

# MOBILE

# BRAZIL 2016

## Forecasts and Key Trends

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# MOBILE BRAZIL 2016: FORECASTS AND KEY TRENDS

The economic turmoil in Brazil does not seem to have had a significant impact on the country's mobile market, although that will change if conditions continue to worsen.

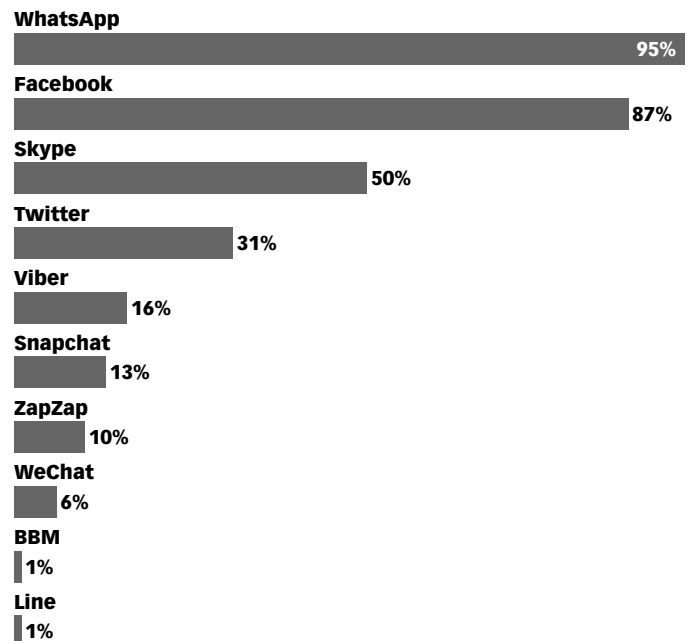
Balancing against the negative economic forces are recent investments in better mobile infrastructure across the country. That and the availability of over-the-top (OTT) messaging apps are keeping mobile usage growing in Brazil.

- The number of smartphone users in Brazil will total 64.0 million in 2016, eMarketer estimates. Affordable phones running on the Android operating system (OS) make up more than three-quarters of the smartphone market.
- Mobile phone usage overall is widespread. Though demographic data is hard to come by, mobile users in Brazil tend to skew younger, be better educated and have higher incomes.
- Aside from mobile messaging apps, social and video are popular activities among mobile users in the country.

**WHAT'S IN THIS REPORT?** This report highlights eMarketer's latest estimates for mobile usage in Brazil and presents a variety of data points from third-party providers.

## Mobile Messaging Apps Used by Internet Users in Brazil, 2015

% of respondents



Note: n=7,444 ages 18+

Source: Nova/sb and Ilumeo, "Estudo Popsynergy," Jan 22, 2016

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**KEY STAT:** A fragmented mobile market and a souring economy have led to extremely widespread use of WhatsApp, which allows for economical communication among users in Brazil.

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## THE CURRENT MOBILE PICTURE IN BRAZIL

**Brazil's mobile market has been resilient despite the country's slumping economy and scandal-battered government since 2014. But it is not exactly clear whether mobile uptake is consolidating or coming to a halt.**

Brazil invested in widespread network improvements prior to the 2014 World Cup soccer tournament, and that has continued as the country prepares for the Rio 2016 Summer Olympics. As a result, the number of 2G connections in Brazil has declined sharply, while 3G and 4G connections have grown rapidly.

Until recently, the country's growing middle class was enthusiastically taking advantage of the improving mobile infrastructure. In 2014, the mobile phone internet audience increased 32.8%—among the highest growth rates in the world, eMarketer estimates.

But there are signs that Brazil's economic struggles have slowed mobile growth or even reversed some of the gains in recent years. It is difficult, however, to gauge how much of Brazil's mobile market has been affected by broader economic factors, given the paucity of information and the long delays for official data to be released (for example, key government data for 2014 was not published until April 2016).

Seven consecutive quarters of GDP contraction, an inflation rate that topped 10% in late 2015, unemployment surpassing 10% this year and a slumping currency have all contributed to economic pressures in Brazil. Adding to that, wide-ranging political scandals and political infighting have weakened the government's ability to take meaningful action to refresh the economy.

Amidst these political and economic forces, there are signs of cracks in the mobile market, including reports of declining smartphone sales in 2015 and data showing a decrease in the number of mobile connections.

But neither are a definitive sign of serious problems in the mobile market. For instance, declining smartphone sales do not mean that smartphone users are abandoning their devices. Rather, it may simply mean that users are making the switch from multiple older devices to a single, last-generation phone that supports internet-based voice calling and messaging.

In January 2016, Brazil's telecommunications agency, Agência Nacional de Telecomunicações (Anatel), reported that the total number of mobile connections in Brazil slid by 8.7% last year. But this data may be more a reflection of changing technology than economic weakness. Brazil has a fragmented mobile market (the top four carriers hold market shares ranging only from 18% to 28%) which for years forced consumers to cobble together multiple connections in order to save money—by avoiding hefty out-of-network voice and texting fees. Increasingly more consumers are switching from traditional voice-calling and SMS to internet-based mobile messaging services like WhatsApp, which allow them to get around the need for multiple connections.

In sum, while the country's economy and political situation are in deep distress, the mobile market is most likely hanging on to gains. Consumers have so completely integrated mobile into their lives that it is considered a necessity baked into their monthly budgets. Therefore, eMarketer continues to project growth in key mobile usage metrics in Brazil.

## SMARTPHONE AND TABLET USERS

eMarketer estimates the number of smartphone users in Brazil will total 64.0 million in 2016, the highest amount among the other countries in Latin America tracked by eMarketer. Smartphone user growth will amount to 17.9% this year and drop to single-digit percentages by 2019 as the audience continues to near saturation.

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

	2014	2015	2016	2017	2018	2019	2020
<b>Smartphone users (millions)</b>							
Brazil	41.3	54.3	64.0	72.8	80.2	85.8	90.5
Mexico	30.9	37.7	44.2	49.9	55.4	59.2	62.1
Colombia	14.6	16.9	19.0	20.9	22.7	24.4	26.0
Argentina	11.1	13.9	16.2	18.1	19.9	21.6	23.4
Peru	5.7	7.2	8.6	9.9	11.1	12.1	12.9
Chile	6.3	7.1	7.9	8.7	9.3	9.8	10.3
Other	19.8	25.0	29.7	34.0	38.1	41.5	44.9
<b>Latin America</b>	<b>129.8</b>	<b>162.1</b>	<b>189.6</b>	<b>214.3</b>	<b>236.6</b>	<b>254.5</b>	<b>270.1</b>

### Smartphone user growth (% change)

Peru	43.5%	26.1%	18.6%	15.5%	12.0%	8.8%	7.1%
Brazil	42.6%	31.4%	17.9%	13.8%	10.1%	7.1%	5.4%
Mexico	36.2%	22.0%	17.3%	13.0%	10.9%	6.9%	4.9%
Argentina	27.7%	24.9%	16.9%	11.5%	9.7%	8.9%	7.9%
Colombia	25.4%	15.2%	12.6%	10.2%	8.3%	7.4%	6.7%
Chile	20.6%	13.4%	11.4%	9.4%	7.4%	5.6%	4.9%
Other	41.4%	26.2%	19.0%	14.4%	12.1%	9.0%	8.1%
<b>Latin America</b>	<b>36.2%</b>	<b>24.9%</b>	<b>17.0%</b>	<b>13.0%</b>	<b>10.4%</b>	<b>7.6%</b>	<b>6.1%</b>

Note: individuals of any age who own at least one smartphone and use the smartphone(s) at least once per month; numbers may not add up to total due to rounding

Source: eMarketer, April 2016

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eMarketer also estimates similar growth among the mobile phone internet audience, which will total 90.7 million individuals this year, a 14.6% annual increase. Among mobile phone users in the country, mobile internet penetration will be 68.0%.

## 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%

### Mobile phone internet user penetration (% of mobile phone users)

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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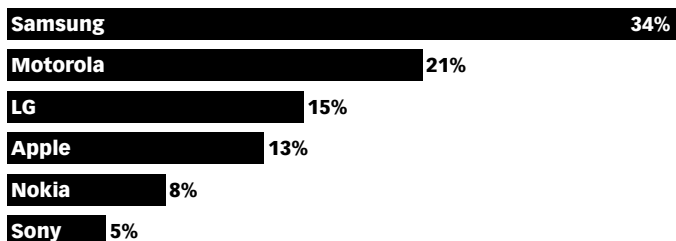
A variety of data sources point to mobile growth despite economic uncertainty. The "Spring 2015 Global Attitudes" survey from Pew Research Center found that the number of adults who owned a smartphone rose from 15% in 2013 to 41% in 2015. A separate February 2016 report from Cisco Systems estimated that the amount of smartphone devices in use reached 134 million in 2015, and expected that total to jump to 221 million by 2020.

Globally, Brazil is currently the fifth-largest smartphone market behind China (531.7 million smartphone users), India (223.6 million), the US (207.2 million) and Indonesia (65.2 million), eMarketer estimates.

Because of high taxation on imports and the infamous "Custo Brasil"—a term Brazilians use to refer to red-tape costs—most smartphone makers offer a wide variety of affordable devices.

South Korea-based Samsung has built a sizable lead as the top mobile phone manufacturer in Brazil by user share thanks to a lineup peppered with plenty of reasonably priced devices. In a November 2015 survey from Mobile Marketing Association (MMA) conducted by Millward Brown and Netquest, more than one-third of mobile phone users between ages 14 and 55 cited Samsung as the maker of their primary mobile phone. Also offering a wide array of affordable devices, Motorola and LG rounded up the top three with 21% and 15% of respondents, respectively.

**Mobile Phone User Share in Brazil, by Brand, Nov 2015**  
% of respondents



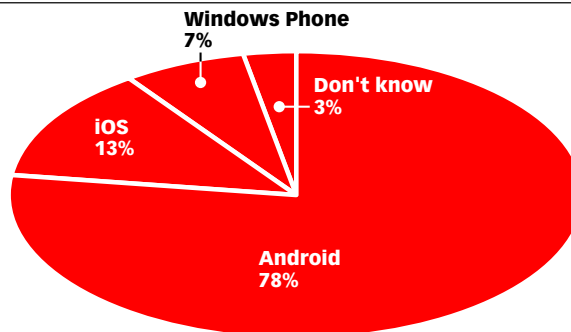
*Note: n=1,200 ages 14-55*  
*Source: Mobile Marketing Association (MMA), "MMA Mobile Report 2015" conducted by Millward Brown and Netquest in partnership with Adsmovil, Mirum, ROlx and Zenvia, Dec 17, 2015*

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Apple's high-end phones garnered just a 13% share. The company could see a decline in its share of Brazil's smartphone users as competitors flood the market with low-cost devices.

Not surprisingly, Android is the dominant operating system in Brazil. According to the MMA study, 78% of smartphone users owned an Android device as of late 2015.

**Smartphone User Share in Brazil, by OS, Nov 2015**  
% of respondents



*Note: n=1,200 ages 14-55; numbers may not add up to 100% due to rounding*  
*Source: Mobile Marketing Association (MMA), "MMA Mobile Report 2015" conducted by Millward Brown and Netquest in partnership with Adsmovil, Mirum, ROlx and Zenvia, Dec 17, 2015*

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The importance of affordability cannot be overstated in a market like Brazil, where about three-quarters of the population earn less than \$812 per month and typically pay up to a 50% premium over the prices paid for the same devices by consumers in the US.

Android boasts a commanding lead in Brazil's smartphone market, which is hardly surprising given that the adaptable, open-source system powers the vast majority of the less-expensive devices popular in the market. Those traits have encouraged original equipment manufacturers (OEMs) to expand their Android offerings in the country, particularly among entry-level devices.

When it comes to tablets, eMarketer estimates that the number of individuals who will use the device on a regular basis will reach 41.3 million in 2016. Tablet user growth has been solid in recent years and will continue to climb throughout the forecast period, albeit at fairly modest single-digit levels.

## 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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Data on tablet sales suggest even those modest forward-looking estimates may be optimistic. Sales of tablets have slumped in Brazil; IDC Brasil estimates that sales fell 38% in 2015 and projects a further 29% drop in 2016. While those declines are significant, they may not mean that usage growth is capped. If purchasers are new buyers on the market, then user growth may still be rising, even amid weak sales.

## DEMOGRAPHIC PROFILE OF MOBILE USERS

Publicly available data for mobile users broken down by age, gender and income is hard to come by in Brazil, and what little data is released is often older than researchers prefer. However, some patterns do emerge.

Data collected in 2014 and 2015 for Google's Consumer Barometer from TNS Infratest found fairly uniform mobile usage rates except for those older than 55. Among the younger users, penetration rates were at least 92%. For those over 55, though, the rate was 76%.

Government data from the Instituto Brasileiro de Geografia e Estatística (IBGE) for 2014 was just released in April 2016, and it showed that mobile ownership in Brazil is lower among older generations and the less-educated.

## Demographic Profile of Mobile Phone Owners in Brazil, Sep 2014

% of population in each group

<b>Gender</b>	
Female	78.6%
Male	77.3%
<b>Age</b>	
10-14	54.1%
15-17	80.8%
18-19	87.2%
20-24	89.4%
25-29	89.2%
30-34	89.0%
35-39	87.8%
40-44	86.2%
45-49	83.2%
50-54	81.4%
55-59	76.9%
60+	55.6%
Total	77.9%
<b>Years of education</b>	
None or <1	41.3%
1-3	51.5%
4-7	71.1%
8-10	86.0%
11-14	93.6%
15+	96.8%

Note: for personal use

Source: Instituto Brasileiro de Geografia e Estatística (IBGE), "Pesquisa Nacional por Amostra de Domicílios (PNAD) 2014" conducted in partnership with Ministério das Comunicações (MC) - Brazil, April 6, 2016

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Smartphone usage, not surprisingly, skews young. Data for 2015 from the Pew Research Center showed that 61% of 18- to 34-year-olds said they owned a smartphone, compared with 41% of all adult respondents. Among individuals 35 and older, only 26% were smartphone owners.

Google/TNS found similar smartphone patterns. Fully 83% of respondents younger than 25 were smartphone users, compared with just 20% for those 55 and older.

As with mobile usage in general, smartphone users tend to be educated and have more income. According to Pew Research Center, 64% of individuals in Brazil with "more education" were smartphone users as of May 2015, compared with 21% of those with "less education." Some 54% of high-income respondents reported smartphone ownership, more than double the level among lower-income respondents.

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

% of respondents in each group

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

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

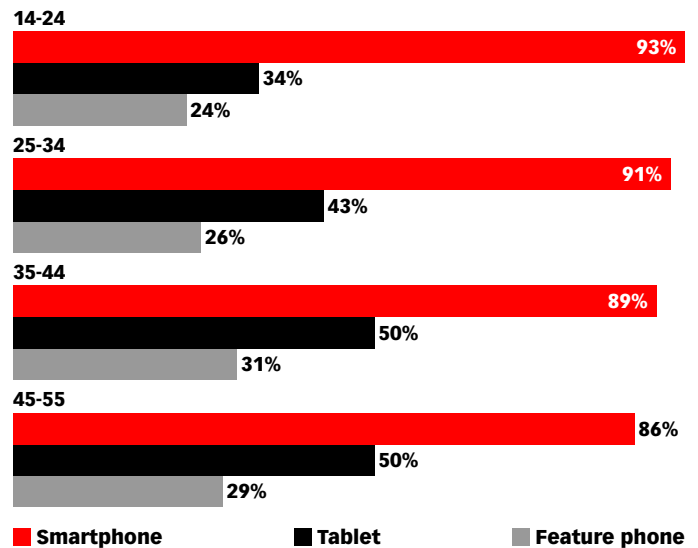
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Regarding tablets, patterns in Brazil follow that of other countries worldwide. Tablet usage is not as tightly tied to youth as smartphone usage. In the MMA study, half of individuals between 35 and 55 years old said they owned a tablet. Conversely, only 34% of those ages 14 to 24—the youngest group polled—owned a tablet. The caveat, however, is that these respondents were representative of mobile internet users and not the overall population.

## Mobile Devices Owned by Mobile Internet Users in Brazil, by Age, Nov 2015

% of respondents in each group



Note: n=1,200

Source: Mobile Marketing Association (MMA), "MMA Mobile Report 2015" conducted by Millward Brown and Netquest in partnership with Adsmovil, Mirum, ROlx and Zenvia, Dec 17, 2015

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A wider-ranging poll conducted by Google and TNS found that consumers ages 25 to 34 were the most likely to be tablet users (19%), higher than those ages 34 to 44 (13%) and 45 to 54 (11%).

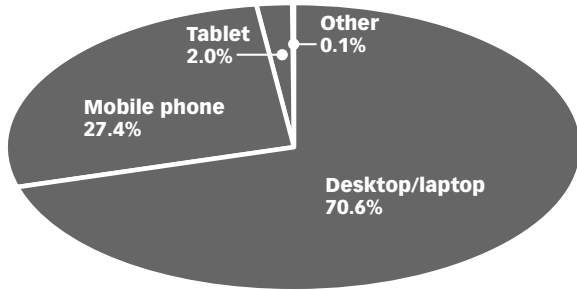
Again, not surprisingly, tablet usage was also higher among consumers earning more income.

## MOBILE INTERNET TRAFFIC

Mobile phones and tablets make up more than a quarter of Brazil's internet traffic, according to findings from comScore Device Essentials. Mobile phones drove 27.4% of total page views in the country in February 2016, and tablets contributed another 2.0%.



**Page View Share in Brazil, 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 computer dominance of internet traffic, more mobile device-based traffic is occurring on the go via mobile data plans. Cisco Systems estimates monthly mobile data traffic per user—excluding Wi-Fi—reached 644 megabytes during 2015, up 54.8% from the 416 megabytes averaged per user in Brazil the prior year.

Top mobile broadband speeds were less common, though, with only 5% of connections linked to 4G. However, 4G connections are expected to represent a little more than a third (36%) of the mobile links in 2020.

**Mobile Data and Device Metrics in Brazil, 2015 & 2020**

	2015	2020
<b>Mobile devices</b>		
Mobile device users (millions)	170.7	182.1
Mobile device user penetration (% of population)	82%	84%
Smartphones in use (millions)	134	221
Connected tablets in use (millions)	3	9
4G connections (% of total mobile connections)*	5%	36%
<b>Mobile data</b>		
Mobile data traffic per user (MB/month)	644	3,702
—Smartphone data traffic (% of total mobile data traffic)	79%	79%
—Tablet data traffic (% of total mobile data traffic)	8%	8%
—Laptop data traffic (% of total mobile data traffic)	10%	6%
Mobile video traffic (% of total mobile data traffic)	56%	75%
4G data traffic (% of total mobile data traffic)	22%	65%

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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Among the factors hampering greater smartphone usage in Brazil, the low number of mobile data plans available is possibly the most notable. According to Anatel, 71.6% of mobile connections were tied to prepaid subscriptions in December 2015. Mobile carriers have been making a modest push to switch consumers to steadier postpaid plans, but the process has been slow; the share of users with postpaid plans increased just 4 percentage points between January and December 2015.

**Mobile Connections and Penetration in Brazil, by Payment Plan, Dec 2015**

millions, % of total and % of population

<b>Prepaid</b>	<b>184.5</b>
—% of total	71.6%
<b>Postpaid</b>	<b>73.3</b>
—% of total	28.4%
<b>Total</b>	<b>257.8</b>
—% of population	125.7%

Source: Agência Nacional de Telecomunicações (Anatel) as cited in press release, Jan 29, 2016

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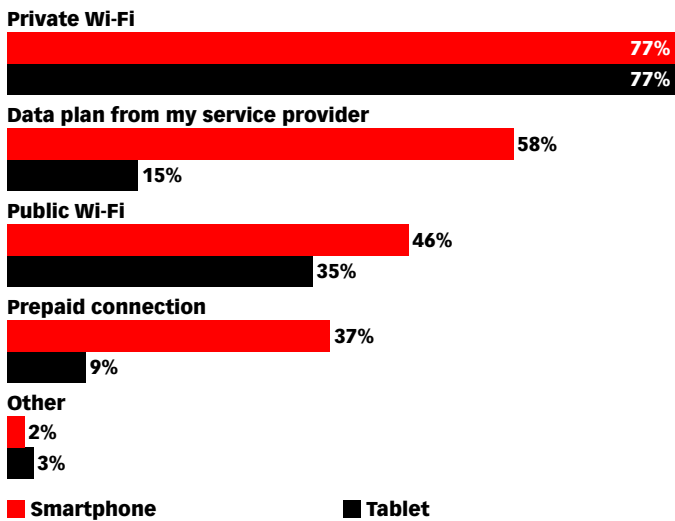
Vivo, the Brazilian brand of Spain-based telecom giant Telefónica, is the largest mobile provider. The lowest-priced postpaid plan listed by the leading carrier goes for BRL124.99 (\$37.48) per month and includes 3 gigabytes of mobile data but limits out-of-network calls—no social media or mobile messaging app usage is included, a feature that has drawn lots of new users in Mexico, for example. Meanwhile, prepaid plans would cost BRL0.99 (\$0.30) per block of 30 megabytes of data, BRL0.99 per day for voice service and BRL0.99 per SMS bundle—300 to Vivo users and 15 out-of-network.

Wi-Fi connections are the most leveraged by mobile internet users in Brazil. According to MMA and Millward Brown, 77% of smartphone internet users go online via private Wi-Fi connections.



## Methods Used to Access the Internet via Smartphone vs. Tablet According to Mobile Internet Users in Brazil, Nov 2015

% of respondents



Note: n=1,200 ages 14-55

Source: Mobile Marketing Association (MMA), "MMA Mobile Report 2015" conducted by Millward Brown and Netquest in partnership with Adsmovil, Mirum, ROlx and Zenvia, Dec 17, 2015

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## MOBILE ACTIVITIES

OTT mobile messaging apps, particularly WhatsApp, are thriving in Brazil and are perhaps the primary engine powering the recent surge in 4G connections. Other top mobile activities in the country include social media and video consumption.

eMarketer defines OTT mobile messaging apps as services that provide private one-to-one or one-to-many communication between registered users (via mobile phone number or user ID), where messages and calls (voice or video) are then transmitted via data connections and the mobile web. Examples include Facebook Messenger, Line, Snapchat, WeChat and WhatsApp. This definition excludes anonymous social sharing apps (such as Whisper, YikYak, etc.), social networking apps that offer private messaging capabilities as a secondary feature (Instagram, Twitter) and apps that solely provide OTT voice/video calling. Under this definition, the number of mobile phone messaging app users in Brazil will rise 18.1% to reach 56.5 million in 2016. By the end of 2019, that tally will jump to 77.0 million.

## Mobile Phone Messaging App Users in Latin America, by Country, 2014-2019

	2014	2015	2016	2017	2018	2019
<b>Mobile phone messaging app users (millions)</b>						
Brazil	36.0	47.8	56.5	64.5	71.7	77.0
Mexico	21.5	29.8	35.1	40.2	45.1	48.7
Argentina	9.4	13.1	15.2	16.6	18.1	19.6
Other	35.9	52.4	62.7	70.7	78.8	85.3
<b>Latin America</b>	<b>102.8</b>	<b>143.2</b>	<b>169.5</b>	<b>192.1</b>	<b>213.8</b>	<b>230.7</b>

	2014	2015	2016	2017	2018	2019
<b>Mobile phone messaging app user growth (% change)</b>						
Argentina	36.5%	39.6%	16.0%	9.7%	9.0%	8.3%
Mexico	37.8%	39.0%	17.5%	14.7%	12.1%	8.0%
Brazil	52.6%	32.9%	18.1%	14.2%	11.1%	7.4%
Other	41.5%	45.9%	19.6%	12.7%	11.5%	8.2%
<b>Latin America</b>	<b>43.9%</b>	<b>39.3%</b>	<b>18.3%</b>	<b>13.4%</b>	<b>11.3%</b>	<b>7.9%</b>

Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month; numbers may not add up to total due to rounding

Source: eMarketer, Nov 2015

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Roughly two-thirds of mobile phone internet users in Brazil already use messaging apps. By 2019, this proportion is expected to represent 78.5% of that group.

## Mobile Phone Messaging App User Penetration in Latin America, by Country, 2014-2019

	2014	2015	2016	2017	2018	2019
<b>Mobile phone messaging app user penetration (% of mobile phone internet users)</b>						
Argentina	66.1%	78.0%	79.3%	81.0%	82.8%	84.1%
Brazil	57.1%	65.5%	67.5%	71.7%	75.5%	78.5%
Mexico	47.6%	56.3%	58.8%	62.2%	65.1%	66.4%
Other	63.5%	77.6%	80.2%	80.3%	82.0%	82.5%
<b>Latin America</b>	<b>57.5%</b>	<b>68.1%</b>	<b>70.4%</b>	<b>73.0%</b>	<b>75.7%</b>	<b>77.4%</b>

	2014	2015	2016	2017	2018	2019
<b>Mobile phone messaging app user penetration (% of mobile phone users)</b>						
Argentina	31.2%	42.6%	48.4%	52.2%	56.0%	59.7%
Brazil	28.4%	36.7%	42.3%	47.3%	51.5%	54.4%
Mexico	27.5%	36.7%	42.0%	47.0%	51.6%	54.7%
Other	23.9%	34.0%	39.7%	43.9%	48.0%	51.1%
<b>Latin America</b>	<b>26.7%</b>	<b>36.1%</b>	<b>41.7%</b>	<b>46.3%</b>	<b>50.5%</b>	<b>53.6%</b>

	2014	2015	2016	2017	2018	2019
<b>Mobile phone messaging app user penetration (% of population)</b>						
Argentina	21.8%	30.1%	34.6%	37.6%	40.6%	43.6%
Mexico	17.9%	24.7%	28.7%	32.6%	36.2%	38.7%
Brazil	17.8%	23.4%	27.4%	31.1%	34.3%	36.6%
Other	14.9%	21.5%	25.4%	28.3%	31.3%	33.5%
<b>Latin America</b>	<b>16.9%</b>	<b>23.4%</b>	<b>27.4%</b>	<b>30.8%</b>	<b>33.9%</b>	<b>36.3%</b>

Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month

Source: eMarketer, Nov 2015

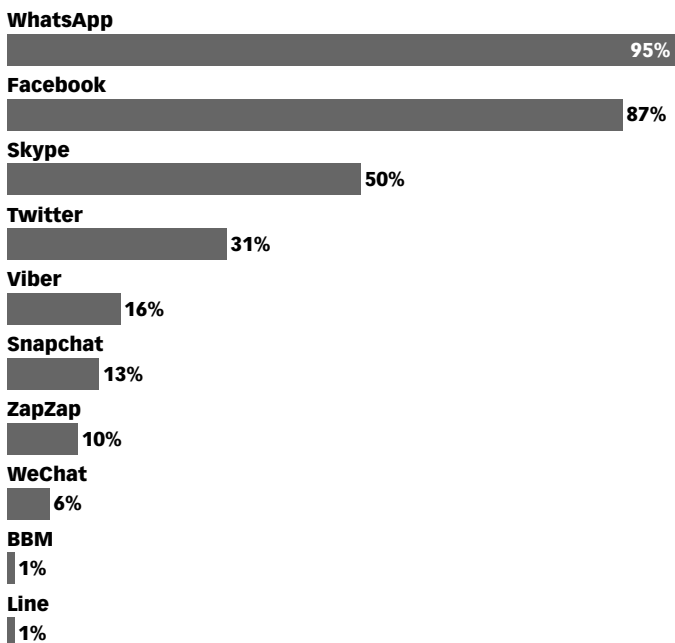
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Nearly all internet users in Brazil use WhatsApp, according to research from Nova/sb and Ilumeo. In January 2016, 95% of internet users ages 18 and older said they used the mobile messaging app, while Facebook Messenger came in second place with 87%. Skype, Snapchat and Tencent's WeChat were much less commonly used.

### Mobile Messaging Apps Used by Internet Users in Brazil, 2015

% of respondents



Note: n=7,444 ages 18+

Source: Nova/sb and Ilumeo, "Estudo Popsynergy," Jan 22, 2016

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WhatsApp estimates its user base in Brazil currently surpasses 100 million. The service, which supports mobile messaging and calls over the internet at no cost regardless of service provider, is hugely popular among mobile users there and is one of the key drivers behind the recent surge in last-generation smartphone uptake.

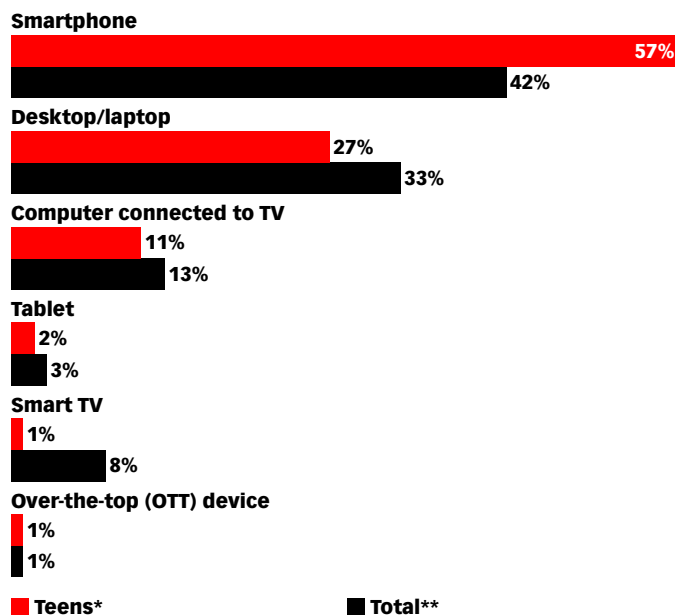
Such is the importance of WhatsApp that there was a massive public outcry when a local judge ordered wireless phone carriers to suspend access to the service for 72 hours in early May 2016 due to a dispute over access to encrypted data (after another digital blockade ordered in December 2015), opening a narrow window of opportunity for WhatsApp competitor Telegram.

Growth in the number of mobile phone social network users in Brazil is on an upswing, too, despite the lack of subsidies that are enjoyed by consumers in other regional markets (Mexico being the most notable, as all mobile carriers there offer usage of Facebook, Facebook Messenger, Twitter and WhatsApp that doesn't count against data allowances in most prepaid and postpaid schemes). eMarketer estimates that individuals in Brazil who access their social network profiles via mobile phone at least once per month will reach 82.1 million in 2016; by the end of 2020, that number will approach 100 million.

Digital video viewing has also turned decidedly mobile among consumers in Brazil, particularly younger audiences. In a September 2015 survey from Google, Grupo Meio & Mensagem and Provokers, 42% of digital video viewers ages 14 to 55 preferred using a smartphone for watching such content, well ahead of the 33% who opted for desktops/laptops.

### Preferred Device for Watching Digital Video According to Teen\* vs. Total\*\* Digital Video Viewers in Brazil, Sep 2015

% of respondents



Note: teens n=167; total n=1,035; numbers may not add up to 100% due to rounding; \*ages 14-17; \*\*ages 14-55

Source: Google, Grupo Meio & Mensagem and Provokers, "Como os jovens brasileiros assistem video: entendendo as mudanças de hábito e atitude," Nov 2015

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By comparison, more than half of teen respondents said they preferred smartphones for watching digital video content, compared with just 27% who preferred desktop/laptops.

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