

# Brazilians in a Mobile World

## *Technology, media, and how to connect*





# Mobile Internet in Brazil: State of the Nation

There are  
**193 MM**  
inhabitants



With  
**250 MM**  
cell phones



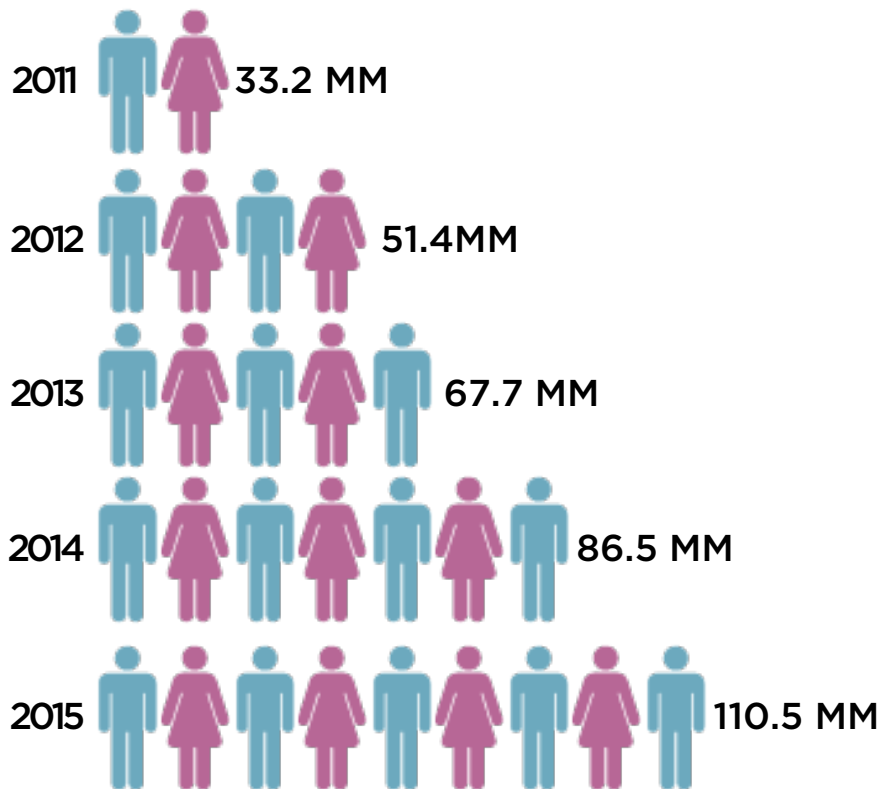
And  
**45 MM**  
have 3G  
internet access



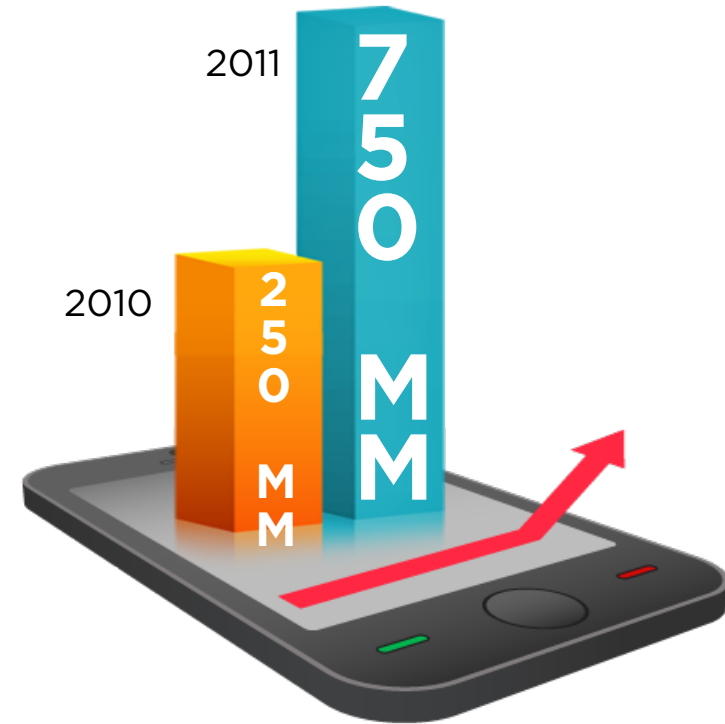


# ...and mapping the future

**Mobile internet users in Brazil**



**Mobile ad impressions served**



**300%** growth from 2011





# Our Research Approach

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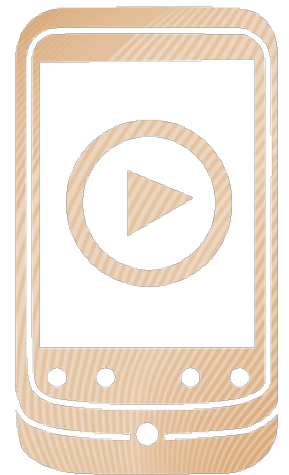


Quantitative online survey of 750 Brazilian mobile internet users.

- Aged 14-54
- Use the internet through their mobile device at least once a week

Sample profile

- 49% female, 51% male
- Average age 32
- 62% use a smartphone, 28% use a tablet





# Meet the Brazilian mobile internet user

50%

“I read newspapers or magazines less because I prefer to read this content on my mobile device.”

“My mobile device is more entertaining than TV.”

49%

40%

“Using my mobile device to manage my life helps me to be organized, efficient and productive.”





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# ...and enables myriad activities





**Communication is key**

**Checked/sent email, 77%**  
**Viewed social network, 72%**  
**Used IM, 80%**

**Shared video, 49%**

**Shared photos online, 53%**

**Posted/wrote on a blog, bulletin board, forum or chat room, 50%**

**Used Location based services, 52%**

**Used video conferencing, 44%**

**Posted videos online, 44%**

**Visited online dating sites, 49%**



**...and so is content**

**Found out about upcoming movies, 57%**

**Got info on favorite TV shows, 55%**

**Looked up directory information, 68%**

**Used search engines to find information, 71%**

**Looked for how-to information, 50%**

**Read news articles on a portal or online newspaper, 70%**

**Watched a professionally made video, 54%**

**Watched an amateur video, 57%**

**Read articles/ headlines on a blog or forum, 68%**



# These activities fall into 7 Mobile Modes



## Connect

Connecting IM, email, social media; sharing content with friends



## Search

Using a search engine to find specific information, such as health-related or looking up something local



## Entertain

Playing music or games and viewing entertainment-related videos and articles



## Manage

Managing key aspects of daily life like a stock portfolio or paying an online bill



## Inform

Reading news or educational articles / videos



## Shop

Purchasing or comparing prices for goods or services









## Navigate

Using an online map or GPS system





# ...which reflect different mindsets

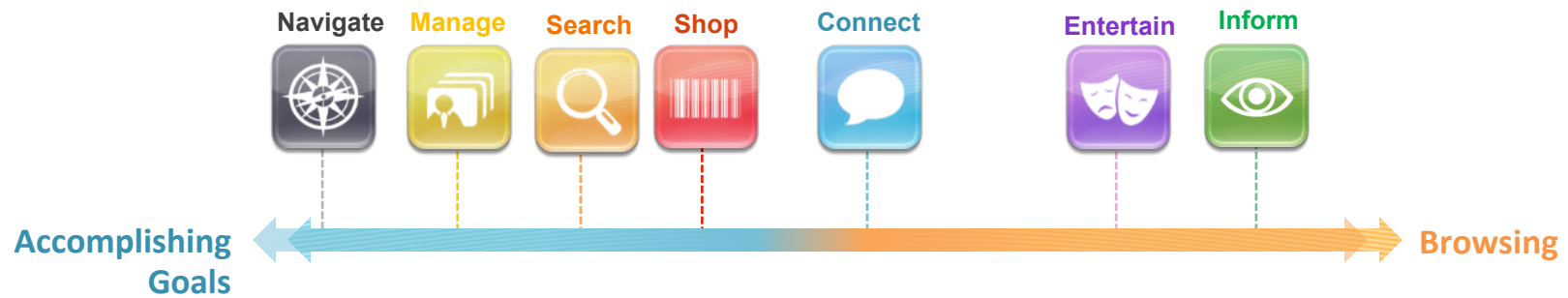
						
Connect	Search	Entertain	Manage	Inform	Shop	Navigate
Check/Send email	Use search engines to find information	Browse for or download music online	Plan and manage daily schedule	Read articles/headlines from portals, newspapers, etc	Browse retail/shopping sites	Use an online map
Instant message	Research a topic for school or work	Listen to streaming radio or created music playlists	Conduct online banking	Read articles/headlines from blogs/ message boards/ forums	Compare products/services	Use an online GPS service
View Or Update social networks, Twitter etc	Look up local or directory information	Find out about movies/theater show times and locations	Make travel arrangements	Watch video	Compare prices when in a store	





# The Motivations For Each Mode Differ

Content, entertainment and Inform are more about browsing while maps, online management, searching for info and shopping are more goal-oriented.





# Socialising and passing the time are important

*% of mobile internet users doing each of these on their mobile device*



Connect



Search



Entertain



Manage



Inform



Shop



Navigate

Mobile + PC

93%

85%

86%

81%

80%

74%

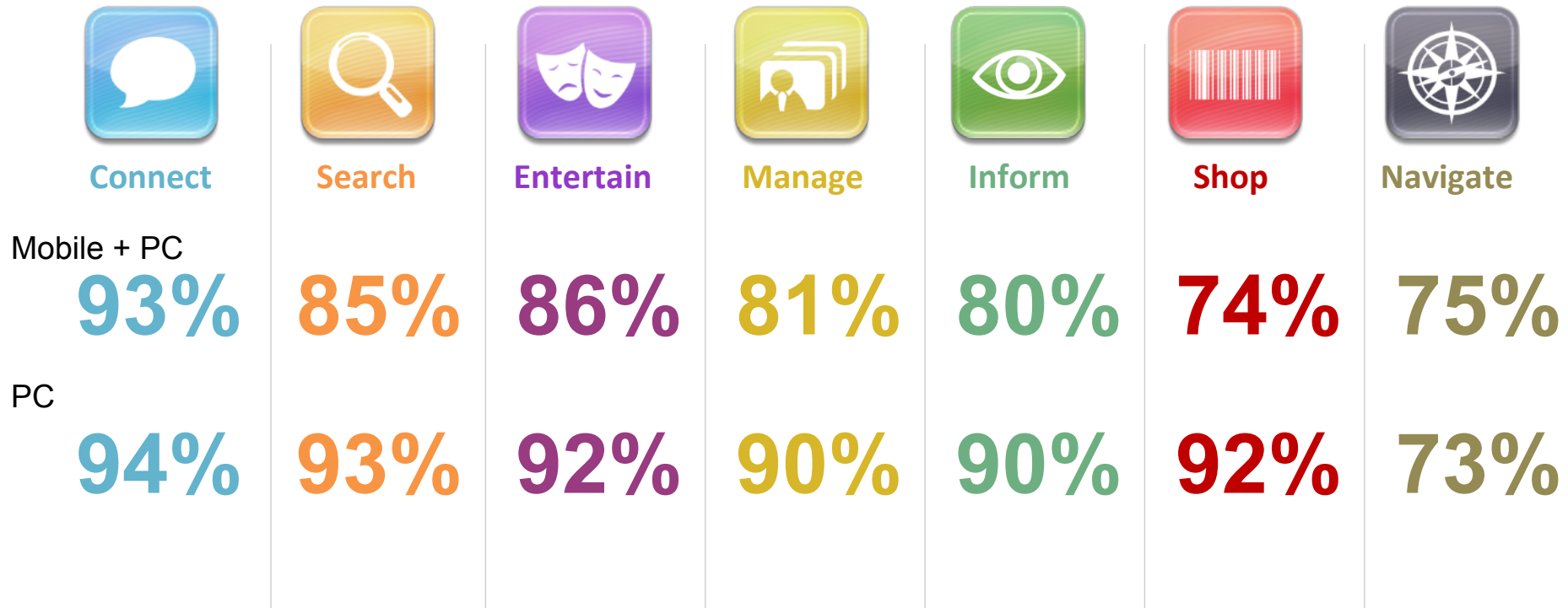
75%





# Fixed-line internet is still the preferred channel

*% of mobile internet users doing each of these on a PC or laptop*





# ...and very few mobile users stick only to mobile

*% of mobile internet users doing these only on their mobile*



Connect



Search



Entertain



Manage



Inform



Shop



Navigate

Mobile & PC

93%

85%

86%

81%

80%

74%

75%

Mobile Only

15%

14%

17%

17%

15%

18%

31%





# Summary: Mobile Modes

- Mobile internet has become a central part of many Brazilians' online life
- ...and it enables them to undertake myriad activities.
- These activities can be summarised into 7 Mobile Modes, reflecting different needs and mindsets.



# Mobile Modes and Beyond





# The Mobile Modes

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Connect



Search



Entertain



Manage



Inform



Shop

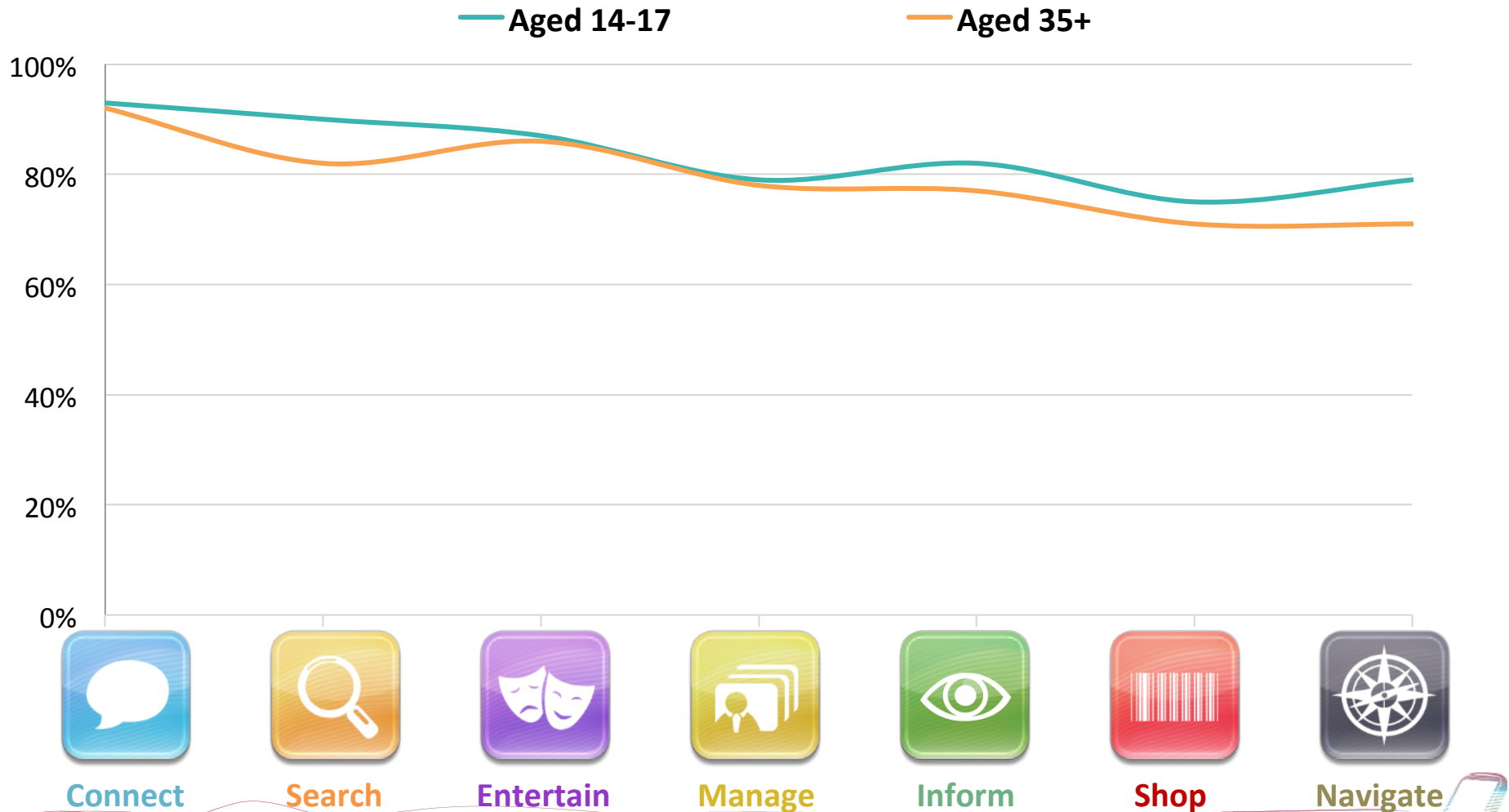


Navigate



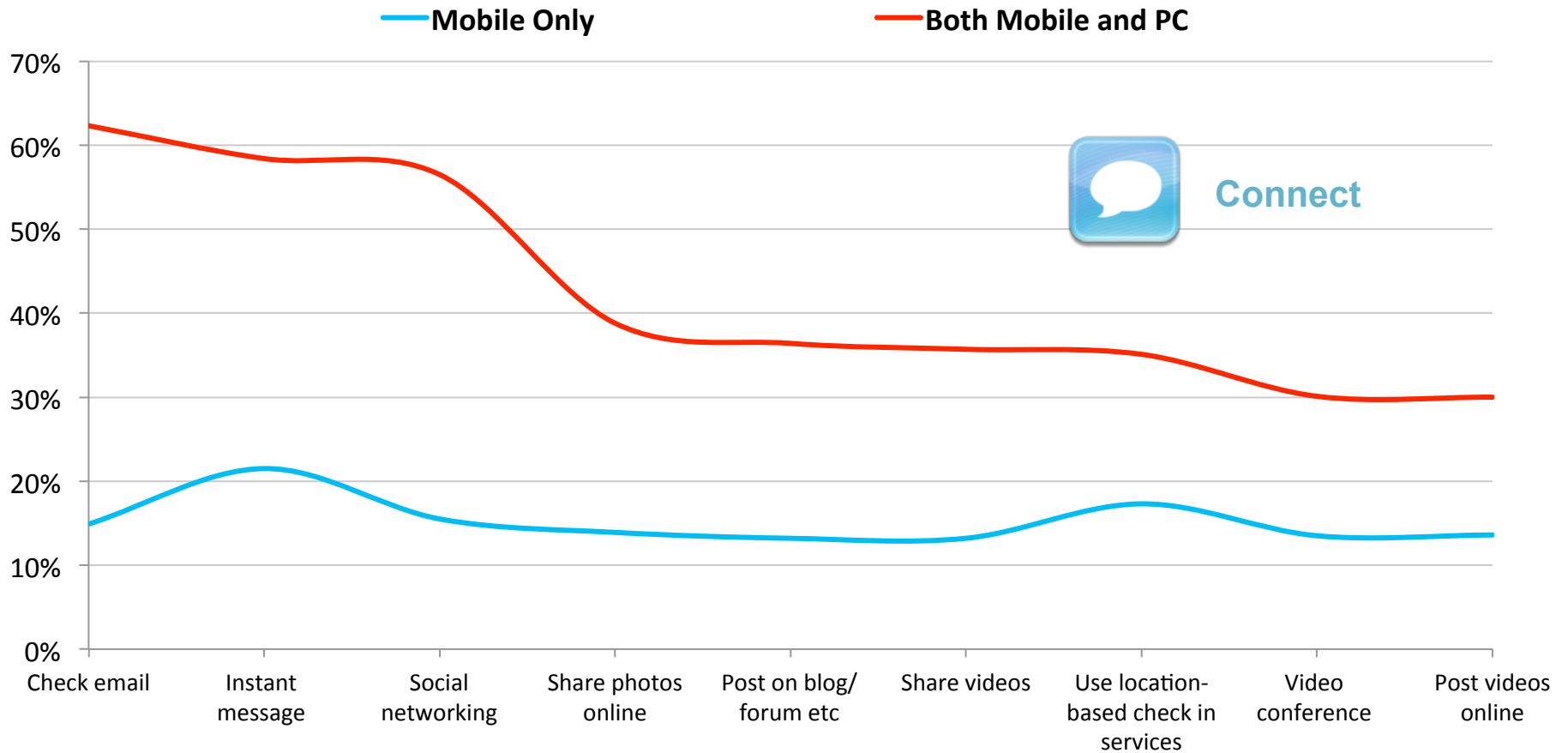


# Younger users do more on their mobiles



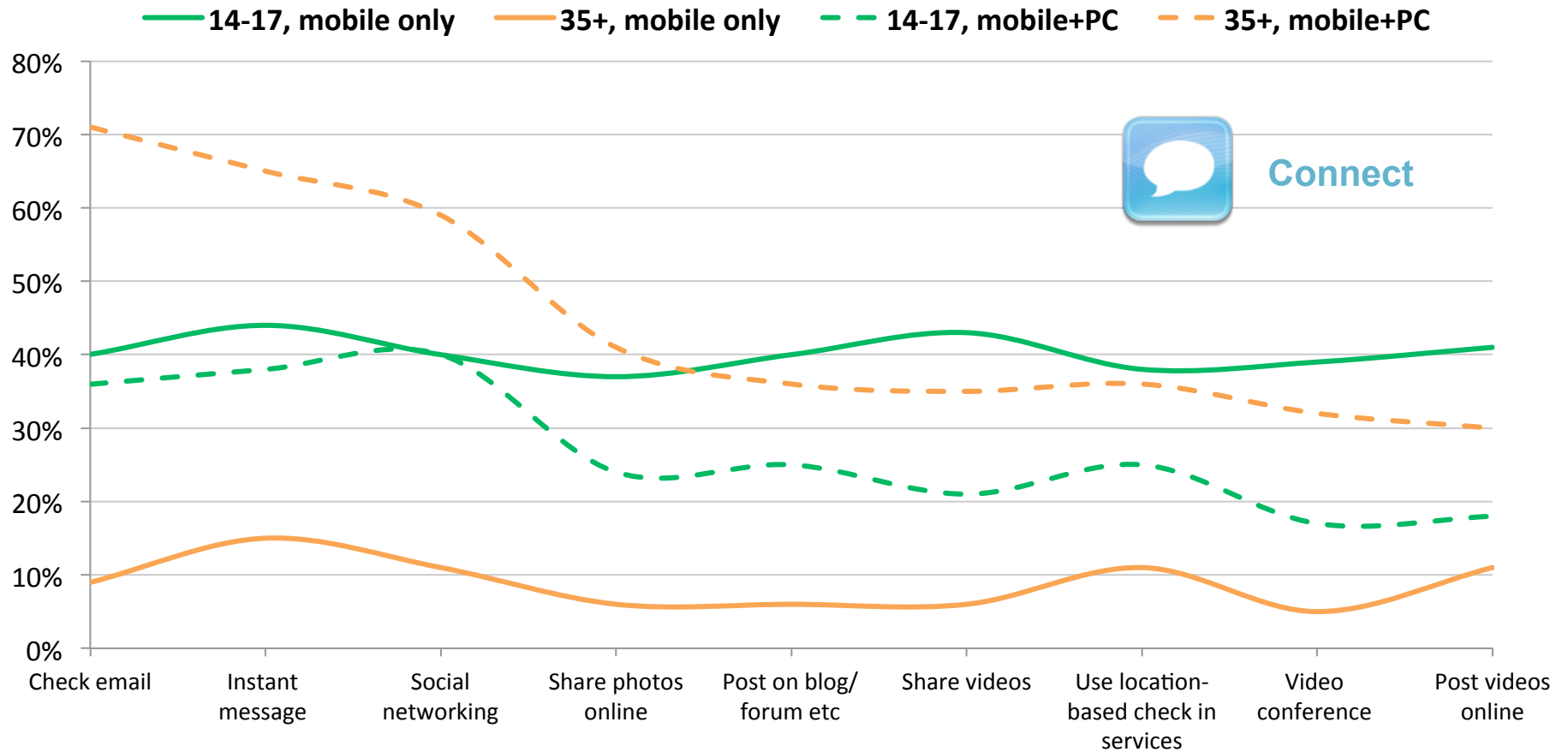


# Within 'Connect', mobile's importance varies





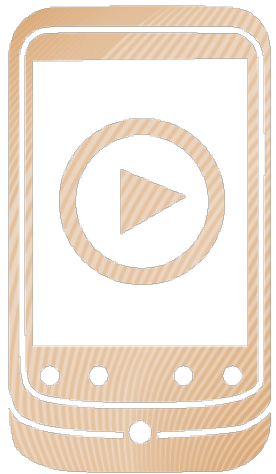
# And device preference relates to age





# Content is a key driver of mobile internet use

**80%** of mobile internet users use their mobile for reading and watching content (the “Inform” Mode)



**50%** read magazines and newspapers less because they consume content on their mobile devices



**95%** of mobile internet users have downloaded content on their mobile device

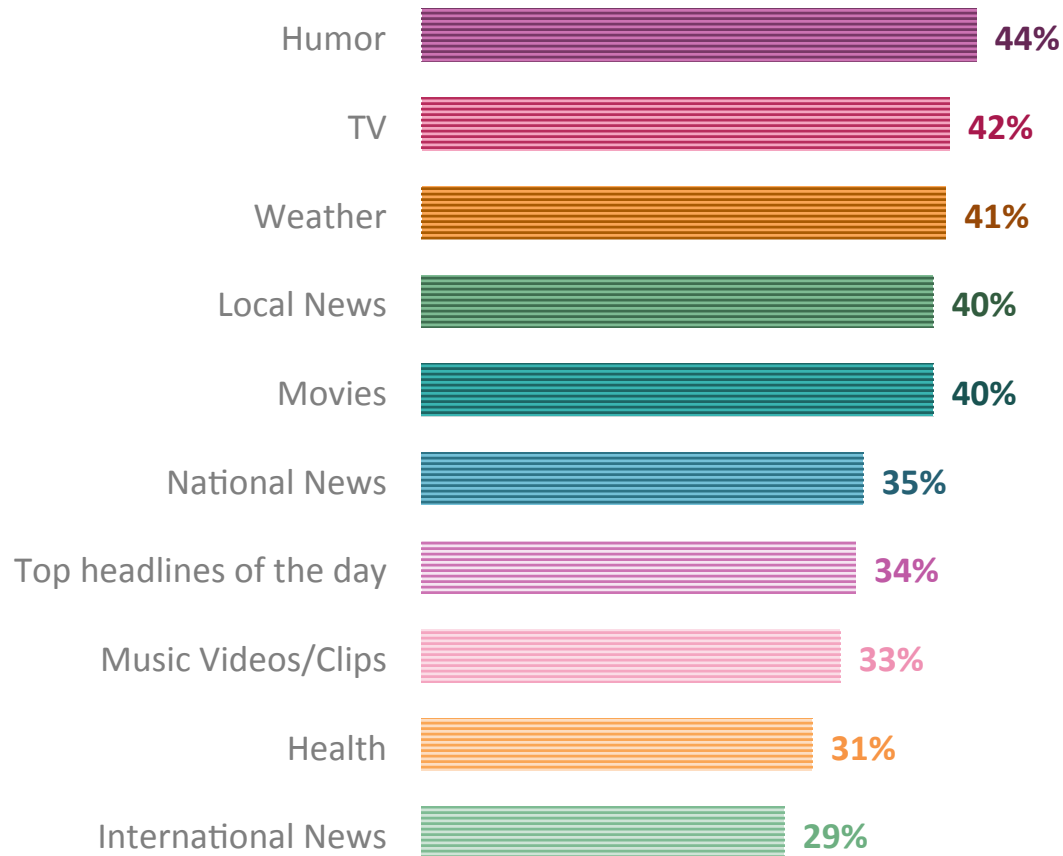




# News, weather and entertainment are most-read

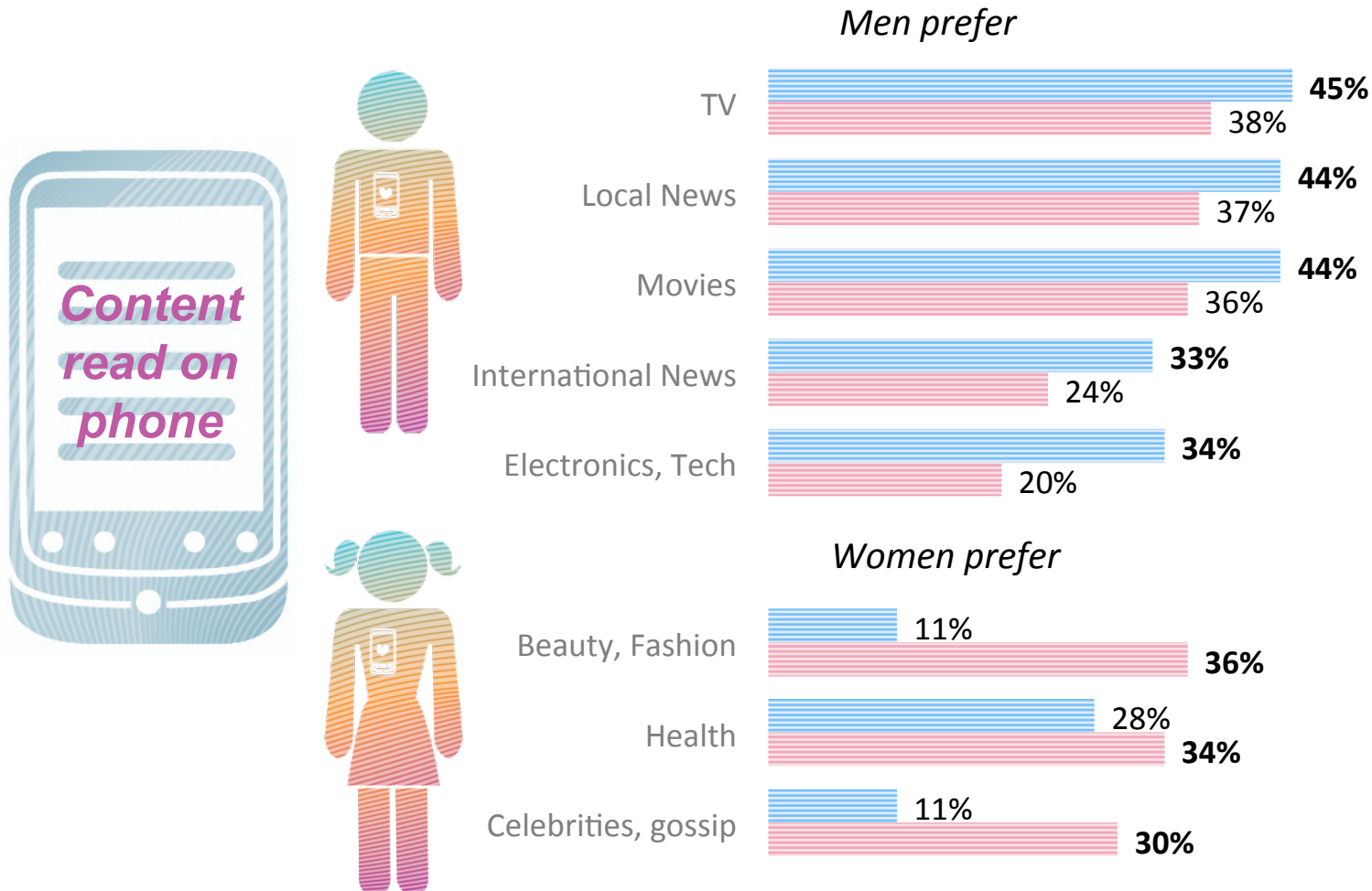
**80%** of mobile internet users use their mobile for reading and watching content (the “Inform” Mode)

## *Types of content read through app or browser*





# ...but men and women read different things



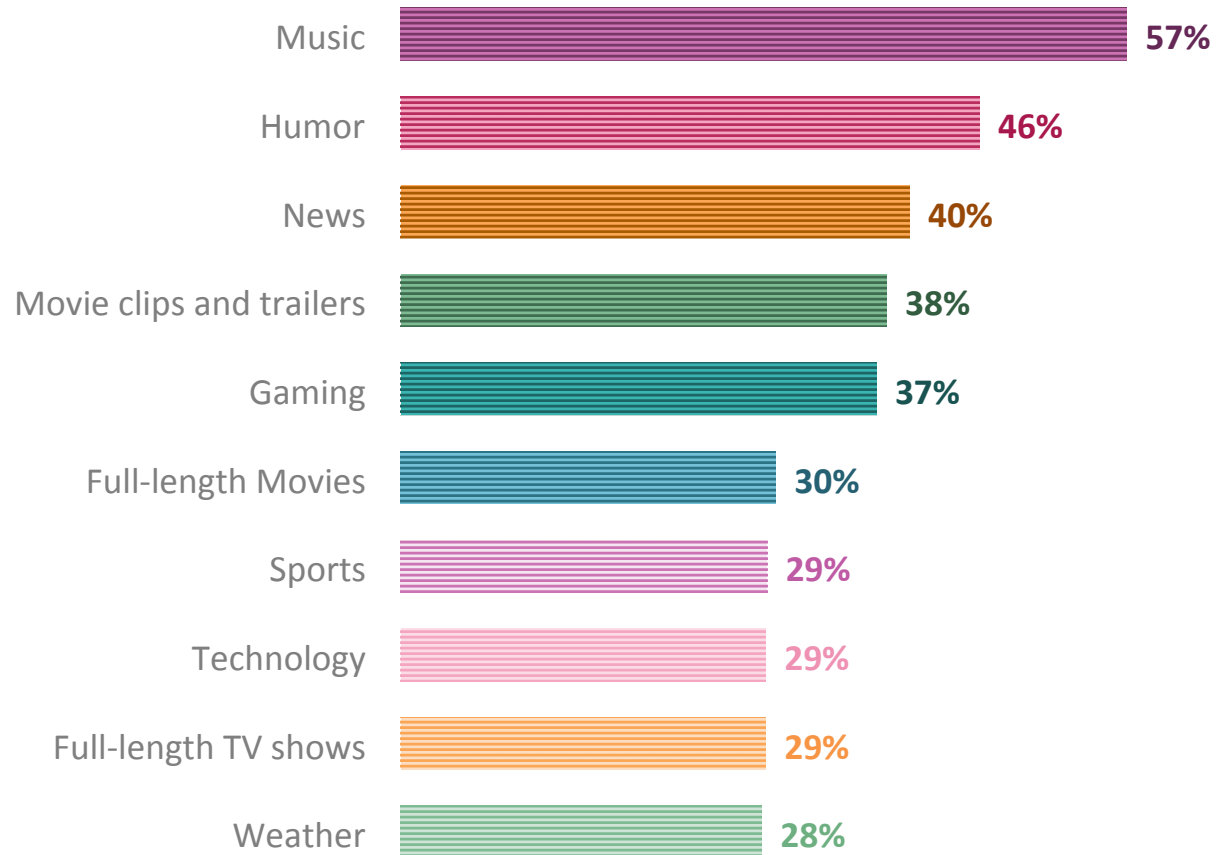


# Mobile video is growing in importance

**80%** of mobile internet users use their mobile for reading and **watching** content (the “Inform” Mode)



## *Types of video watched*

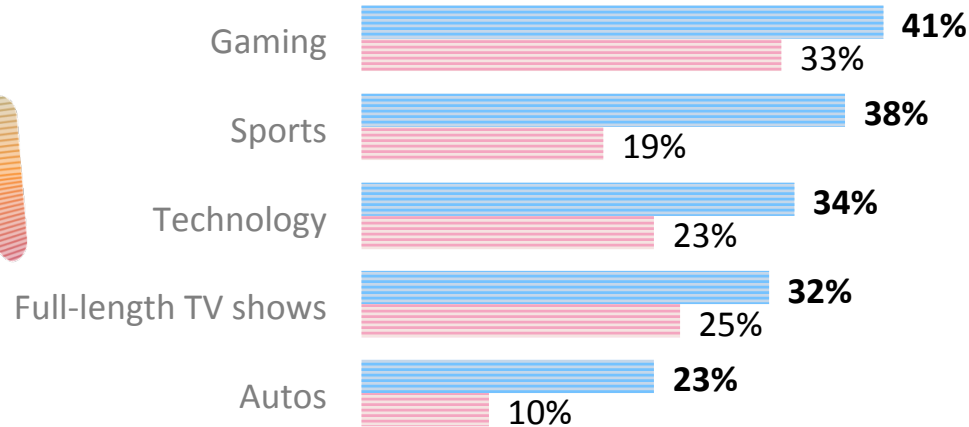




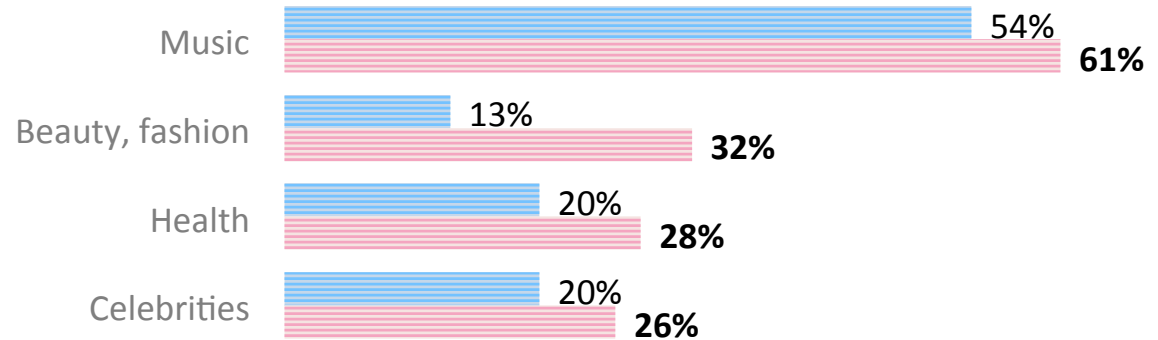
# Again, there are gender differences



## *Men prefer*



## *Women prefer*





# Apps are important in the mobile experience

**98%** of Brazilian mobile internet users say they use mobile applications



**82%** download apps at least once a month



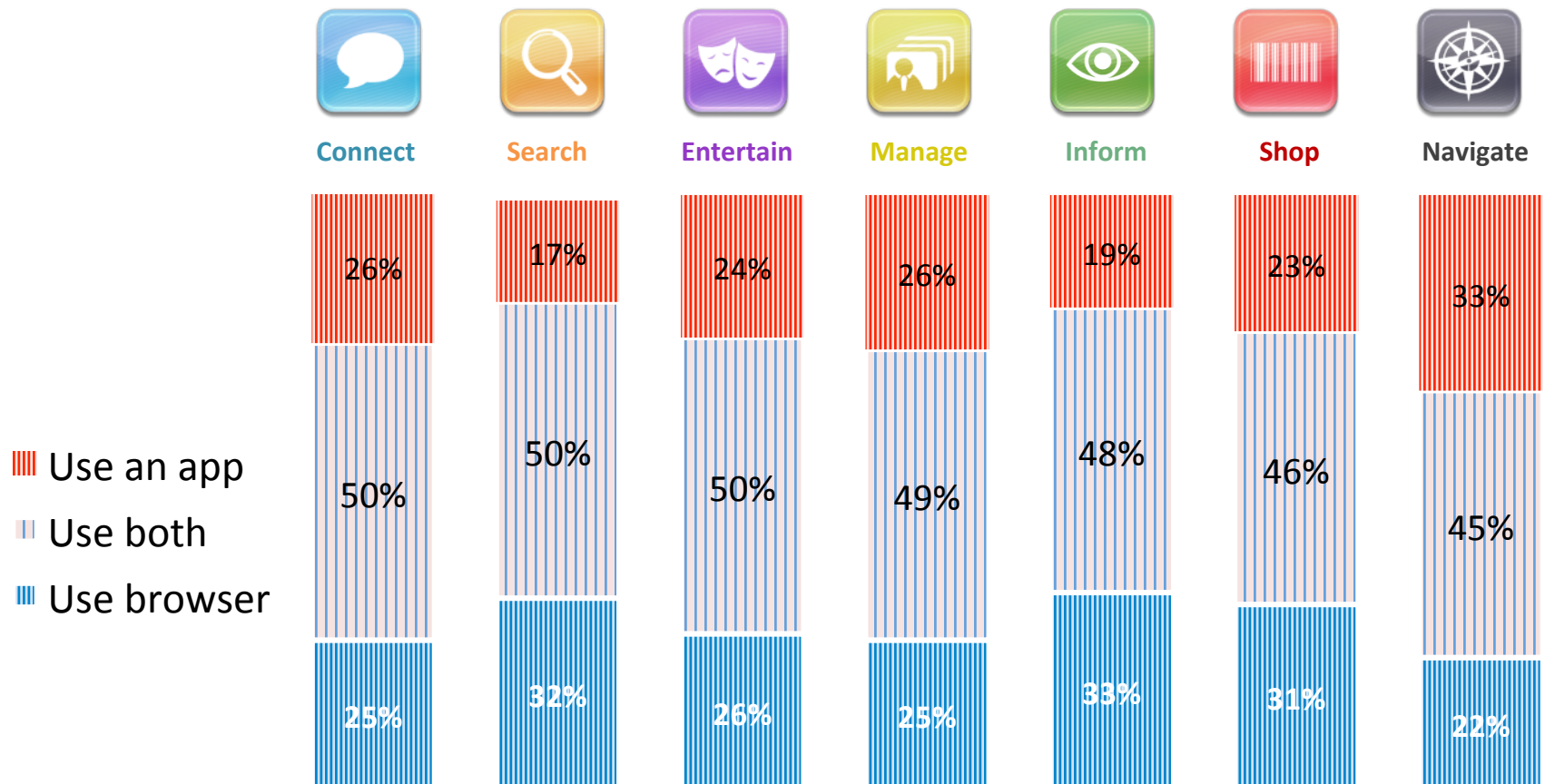
On average, Brazilian mobile internet users use different applications on their mobile devices

**17**





# Apps are most important for Navigate, Connect, Manage & Entertainment

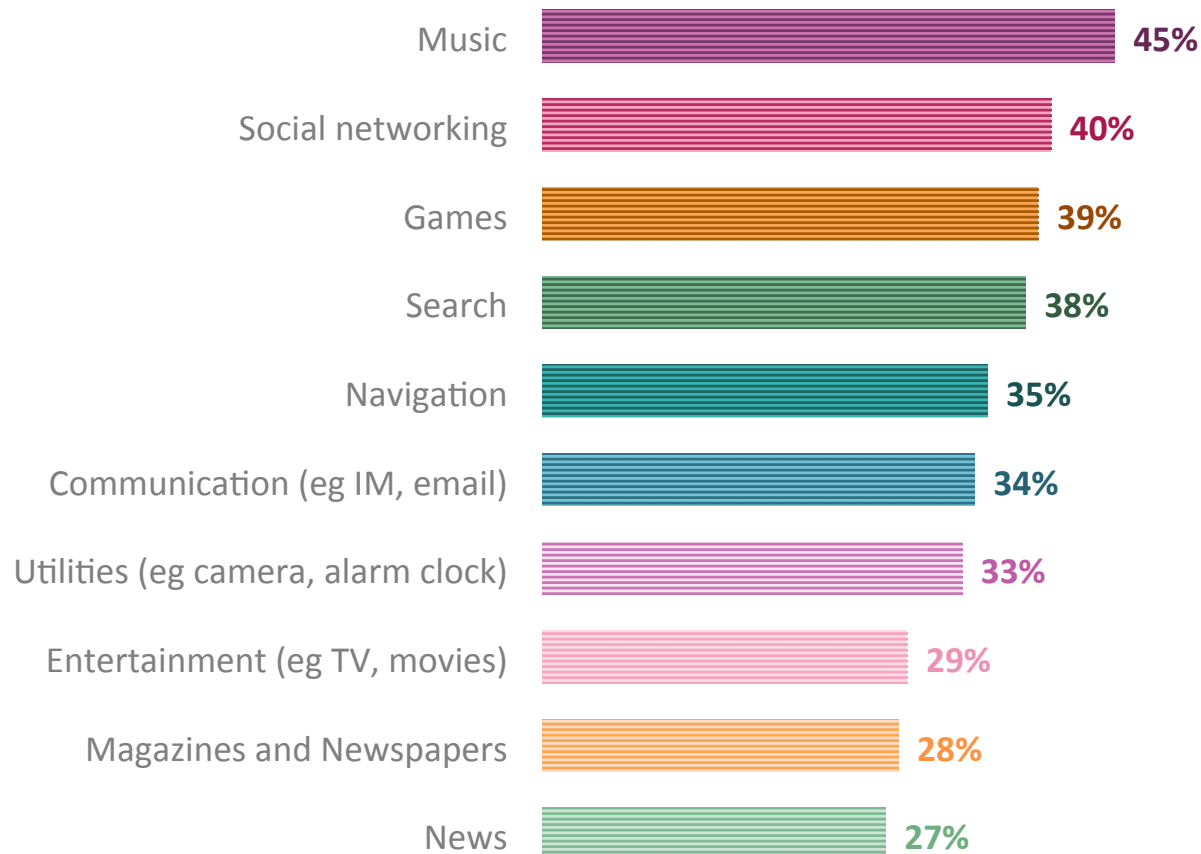




# 'Fun' apps are most popular, but functional apps are important

**98%** of Brazilian mobile internet users say they use mobile applications

## *Types of apps used*





# Mobile Modes and Beyond

- Across the Mobile Modes there are some consistent themes: of demographic patterns, the importance of content, and the role of apps.
- Content is a vital part of the mobile internet experience, be it news articles, videos, photos or how-to guides.
- Apps are a key element of simplifying the mobile web experience, and Brazilians are avid consumers of them.

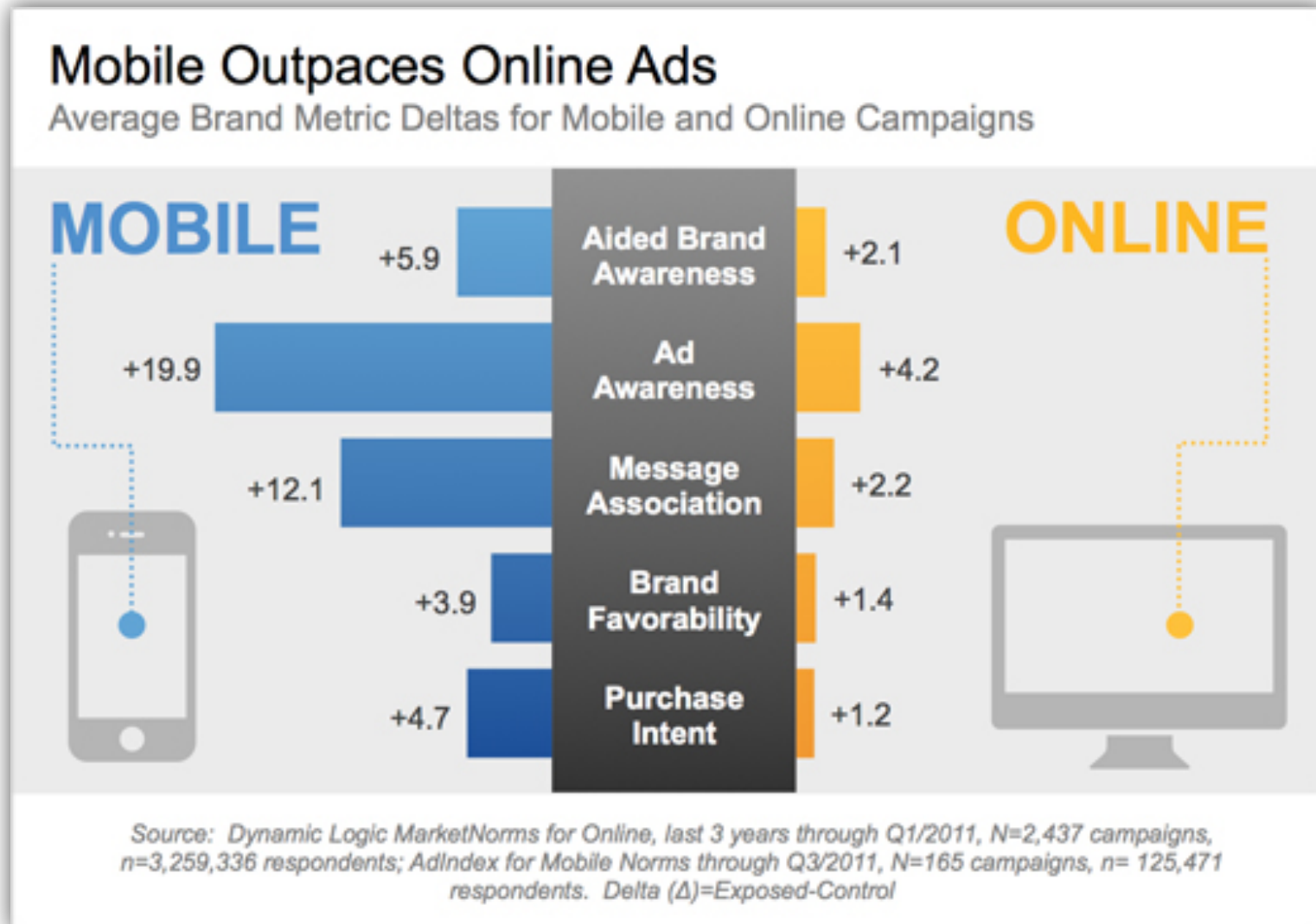


# Mobile as a Marketing Channel





# Mobile advertising is more effective than (PC) online





## ...and mobile internet users appreciate ads' value

51%

"I'm OK with mobile ads if it means that I can access mobile content for free."

"I'm OK with mobile ads when they're useful and relevant."

49%

38%

"I think mobile ads are intrusive."

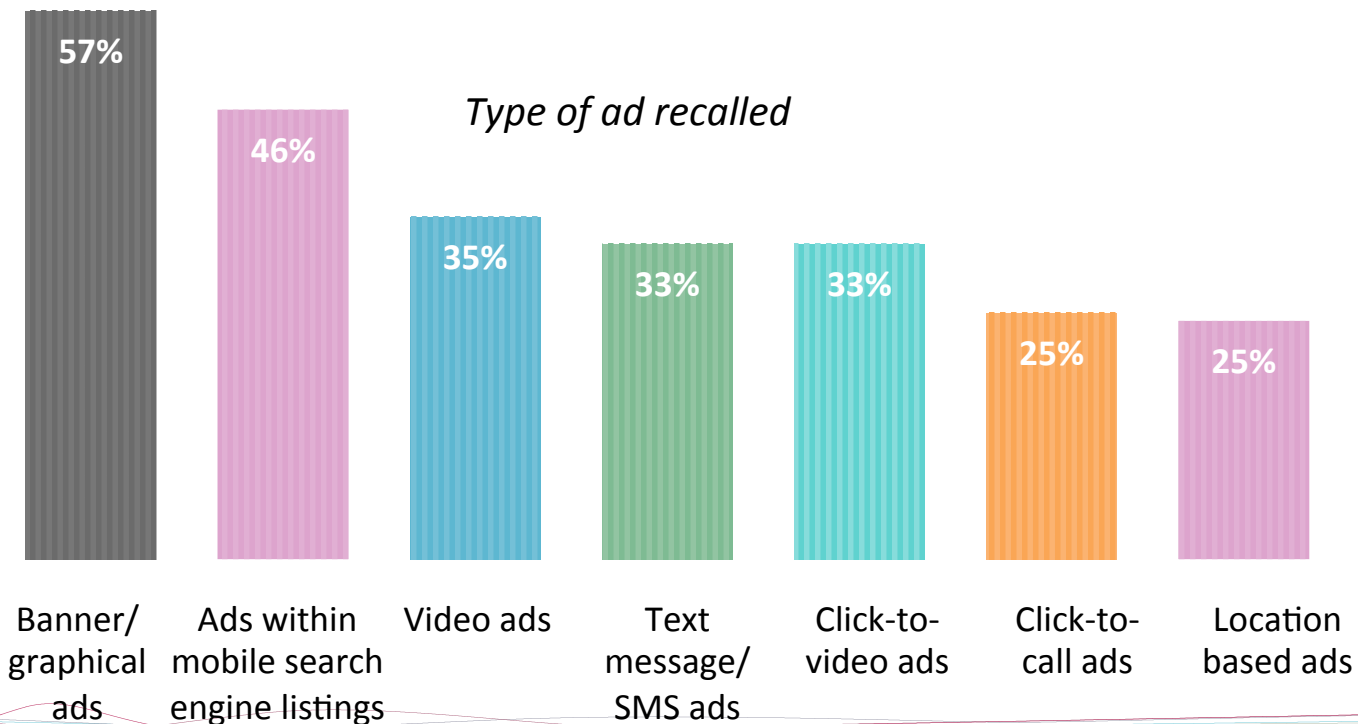




# Mobile ad recall and response are high

**47%** of mobile internet users remember seeing an ad on their mobile

...of whom **67%** have clicked on an ad





## ...but recall varies by Mode

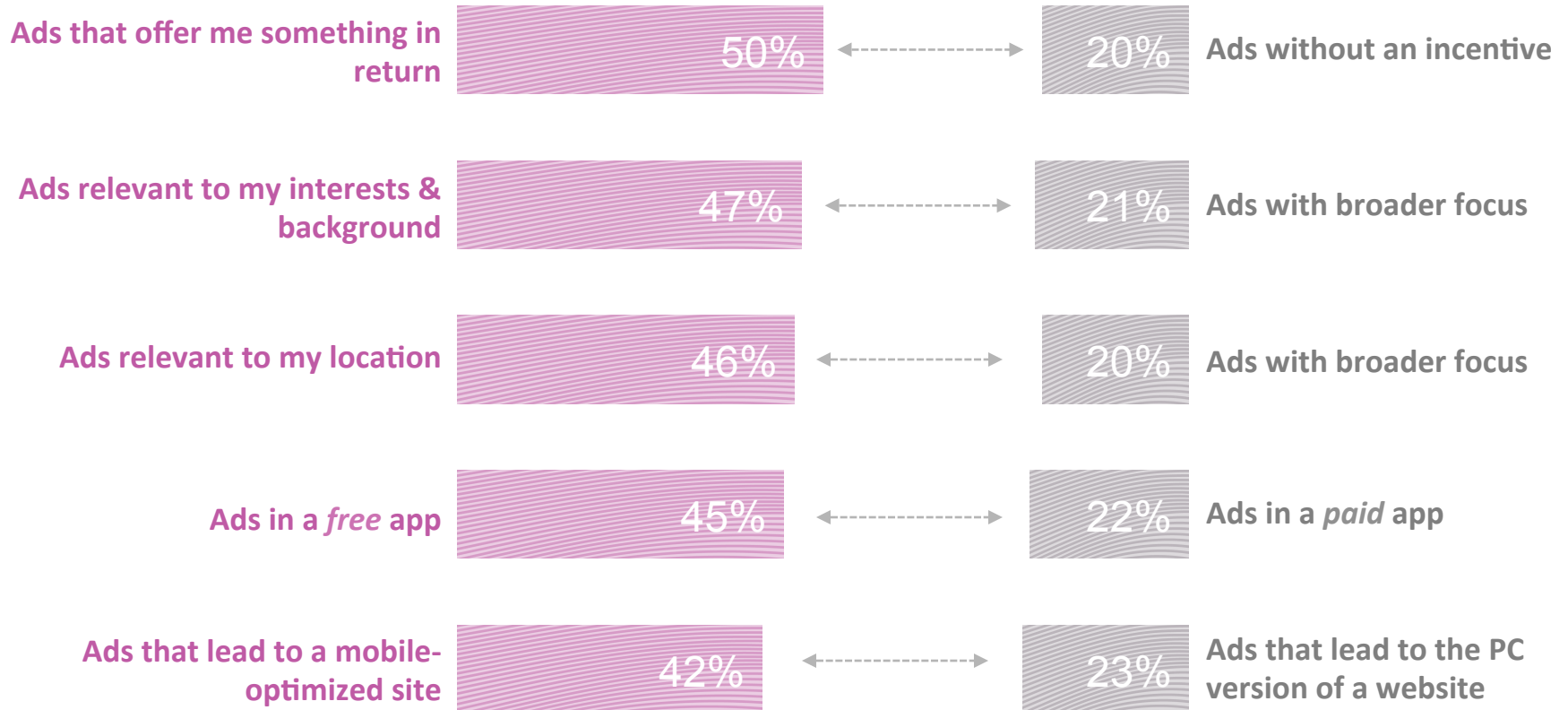
**47%** of mobile internet users remember seeing an ad on their mobile





# There are some basic principles of mobile advertising

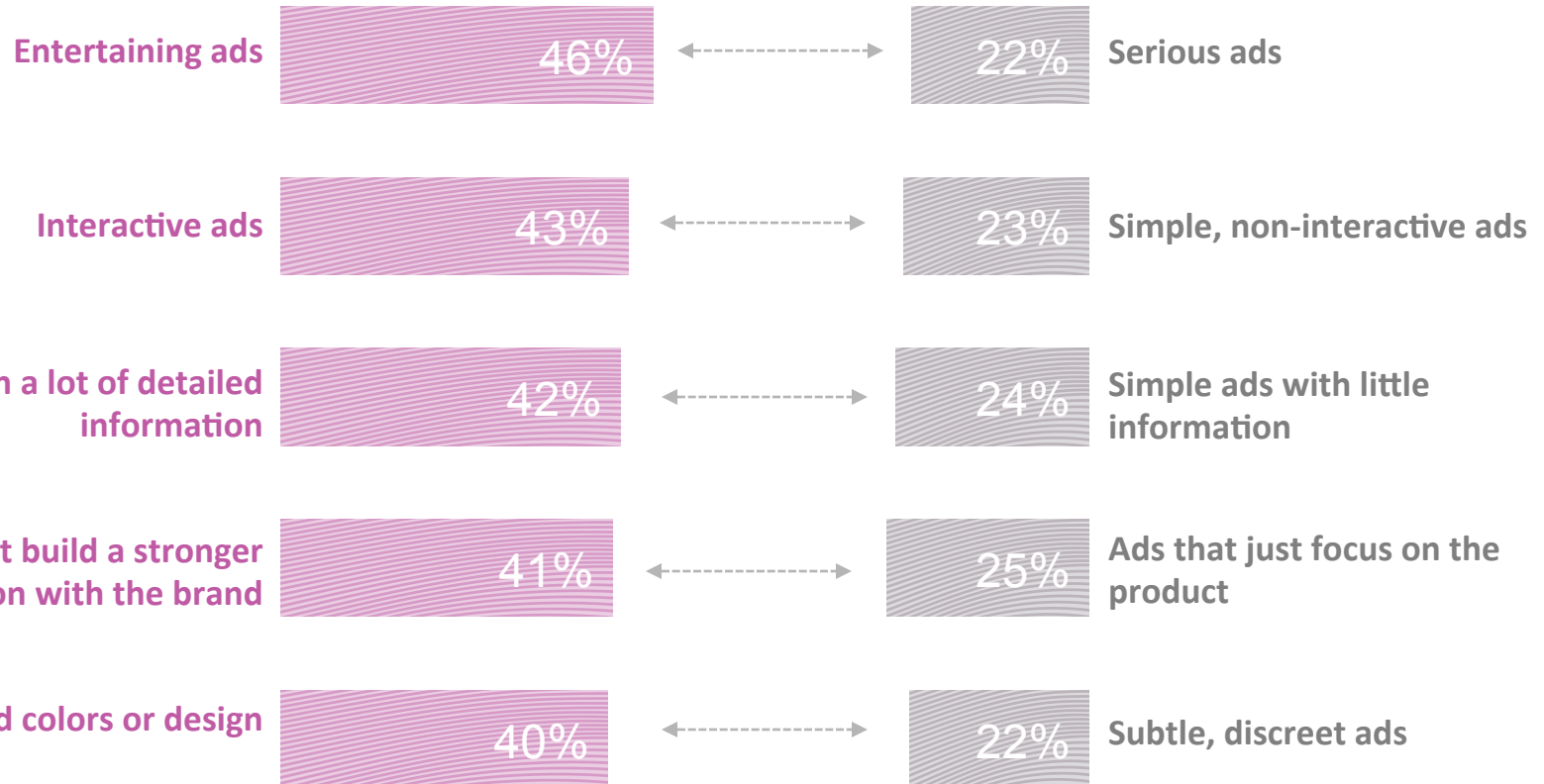
## The ads that would catch mobile users' attention





## ...and some creative preferences

### The ads that would catch mobile users' attention






# In Closing

- Mobile internet is big, and it's getting bigger
- While mobile internet covers myriad activities and challenges, it can be condensed into 7 mobile modes
- There are some differences in how people pursue these modes
- And across the modes there are consistent themes in content, video and Apps
- Marketing is accepted, and people are responsive



# How to optimize your ads by mode

 <p>Browsing</p> <p>Accomplishing Goals</p>	Mode	Optimization Strategy
	 <b>Inform</b>	Consumers are highly engaged but also have a sense of discovery, so ads do not necessarily need to be relevant to site content.
	 <b>Entertain</b>	Good ad recall. Ads should be relevant to site content. Opportunity to introduce bold, relevant ads that entertain and grab user's attention.
	 <b>Connect</b>	Ads can be more emotional and invoke feeling. Increase engagement by keeping ads personally relevant and targeted.
	 <b>Shop</b>	Creative that introduces consumers to new, relevant products and offers a way to purchase them more easily and/or at a lower price than from other sources.
	 <b>Search</b>	Strong ad recall. Consumers are more open-minded to exploring to a degree. Introduce consumers to info that is relevant to what they are searching for.
	 <b>Manage</b>	Ad recall is the highest. Potential to get annoyed is high if ad is not relevant to the task at hand. Consider sponsorship or subtle ads that help consumers accomplish their goal.
	 <b>Navigate</b>	Potential to get annoyed is high if ad is not relevant. Ads that are easy to use, relevant, and reliable can result in high ad engagement.





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**Obrigada!**

**Elizabeth Capdevila**  
**Latam Market Research**

**YAHOO!**