

MOBILE PERU

2016

Updated Forecasts and
Key Growth Trends

AUGUST 2016

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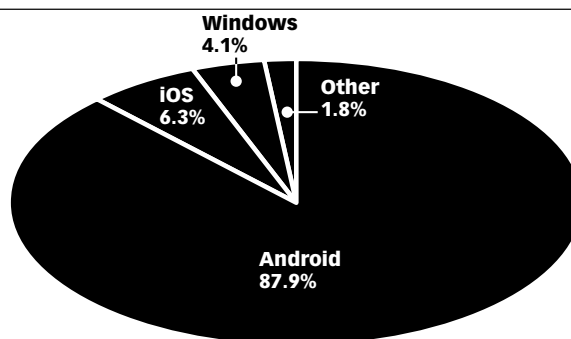
MOBILE PERU 2016: UPDATED FORECASTS AND KEY GROWTH TRENDS

Of the six major economies in Latin America, Peru has the least developed mobile market. As a result, advertisers have resisted moving much of their digital budgets toward mobile. But that will continue to change over the next few years, as the number of smartphone users continues to increase, giving advertisers more reason to boost mobile investment.

- Peru's mobile connections reached 35.2 million in March 2016, representing 117.1% of the general population.
- Peru's mobile user base will expand 3.0% to reach 20.0 million in 2016—65.1% of the country's population.
- Smartphone users will total 8.6 million this year, increasing 18.6% since 2015. This will represent 27.9% of the population, which is the lowest penetration rate among the six Latin American markets in this eMarketer series, and the only one below the regional average.
- Mobile phones and tablets represent less than 30% of internet traffic in Peru, the lowest such share in the region.
- Android accounts for almost nine in 10 smartphone page views and more than two-thirds of tablet internet traffic. iOS still controls 29.1% of tablet queries but just 6.3% of smartphone online page views.
- Mobile ad spending will represent 13.1% of total digital ad spending in Peru this year, well below the 29.4% average across all of Latin America.

WHAT'S IN THIS REPORT? This report examines the state of Peru's mobile market and places it in a regional context, while also providing the most up-to-date user and ad spending estimates.

Mobile Phone Page View Share in Peru, 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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KEY STAT: Android, the dominant operating system in just about every mobile category in Peru, powers nearly nine in 10 (87.9%) mobile phone page views in the country.

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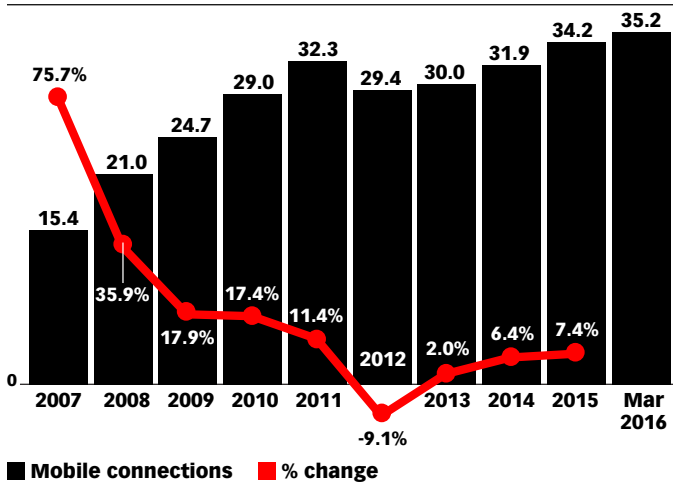
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THE CURRENT MOBILE PICTURE IN PERU

Peru is the least developed mobile market of the six Latin American countries analyzed by eMarketer in depth, which includes Argentina, Brazil, Chile, Colombia and Mexico. Peru ranks fifth in mobile usage and sixth in mobile ad spending.

Total mobile connections in Peru reached 34.2 million in 2015, up 7.4% from a year earlier, according to local telecom regulator Organismo Supervisor de Inversión Privada en Telecomunicaciones (OSIPTTEL). In March 2016, mobile connections had risen to 35.2 million.

Mobile Connections in Peru, 2007-March 2016
millions and % change



Source: Organismo Supervisor de Inversión Privada en Telecomunicaciones (OSIPTTEL); eMarketer calculations, 2016

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Mobile connection penetration exceeded 100% of Peru's population in December 2010 and has stood above that threshold since, reaching 117.1% in March 2016, according to OSIPTTEL records.

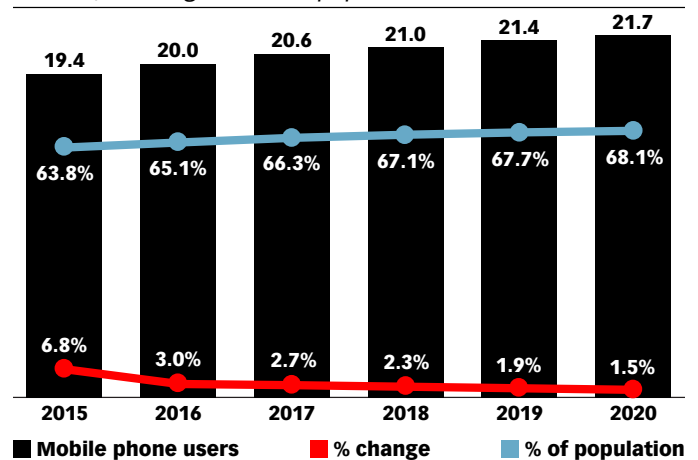
The metropolitan area of Lima (the nation's capital) and Callao accounted for 38.2% of mobile connections in March 2016, according to OSIPTTEL. Combined with the Arequipa (5.5%), La Libertad (5.7%) and Piura (4.8%) departments—a political demarcation akin to states in the US—these coastal areas contain 54.3% of mobile connections and just over half (50.9%) of the population in the country.

Peru is divided into three distinct natural regions: costa, sierra and selva (coast, highlands and jungle), each with distinct characteristics that affect human settlement as well as their economic and technological development. Because of their harsher landscape, mobile development in both the highlands and jungle is behind that of the coast. For example, Cusco (in the highlands) had just a 4% share of mobile connections nationwide in March 2016, and was home to 4.2% of the population in late 2015. And the Amazonas (in the jungle), home to 1.4% of the population, accounted for 0.9% of mobile connections, according to Instituto Nacional de Estadística e Informática (INEI) and OSIPTTEL estimates.

Of the four major mobile carriers in Peru, Spanish Telefónica's Movistar has remained on top by a wide margin. According to OSIPTTEL, Movistar provided 50.2% of mobile connections—some 17.7 million—in March 2016. As is usually the case across Latin America, Peru is a battleground between Telefónica and América Móvil. The latter serves the country under the Claro brand with a 34.3% market share.

eMarketer estimates that mobile phone owners in Peru will total 20.0 million in 2016, a 3.0% year-over-year increase. The mobile phone user expansion will therefore be three times that of population growth this year (1.1%), and will remain above it for the remainder of the decade. Mobile phone user penetration will rise slightly, from 65.1% this year to 68.1% in 2020, when 21.7 million individuals will regularly use a mobile phone.

Mobile Phone Users and Penetration in Peru, 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

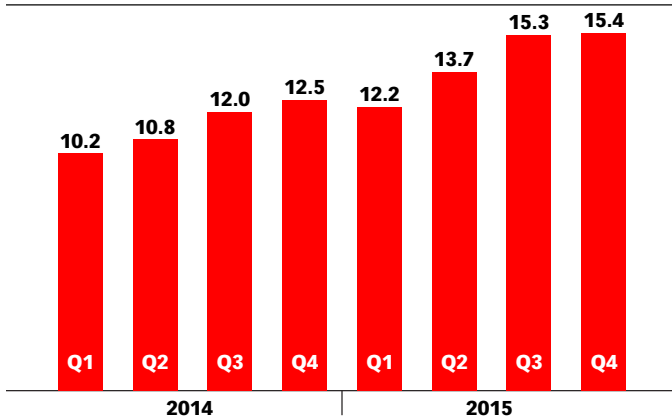
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Peru ranks fifth in Latin America both by total mobile phone users and penetration. Peru's position in both rankings will remain the same through 2020, despite the country registering the highest mobile phone user growth rates during the forecast period.

OSIPTEL estimates that there were 15.4 million mobile phone internet users in Peru during Q4 2015, up from 12.5 million a year prior. The steadier postpaid method of subscriptions was nevertheless in the minority—just over one-fifth of the total, or 3.5 million.

Mobile Phone Internet Users in Peru, Q1 2014-Q4 2015
millions



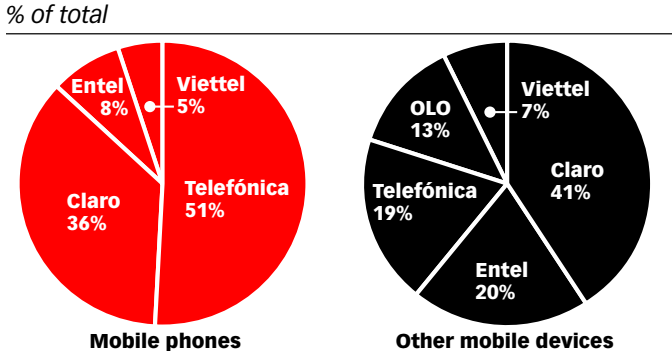
Source: Organismo Supervisor de Inversión Privada en Telecomunicaciones (OSIPTEL), Feb 2016

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As of late 2015, Telefónica's Movistar leads the mobile internet market in Peru with 7.8 million users, translating to a 51% market share. Claro trails with a 36% slice, according to OSIPTEL.

Share of Mobile Phone Internet Users in Peru, by Device and Carrier, Q4 2015
% of total



Source: Organismo Supervisor de Inversión Privada en Telecomunicaciones (OSIPTEL), Feb 2016

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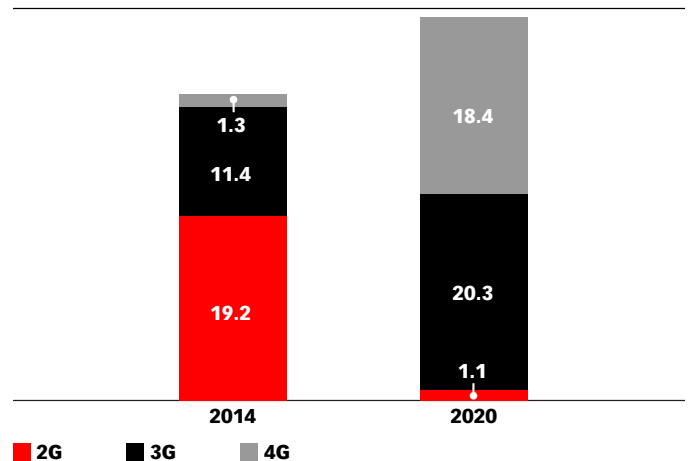
Mobile internet access via other mobile devices is largely under Claro's control, with a 41% market share, followed by Entel's 20%. Movistar serves only 19% of this secondary market, which includes tablets, dongles and modem cards.

MOBILE DEVICES

The number of mobile connections and penetration continues to increase in Peru. But with widespread mobile phone adoption, future growth will likely come from more advanced devices that could potentially generate some degree of consolidation, lowering the number of devices in use.

In 2014, second-generation (2G) devices made up 60.2% of mobile connections in Peru, but they may reach the brink of extinction in the next few years. Counterpoint Research projects that only 1.1 million mobile connections, or 2.8% of the total, will be linked to a 2G device by 2020. At the same time, 3G connections will nearly double during that period to reach 20.3 million, while 4G will swell from just 1.3 million connections to 18.4 million, or 46.2% of the total.

Mobile Connections in Peru, by Access Technology, 2014 & 2020
millions



Source: Counterpoint Research as cited by 5G Americas, Dec 2015

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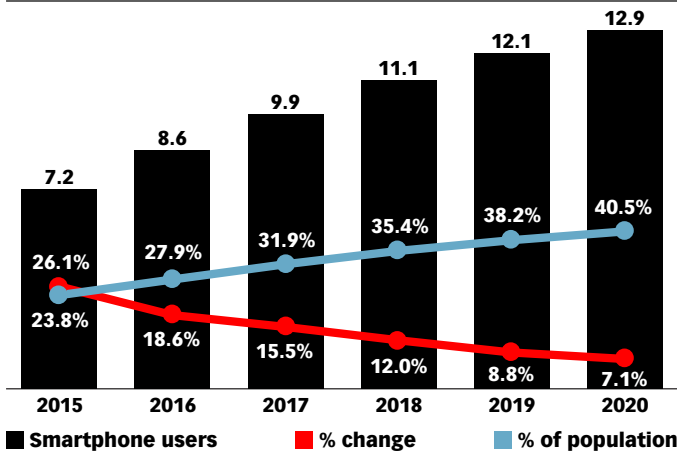
In all, Counterpoint projects that between 2014 and 2020, nearly 8 million new mobile connections will be added to the market in Peru.

Smartphones

GSMA Intelligence projects that smartphone connection as a percentage of total mobile connections will rise from 19% to 57% between 2014 and 2020.

eMarketer estimates Peru's smartphone user base will increase 18.6% this year to reach 8.6 million, equivalent to over one-quarter of the population and less than half of the total mobile phone user base. Among the six major mobile markets in Latin America tracked by eMarketer, Peru leads only Chile in the absolute number of smartphone users.

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



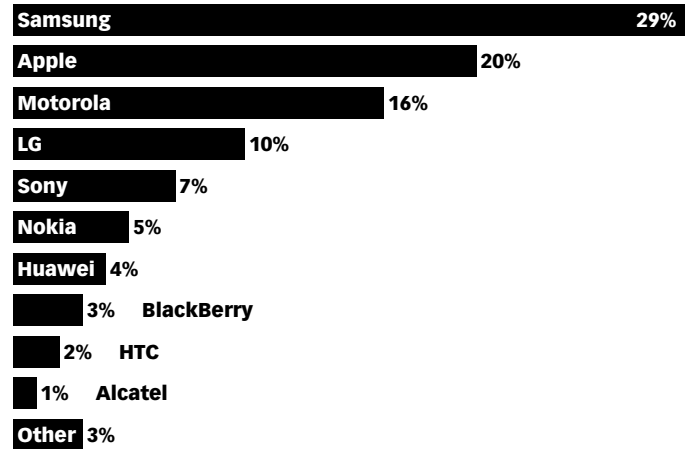
Note: individuals of any age who own at least one smartphone and use the smartphone(s) at least once per month
Source: eMarketer, April 2016
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The country will remain the only major market in the region where smartphone penetration will continue to be below the regional average. Whereas Peru's figure will rise from 27.9% to 40.5% of the population between 2016 and 2020, the median across all countries in Latin America will swell from 30.6% to 42.1%, eMarketer predicts.

Recent data about smartphone uptake broken down by operating system and original equipment manufacturer (OEM) is difficult to come by in Peru, and the little that does exist points at the predominance of Android devices. In May 2015 research conducted in the metropolitan areas of Lima and Callao by Futuro Labs, Samsung led the market at 29% while Apple came in second at 20%—one of the highest shares it held in any Latin American country. Motorola came in third place with a 16% share.

Smartphone Ownership Share Among Smartphone Owners in Urban Peru*, by Brand, May 2015

% of respondents



Note: ages 15+; *Callao and Lima
Source: Futuro Labs, "Estudio del Usuario de Smartphone 2015-Q2," July 24, 2015

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An earlier Futuro Labs study found that Apple devices were particularly common among individuals ages 35 to 44 in Peru, at 22.4% in February 2015. Samsung registered its highest reach among younger adults ages 25 to 34, with 36.3% of respondents in that group owning such a device.

When it came to deciding on which device to buy, brand prestige and design were two of the top three traits sought by smartphone owners in Peru—50.4% and 44.3% of respondents, respectively—both strengths often associated with Apple products. However, the other big consideration was cost, mentioned by 46.4%.

Men are more likely than women to own a smartphone in Peru. In a February 2016 Pew Research Center study, 29% of male respondents ages 18 and older said they owned such a device, compared with 21% of females.

Smartphone Ownership Among Adults in Select Countries, by Gender, May 2015

% of respondents in each group

	Male	Female
Burkina Faso	18%	9%
Canada	72%	63%
France	53%	45%
Germany	64%	56%
Ghana	27%	15%
India	21%	13%
Kenya	32%	20%
Mexico	44%	28%
Nigeria	34%	21%
Pakistan	15%	6%
Peru	29%	21%
Russia	48%	41%
Spain	75%	66%
Tanzania	14%	8%
Uganda	6%	3%
UK	72%	65%
Ukraine	30%	24%
Venezuela	48%	42%
Vietnam	39%	31%

Note: ages 18+; only the 19 countries with statistically significant gaps are shown

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

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According to Pew, 41% of adults between 18 and 34 years old said they possess a smartphone, compared with 15% of those 35 and older. Among the six Latin American countries included in this series, the smartphone ownership gap between both groups averaged about 33 percentage points. Chile, the country with the highest smartphone penetration levels, was the only market in the region where smartphone ownership had reached at least 50% for the older as well as the younger age group (86%).

Nearly four in 10 respondents with "more education" said they owned a smartphone, while only 5% of those with "less education" said the same. Fully 31% with higher income owned one, compared with 9% of those with lower income.

While education and income drew wider gaps in smartphone uptake than did gender, the disparities were less than in the region as a whole: The average education and income gaps in Latin America were 41.5 and 27.2 percentage points, respectively.

(For countries tracked in Latin America, Pew uses the term "less education" to refer to individuals with below a secondary education and "more education" when referring to individuals 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

Few tablets are currently sold in Peru. And with global sales slowing in general, tablets will remain a rare sight in the country. Under these circumstances, facts about Peru's small tablet market are hard to come by, so inferences must be made based on larger data sets or shipment estimates.

According to Dominio Consultores data cited by newspaper El Comercio, 530,000 tablets were imported to the country in H1 2015, which is 29% less than the same period the previous year. The reduction during H1 2015 was significantly lower for analysts, who had previously projected a 28% expansion for the full year.

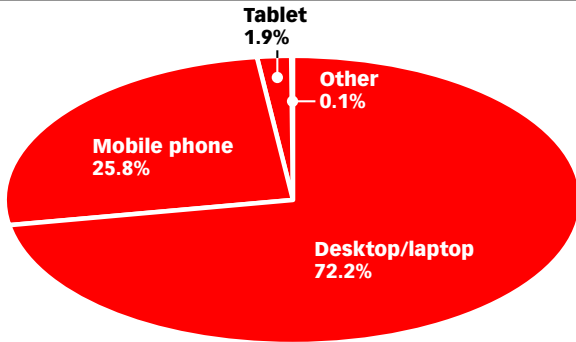
Cisco Systems estimated that the number of mobile-connected tablets in Latin America totaled 9.5 million in 2015; Brazil (3.2 million tablets), Mexico (1.9 million), Argentina (700,000) and Chile (600,000) were the largest contributors to that tally.

Cisco did not break down estimates for other countries in the region but calculated 3.1 million tablets in its "rest of Latin America" grouping. Given that Colombia and Venezuela are much more advanced mobile markets, and that Colombia has a much larger population than Peru, it makes sense to expect a considerable portion of that tally comes from those two countries. And since Peru often trails Chile in mobile uptake, it is reasonable to estimate that there were well under 600,000 connected tablets in Peru last year.

MOBILE INTERNET TRAFFIC

Mobile internet traffic is lower in Peru than in any other major market in Latin America. According to data provided by comScore, mobile phones and tablets combined drove just over one-quarter of page views in February 2016. The average among the six Latin American countries studied in this series was 30.7%; Chile had the highest rate, at 35.9%.

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



Source: comScore Device Essentials, April 7, 2016

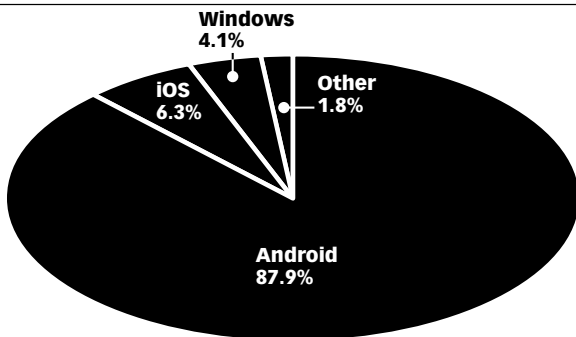
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Traffic by Operating System

Google's operating system controls the majority of mobile phone internet traffic in Peru. comScore found that nearly nine in 10 page views on mobile phones (most of them smartphones in all likelihood) were powered by Android in February 2016. iOS was far behind with just a 6.3% share, followed by Windows with 4.1%.

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



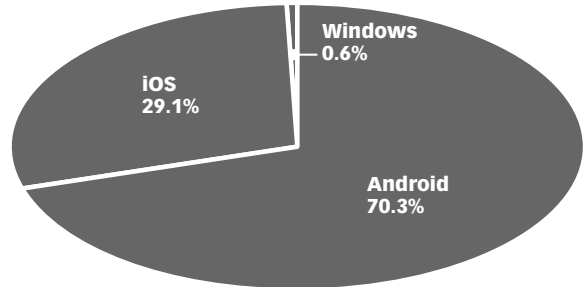
Note: numbers may not add up to 100% due to rounding
Source: comScore Device Essentials, April 7, 2016

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Tablet traffic was slightly more diverse, but dominated by Android nonetheless. In comScore's findings, Google's OS controlled 70.3% of tablet traffic for that month, and iOS accounted for nearly all the rest.

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



Source: comScore Device Essentials, April 28, 2016

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MOBILE ACTIVITIES

Mobile internet uptake may be lagging in Peru, but activities conducted by its existing mobile web users are similar to those across Latin America.

February 2016 data provided by comScore shows that news and information sites received the greatest number of unique visitors in Peru, with 5.1 million via smartphones and 406,000 via tablets. Entertainment, which includes digital video and music streaming services, was the second most-visited category with nearly 4.1 million unique visitors for smartphones and 388,000 for tablets.

It is worth noting that news and information was also the top category in all major markets in Latin America, except Brazil—where portals led the way. Even in Chile's tiny market (with a population just over half the size of Peru's), the internet audience in the uppermost category was significantly larger, at 7.5 million unique users via smartphones and 496,000 on tablets.

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

thousands

	Smartphone	Tablet
News/information	5,063	406
Entertainment	4,069	388
Portals	2,712	235
Lifestyle	1,962	156
Social media	1,766	132
Sports	1,716	106
Directories/resources	1,564	131
Business/finance	979	73
Technology	864	101
Family & youth	827	75
Health	735	54
Career services & development	609	45
Travel	386	37
Automotive	350	28
Services	340	55
Real estate	285	28
Games	252	51
Search/navigation	222	17
Education	125	19
Retail	125	13

Note: via browser only; top 20 categories by smartphone visitors shown
Source: comScore Mobile Metrix, April 7, 2016

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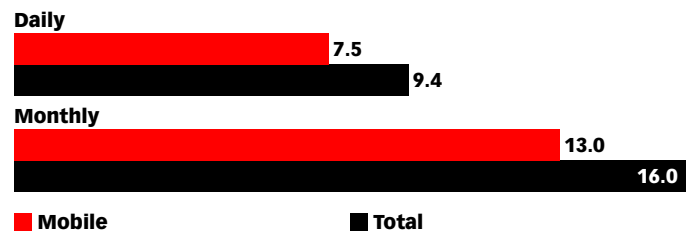
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Social media, which is especially popular in Latin America, ranked a modest fifth place, with 1.8 million unique visitors via smartphones and 132,000 via tablets. In all likelihood, the audience counts for social media and entertainment are lower due to comScore figures excluding apps, which usually drive the bulk of activity in both types of content.

Mobile social media user estimates are harder to come by in Peru, but existing data can be pieced together to give an indication of uptake and usage. Data shared with eMarketer by Facebook—the dominant social media platform across the region—shows that the property had 16.0 million monthly active users (MAUs) in Peru during Q4 2015. Some 81.3% of them, or 13.0 million, regularly signed into their accounts via mobile devices. Additionally, 7.5 million Facebook users accessed their profile daily on their mobile device.

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

millions



Source: Facebook, March 2, 2016

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eMarketer estimates that 79.3% of Facebook users in Latin America accessed their profile via mobile phones at least once a month in 2015—very similar to the social network’s own estimate. That portion will rise to 82.6% this year.

Over one-third (36.4%) of the population in Latin America will be mobile phone social network users this year. Under the assumption that Peru’s rate is about average for the region, and considering that INEI projects the population will reach 31.5 million in 2016, Peru’s mobile social network user base would be on the order of 11.5 million this year. (Note: eMarketer’s social media projections tend to be lower for both the overall category and individual properties, including Facebook, because of an attempt to discount corporate profiles, fake accounts, bots and duplicates.)

Regarding social media usage patterns, comScore estimates that nearly all mobile users accessing social media via browsers do so using smartphones. Counting both tablets and smartphones, Android was used in eight out of 10 mobile social media sign-ins in December 2015.

Mobile Social Media Users in Peru, by Device and OS, Dec 2015

thousands and % of total

	Mobile social media users (thousands)	% of total
By device		
Smartphone	1,634	92.7%
Tablet	129	7.3%
By OS		
Android	1,412	80.1%
iOS	351	19.9%
By OS and device		
Android phone	1,334	75.7%
iPhone	300	17.0%
Android tablet	78	4.4%
iPad	51	2.9%
Total	1,763	100.0%

Note: via browser only

Source: comScore Mobile Metrix; eMarketer calculations, Jan 28, 2016

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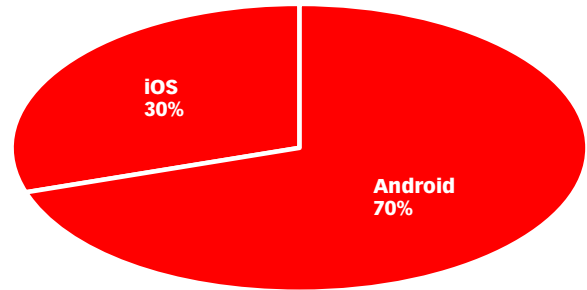
Data shared by ecommerce platform Linio also showed a high mobile buyer penetration rate, reaching 31.5% of digital buyers in Q1 2016—just below the 33.9% regional average. Peru’s strong showing in the category, however, is likely the result of a significantly lower base of digital buyers.

eMarketer predicts that 26.8% of the population in Latin America will be digital buyers in 2016. Assuming that Peru’s rate stays the same, the number of individuals purchasing digitally would total 8.4 million, with 2.7 million doing so via mobile devices, based on the Linio estimate for mobile buyer penetration.

Although Peru’s mobile buyer base is small, Android’s dominant role is already apparent. In Q1 2016 Linio estimates, seven in 10 mobile buyers used an Android device to make purchases, and the remaining 30% used an iOS device.

Mobile Buyer Share in Peru, by OS, Q1 2016

% of total



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

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Android’s share of mobile buyers in Peru was second only to the 89% portion in Argentina, and significantly larger than the 61% average in Latin America as a whole.

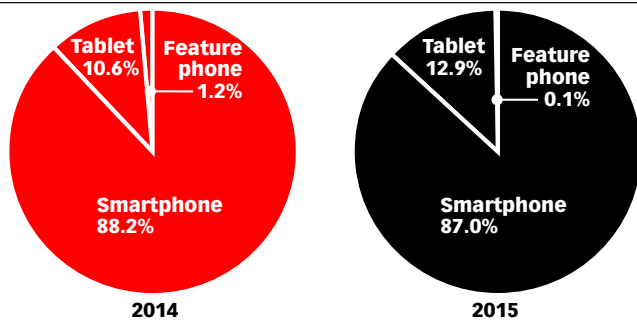
MOBILE ADVERTISING

Marketers in Peru are still waiting for mobile audiences to reach significant numbers. Until then, resources allocated for mobile advertising are minimal.

According to data provided by InMobi, smartphones accounted for 87.0% of mobile ads served in the country last year, down 1.2 percentage points over 2014. The same source estimated that 85.3% of these ads were served via apps, up from 82.3% in 2014.

Mobile Ad Impression Share in Peru, by Device, 2014 & 2015

% of total on InMobi's network



Note: represents activity on InMobi's network, broader industry metrics may vary
Source: InMobi, April 6, 2016

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More recent Adsmovil data showed a similar pattern; 66.9% of mobile ad impressions served in its network were on apps in Q1 2016, with mobile browsers taking the rest.

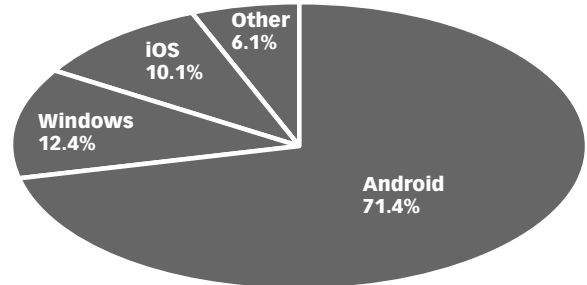
Peru received just over 4.2 billion mobile ad impressions, the lowest such volume of any Adsmovil market in Latin America. By comparison, Chile had 5.1 billion mobile impressions.

InMobi served 88.1% of mobile ads to Android devices in 2015, up sharply from 76.7% a year prior. iOS came in second—up one spot—with a 7.2% slice, 2.2 percentage points less than the previous year. BlackBerry lost the most share during that time, dropping from 10.6% to 2.4%. Windows added just 0.1 percentage points to reach a 2.1% share in 2015.

Adsmovil found that 71.4% of mobile ads in Peru were served to Android devices in Q1 2016. Windows came in second with a 12.4% market share, ahead of the 10.1% of mobile ads landing on iOS.

Mobile Ad Impression Share in Peru, 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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Among the top 10 mobile categories, games led in the InMobi ranking, with a 42.0% portion of mobile impressions served in 2015, up one spot and significantly higher than the 31% market share it held a year earlier. The entertainment category dropped 2.5 percentage points to second place, receiving 30.5% of mobile ad impressions. And despite its popularity, the social and communications category dropped from 14% to 5.4%.

MOBILE AD SPENDING

eMarketer estimates that mobile internet ad spending will increase 120.0% to reach \$11.2 million in 2016. But as mentioned earlier, most advertisers in Peru are investing the bare minimum in mobile. At that level, mobile will represent just over one-tenth of digital advertising budgets and merely 1.5% of total media ad spending.

Total Media, Digital and Mobile Internet Ad Spending in Peru, 2014-2020

	2014	2015	2016	2017	2018	2019	2020
Total media ad spending* (millions)	\$640.6	\$685.4	\$730.0	\$781.1	\$827.9	\$869.3	\$904.1
—% change	8.0%	7.0%	6.5%	7.0%	6.0%	5.0%	4.0%
Digital ad spending** (millions)	\$58.4	\$71.8	\$85.4	\$100.8	\$116.0	\$129.9	\$142.9
—% change	40.0%	23.0%	19.0%	18.0%	15.0%	12.0%	10.0%
—% of total media ad spending	9.1%	10.5%	11.7%	12.9%	14.0%	14.9%	15.8%
Mobile internet ad spending*** (millions)	\$2.1	\$5.1	\$11.2	\$22.4	\$38.1	\$60.9	\$85.3
—% change	150.0%	140.0%	120.0%	100.0%	70.0%	60.0%	40.0%
—% of digital ad spending	3.6%	7.1%	13.1%	22.2%	32.8%	46.9%	59.7%
—% of total media ad spending	0.3%	0.7%	1.5%	2.9%	4.6%	7.0%	9.4%

Note: converted at the exchange rate of US\$1=PEN3.18; *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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Triple-digit growth rates will come to an end in 2017, when mobile ad spending will double to reach \$22.4 million. In 2020, a 40.0% increase is expected to push the total to \$85.3 million, representing 59.7% of digital advertising budgets.

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