

# IMS MOBILE IN LATAM

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**JANUARY 2015**

# METHODOLOGY

**1 METHODOLOGY:**

Online survey panelists in six countries were contacted via email to complete a 10 minute survey about device ownership, app usage, and behaviors.

**2 TIMING**

The survey was fieldwork was conducted January 6-13th, 2015

**3 SAMPLE REQUIREMENTS**

Participants were smartphone and tablet owners who use mobile apps.

**4 SAMPLE SIZES:**

Country	Sample Size	Margin of Error (95% confidence level)
Total	4,044	+/- 1.5 percentage points
Brazil	1,609	+/- 2.4 percentage points
Mexico	805	+/- 3.5 percentage points
Argentina	405	+/- 4.9 percentage points
Colombia	414	+/- 4.8 percentage points
Peru	407	+/- 4.9 percentage points
Chile	404	+/- 4.9 percentage points

# EXECUTIVE SUMMARY

**1 MOBILE DEVICE USE:**  
More than nine in ten online Latin Americans own or use a mobile device on a regular basis, and nearly all (99 percent) have apps downloaded on their devices.

**2 SMARTPHONE APP DOWNLOADS:**  
Smartphone users in Latin America have downloaded an average of 18 apps on their devices. Twenty-two percent of mobile users spend 20 hours or more each week using internet through their smartphones.

**MOST POPULAR MOBILE APPS:**

More than 60 percent of the mobile users of each specific apps such as Twitter, LinkedIn, Spotify and Waze consider they are very important in day-to-day life.

**3 TABLET USE:**  
Tablet users in LatAm mostly use their devices at home, when spending time with friends, in the house of friends or family, or at school.

**TABLET APP DOWNLOADS:**

Tablet users in Latin America have downloaded an average of 19 apps on their devices. Twenty percent of tablet users spend more than 7 hours each week using internet through their tablet devices.



**IMS brands have broad regional reach across the mobile audience, ranging from 48% to 88% in each of the six countries measured.**

The aggregate regional reach is 67% of the mobile audience, with a potential to reach 78% of users across the total audience of all eight IMS brands.

Additionally, a high proportion of those who have IMS client apps use them with high frequency – on a weekly basis, or more often.



# ONLINE AUDIENCE OVERVIEW

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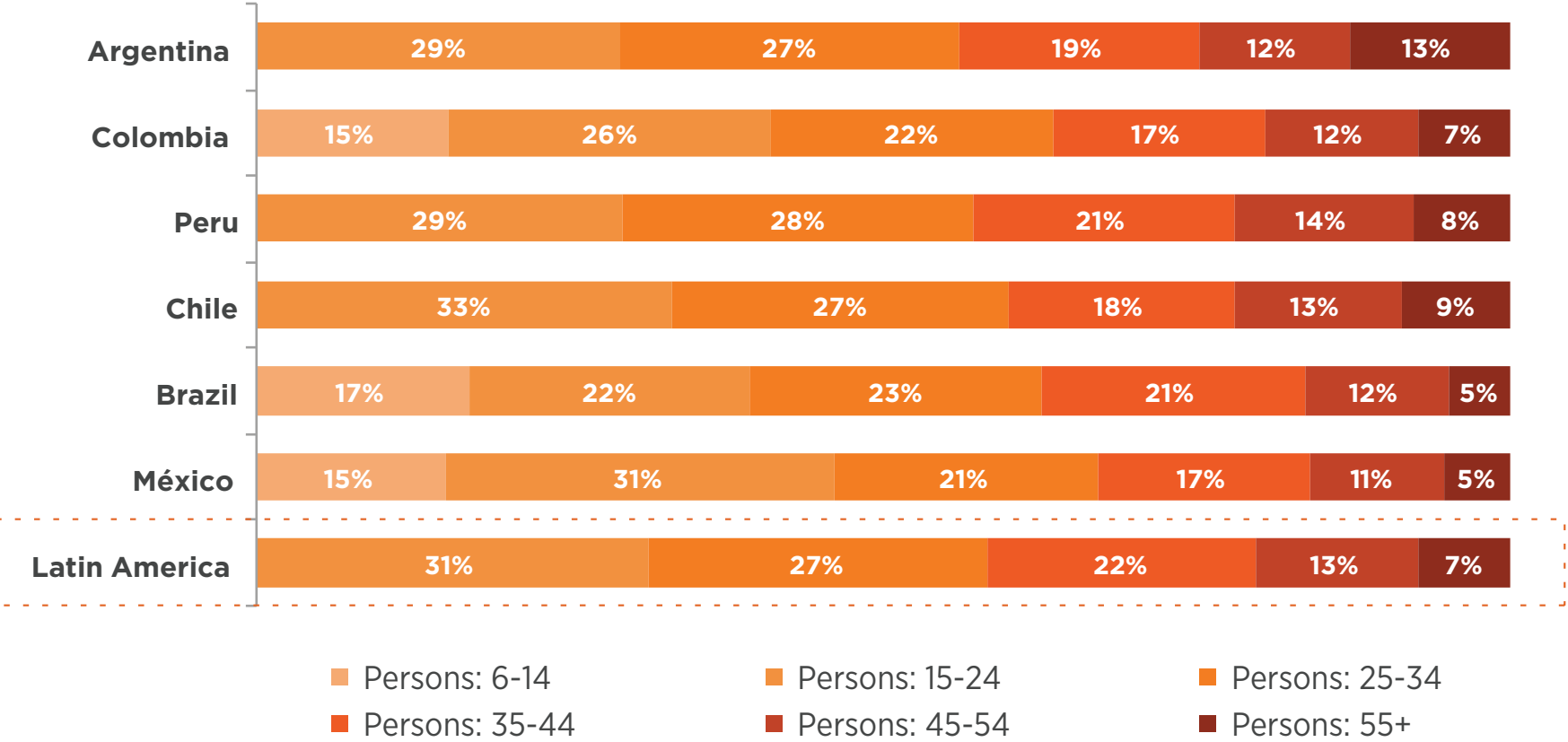
Latin America Regional Overview

comScore syndicated Data



# TOTAL DESKTOP INTERNET AUDIENCE AGE DISTRIBUTION IN LATIN AMERICA

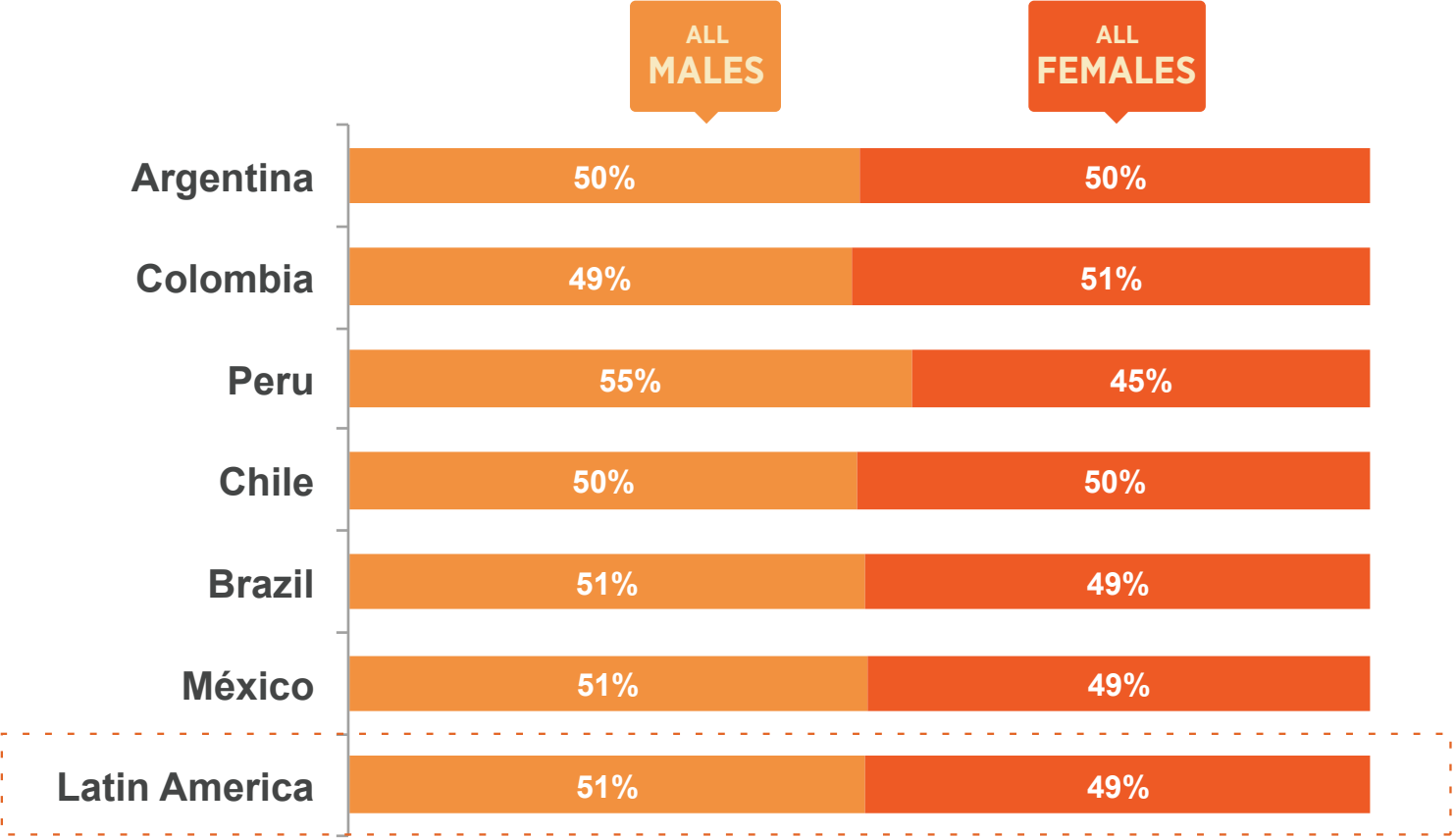
IMS  
Mobile  
in LatAm



**THE ONLINE AUDIENCE IN  
LATIN AMERICA IS YOUNG,**  
WITH MORE THAN HALF  
OF THE AUDIENCE UNDER  
35 YEARS OF AGE.

# TOTAL DESKTOP GENDER DISTRIBUTION ACROSS LATIN AMERICA

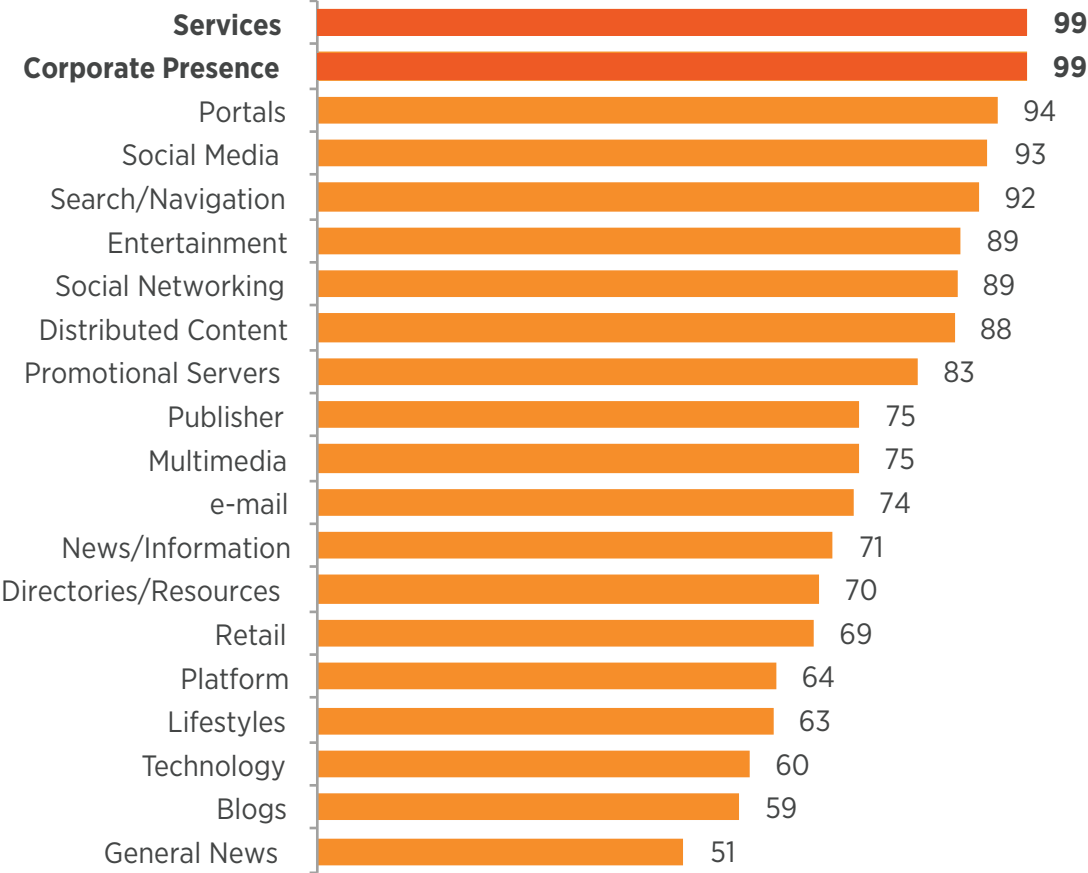
IMS  
Mobile  
in LatAm



THE GENDER DISTRIBUTION OF THE ONLINE AUDIENCE IS **VERY CLOSE TO BEING BALANCED ON AN OVERALL BASIS** AND FOR MOST OF THE INDIVIDUAL COUNTRIES.

# TOP CATEGORIES BY REACH (%) IN LATIN AMERICA, DESKTOP ONLY ACCESS

IMS  
Mobile  
in LatAm



**SERVICE AND CORPORATE PRESENCE ARE THE TOP CATEGORIES IN LATIN AMERICA.**



# MOBILE



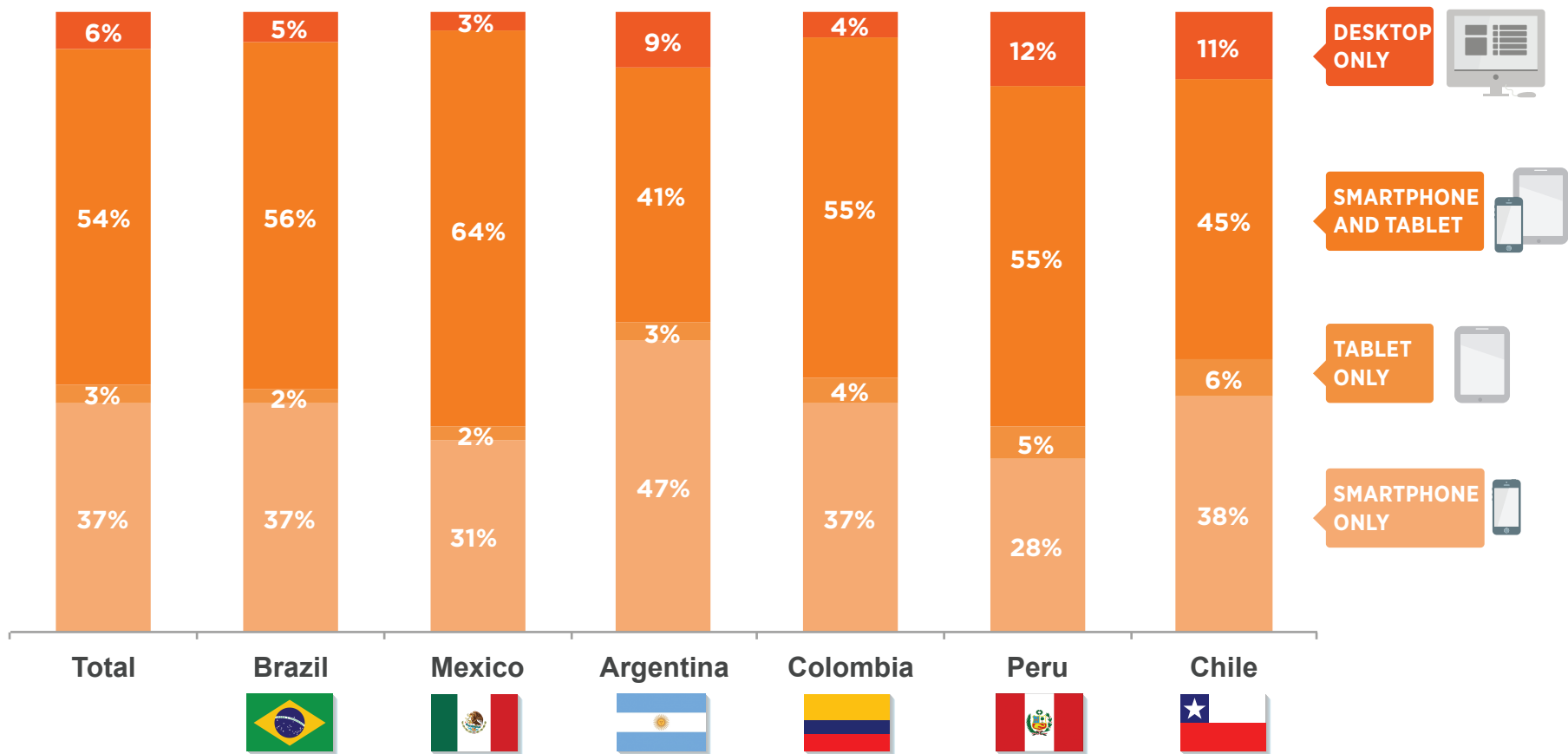
Device Usage

# DEVICE OWNERSHIP COMBINATIONS

IMS  
Mobile  
in LatAm

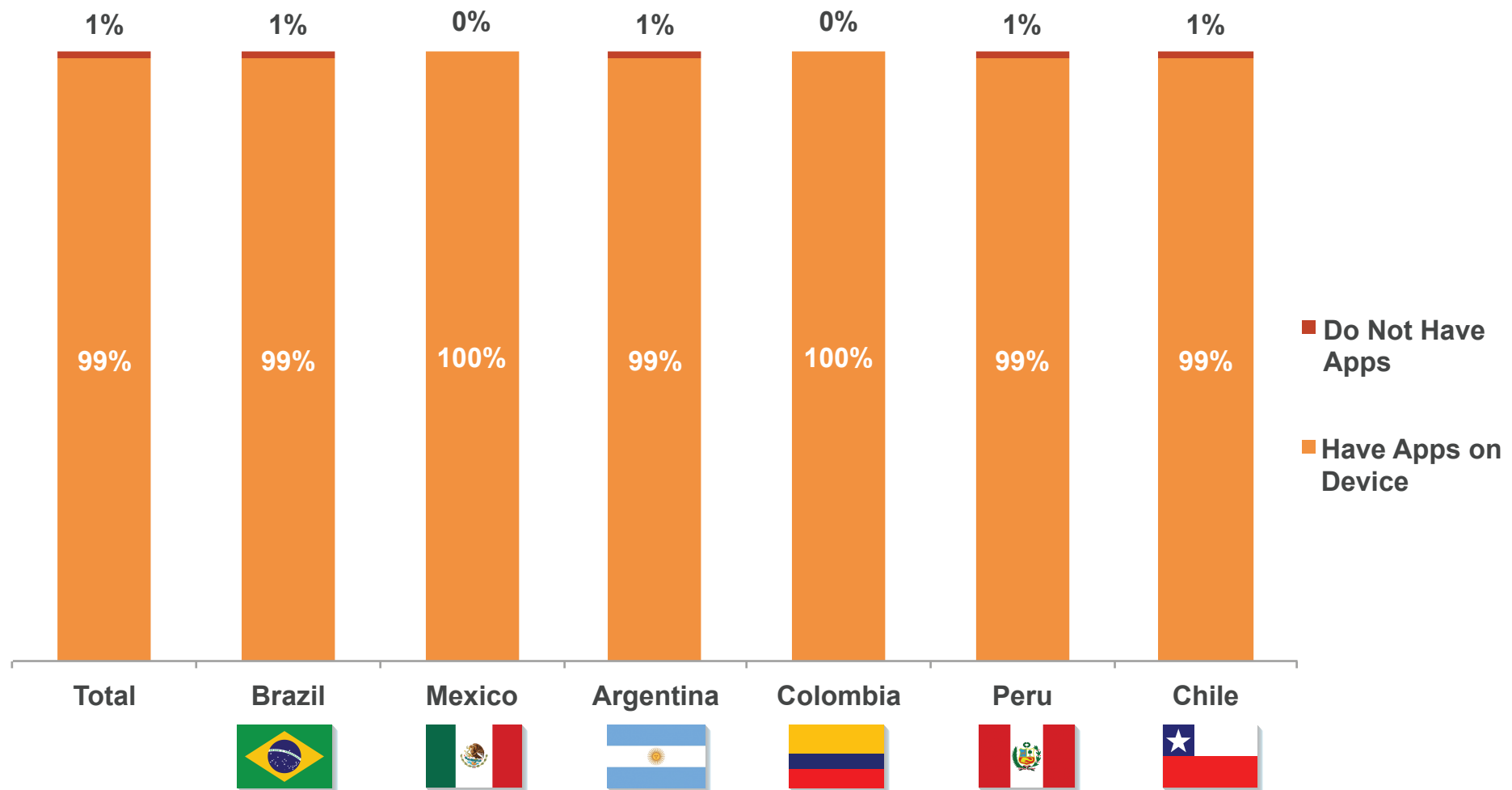


**+9/10**  
ONLINE LATIN  
AMERICANS  
OWN OR USE A  
**MOBILE DEVICE** ON  
A REGULARLY BASIS.



# APP USAGE ON MOBILE DEVICES

IMS  
Mobile  
in LatAm



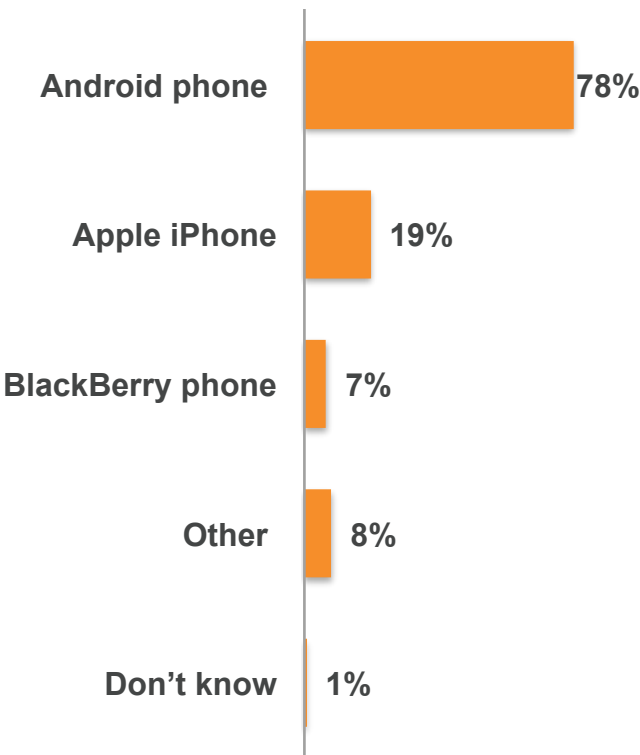
# SMARTPHONE OWNERSHIP AND USAGE (TOTAL)

IMS  
Mobile  
in LatAm

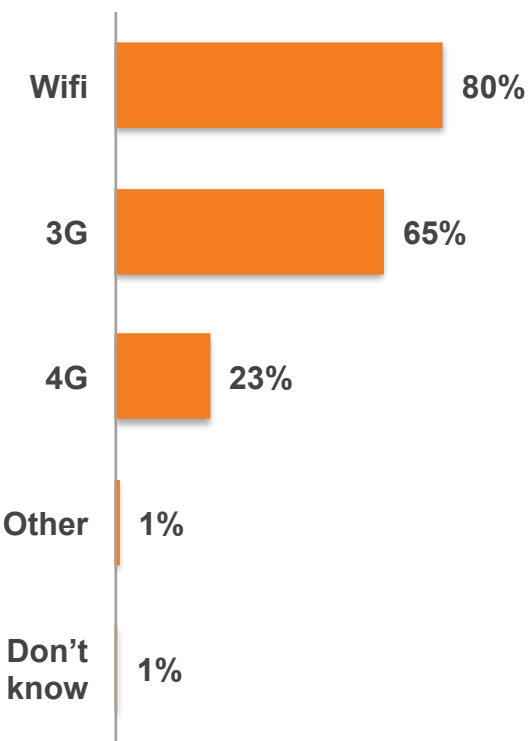


ANDROID IS THE LEADING SMARTPHONE  
BRAND IN THE REGION.

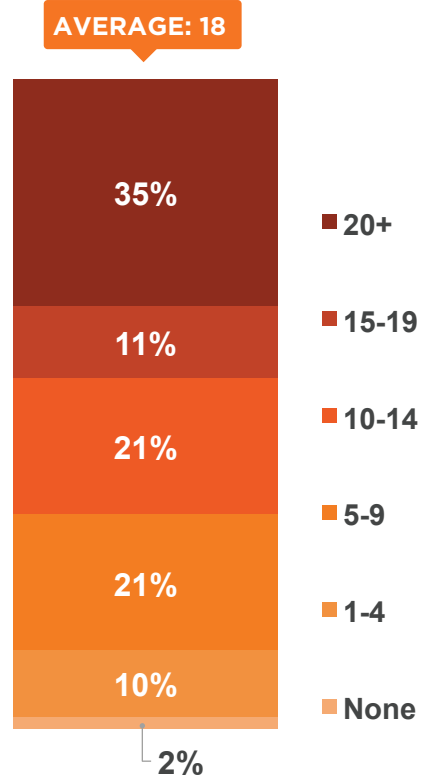
## TYPE OF SMARTPHONE



## TYPE OF INTERNET ACCESS



## NUMBER OF APPS ON PHONE



# SMARTPHONE OWNERSHIP AND USAGE - BY COUNTRY

IMS  
Mobile  
in LatAm

	Total	 Brazil		 Mexico		 Argentina		 Colombia		 Peru		 Chile	
	%	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index
Android	78	82	105	74	95	75	96	79	101	79	101	70	90
iPhone	19	16	84	26	137	11	58	22	116	26	137	36	189
Blackberry	7	3	43	6	86	13	186	12	171	19	271	9	129
Other	8	8	100	7	88	15	188	8	100	7	88	6	75
Don't Know	1	1	100	1	100	1	100	1	100	1	100	<1	100

Wifi	80	81	101	82	103	84	105	74	93	74	93	74	93
3G	65	65	100	57	88	84	129	56	86	60	92	71	109
4G	23	19	83	31	135	9	39	41	178	36	157	27	117
Other	1	1	100	1	100	2	200	1	100	1	100	1	100
Don't Know	1	<1	100	1	100	1	100	1	100	1	100	<1	100

Have Apps on Phone	98	98	100	99	101	96	98	99	101	99	101	99	101
Avg # of Apps on Device	18	16	89	20	111	18	100	19	106	18	100	19	106

S4a. What type of smartphone do you have?

S4c. What type of Internet access do you use on your smartphone?

S4b. Approximately how many apps do you have downloaded to your smartphone?

Base: Connect to internet on smartphone (n=3,867)




comScore

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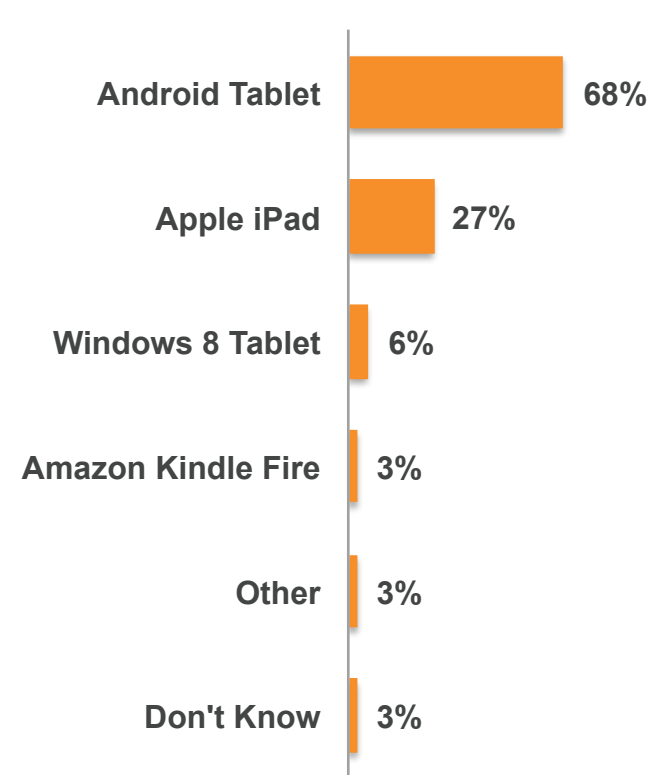


# TABLET OWNERSHIP AND USAGE (TOTAL)

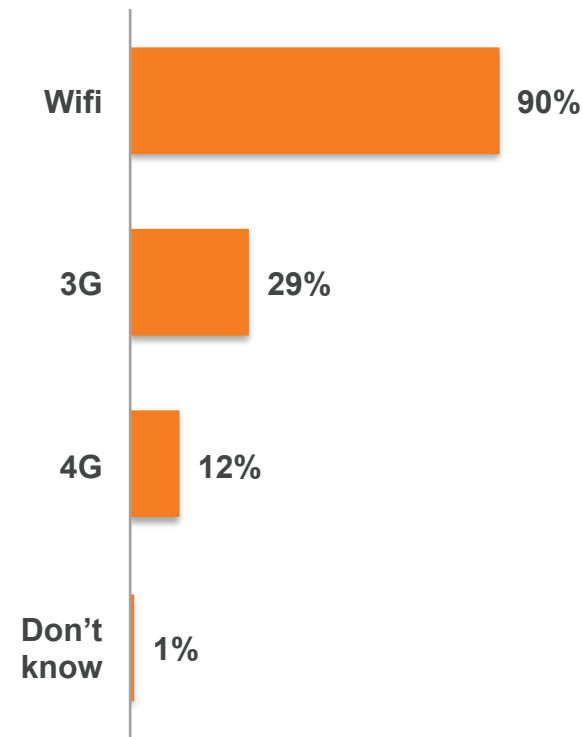
IMS  
Mobile  
in LatAm

 **ANDROID IS ALSO THE LEADING TABLET BRAND,**  
ALTHOUGH ONE-QUARTER OWN AN IPAD.

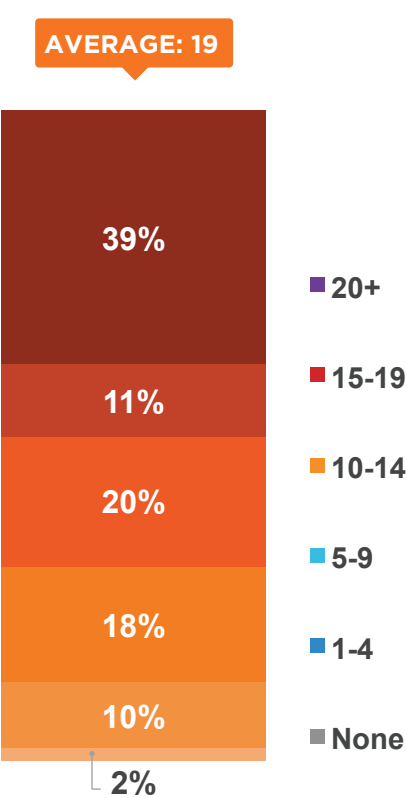
TYPE OF TABLET



TYPE OF INTERNET ACCESS



NUMBER OF APPS ON TABLET



# TABLET OWNERSHIP AND USAGE - BY COUNTRY

IMS  
Mobile  
in LatAm

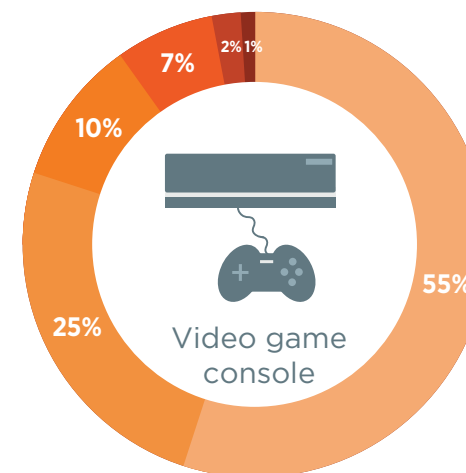
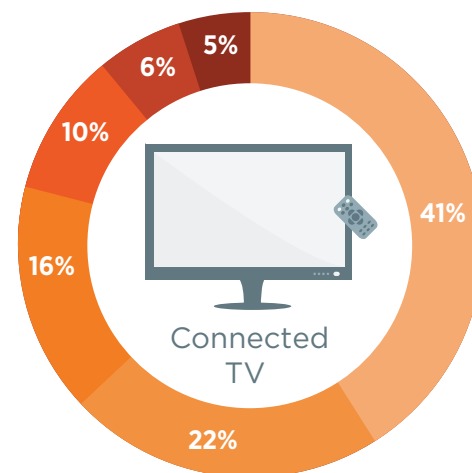
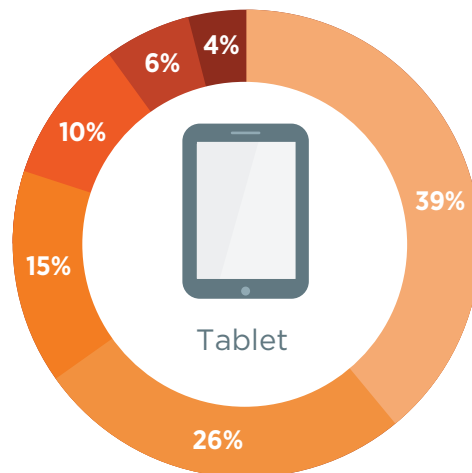
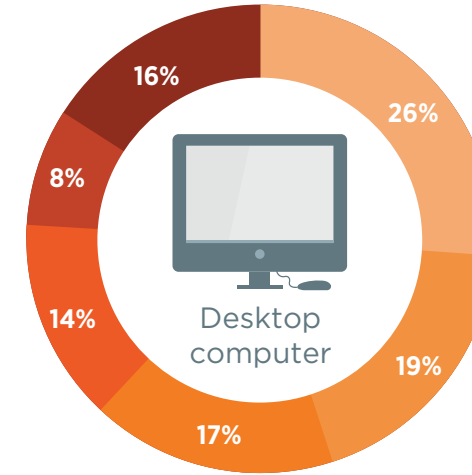
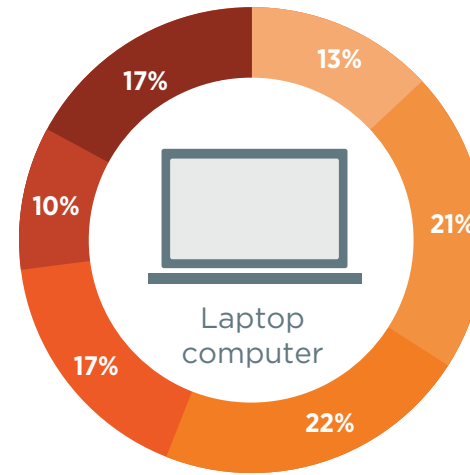
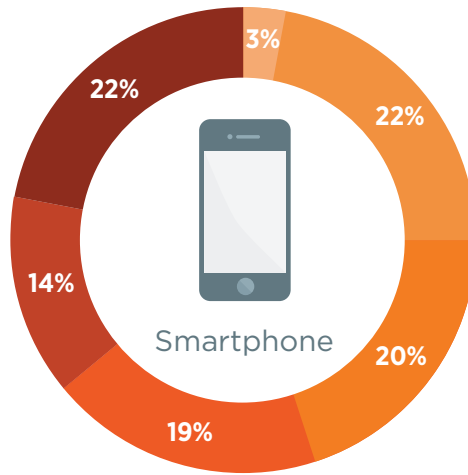
	Total	 Brazil		 Mexico		 Argentina		 Colombia		 Peru		 Chile	
	%	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index
Android	68	71	104	59	87	74	109	68	100	72	106	68	100
iPad	27	24	89	37	137	19	70	26	96	27	100	27	100
Windows 8 Tablet	6	6	100	6	100	7	117	5	83	10	167	4	67
Amazon Kindle Fire	3	3	100	3	100	1	33	3	100	2	67	6	200
Other	3	2	67	3	100	5	167	5	167	3	100	3	100
Don't Know	3	3	100	2	67	5	167	4	133	2	67	3	100

Wifi	90	89	99	92	102	94	104	90	100	95	106	89	99
3G	29	36	124	18	62	26	90	24	83	28	97	28	97
4G	12	12	100	12	100	7	58	18	150	18	150	8	67
Don't Know	3	3	100	2	67	5	167	4	133	2	67	3	100

Have Apps on Tablet	97	96	99	98	101	97	100	97	100	97	100	94	97
Avg # of Apps on Device	19	16	84	22	116	21	111	21	111	20	105	20	105

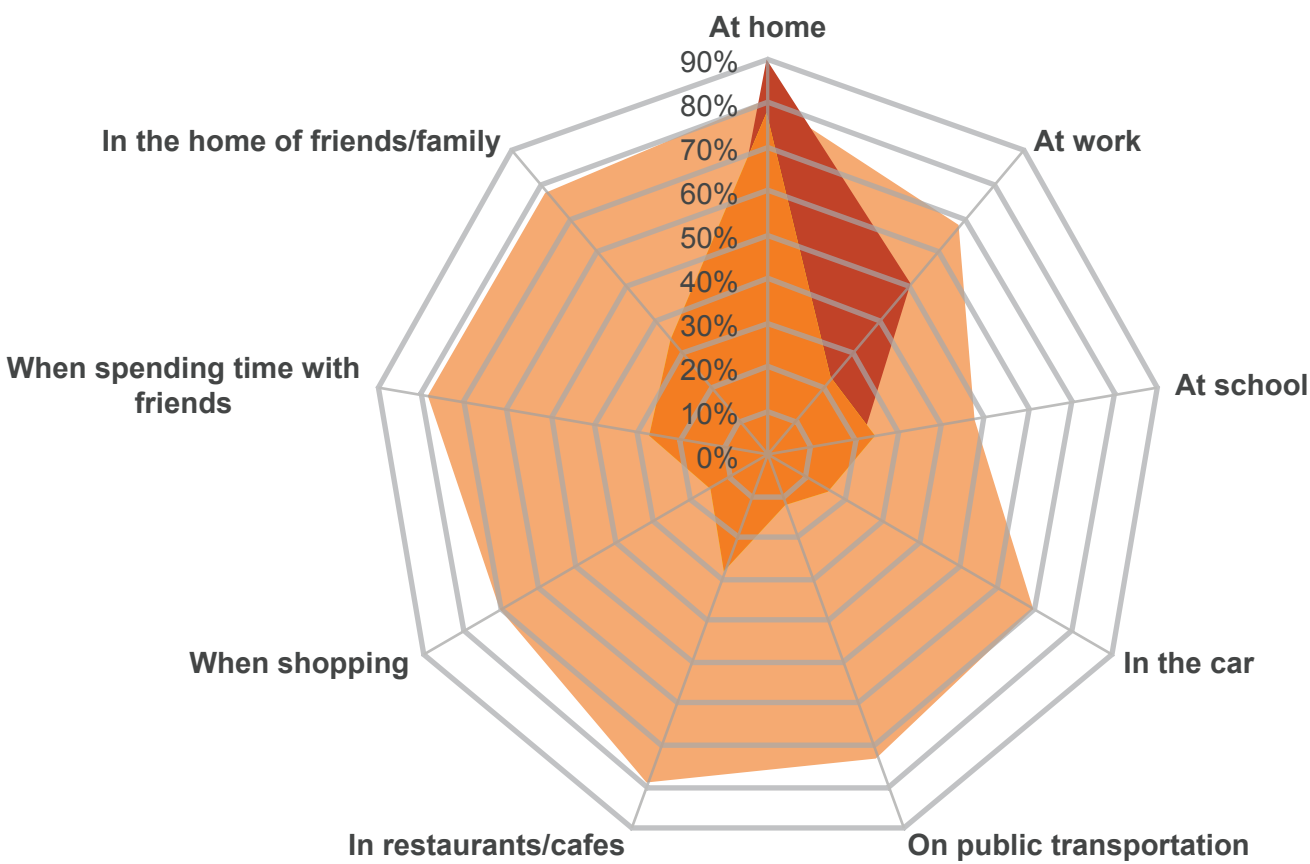
# ONLINE MEDIA CONSUMPTION – BY DEVICE

IMS  
Mobile  
in LatAm



# LOCATIONS USED

IMS  
Mobile  
in LatAm



■ Laptop (A=3,432)



■ Smartphone (B=3,787)

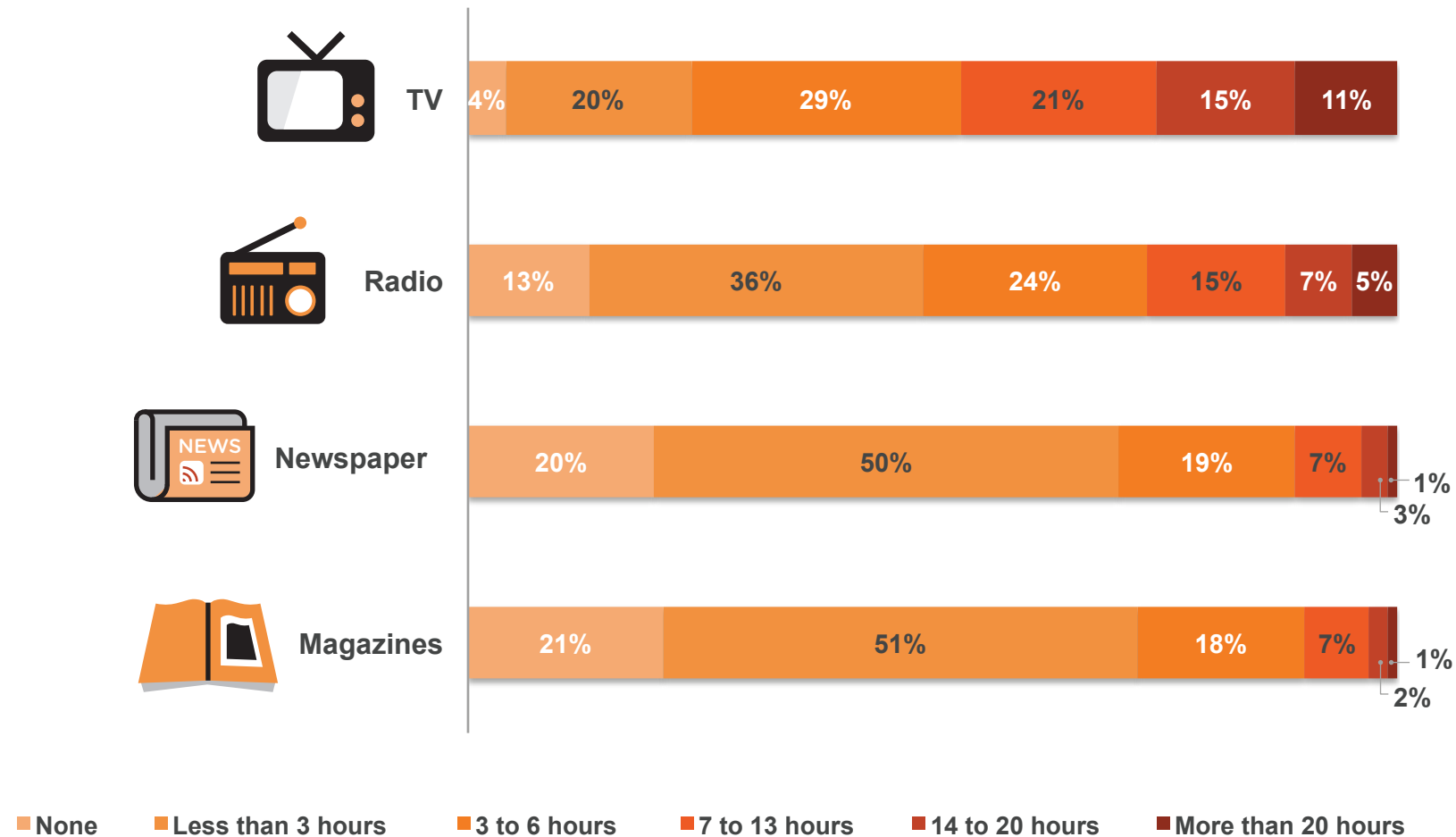


■ Tablet (C=2,443)

OTHER:  
Laptop - 2%  
Smartphone - 3%  
Tablet - 3%

# OFFLINE MEDIA CONSUMPTION

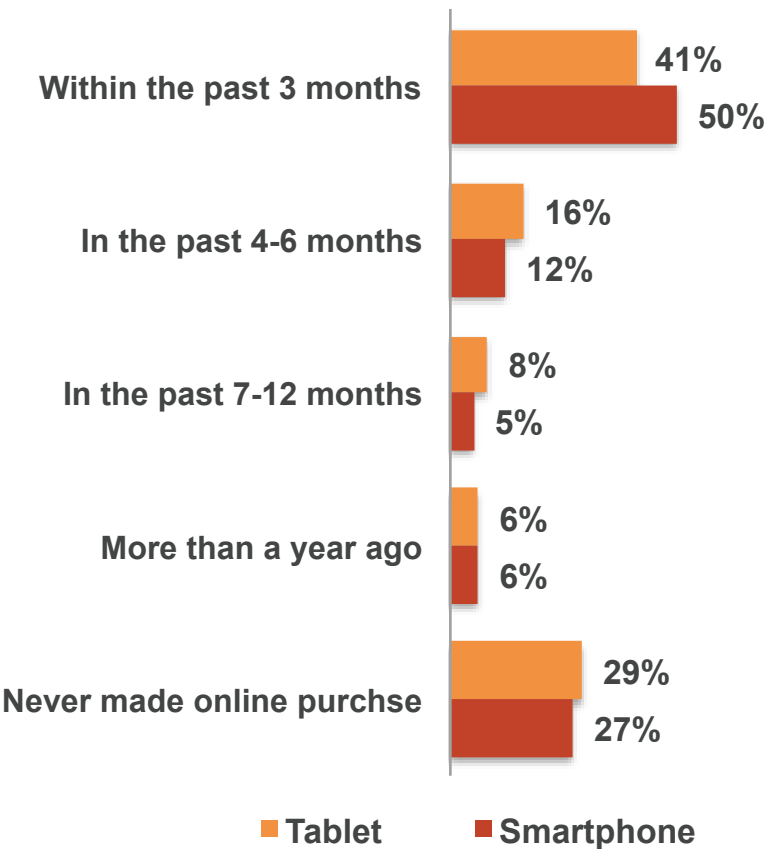
IMS  
Mobile  
in LatAm



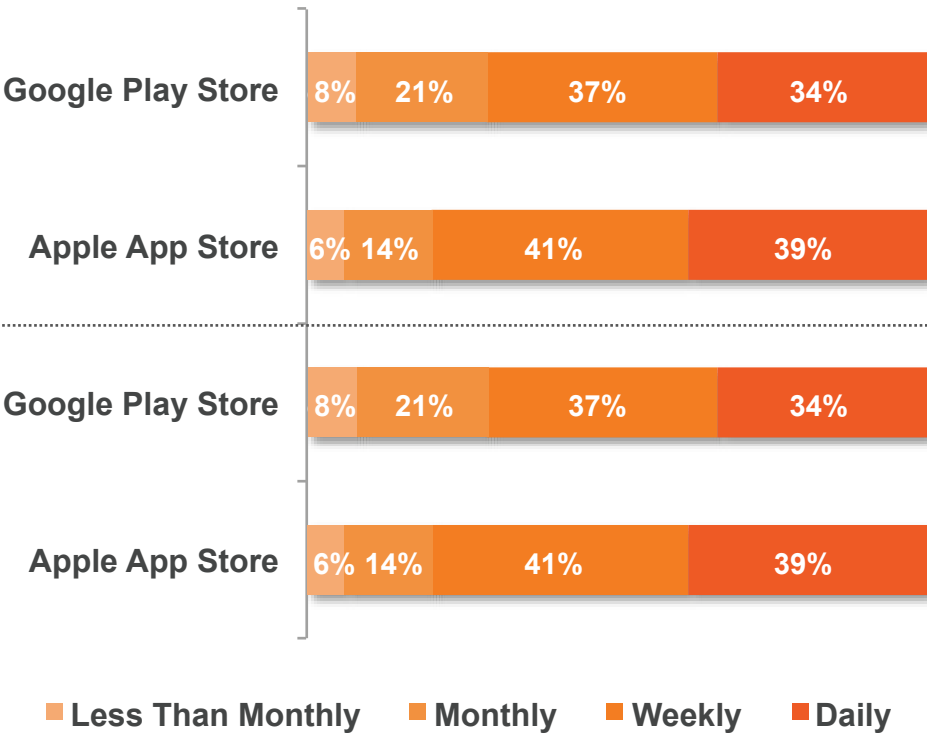
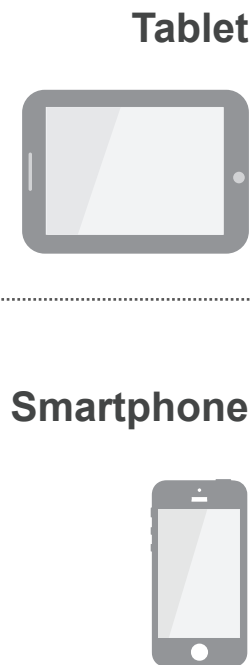
# ONLINE PURCHASES & APP STORE VISITATION

IMS  
Mobile  
in LatAm

## ONLINE PURCHASES

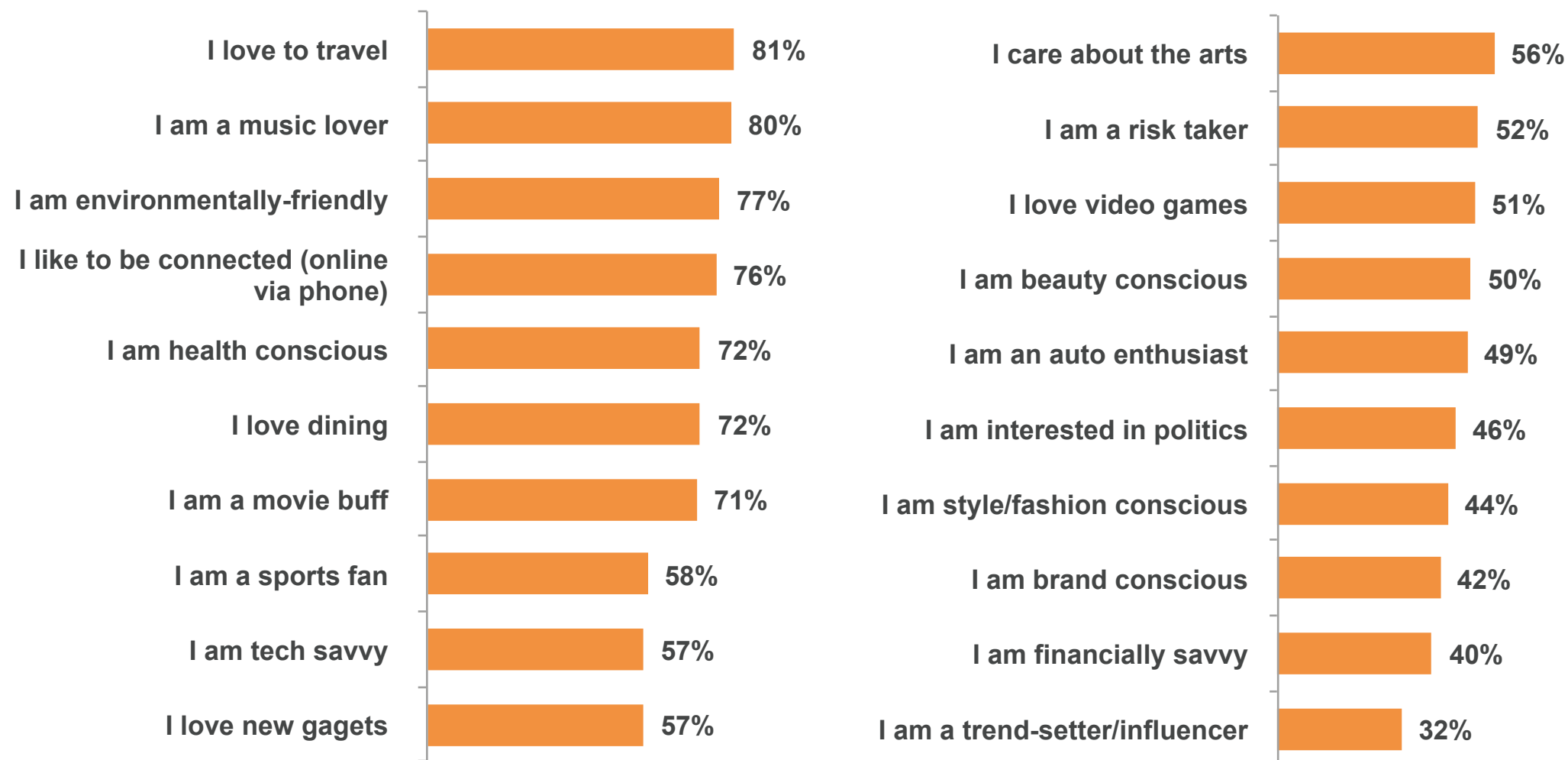


## FREQUENCY OF VISITING PLAY STORE/APP STORE



# AGREEMENT WITH SELF-DESCRIPTION STATEMENTS

IMS  
Mobile  
in LatAm





# MOBILE



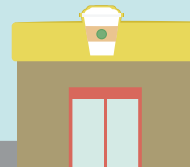
App Usage



# THE JOURNEY

IMS offer **78%**  
Total Potential Regional  
Reach through any  
mobile device  
— comScore

1



**8:00 AM**  
While having  
breakfast: Reads  
Tweets / Checks  
the LinkedIn  
profile of a client



**8.30 PM**  
Drives to  
work



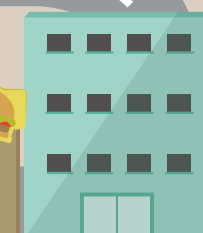
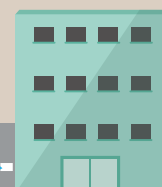
**9.15 AM**  
Attends a  
meeting



**6:30 AM**  
Alarm Clock Goes  
Off – Sees all push  
notifications from  
last night

**6:31 AM**  
Checks Weather

**6:45 AM**  
Goes running



**6.00 PM**  
Picks up her  
kids and  
drives home



**2.00 PM**  
Works on a  
presentation



**1.30 PM**  
Finds a place for lunch



**6.30 PM**  
Watches 10 minutes of  
the last episode of the  
sitcom while queuing  
in the supermarket



**7.45 PM**  
Cooks  
dinner

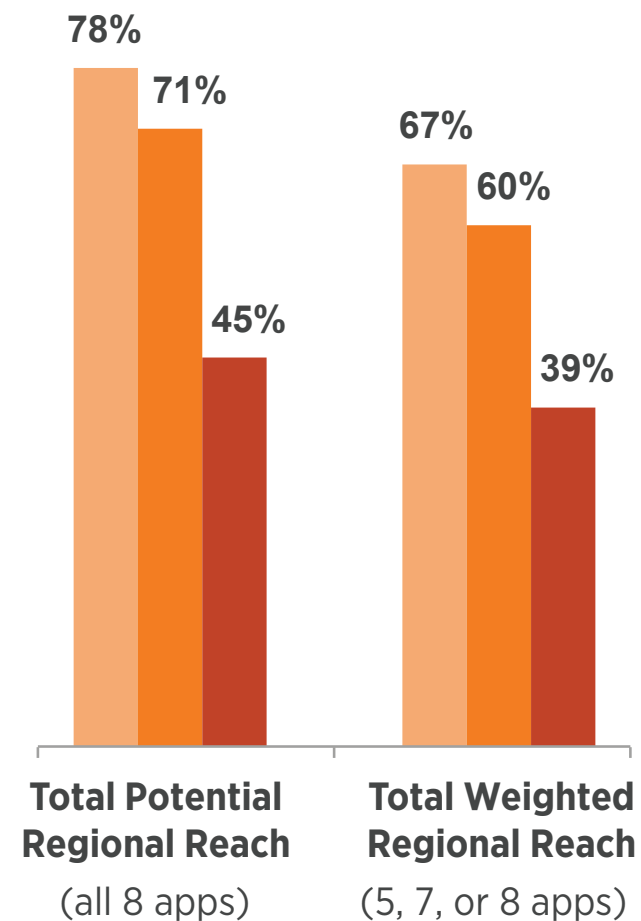


**9.45 PM**  
watches her favorite  
show with her  
husband



# IMS NET REACH

IMS  
Mobile  
in LatAm



Q3. Do you currently have the mobile app for any of these properties downloaded to your device(s)?  
Base: Total Respondents

# TWITTER USERS IN LATAM

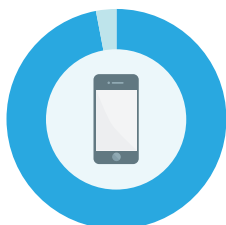
IMS  
Mobile  
in LatAm



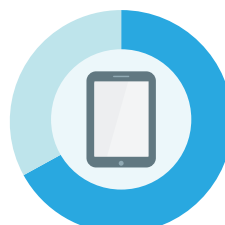
6/10

.....  
consider Twitter an important  
tool in their day-to-day

## INTERNET ACCESS:



97% through  
smartphones

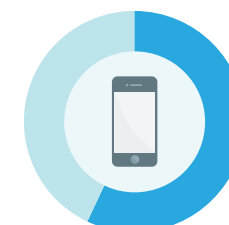


67% through  
tablets

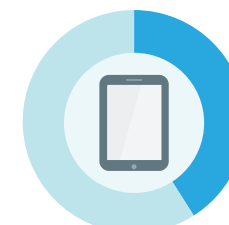


86% use Twitter at  
least once a week

## PURCHASE ONLINE WITHIN THE PAST THREE MONTHS:



57% through  
smartphones

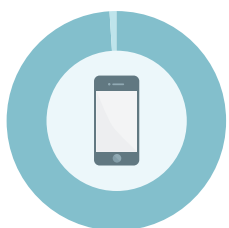


41% through  
tablets

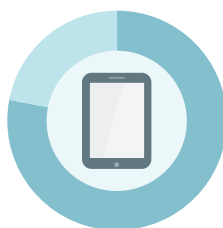
# WAZE USERS IN LATAM

IMS  
Mobile  
in LatAm

## INTERNET ACCESS:

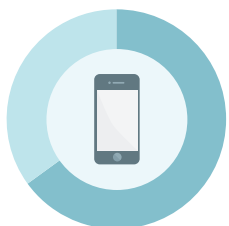


**99%** through smartphones



**78%** through tablets

## PURCHASE ONLINE WITHIN THE PAST THREE MONTHS:



**65%** through smartphones



**54%** through tablets



**7/10**

consider Waze an important tool in their day-to-day



**82%** use Waze at least once a week

## SELF-DESCRIPTION STATEMENTS:



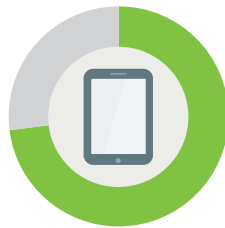
# SPOTIFY USERS IN LATAM

IMS  
Mobile  
in LatAm

## INTERNET ACCESS:



**97%** through smartphones

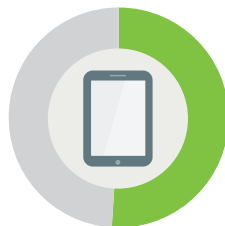


**73%** through tablets

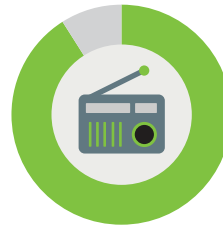
## PURCHASE ONLINE WITHIN THE PAST THREE MONTHS:



**63%** through smartphones



**51%** through tablets



**91%** listen radio weekly



**89%** use Spotify at least once a week

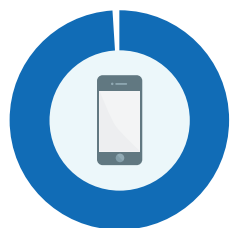
## SELF-DESCRIPTION STATEMENTS:



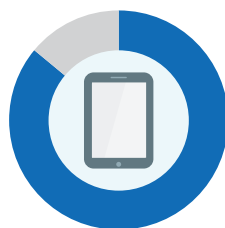
# FOURSQUARE USERS IN LATAM

IMS  
Mobile  
in LatAm

## INTERNET ACCESS:

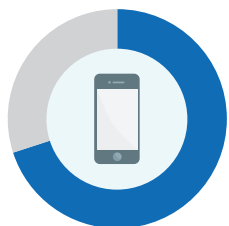


99% through smartphones

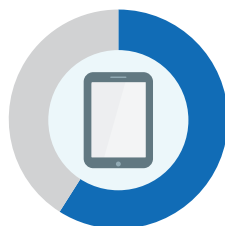


86% through tablets

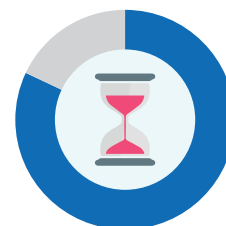
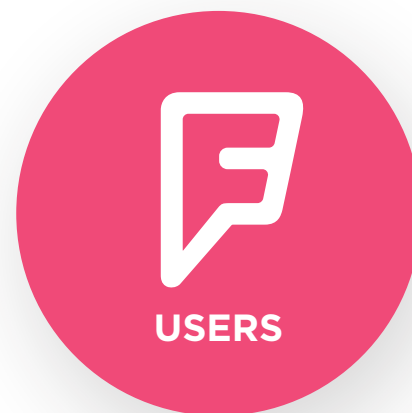
## PURCHASE ONLINE WITHIN THE PAST THREE MONTHS:



70% through smartphones



59% through tablets



82% use Foursquare at least once a week

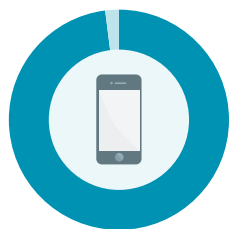
## SELF-DESCRIPTION STATEMENTS:



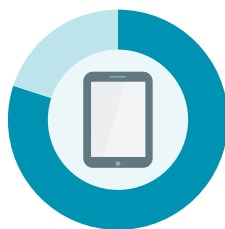
# LINKEDIN USERS IN LATAM

IMS  
Mobile  
in LatAm

## INTERNET ACCESS:

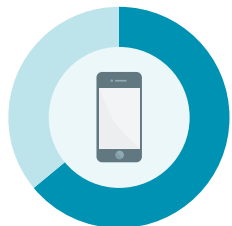


98% through  
smartphones

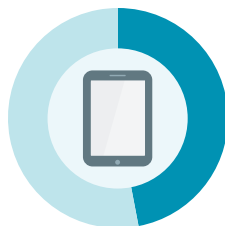


80% through  
tablets

## PURCHASE ONLINE WITHIN THE PAST THREE MONTHS:



64% through  
smartphones



47% through  
tablets

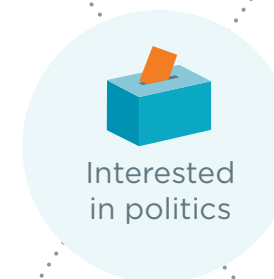
  
**6/10**

.....  
consider LinkedIn an important  
tool in their day-to-day



84% use LinkedIn at  
least once a week

## SELF-DESCRIPTION STATEMENTS:



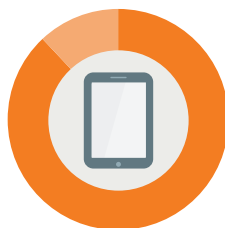
# CRACKLE USERS IN LATAM

IMS  
Mobile  
in LatAm

## INTERNET ACCESS:



98% through smartphones

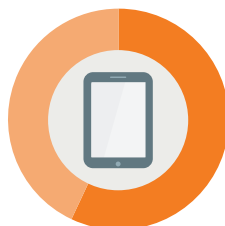


88% a través de sus tablets

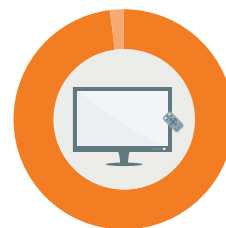
## PURCHASE ONLINE WITHIN THE PAST THREE MONTHS:



68% through smartphones



57% through tablets



98% watch TV weekly

**CRACKLE**  
USERS



78% use Crackle at least once a week

## SELF-DESCRIPTION STATEMENTS:



Financially Savvy



Brand Conscious



Style & fashion Conscious



Love video games



Influencer



THANK YOU!



**ims**

LatAm for  
Fast-moving  
Companies

**CONTACT.** [www.ims corporate.com](http://www.ims corporate.com) |  [/IMSCorp](https://www.facebook.com/IMSCorp) |  [@IMSCorp](https://twitter.com/IMSCorp) |  [info@ims corporate.com](mailto:info@ims corporate.com)