

MOBILE CHILE

2016

Updated Forecasts and
Key Growth Trends

JULY 2016

Osbaldo Franco

Contributors: Daiane Bobka, Catherine Boyle



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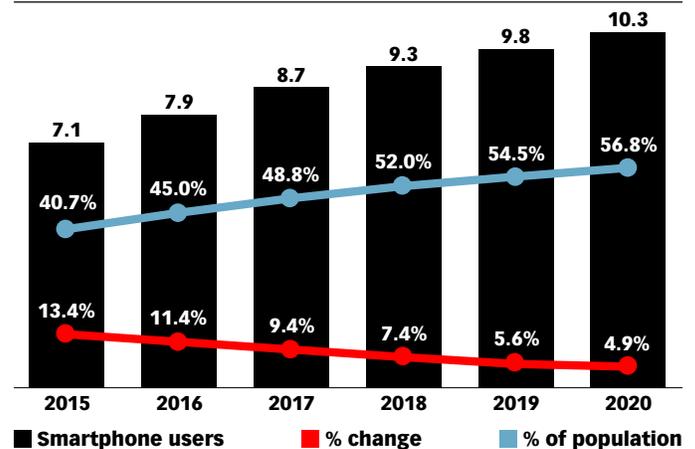
MOBILE CHILE 2016: UPDATED FORECASTS AND KEY GROWTH TRENDS

Chile is one of the most developed economies and mobile markets in Latin America, with the highest smartphone uptake rates across the region. So far, advertisers have been cautious about their investments in mobile, but eMarketer projects that mobile ad spending will expand at a sustained double-digit rate as familiarity with the channel improves throughout the rest of the decade.

- Chile's mobile user base will expand slightly to reach 13.0 million in 2016, which will represent 45.0% of the country's population.
- There will be 7.9 million smartphone users in Chile this year, which will translate to 45.0% of the population—the highest penetration rate by far in Latin America.
- Android controls 85.3% of smartphone page views and 60.6% of tablet internet traffic in the country, according to comScore. But iOS still powers a robust 39.1% of tablet queries.
- eMarketer estimates that mobile internet ad spending will represent 19.0% of digital ad spending in Chile this year, which is well below the 29.4% average in Latin America. The mobile portion of digital budgets in the country and the region will be much closer by 2020, at 67.0% and 69.8%, respectively.
- Mirroring user trends, Android holds a commanding share of mobile ad impressions—roughly 77% to 88%, depending on the period and ad network.

WHAT'S IN THIS REPORT? This report examines eMarketer's latest estimates for mobile uptake in Chile and the activities among consumers using those devices. It also looks at mobile ad spending by format, device, channel and operating system and presents the latest mobile ad spending estimates against the regional backdrop.

Smartphone Users and Penetration in Chile, 2015-2020
millions, % change and % of population



Note: individuals of any age who own at least one smartphone and use the smartphone(s) at least once per month
Source: eMarketer, April 2016

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KEY STAT: By 2018, more than half (52.0%) of the population in Chile, or 9.3 million individuals, will own and use a smartphone at least once a month.

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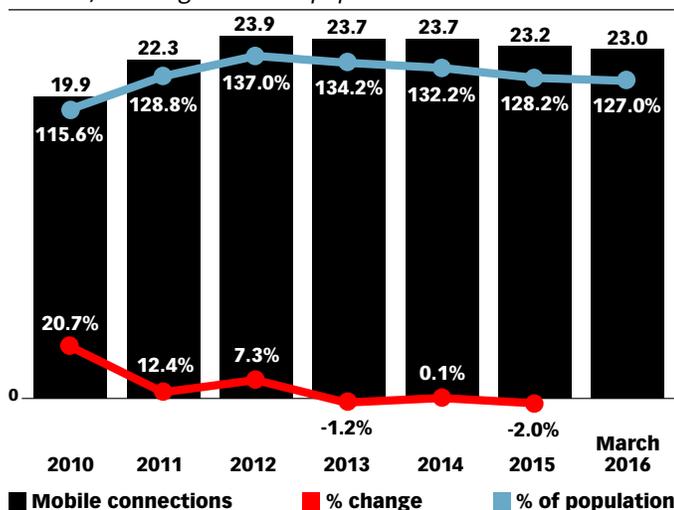
THE CURRENT MOBILE PICTURE IN CHILE

Chile is perhaps the most developed economy in Latin America. Among the six major markets in the region for which eMarketer produces individual estimates, only Chile and Argentina have economies classified by the World Bank as “high income.”

Next to Brazil, Mexico and even Colombia, however, Chile is a relatively small market with a population projected to reach 18.2 million in 2016, according to the Instituto Nacional de Estadísticas (INE), the country’s census bureau.

As a mobile market, Chile is one of the most developed among the six countries in the region tracked by eMarketer; Argentina, Brazil, Colombia, Mexico and Peru are the other five. Total mobile connections in Chile have hovered at about 23 million almost every month since August 2012, according to local telecom regulator Subsecretaría de Telecomunicaciones (SUBTEL). Such stability points to a mature market.

Mobile Phone Connections in Chile, 2010-March 2016
millions, % change and % of population



Source: Subsecretaría de Telecomunicaciones (SUBTEL) - Chile, June 8, 2016
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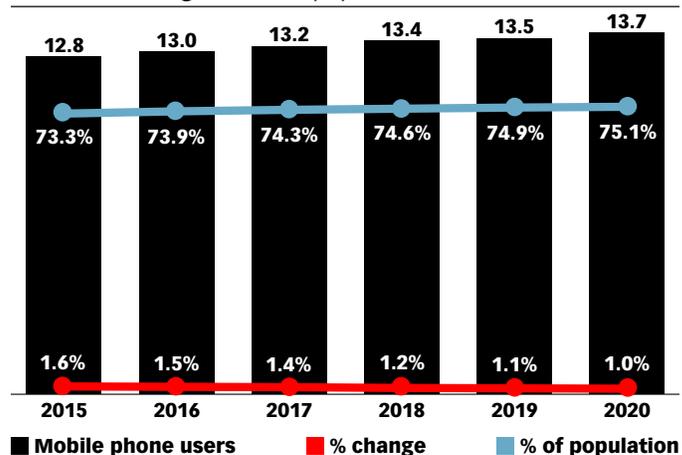
There are three major mobile carriers in Chile: Spanish Telefónica’s Movistar, domestic player Entel and Claro, the brand used by Carlos Slim’s América Móvil in Spanish-speaking Latin America outside of Mexico.

Together, the three competitors control almost all of the market. Entel and Movistar are constantly trading the top spot. According to SUBTEL, Entel currently heads the market with 35.7% of mobile connections as of March 2016. Movistar had 34.3% that month, while Claro’s share was 24.1%.

eMarketer projects that the number of mobile phone users in Chile will reach 13.0 million in 2016, a 1.5% year-over-year increase. This expansion is just slightly higher than the population’s growth rate, which was 1.04% in 2015 and will drop to 0.89% in 2020, according to INE. Mobile phone user penetration will rise slightly from 73.9% this year to 75.1% in 2020, when 13.7 million individuals will regularly use a mobile phone, eMarketer estimates.

Mobile Phone Users and Penetration in Chile, 2015-2020

millions, % change and % of population



Note: individuals of any age who own at least one mobile phone and use the phone(s) at least once per month
Source: eMarketer, April 2016

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Chile’s mature mobile market comes sharply into focus when taking a closer look at the country’s uptake of the mobile web. According to SUBTEL, the number of mobile internet connections has slowly risen from just over 9 million in March 2013 to 11.8 million the same month this year. Over nine in 10 (91.9%) of them were for a smartphone, and the rest with dongles (4.7%) and machine-to-machine (3.4%) connections.

MOBILE DEVICES

The number of Chile's total mobile connections and penetration have gone down, but at a leisurely pace. The percentage of the population with a mobile connection has been on a steady downturn in recent years, dropping from 138.1% in June 2013 to 123% in March 2016.

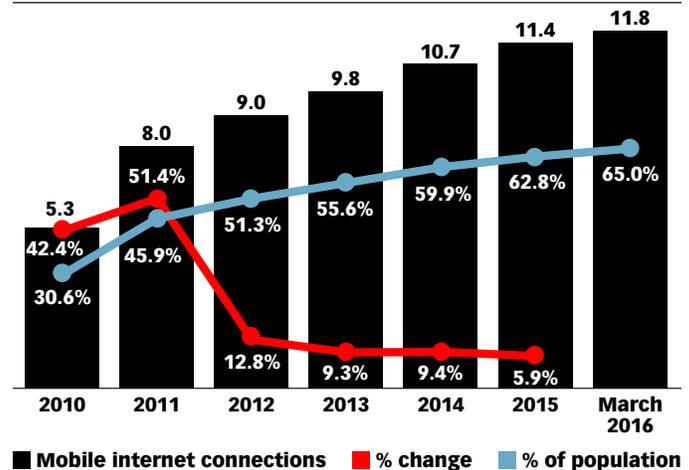
The reductions are partly due to consumers getting rid of extra devices, both for personal and professional uses. It is highly likely that faster devices equipped to carry out voice, text and video communications via the internet are slowly but steadily replacing older, less-capable 2G devices.

SUBTEL defines a mobile subscription as one in which a client has conducted a phone call (inbound or outbound) at least once per month. Under that classification, 2G mobile phone subscriptions declined from 16.4 million in March 2013 to 6.8 million in March 2016. During the same period, 3G mobile phone subscriptions rose from 6.9 million to 15.1 million. 4G mobile phone subscriptions, which were first reported by SUBTEL in November 2013, rose from 11,378 to 1.1 million this past March.

SUBTEL defines a mobile internet connection as one that makes contact with the internet at least once during the reported period, whether via smartphones, dongles or machine-to-machine (M2M) connections, and considering only the fastest network used for the connection. There were 11.8 million mobile internet connections in March 2016, with the majority of them using 3G (64.4%) to access the web, followed by 4G (25.9%). Interestingly, the latter amounts to 3.1 million 4G connections, nearly tripling the number of mobile phone subscriptions linked to a 4G device.

Mobile Internet Connections in Chile, 2010-March 2016

millions, % change and % of population



Note: includes 2G, 3G and 4G connections

Source: Subsecretaría de Telecomunicaciones (SUBTEL) - Chile; eMarketer calculations, June 8, 2016

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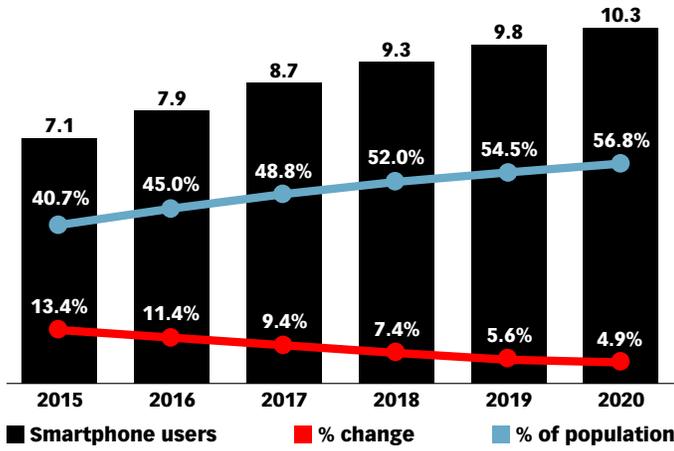
The overall move toward advanced mobile access to the web is hardly surprising for local experts, who know that for Chile's internet users, mobile is key. "A multitude of consumers in Chile who get online for the first time do so through mobile devices," said Rodrigo Saavedra, general manager at the Interactive Advertising Bureau Chile (IAB Chile).

Smartphones

Mobile internet connections linked to a smartphone totaled 10.8 million in March 2016, SUBTEL reported. Nearly two-thirds (64.2%) of those connections were 3G. 4G smartphones represented 27.2% of the total, and 2G made up the remaining 8.6%.

eMarketer measures the number of individuals of any age who own at least one smartphone and use that device at least once per month, rather than the number of smartphone connections. We expect there will be 7.9 million smartphone users in 2016, an 11.4% increase year over year—which far outpaces the 1.5% growth rate for mobile phone users. By the end of the forecast period, 56.8% of the population, or 10.3 million individuals, will be smartphone users.

Smartphone Users and Penetration in Chile, 2015-2020
 millions, % change and % of population



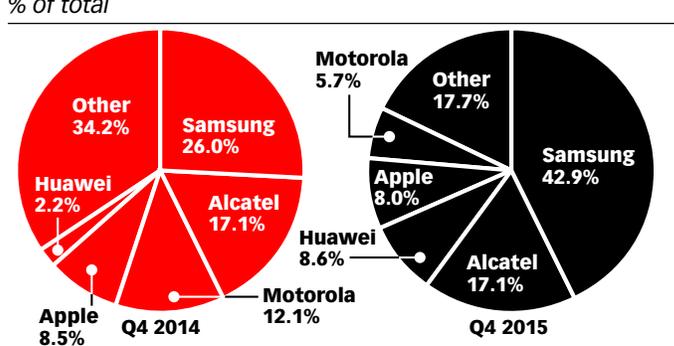
Note: individuals of any age who own at least one smartphone and use the smartphone(s) at least once per month
 Source: eMarketer, April 2016

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Smartphone user penetration will reach 45.0% of Chile’s population in 2016, ahead of all other markets in the region eMarketer forecasts, followed by Colombia (40.2%). Chile’s smartphone user penetration rate puts it well ahead of the 30.6% regional average and on par with more advanced economies like Japan (44.0%) and Italy (49.9%).

Despite having one of the most developed smartphone markets in the region, Chile has the same handset affordability concerns as its neighbors. As in most of Latin America, Samsung is the leading original equipment manufacturer (OEM) in Chile by a considerable margin. According to Counterpoint, 42.9% of smartphones shipped during Q4 2015 were Samsung models, a large jump from its 26.0% share one year prior. Alcatel came in second place, with a 17.1% slice (the same ranking and share it held in 2014), followed by Huawei with 8.6%, compared with 2.2% a year earlier.

Smartphone Shipment Share in Chile, by Brand, Q4 2014 & Q4 2015
 % of total



Note: numbers may not add up to 100% due to rounding
 Source: Counterpoint as cited in company blog, April 26, 2016
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When it comes to operating system used on smartphones, 70% of respondents to an Internet Media Services (IMS) and comScore survey said they owned a smartphone running Android in January 2015, well ahead of iOS (36%) and RIM/BlackBerry’s 9% slice (the poll allowed multiple answers to account for multiple device ownership.)

Given that Counterpoint’s research indicates that Apple’s smartphone shipment share actually went down between Q4 2014 and Q4 2015, from 8.5% to 8.0%, its 36.0% share of smartphone owners is impressively high. It’s likely that loyal Apple customers are hanging on to their legacy iPhones, instead of buying new models or switching to an Android device.

According to May 2015 findings from Pew Research Center, 86% of adults between 18 and 34 years old own a smartphone, compared with half of respondents ages 35 and older. Among the Latin American countries included in the study (Argentina, Brazil, Mexico, Peru and Venezuela), the smartphone ownership gap between both groups averaged about 33 percentage points. Chile, however, was the only market in the region where smartphone ownership was over half for the older as well as the younger age group.

Education and income were more important in determining smartphone ownership in Chile than they were in the other Latin American countries studied by Pew. Nearly three-quarters (74%) of respondents with “more education” in Chile owned the device, but only 16% of those with “less education” did so. And 79% of respondents with higher income owned one, compared with 46% of those with a lower income. The average education and income gaps in Latin America stood at 41.5 and 27.2 percentage points, respectively.

(For countries tracked in Latin America, Pew uses the term “less education” when referring to individuals with below a secondary education and “more education” when referring to those with secondary education or above. Respondents with a household income below the approximate country median are considered “lower income” and those with an income at or above the approximate country mean are considered “higher income.”)

Tablets

Recent data about tablet uptake and usage in Chile is scarce, but the available information implies that these devices have had little impact on the rest of the country’s mobile landscape.

According to estimates from the International Data Corporation (IDC), tablet sales in Chile increased from 1.6 million to 1.7 million between 2012 and 2014. The 2014 figures represent a 17% drop from the year before, which works out to about 2 million of them shipped in 2013. More recently, IDC estimated that sales of tablet devices totaled 210,516 in Q1 2016, down 57.3% from the 492,743 in Q1 2014.

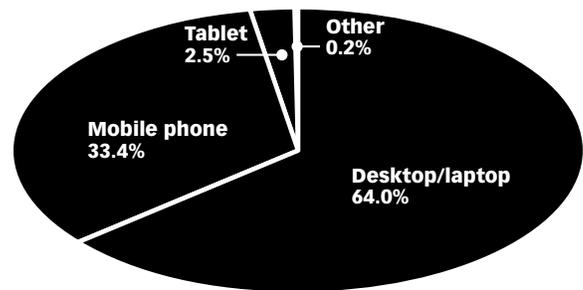
Regarding tablet users’ demographic makeup, TGI Latina data provided by Starcom MediaVest Group found that males were more likely than females to use the device, at 55.2% vs. 44.8% in 2014. Individuals ages 25 to 34 were the most likely to have a tablet (27.0%), followed by 35- to 44-year-olds (19.9%).

As with smartphones, income level is directly related to tablet ownership in Chile. Consumers in the second-lowest income level (D)—per standards set by Asociación de Investigadores de Mercado (AIM)—represented 41.1% of the population but just 27.1% of tablet users in 2014. Those in the C3 and C2 levels, representing 19.2% and 12.1% of the population, respectively, accounted for 26.7% and 24.6% of the tablet user base, TGI Latina found. Top earners in the ABC1 set represented 21.6% of tablet users, but were only a 5.4% portion of the population. The lowest rung of the income pyramid, the E group, represents 22.4% of the population but was not accounted by TGI Latina, who most likely assumed that poverty levels in this group prevented tablet ownership altogether.

MOBILE INTERNET TRAFFIC

Noncomputer internet traffic is heavier in Chile than in any other major market in Latin America. According to data provided by comScore, mobile phones and tablets drove a combined 35.9% of page views in February 2016. Mexico was the second-most mobile market with 32.5% of internet traffic occurring via smartphones or tablets. The average among the six Latin American countries studied was 30.7%.

Page View Share in Chile, by Device, Feb 2016
% of total



Note: numbers may not add up to 100% due to rounding
Source: comScore Device Essentials, April 7, 2016

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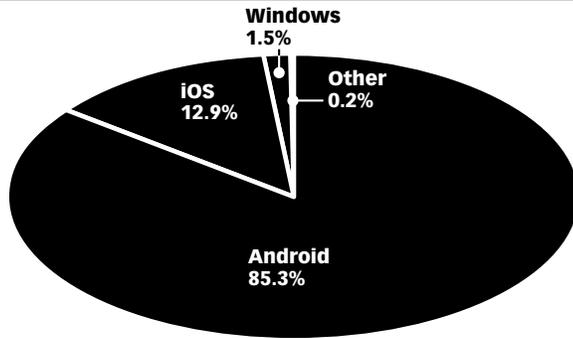
Despite topping the region’s mobile internet traffic ranking, desktops and laptops still dominated the vast majority of page views in Chile, driving nearly two-thirds (64.0%) of the total.

Traffic by Operating System

comScore found that Google’s operating system controlled 85.3% of mobile phone internet traffic in February 2016. iOS drove 12.9% of mobile page views—a seemingly robust amount considering that fewer than one in 10 devices shipped in Chile during the past two years came from Apple. However, it seems less impressive when contrasted with the 36% of respondents in an IMS/comScore study from January who said they owned an iOS-powered smartphone.

Mobile Phone Page View Share in Chile, by OS, Feb 2016

% of total



Note: numbers may not add up to 100% due to rounding

Source: comScore Device Essentials, April 7, 2016

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Apple had a bigger showing according to data based on tablet internet traffic; an estimated 60.6% of page views via tablets occurred on Android devices, and 39.1% were running on iOS.

MOBILE ACTIVITIES

comScore data gathered in February 2016 found that news and information sites received the greatest number of unique visitors in Chile, with 7.5 million via smartphones and 496,000 via tablets. The entertainment category—which includes video and music content—followed closely, totaling 7.4 million visitors using a smartphone and 595,000 on a tablet. Social media visitors reached a combined 3.5 million.

It is likely that both the unique visitor tallies for entertainment and social media are underreported given that comScore's measuring excludes mobile apps, which drive most of the mobile activity in these popular categories.

Leading Smartphone vs. Tablet Web Categories in Chile, Ranked by Unique Visitors, Feb 2016

thousands

	Smartphone	Tablet
News/information	7,518	496
Entertainment	7,380	595
Portals	4,633	342
Lifestyle	4,072	256
Social media	3,349	193
Directories/resources	2,621	156
Sports	2,417	126
Technology	1,636	117
Family & youth	1,398	79
Health	1,234	72
Travel	1,005	82
Telecom	939	52
Business/finance	908	63
Search/navigation	876	41
Services	747	49
Games	697	70
Career services and development	575	37
Automotive	427	31
Retail	340	27
Regional/local	128	9

Note: via browser only; top 20 categories by smartphone visitors shown

Source: comScore Mobile Metrix, April 7, 2016

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Separate comScore data from December 2015, which was broken down by device and operating system, found that unique visitors using Android devices to visit news and information sites represented 87% via smartphones and only 58% via tablets. And in the popular social media category, Android's share of unique visitors dropped to 72% on smartphones and 55% on tablets.

Mobile internet usage in Chile differs in several important ways from patterns observed via desktops and laptops relying on fixed connections. In the February 2015 survey, "services" was the top computer category with 7.2 million unique visitors, making it less popular than the top mobile category. As with mobile, "entertainment" ranked second via computers as well, but received some 300,000 less visitors. On the other hand, the number of unique computer users visiting social media sites was twice the size of those using mobile browsers (7.0 million vs. 3.3 million), but the gap may be due to the fact that comScore does not monitor mobile app activity.

MOBILE ADVERTISING

Given the high adoption rates and increasing sophistication observed among mobile internet users, mobile advertising uptake is lower than might be expected.

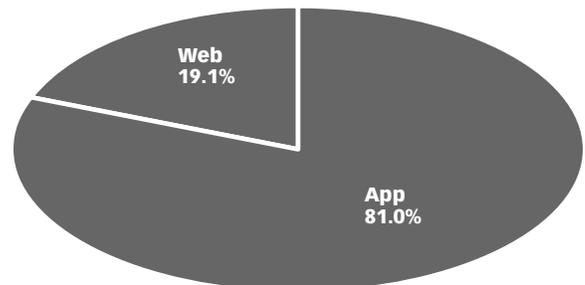
Some of this can be seen by comparing Chile's market to that of the largest market in the region, Brazil. Brazil's population is 11.3 times larger than Chile's, but it has a lower rate of smartphone use, with just 8.1 times the number of smartphone users in 2016, according to INE, Instituto Brasileiro de Geografia e Estatística (IBGE) and eMarketer estimates.

Despite its smaller smartphone rates, Brazil's population was served with 11.6 times as many mobile ad impressions as Chile during Q1 2016, according to data provided by Adsmovil.

Over four in five (81.0%) of those impressions in Chile were delivered via apps—a sign that a majority of mobile advertising activity in Chile is also taking place within apps.

Mobile Ad Impression Share in Chile, App vs. Web, Q1 2016

% of total on Adsmovil network



Note: represents activity on Adsmovil's network, broader industry metrics may vary; numbers may not add up to 100% due to rounding

Source: Adsmovil, May 9, 2016

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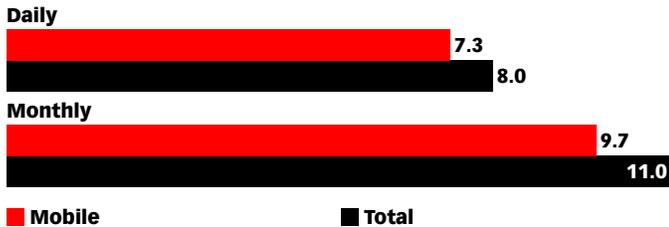
As might be expected, most mobile ad impressions in Chile are delivered to Android devices. According to InMobi, Google's share of mobile ads served in 2014 vs. 2015 edged up slightly from 87.9% to 88.3%. iOS also scored a marginal gain of 0.7 percentage points to reach 10.3% of the market in 2015.

In Q1 2016, Adsmovil reported that just over three-quarters of the ads served on its mobile network landed on a device powered by Google's OS. That left 13.3% of impressions going to iOS, and 5.8% going to Windows.

Facebook's estimates of its own mobile monthly active user base were much more bullish. According to data provided to eMarketer, 11.0 million users accessed their account at least once a month in Q4 2015, with 88.2% of those users—9.7 million—logging in via mobile devices on a regular basis.

Mobile vs. Total Active Facebook Users in Chile, by Frequency, Q4 2015

millions



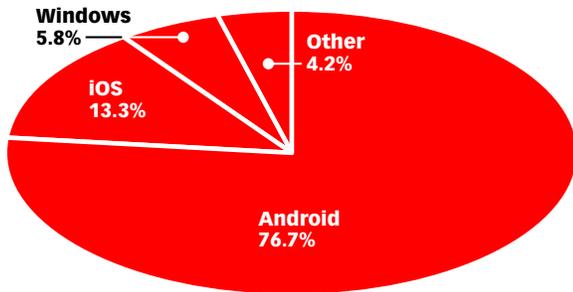
Source: Facebook, March 2, 2016

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Additionally, 7.3 million Facebook users in Chile accessed their profile via mobile devices on a daily basis during the same time period.

Mobile Ad Impression Share in Chile, by OS, Q1 2016
 % of total on Adsmovil network



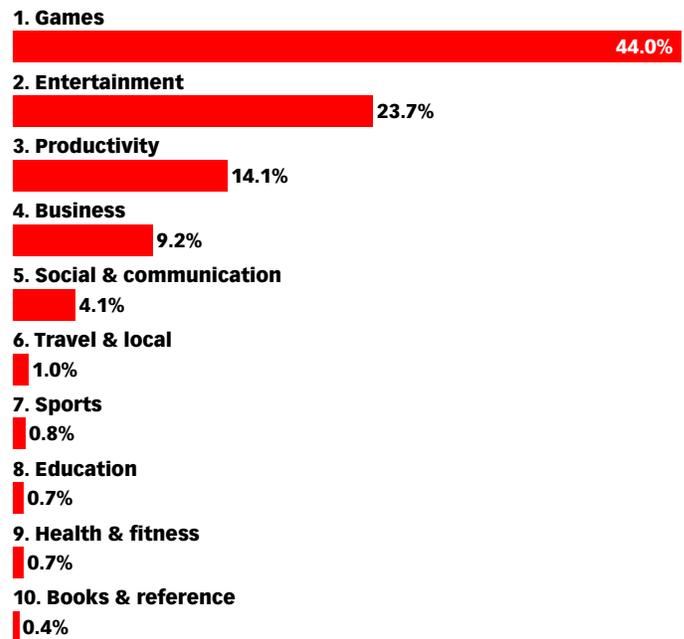
Note: represents activity on Adsmovil's network, broader industry metrics may vary
 Source: Adsmovil; eMarketer calculations, May 9, 2016

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The largest share of mobile ad impressions served by InMobi went to Samsung devices in 2015, at 44.4% of the total, followed by another Android-heavy OEM, Motorola with 11.5%. The shares for both of the OEMs dropped by at least 2 percentage points over the previous year. By comparison, Apple devices received 10.3% of mobile ads in 2015, up 0.7 percentage points.

Among the top 10 mobile categories in Chile, games led with a 44.0% share of mobile ad impressions last year, significantly higher than the 28% slice it had in 2014, when it was in second place. Entertainment dropped from first place in 2014, with 36.0%, to 23.7% last year.

Top 10 Mobile Categories in Chile, Ranked by Mobile Ad Impression Share, 2015
 % of total on InMobi's network



Note: represents activity on InMobi's network, broader industry metrics may vary; numbers may not add up to 100% due to rounding
 Source: InMobi, April 6, 2016

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The highly popular “social and communication” garnered a 4.1% share of mobile ads, less than half its 9% share the prior year. This may seem surprisingly small given the popularity of such properties, but it reflects the control that Facebook—which dominates the category—maintains over advertising within its platform.

MOBILE AD SPENDING

eMarketer estimates that mobile internet ad spending in Chile will climb 90.0% to reach \$31.1 million in 2016. This figure includes display (banners, video and rich media) and search served to smartphones and tablets but excludes SMS, MMS and P2P messaging-based advertising.

By comparison, mobile ad spending in Brazil will reach \$887.7 million this year, or about 28.5 times as much as Chile, despite having a population and smartphone user base that are 11.3 and 8.1 times as large, respectively.

Total Media, Digital and Mobile Internet Ad Spending in Chile, 2015-2020

	2015	2016	2017	2018	2019	2020
Total media ad spending* (millions)	\$1,043.6	\$1,048.8	\$1,069.8	\$1,090.1	\$1,109.7	\$1,127.5
—% change	-1.5%	0.5%	2.0%	1.9%	1.8%	1.6%
Digital ad spending** (millions)	\$143.4	\$163.5	\$183.1	\$197.7	\$209.6	\$220.1
—% change	15.0%	14.0%	12.0%	8.0%	6.0%	5.0%
—% of total media ad spending	13.7%	15.6%	17.1%	18.1%	18.9%	19.5%
Mobile internet ad spending*** (millions)	\$16.3	\$31.1	\$52.8	\$84.5	\$119.9	\$147.5
—% change	120.0%	90.0%	70.0%	60.0%	42.0%	23.0%
—% of digital ad spending	11.4%	19.0%	28.8%	42.7%	57.2%	67.0%
—% of total media ad spending	1.6%	3.0%	4.9%	7.7%	10.8%	13.1%

Note: converted at the exchange rate of US\$1=CLP654.22; *includes digital (desktop/laptop, mobile and other internet-connected devices), directories, magazines, newspapers, out-of-home, radio and TV; **includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets and other internet-connected devices, and includes all the various formats of advertising on those platforms; excludes SMS, MMS and P2P messaging-based advertising; ***includes display (banners, video and rich media) and search; excludes SMS, MMS and P2P messaging-based advertising; includes ad spending on tablets
Source: eMarketer, March 2016

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Mobile ad spend will represent only 19.0% of total digital ad spending in Chile this year, putting the country near Peru's 13.1% among the six Latin America markets eMarketer tracks. The regional average will be much higher, at 29.4%.

Although mobile and overall digital ad spending estimates are modest in Chile, many marketers and publishers are bullish in their projections, believing that the market is following a predictable path. Alejandro Zuzenberg, Facebook's head of sales for Argentina and Latin America's South Cone region, explained the trajectory: "Digital is a medium driven by users first, then technology companies try to understand and interpret [user habits] to offer products and services. [Finally] come the advertisers, adapting to the new ways in which media is being consumed," he said. (Editor's Note: Zuzenberg is now the co-founder and CEO of BotMaker.)

The portion of mobile ad spending within digital budgets will expand over the rest of this decade and will represent more than two-thirds of total digital ad spending in 2020, when it will reach \$147.5 million, eMarketer predicts.

But in Chile, much work remains before mobile ad spending takes off. "To shorten the gap between [a large] audience and [small digital ad] spending, we need to convince advertisers that there is a very important audience that is underserved and eager to receive those [digital] ads," Saavedra said.

EMARKETER INTERVIEWS



Rodrigo Saavedra
General Manager
Interactive Advertising Bureau Chile
(IAB Chile)

Interview conducted on August 3, 2015



Alejandro Zuzenberg
Head of Sales, Argentina and South Cone
Facebook

Interview conducted on August 18, 2015

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EDITORIAL AND PRODUCTION CONTRIBUTORS

Cliff Annicelli

Michael Balletti

Joanne DiCamillo

Dana Hill

Stephanie Meyer

Kris Oser

Heather Price

John Rambow

Allie Smith

Managing Editor, Reports

Copy Editor

Senior Production Artist

Director of Production

Senior Production Artist

Deputy Editorial Director

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Executive Editor, Reports

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