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220 MILLION
INTERNET USERS IN LATAM
DIGITAL LATINO

96% ACCESS INTERNET DAILY

86% MORE THAN ONCE A DAY
ONLINE ACTIVITY - BRAZIL

BRAZILIANS SURF

41 HOURS MONTHLY

86% ACCESS SOCIAL NETWORKS

5h20 DOING SOCIAL ACTIVITY

82% WATCH VIDEO ONLINE

11h35 WATCHING AND LISTENING VIDEO/MUSIC

60% ACCESS TERRA

7h07 READING NEWS
**DIGITAL LATINO TRENDS**

1. **SOCIAL**
   - 67% express opinion
   - 59% take care about someone else's opinion
   - 86% are active social networks users

2. **LIVE**
   - Follow live any single event
   - Multiscreen, anytime, anywhere
   - Live video is a killer content on internet

3. **VIDEO**
   - Class A/B: 96% watch videos online, 87% offline
   - 15-30 yrs: 31% watch TV series online, 27% offline

4. **MUSIC**
   - 2nd reason to have a home computer (internet is 1st)
   - Digital is the first income revenue for music industry in Brazil
TERRA IS THE LEADING DIGITAL MEDIA COMPANY IN LATIN AMERICA
70 MILLION PEOPLE ACCESS TERRA MONTHLY
TERRA IS THE 31ST MOST VISITED SITE IN THE WORLD
STRATEGIC FRAMEWORK

CONTENT

PEOPLE

SOCIAL

SCREENS
MILLION EYEBALLS IN LATAM

6 MILLION LISTENERS IN LATAM

12 MILLION EYEBALLS IN LATAM
MILLIONS OF SONGS
GLOBAL AND LOCAL CATALOG
ALL MAJORS AND INDEPENDENT
AVAILABLE SMARTPHONES AND WEB
GUADALAJARA 2011 | LONDRES 2012

OFFICIAL BROADCASTER

100 MILLION PEOPLE

13 LIVE HD CHANNELS

LIVE ON SMARTPHONES AND TABLETS
**ADDING VALUE TO TELEFÓNICA**

**TERRA TV**
- Gives to Telefónica access to state of art OTT multiplatform
- Technology and content expertise leverage Telefónica know how
- Unique video content offering

**SONORA**
- Unique offering to Telefónica’s broadband customers
- Expansion to Telefónica’s smartphone clients increase loyalty and conversion
- 500,000 Telefónica’s clients on the program

**CONTENT**
- Terra offers huge catalog of premium content for mobile
- 2 million Movistar clients impacted daily by Terra content
- 7 million pieces of content per day are delivered for Telefónica clients

**INNOVATION**
- Online Advertising Leadership
- Anticipating internet trends
- Internet brand awareness
STRATEGY TO GROW

1. ANYWHERE
   All products and contents must be available in any screen, device and O.S.

2. INSTANTLY
   Live events push content for mobiles. Everything on the cloud.

3. FREMIUM
   Free content - Advertising. Premium content - Subscription.