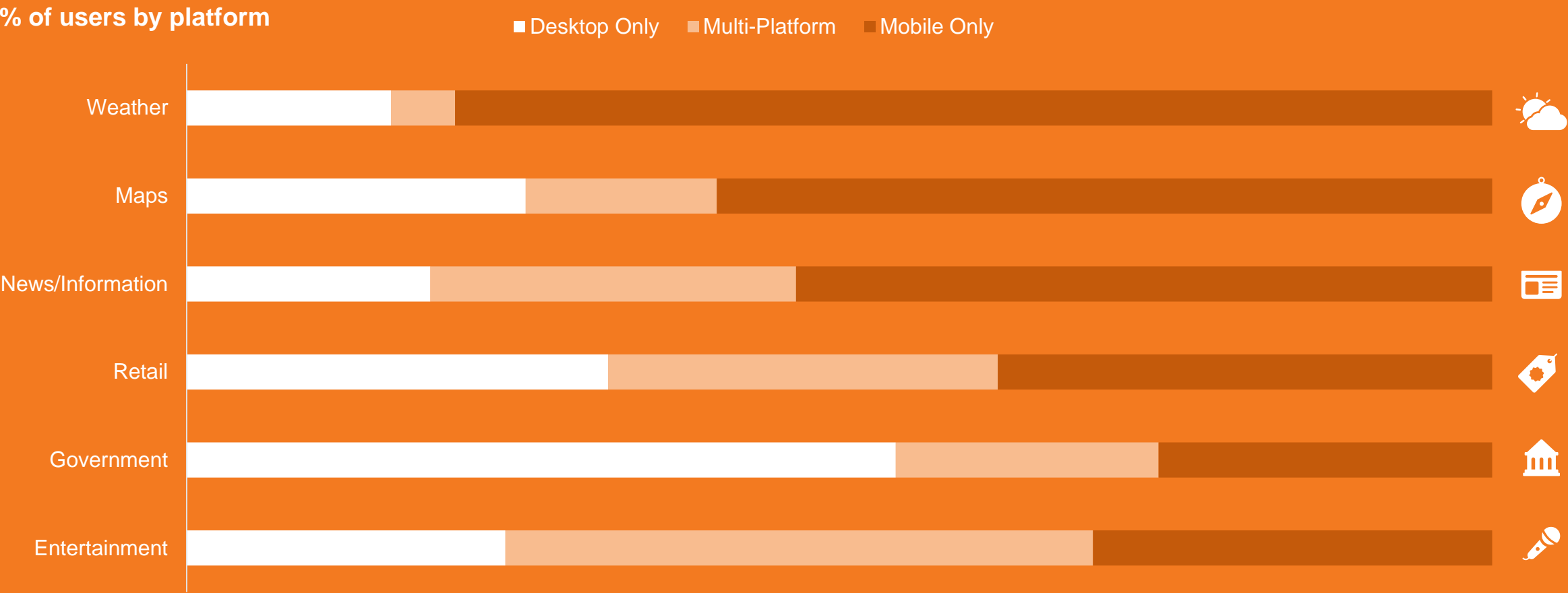
DESKTOP ONLY (VS. 16% OF 25–54)



BRAZIL

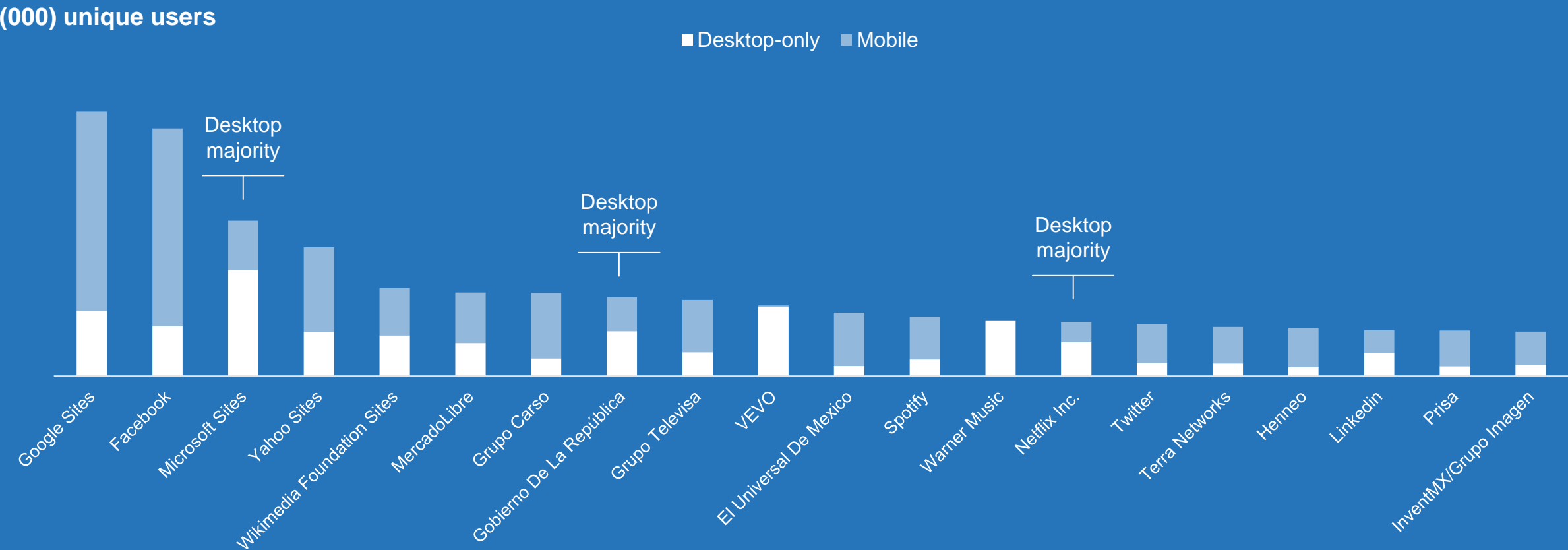
# Platform choice influenced heavily by content

Source: comScore MMX Multi-Platform, June 2017



# ‘Mobile First’ matters for digital businesses

Source: comScore MMX Multi-Platform, June 2017



MEXICO

Digital video has also become part of  
our digital nature

# Overall rise in desktop videos consumed and it's duration

Source: comScore Video Metrix, June 2017

**+6%**

**VIDEOS(000)**

**+7%**

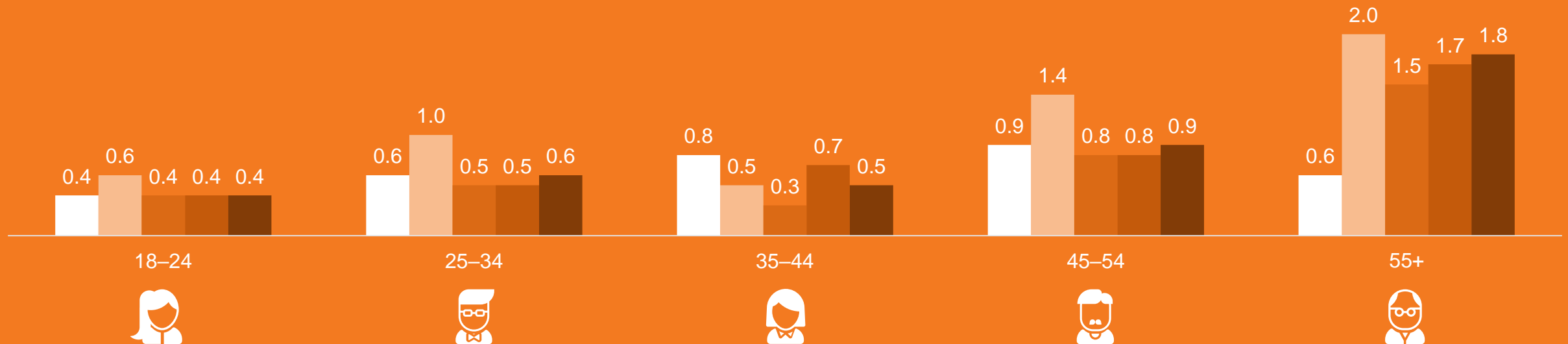
**MINS PER VIDEO**

# Younger users potentially under-monetized on desktop

Source: comScore Video Metrix, June 2017

Advertising % total mins

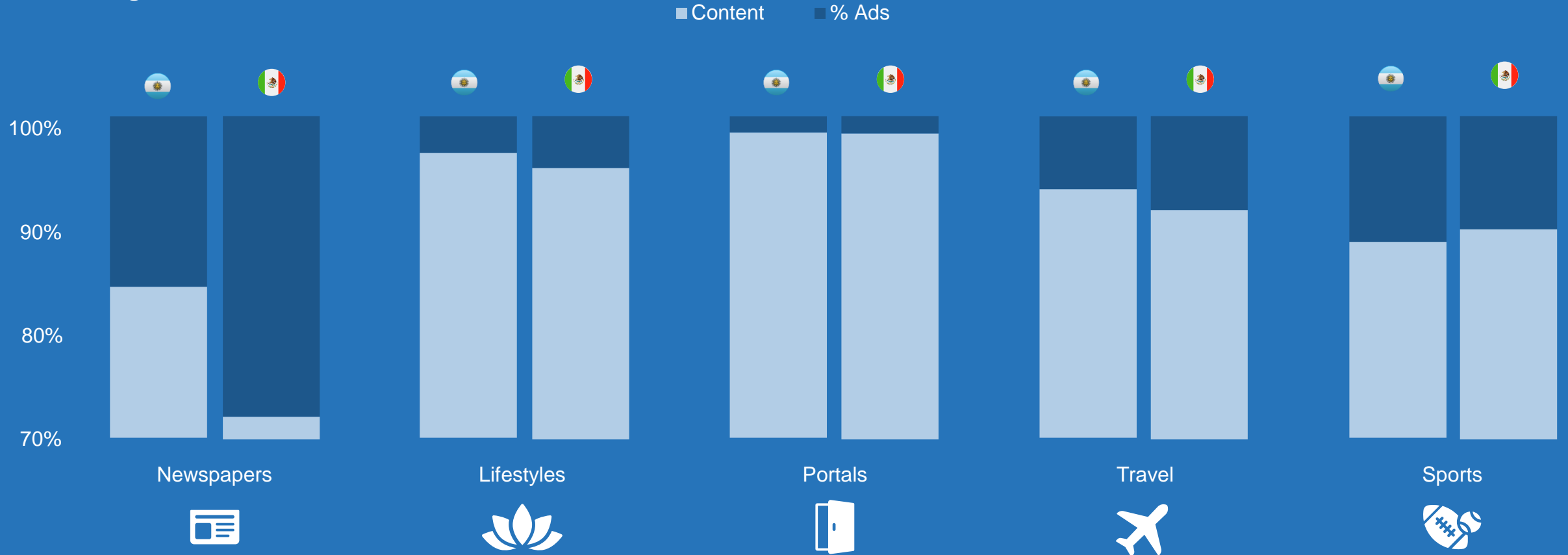
■ Argentina ■ Brazil ■ Chile ■ Colombia ■ Mexico



# Video category monetization varies dramatically

Source: comScore Video Metrix, June 2017

## Advertising % total mins



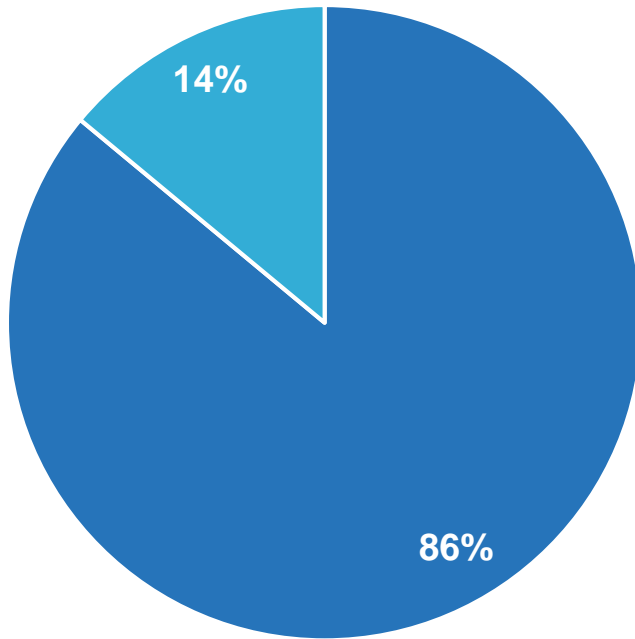


# USH Overview

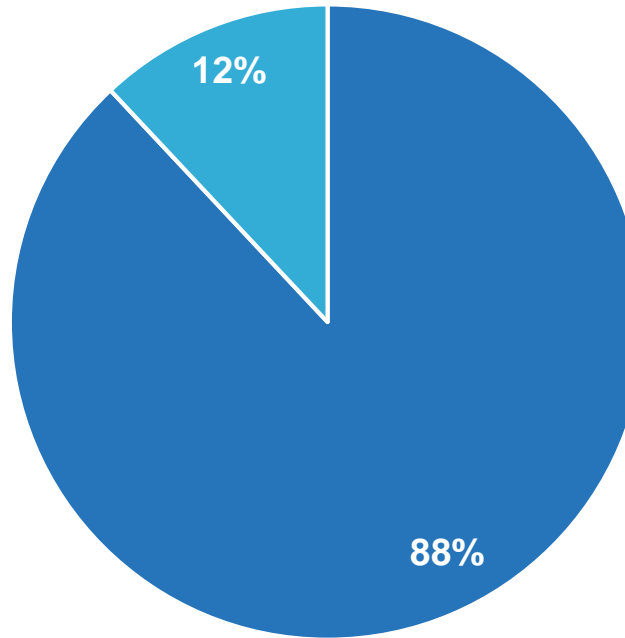
# 14% of U.S. internet users are Hispanic

Source: comScore MMX Multi-platform, June 2017

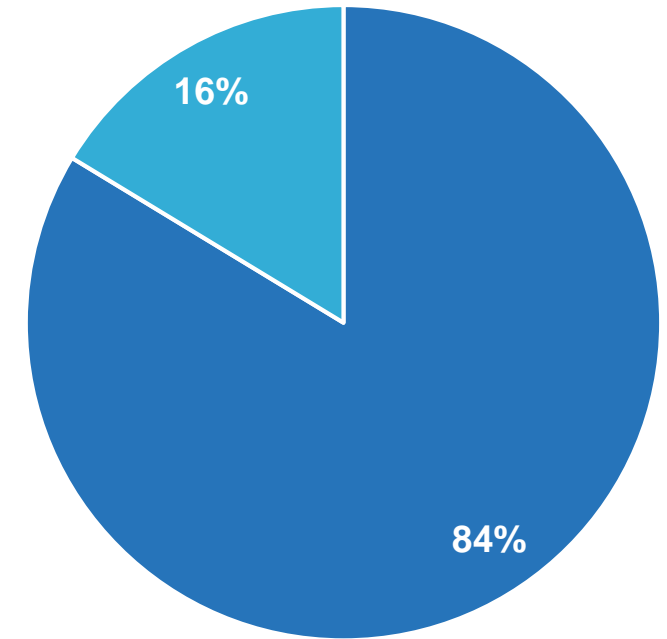
Total Digital Population



Desktop



Mobile

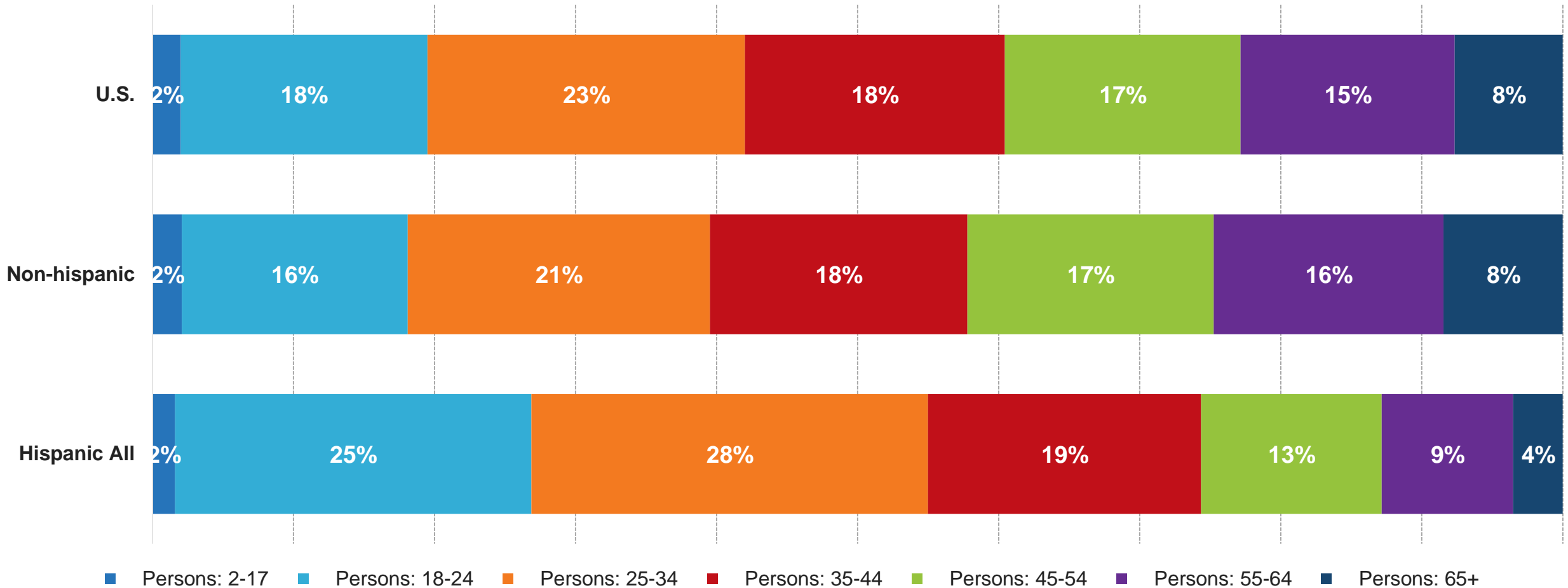


■ Non-Hispanic ■ Hispanic All

# USH internet users are slightly younger than Non-Hispanic

Source: comScore MMX Multi-platform, June 2017

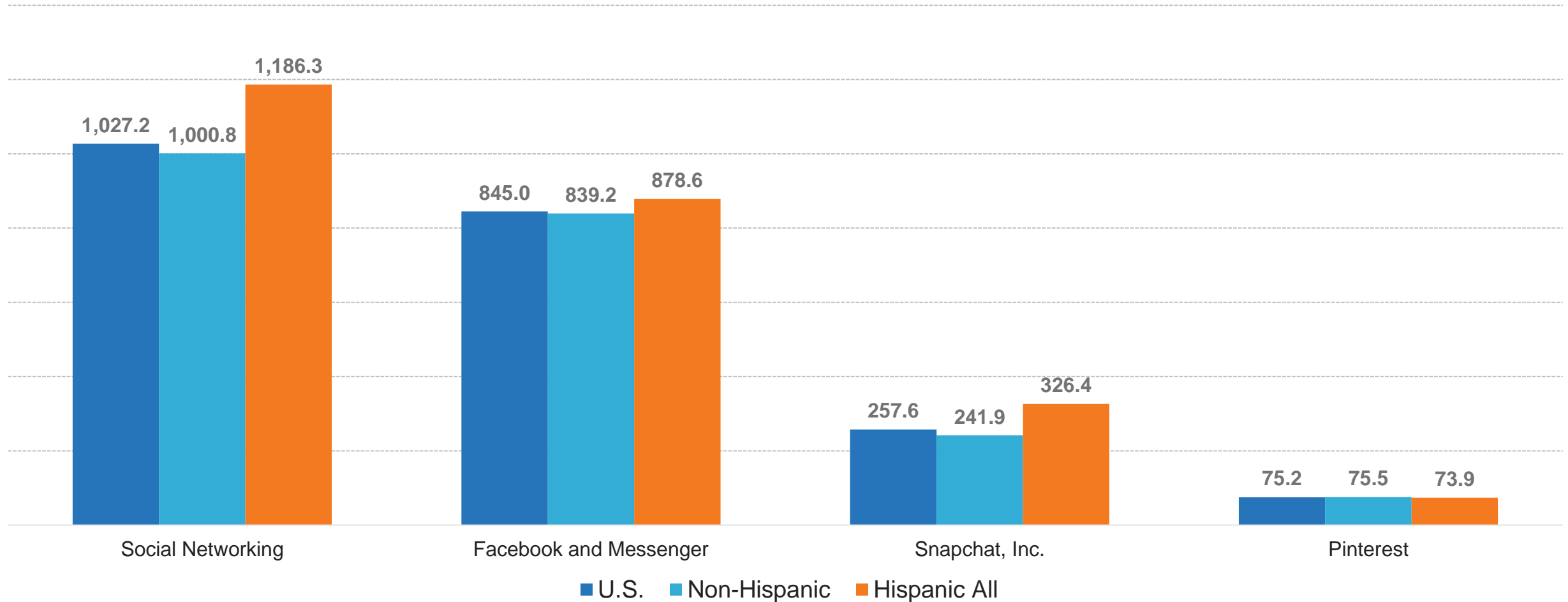
## Advertising % total mins



# USH spend more time on social media than Non-Hispanics

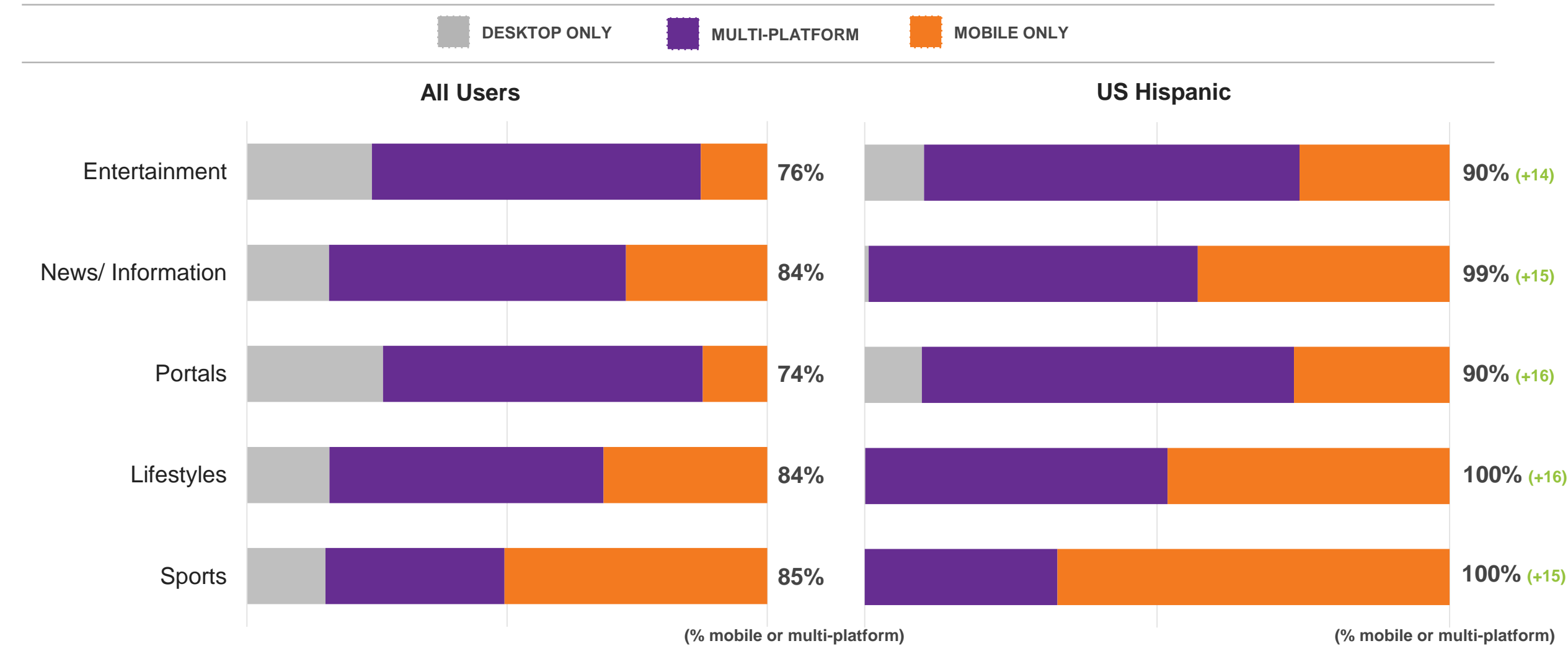
Source: comScore MMX Multi-platform, June 2017

Average Minutes per Visitor



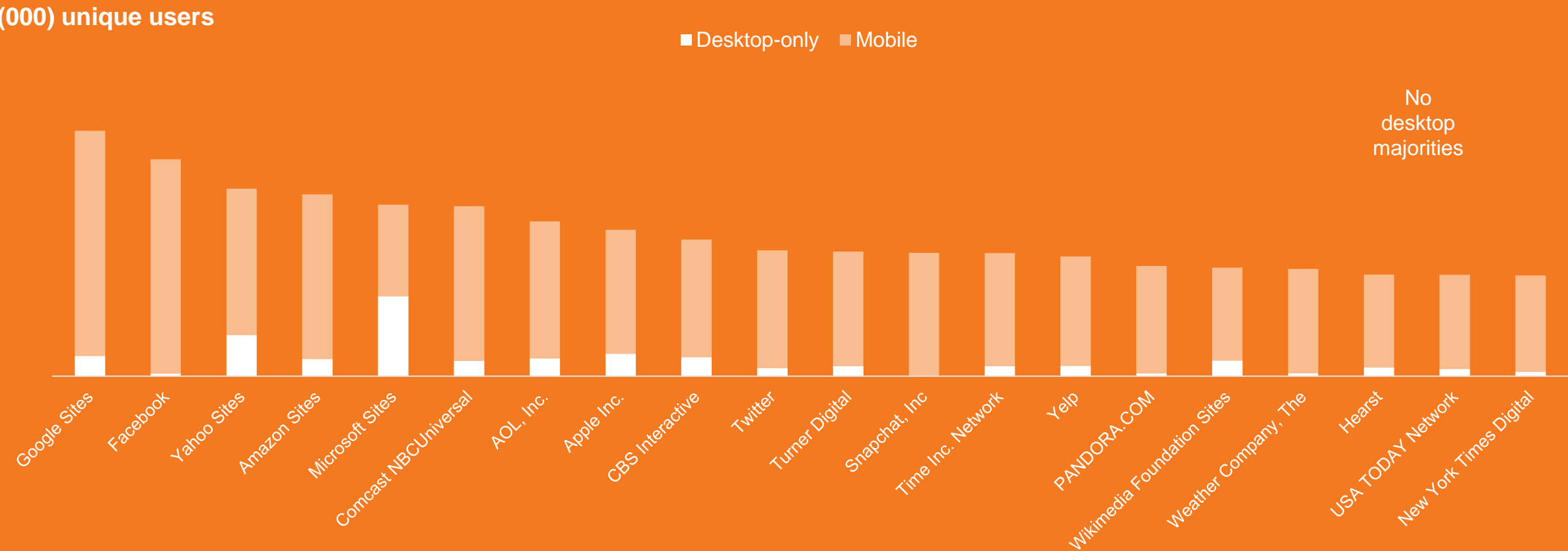
# U.S. Hispanic audience is more mobile driven

Source: comScore MMX Multi-Platform, June 2017



# ‘Mobile First’ matters for USH

Source: comScore MMX Multi-Platform, June 2017



# Key Takeaways

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- **LatAm & North America almost in parity with one another.**
- **Mobile adds incremental time and audiences.**
- **Digital video has also become part of our digital nature.**
- **Younger users potentially under-monetized on desktop.**
- **USH internet users are slightly younger than Non-Hispanic.**





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