

# MOBILE ARGENTINA 2016

Updated Forecasts and  
Key Growth Trends

**AUGUST 2016**

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# MOBILE ARGENTINA 2016: UPDATED FORECASTS AND KEY GROWTH TRENDS

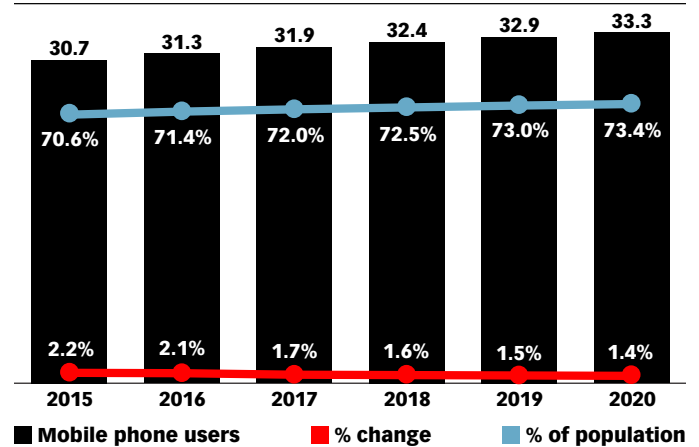
**A sputtering economy, slow network upgrades and government policies on foreign handsets have held back Argentina's shift from basic feature phones to more powerful and versatile smartphones.**

The economy is still in flux, but restrictions on imported handsets have eased and 4G is becoming more common. As a result, smartphone uptake is on the rise in Argentina. Still, mobile internet usage lags that of the other major markets in Latin America.

- More than 70% of Argentina's population will be mobile phone owners in 2016, and that percentage isn't expected to change much over the next few years.
- There will be 16.2 million smartphone users in the country this year, accounting for 37.1% of the population. The absolute number of users makes Argentina the fourth-largest smartphone market in Latin America behind Colombia, Brazil and Mexico.
- Mirroring trends across the globe, smartphone users in Argentina tend to be young, well-educated and more affluent than non-users.
- Android phones make up a large majority of the market, with Windows and iOS phones trailing far behind.
- Mobile ad spending will represent 23.1% of total digital ad spending in Argentina this year, well below the 29.4% regional average.

**WHAT'S IN THIS REPORT?** This report examines eMarketer's latest estimates for mobile usage in Argentina and the socioeconomic traits affecting that usage, as well as the demographic composition of the user base. It also analyzes mobile ad spending estimates in the country.

**Mobile Phone Users and Penetration in Argentina, 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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**KEY STAT:** Seven in 10 individuals in Argentina use mobile phones. Growth will be extremely limited over the forecast period due to a mature mobile market.

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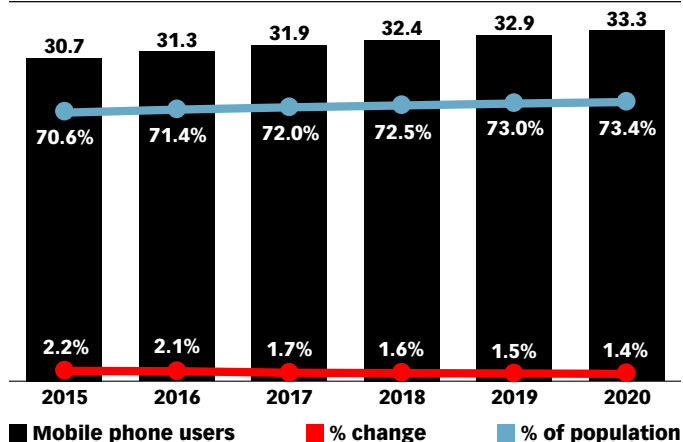
# THE CURRENT MOBILE PICTURE IN ARGENTINA

**Argentina is the fourth-largest country in Latin America both by population and GDP. It is also the fourth-largest mobile market, as measured by mobile users.**

eMarketer projects that 71.4% of Argentina's population will own at least one mobile phone and use it at least once per month in 2016, totaling 31.3 million people. Relative to population size, its mobile phone user penetration trails only that of Chile (73.9%). In absolute terms, Argentina ranks fourth behind Brazil (133.5 million mobile phone users), Mexico (84.4 million) and Colombia (33.0 million), all countries with larger populations.

Already one of the most mature mobile markets in the region, Argentina's mobile phone user base will increase just 2.1% in 2016. Growth rates will continue to dwindle throughout the rest of the decade, slowing to 1.4% by 2020, when the mobile phone audience will be 33.3 million.

**Mobile Phone Users and Penetration in Argentina, 2015-2020**  
millions, % change and % of population



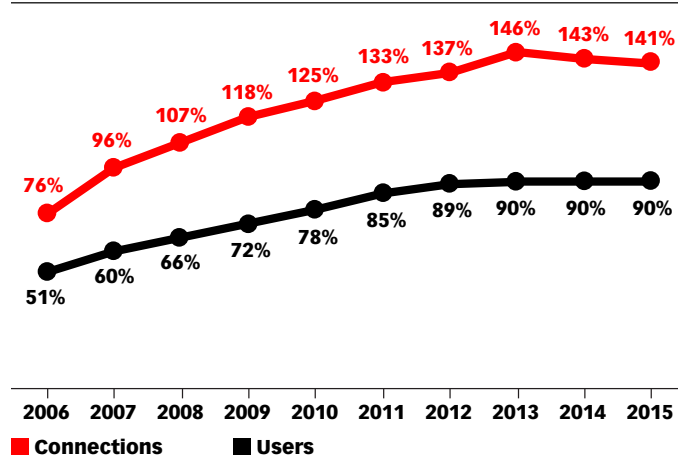
Note: individuals of any age who own at least one mobile phone and use the phone(s) at least once per month  
Source: eMarketer, April 2016

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Mobile phone user estimates from other sources are more bullish but likewise point up the maturity of the mobile market. For example, GSMA estimates that 90% of consumers in Argentina were mobile phone users in 2015, a proportion that has held steady since 2013. By GSMA's reckoning, the country ranked second in Latin America for mobile phone user penetration, behind only Chile (93%).

Mobile connection penetration—a broader metric that focuses on devices instead of individuals—reached 141% in 2015, down from a high of 146% in 2013. GSMA estimates there were 63 million mobile connections in Argentina last year, for a second 1% annual reduction in a row. The decline could reflect economic woes, but it is likely that users, accustomed to maintaining multiple mobile connections to save money, may be shifting behavior and consolidating their usage to a single device or connection.

**Mobile Phone User and Connection Penetration in Argentina, 2006-2015**  
% of population



Source: GSMA, "Country overview: Argentina - Impact of the mobile ecosystem: perspectives and opportunities," April 6, 2016

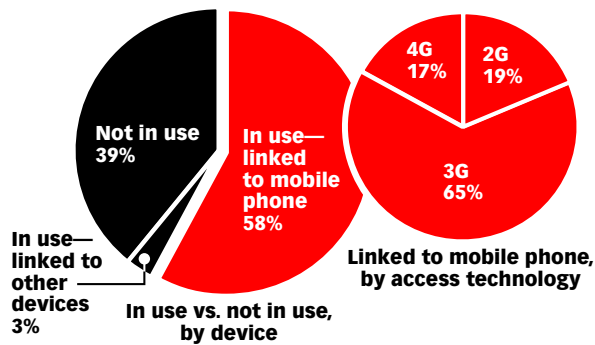
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For the past five years, consumers in Argentina have increasingly ditched feature phones and 2G connections in favor of faster 3G smartphones; 4G devices have recently also become popular. Consumers expecting the launch of LTE networks may have held on to older devices in 2014, to then upgrade to a new device. (According to 5G Americas, LTE deployments in Argentina began in December 2014.) While year-by-year data showing this transition is not publicly available, GSMA estimates that the portion of voice-only mobile phone subscribers in Argentina dropped from 38% to 29% of the population between 2010 and 2015. By comparison, the share of 2G mobile internet subscribers dropped from 35% to 28% during that period. The combined share of mobile broadband connections (including 3G and 4G) rose sharply from 5% to 37%.

According to Buenos Aires-based telecom consultant firm Carrier y Asociados, only 58% of mobile connections in Argentina were in use as of December 2015. Of those active links, nearly two-thirds corresponded to 3G devices and 17% were connected to the growing 4G network.

## Active Mobile Connections in Argentina that Are In Use vs. Not in Use, by Device/Access Technology, Dec 2015

% of total



Note: numbers may not add up to 100% due to rounding  
Source: Carrier y Asociados, "Mercado celular argentino 2016" as cited in company blog, April 29, 2016

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Argentina's mobile market is highly competitive, with four major carriers serving consumers. Three of those carriers hold nearly identical market shares. Mexico-based telecom giant América Móvil, under the Claro brand, held a marginal lead in March 2016 with one-third of mobile connections, according to Frost & Sullivan estimates cited by 5G Americas in "TIC Argentina." Tied for second were Spanish Telefónica's Movistar brand and domestic player Personal, both with 32% market shares. Fourth-placed Nextel controlled only 3% of the market.

## Argentina's Economy in a GDP Nutshell

At the turn of the century, Argentina suffered a devastating economic downturn, as GDP slid 4.4% in 2001 and 10.9% in 2002. Economic activity bounced back because of demand from China and Brazil for Argentina exports, led by agricultural products. According to the World Bank, Argentina's GDP growth rate averaged 7.2% between 2003 and 2011.

But when China began to pivot from a manufacturing and construction-centric economy to domestic consumption—and when Brazil's economy slumped at the same time—Argentina's growth faltered. Between 2012 and 2015, Argentina's GDP expanded at an average 1.6% per year and is expected to contract 0.5% in 2016.

Mobile internet use in Argentina was held back in the first half of this decade, partly due to government efforts to encourage domestic production of smartphones. Hampered by delays in auctioning the spectrum, 4G network rollouts only started in December 2014. But the majority of those issues were resolved by late 2015.

Argentina has plenty of catching up to do, however, before it reaches the adoption levels already achieved by its regional neighbors. eMarketer estimates the number of mobile phone internet users will reach 19.1 million in 2016, a 14.2% year-over-year increase.

## Mobile Phone Internet Users and Penetration in Latin America, by Country, 2014-2020

	2014	2015	2016	2017	2018	2019	2020
<b>Mobile phone internet users (millions)</b>							
Brazil	65.6	79.1	90.7	97.5	103.0	106.3	109.4
Mexico	45.5	53.4	60.3	65.3	69.8	73.8	76.6
Argentina	14.2	16.8	19.1	20.5	21.9	23.3	24.6
Other	56.8	68.0	78.6	88.6	96.7	104.0	109.2
<b>Latin America</b>	<b>182.1</b>	<b>217.3</b>	<b>248.8</b>	<b>271.9</b>	<b>291.4</b>	<b>307.5</b>	<b>319.9</b>
<b>Mobile phone internet user growth (% change)</b>							
Brazil	32.8%	20.6%	14.6%	7.5%	5.7%	3.2%	2.9%
Argentina	22.0%	18.4%	14.2%	7.3%	6.6%	6.5%	5.7%
Mexico	22.0%	17.5%	12.9%	8.3%	6.9%	5.8%	3.8%
Other	26.2%	19.6%	15.7%	12.6%	9.2%	7.6%	5.0%
<b>Latin America</b>	<b>27.0%</b>	<b>19.3%</b>	<b>14.5%</b>	<b>9.3%</b>	<b>7.2%</b>	<b>5.5%</b>	<b>4.0%</b>
<b>Mobile phone internet user penetration (% of mobile phone users)</b>							
Mexico	57.7%	65.1%	71.5%	75.6%	79.2%	82.3%	84.5%
Brazil	51.8%	60.7%	68.0%	71.4%	74.0%	75.1%	76.2%
Argentina	47.2%	54.7%	61.1%	64.4%	67.6%	71.0%	74.0%
Other	37.7%	43.8%	49.5%	54.6%	58.5%	61.9%	64.0%
<b>Latin America</b>	<b>47.1%</b>	<b>54.6%</b>	<b>61.0%</b>	<b>65.2%</b>	<b>68.6%</b>	<b>71.1%</b>	<b>73.0%</b>

Note: mobile phone users of any age who access the internet via mobile phone (browser or app) at least once per month; use of SMS/MMS is not considered mobile internet access; numbers may not add up to total due to rounding

Source: eMarketer, April 2016

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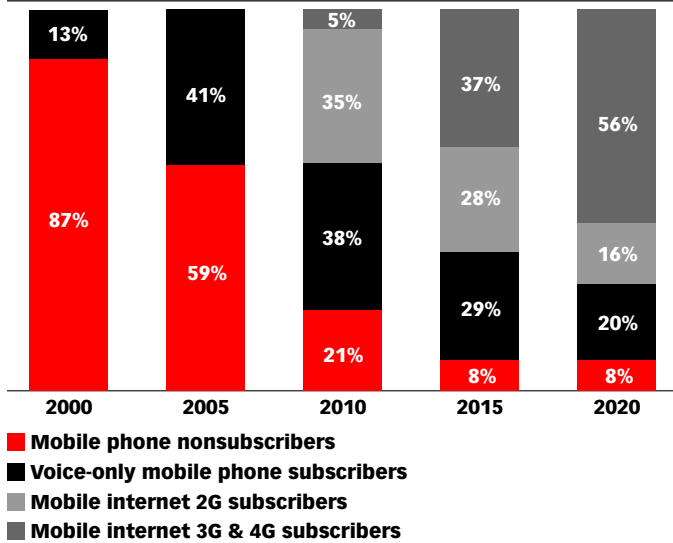
Mobile internet penetration will swell to 61.1% of mobile phone users by the end of this year, or 43.6% of the population. By 2020, those tallies will rise to 74.0% and 54.3%, respectively.

## MOBILE DEVICES

In 2015, voice-only mobile users in Argentina were in the minority, at 29% of the population, according to an April 2016 GSMA study. Mobile phone users with data plans linked to 2G devices—likely feature phones—made up 28% of the population, and 37% had mobile internet subscriptions linked to 3G and 4G smartphones. Less than one in 10 of the population didn't use mobile phones at all.

## Mobile Phone Users in Argentina, by Connection Type, 2000-2020

% of total



Note: numbers may not add up to 100% due to rounding  
Source: GSMA, "Country overview: Argentina - Impact of the mobile ecosystem: perspectives and opportunities," April 6, 2016

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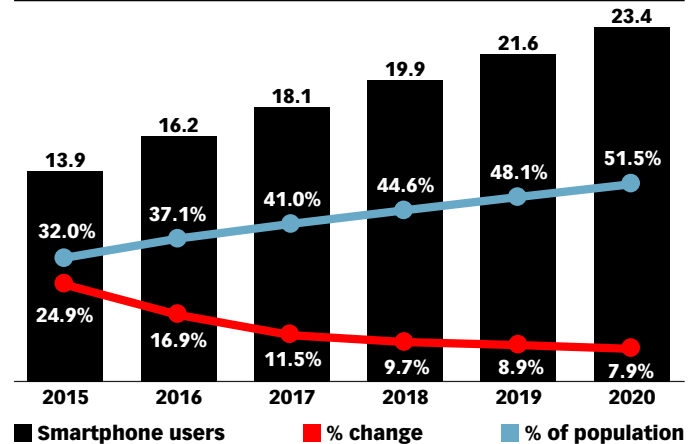
The same study estimates that in the first 15 months since 4G launched in Argentina, 3.0 million 4G connections were activated—the strongest uptake in Latin America during the early adoption months. GSMA also expects that robust 4G adoption will continue, bringing 3G and 4G subscription penetration to a combined 56% of the population by 2020.

## Smartphones

eMarketer estimates that the number of smartphone users in Argentina will rise 16.9% to reach 16.2 million people in 2016, equivalent to 37.1% of the population and just over half (51.9%) of mobile phone users. Among the six countries in Latin America tracked by eMarketer, Argentina will be ahead of only Peru (8.6 million) and Chile (7.9 million)—both with significantly smaller populations—in terms of smartphone users.

## Smartphone Users and Penetration in Argentina, 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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eMarketer predicts that the tipping point for smartphone user penetration in Argentina won't come until 2020, when more than half of the population (51.5%) will be smartphone users for the first time, totaling 23.4 million people and representing 70.1% of mobile phone users.

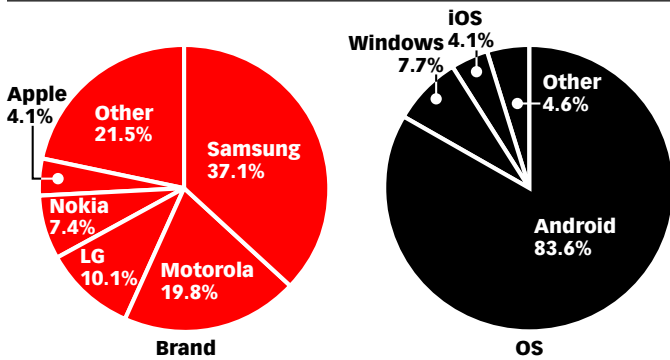
By comparison, smartphone connections (i.e., smartphones in use) will continue to multiply at an even faster clip. According to GSMA estimates, the number of smartphones in use will rise 26.6% to total 31.4 million this year. Double-digit growth will persist almost through 2019, and by 2020, smartphone connections will reach 51.2 million.

When it comes to operating system, Android holds a majority share of smartphones in use in Argentina, at 83.6% in October 2015, according to comScore findings. Windows came in second with a mere 7.7% slice of the market.

Samsung is the leading original equipment manufacturer (OEM) in Argentina; comScore found it commanded a 37.1% share, matched only by the next three makers combined: Motorola (19.8%), LG (10.1%) and Nokia (7.4%). All top-four OEMs offer a number of highly affordable Android-based devices, and Nokia also includes an outside set of Windows options in its lineup.

## Share of Smartphones in Use in Argentina, by Brand and OS, Oct 2015

% of total



Source: comScore Device Essentials, Dec 7, 2015

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Apple, whose phones generally target those with the highest incomes in Argentina, held a 4.1% market share. This percentage might expand if the country's economy strengthens, but if other Latin American markets are an indication Apple isn't likely to win much more than 15% of the market even in a best-case scenario, given the income gaps that divide the country—and indeed the region.

According to the socioeconomic level measuring standard from Sociedad Argentina de Investigadores de Marketing y Opinión (SAIMO) first published in 2006 and ratified by the Comisión de Enlace Institucional (CEI) in 2015, the highest-income level, ABC1, represented 6.2% of households but made up 11.5% of total earnings in Argentina in H1 2012. By contrast, the lowest rungs of the socioeconomic ladder, D1 and D2E, constituted 45.2% of all homes, but made up less than one-third of the earnings.

Not surprisingly, wealthier people are more likely to have smartphones than those with lower incomes. A May 2015 Pew Research Center study found that 53% of higher-income adults in Argentina owned a smartphone, nearly double the 28% level among their lower-income neighbors.

Interestingly, though, income is less important than education and age when determining smartphone ownership in Argentina. The Pew survey found that those with more education were far more likely than those with less education to have smartphones (72% vs. 38%). That pattern paralleled the split between older and younger consumers: More than seven in 10 of 18- to 34-year-olds owned a smartphone, whereas only 35% of those 35 and younger had one.

## Adults in Select Countries Who Own a Smartphone, by Demographic, May 2015

% of respondents in each group

	Age		Education		Income		
	18-34	35+	Less education	More education	Lower income	Higher income	Total
<b>Argentina</b>	<b>71%</b>	<b>35%</b>	<b>38%</b>	<b>72%</b>	<b>28%</b>	<b>53%</b>	<b>48%</b>
Australia	95%	70%	67%	85%	62%	88%	77%
Brazil	61%	26%	21%	64%	25%	54%	41%
Burkina Faso	17%	10%	9%	52%	12%	29%	14%
Chile	86%	50%	16%	74%	46%	79%	65%
China	85%	43%	40%	86%	49%	75%	58%
Ethiopia	-	-	3%	17%	2%	13%	4%
Ghana	27%	15%	11%	52%	7%	26%	21%
Israel	87%	67%	68%	80%	63%	83%	74%
India	27%	9%	7%	29%	7%	22%	17%
Indonesia	39%	7%	7%	42%	10%	31%	21%
Jordan	60%	41%	32%	72%	34%	64%	51%
Kenya	34%	14%	10%	49%	13%	37%	26%
Lebanon	74%	37%	17%	79%	20%	85%	52%
Malaysia	88%	46%	26%	79%	44%	75%	65%
Mexico	54%	22%	17%	67%	23%	50%	35%
Nigeria	39%	13%	6%	38%	20%	36%	28%
Pakistan	13%	7%	5%	22%	5%	14%	11%
Peru	41%	15%	5%	37%	9%	31%	25%
Philippines	31%	14%	9%	31%	11%	31%	22%
Poland	75%	25%	12%	47%	27%	52%	41%
Russia	76%	29%	-	-	25%	53%	45%
Senegal	26%	12%	12%	57%	12%	27%	19%
South Africa	46%	30%	21%	54%	18%	50%	37%
Tanzania	14%	6%	-	-	7%	14%	11%
Turkey	81%	39%	34%	86%	-	-	59%
Uganda	6%	2%	-	-	3%	6%	4%
Ukraine	56%	13%	6%	28%	13%	38%	27%
Venezuela	60%	35%	33%	65%	-	-	45%
Vietnam	56%	17%	23%	53%	28%	51%	35%
West Bank/ Palestine	73%	39%	38%	74%	47%	66%	57%

Source: Pew Research Center, "Smartphone Ownership and Internet Usage Continues to Climb in Emerging Economies," Feb 22, 2016

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(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

Similar to mobile overall, tablet usage in Argentina trails that of Mexico and Brazil. eMarketer estimates that 7.7 million individuals in the country will use a tablet at least once per month in 2016, increasing 16.8% year over year. That will represent 17.5% of the overall population and 25.8% of internet users.

### Tablet Users in Latin America, by Country, 2014-2020

	2014	2015	2016	2017	2018	2019	2020
<b>Tablet users (millions)</b>							
Brazil	28.2	34.7	41.3	45.6	48.1	50.1	51.9
Mexico	22.0	25.4	27.9	30.3	32.6	34.8	36.4
Argentina	5.4	6.6	7.7	8.7	9.5	10.0	10.3
Other	19.4	25.2	31.8	37.7	42.9	46.1	48.7
<b>Latin America</b>	<b>75.0</b>	<b>91.8</b>	<b>108.8</b>	<b>122.2</b>	<b>133.2</b>	<b>141.0</b>	<b>147.3</b>
<b>Tablet user growth (% change)</b>							
Brazil	41.5%	22.9%	19.2%	10.4%	5.5%	4.2%	3.6%
Argentina	27.3%	22.1%	16.8%	12.7%	10.0%	4.9%	3.5%
Mexico	61.1%	15.4%	10.0%	8.4%	7.7%	6.9%	4.4%
Other	88.5%	29.6%	26.4%	18.3%	14.0%	7.3%	5.7%
<b>Latin America</b>	<b>55.9%</b>	<b>22.4%</b>	<b>18.4%</b>	<b>12.4%</b>	<b>8.9%</b>	<b>5.9%</b>	<b>4.4%</b>

Note: individuals of any age who use a tablet at least once per month; tablet user figures may not add up to total due to rounding

Source: eMarketer, April 2016

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Estimates from other sources vary widely. For example, in a January 2016 Qualcomm Innovation Society Index (QuISI) study conducted by the International Data Corporation (IDC), only 4% of internet users ages 18 and older in Argentina said they owned a tablet or ereader last year. In addition, 51% of respondents didn't have plans to buy one, while 16% said they might do so next year. Only 15% of respondents had concrete plans to buy a tablet in the short term.

### Connected Devices Owned by Internet Users in Select Countries in Latin America, 2015

% of respondents

	Argentina	Brazil	Mexico	Colombia
Video game console	57%	48%	41%	37%
Printer	15%	4%	2%	10%
Home theater/smart TV	8%	8%	17%	8%
Security camera	4%	17%	12%	24%
Tablet/ereader	4%	6%	4%	5%
Wearable	0%	1%	4%	0%
Other	9%	16%	19%	15%

Note: ages 18+

Source: Qualcomm Innovation Society Index (QuISI) 2015 conducted by International Data Corporation (IDC), Jan 2016

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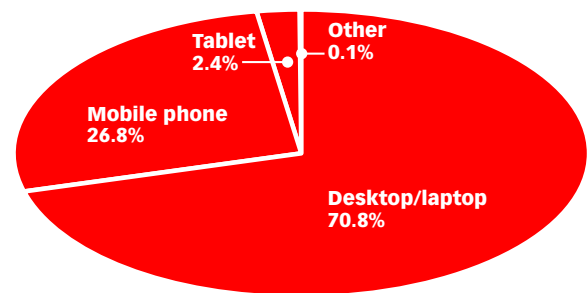
On the other hand, an April 2016 survey from Carrier y Asociados found that 31% of internet users in Argentina connected to the web via tablets, up from 28% in 2015. Overall, eMarketer expects tablet usage will grow at a healthy if not blistering pace for the next few years.

## MOBILE INTERNET TRAFFIC

Given Argentina's lagging mobile device uptake, it is not surprising that mobile internet traffic also lags most major markets in Latin America. According to data provided by comScore, mobile phones and tablets combined drove less than 30% of page views in the country in February 2016. By comparison, Chile and Mexico—the leading mobile internet markets among the six countries analyzed by eMarketer—registered 35.9% and 32.5% during the same period. The regional average stood at 30.7%.

### Page View Share in Argentina, 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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It's likely that smartphones in Argentina are mainly connecting to the internet via Wi-Fi networks, as consumers remain dissatisfied with mobile network speeds and reliability as well as the cost of mobile data plans. "High levels of taxation and economic instability have a direct impact on consumers, most of all low-income Argentines, for whom mobile services are often unaffordable," GSMA reported.

Among those in the lowest group of the income ladder, the cost of mobile ownership represents 9% of their monthly income, with individuals in the second-lowest group spending 4% of their earnings on mobile services. According to the February 2016 "Connected Society" report from GSMA, the target-level cost of owning a mobile (both the device and the service) should not exceed 5% of income.

Cisco Systems estimates that mobile data traffic per user in Argentina reached 663 megabytes per month during 2015, up slightly from 620 megabytes in 2014. By 2020, monthly data traffic on mobile devices will approach 4 gigabytes.

Smartphones' share of mobile data traffic rose from 42% in 2014 to 74% of the total last year. That tally will continue to trend upward, albeit more gradually, to reach a 79% share at the end of the projected period. Tablets accounted for only 8% of mobile data traffic in 2015, a portion that is expected to dip to 6% by 2020.

### Mobile Data and Device Metrics in Argentina, 2015 & 2020

	2015	2020
<b>Mobile devices</b>		
Mobile device users (millions)	35.7	38.3
Mobile device user penetration (% of population)	82%	84%
Smartphones in use (millions)	29	58
Connected tablets in use (millions)	1	2
4G connections (% of total mobile connections)*	3%	36%
<b>Mobile data</b>		
Mobile data traffic per user (MB/month)	663	3,984
—Smartphone data traffic (% of total mobile data traffic)	74%	79%
—Laptop data traffic (% of total mobile data traffic)	15%	7%
—Tablet data traffic (% of total mobile data traffic)	8%	6%
Mobile video traffic (% of total mobile data traffic)	55%	75%
4G data traffic (% of total mobile data traffic)	14%	61%

*Note: includes only devices connected to the mobile network; excludes devices connected solely via Wi-Fi; total number of devices in use may exceed number of users due to dual device/SIM ownership; \*excludes low-power wide area (LPWA) machine-to-machine (M2M) connections*  
 Source: Cisco Systems, "Cisco Visual Networking Index (VNI): Global Mobile Data Traffic Forecast Update, 2015-2020," Feb 3, 2016

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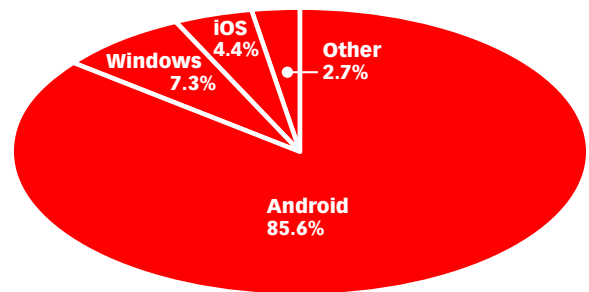
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The late deployment and still-slow development of a robust 4G network remains a drag on smartphone usage. 4G connections stood at just 3% of the total in 2015, but they already represented 14% of mobile data traffic. Cisco predicts that over one-third (36%) of mobile connections and nearly two-thirds (61%) of all mobile data traffic will be linked to a 4G device by 2020.

### Traffic by Operating System

In line with operating system market shares, Android phones are responsible for most of Argentina's mobile traffic. In February 2016, Android made up 85.6% of mobile pages viewed, according to comScore findings.

### Mobile Phone Page View Share in Argentina, by OS, Feb 2016 % of total



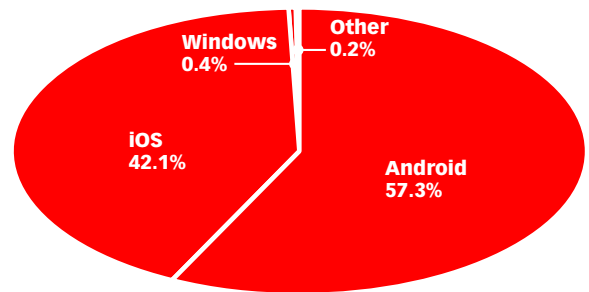
Source: comScore Device Essentials, April 7, 2016

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Apple's share of the tablet market is considerably higher in the country, representing 42.1% of tablet-based internet traffic during the same month, comScore found. But here, too, Android remains the dominant player.

### Tablet Internet Traffic Share in Argentina, by OS, Feb 2016 % of total



Source: comScore Device Essentials, April 28, 2016

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## MOBILE ACTIVITIES

Just as mobile device ownership in Argentina trails that of other markets in Latin America, so too do many mobile activities.

Take video, for example. In a July 2015 study from Millward Brown of mobile users, just 16% of total video time took place on a smartphone; this was considerably lower than most other countries included in the study.



## Share of Daily Time Spent Viewing Video Among Mobile Users\* in Select Countries, by Device/Channel, July 2015

minutes and % of total

	Live TV	Smartphone	Computer	On-demand TV	Tablet	Total minutes
<b>Argentina</b>	<b>39%</b>	<b>16%</b>	<b>18%</b>	<b>19%</b>	<b>9%</b>	<b>228</b>
Brazil	32%	24%	15%	22%	7%	240
Canada	24%	17%	17%	32%	11%	212
Colombia	31%	28%	16%	17%	7%	259
Kenya	30%	26%	20%	17%	8%	236
Mexico	23%	27%	16%	23%	11%	240
Nigeria	39%	26%	16%	10%	9%	272
Saudi Arabia	21%	32%	17%	20%	10%	224
South Africa	32%	15%	19%	25%	9%	215
US	31%	18%	10%	33%	9%	202

Note: ages 16-45; numbers may not add up to 100% due to rounding;  
\*respondents own or have access to both a TV and either a smartphone or a tablet

Source: Millward Brown, "AdReaction: Video Creative in a Digital World" conducted by On Device Research, Oct 14, 2015

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Similarly, mobile purchasing remains a minority activity in Argentina. According to Q1 2016 data from digital retailer Linio, penetration levels in the country trailed far behind other Latin American economies as well as the regional total.

## Mobile Buyer Penetration in Select Countries in Latin America, Q1 2016

% of digital buyers

<b>Mexico</b>	<b>35.6%</b>
<b>Colombia</b>	<b>33.8%</b>
<b>Chile</b>	<b>33.5%</b>
<b>Peru</b>	<b>31.5%</b>
<b>Argentina</b>	<b>22.0%</b>
<b>Total</b>	<b>33.9%</b>

Note: ages 18+; represents activity among shoppers tracked by Linio, broader industry metrics may vary  
Source: Linio, May 10, 2016

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One mobile activity that Argentina is roughly in line with compared with the rest of Latin America is social network usage. For instance, eMarketer estimates that mobile phone Facebook users will make up 38.1% of the country's population in 2016. This reflects the fact that Facebook uptake is more widespread in Argentina than it is in any other market in the region.

## Mobile Phone Facebook User Penetration in Latin America, by Country, 2014-2020

	2014	2015	2016	2017	2018	2019	2020
<b>Mobile phone Facebook user penetration (% of Facebook users)</b>							
Mexico	74.3%	84.2%	86.1%	87.6%	87.8%	88.0%	88.2%
Brazil	72.1%	80.1%	83.5%	86.6%	89.6%	90.9%	92.1%
Argentina	65.1%	71.8%	79.0%	81.6%	83.3%	84.9%	86.7%
Other	69.1%	77.1%	80.5%	83.6%	86.6%	87.9%	89.1%
<b>Latin America</b>	<b>70.9%</b>	<b>79.3%</b>	<b>82.6%</b>	<b>85.4%</b>	<b>87.7%</b>	<b>88.7%</b>	<b>89.8%</b>
<b>Mobile phone Facebook user penetration (% of mobile phone users)</b>							
Brazil	41.0%	49.7%	55.5%	59.4%	62.1%	63.5%	64.9%
Mexico	38.3%	48.8%	55.1%	60.2%	63.4%	66.1%	67.7%
Argentina	40.0%	47.6%	53.4%	56.3%	58.5%	60.3%	62.1%
Other	28.3%	35.6%	41.1%	45.0%	48.8%	51.3%	53.2%
<b>Latin America</b>	<b>35.4%</b>	<b>43.8%</b>	<b>49.6%</b>	<b>53.7%</b>	<b>56.9%</b>	<b>59.0%</b>	<b>60.7%</b>
<b>Mobile phone Facebook user penetration (% of population)</b>							
Argentina	27.9%	33.6%	38.1%	40.5%	42.5%	44.0%	45.6%
Mexico	25.2%	33.0%	38.0%	42.1%	44.7%	47.1%	48.6%
Brazil	25.6%	31.7%	36.0%	39.1%	41.4%	42.8%	44.0%
Other	17.7%	22.6%	26.5%	29.2%	32.0%	33.8%	35.3%
<b>Latin America</b>	<b>22.5%</b>	<b>28.5%</b>	<b>32.7%</b>	<b>35.9%</b>	<b>38.4%</b>	<b>40.1%</b>	<b>41.5%</b>

Note: mobile phone users of any age who access their Facebook account via mobile phone (browser or app) at least once per month  
Source: eMarketer, June 2016

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## MOBILE ADVERTISING

Argentina's tight economic situation and previously restrained mobile internet uptake have forced marketers to think twice before embracing mobile advertising. But that may change thanks to the recent increases in smartphone usage among consumers in the country.

eMarketer estimates that total media ad spending in Argentina will reach \$5.47 billion in 2016. Of that, mobile ad spending will make up \$218.6 million, or 4.0% of the total. There will be dramatic growth over the next few years, with the total topping \$1 billion by 2019.

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

	2015	2016	2017	2018	2019	2020
<b>Total media ad spending*</b> (millions)	\$4,448.0	\$5,471.0	\$6,455.8	\$7,295.1	\$7,878.7	\$8,272.6
—% change	28.0%	23.0%	18.0%	13.0%	8.0%	5.0%
<b>Digital ad spending**</b> (millions)	\$685.3	\$945.7	\$1,219.9	\$1,524.9	\$1,799.3	\$2,015.3
—% change	50.0%	38.0%	29.0%	25.0%	18.0%	12.0%
—% of total media ad spending	15.4%	17.3%	18.9%	20.9%	22.8%	24.4%
<b>Mobile internet ad spending***</b> (millions)	\$91.1	\$218.6	\$434.9	\$769.8	\$1,093.2	\$1,421.1
—% change	205.0%	140.0%	99.0%	77.0%	42.0%	30.0%
—% of digital ad spending	13.3%	23.1%	35.7%	50.5%	60.8%	70.5%
—% of total media ad spending	2.0%	4.0%	6.7%	10.6%	13.9%	17.2%

Note: converted at the exchange rate of US\$1=ARS9.25; \*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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