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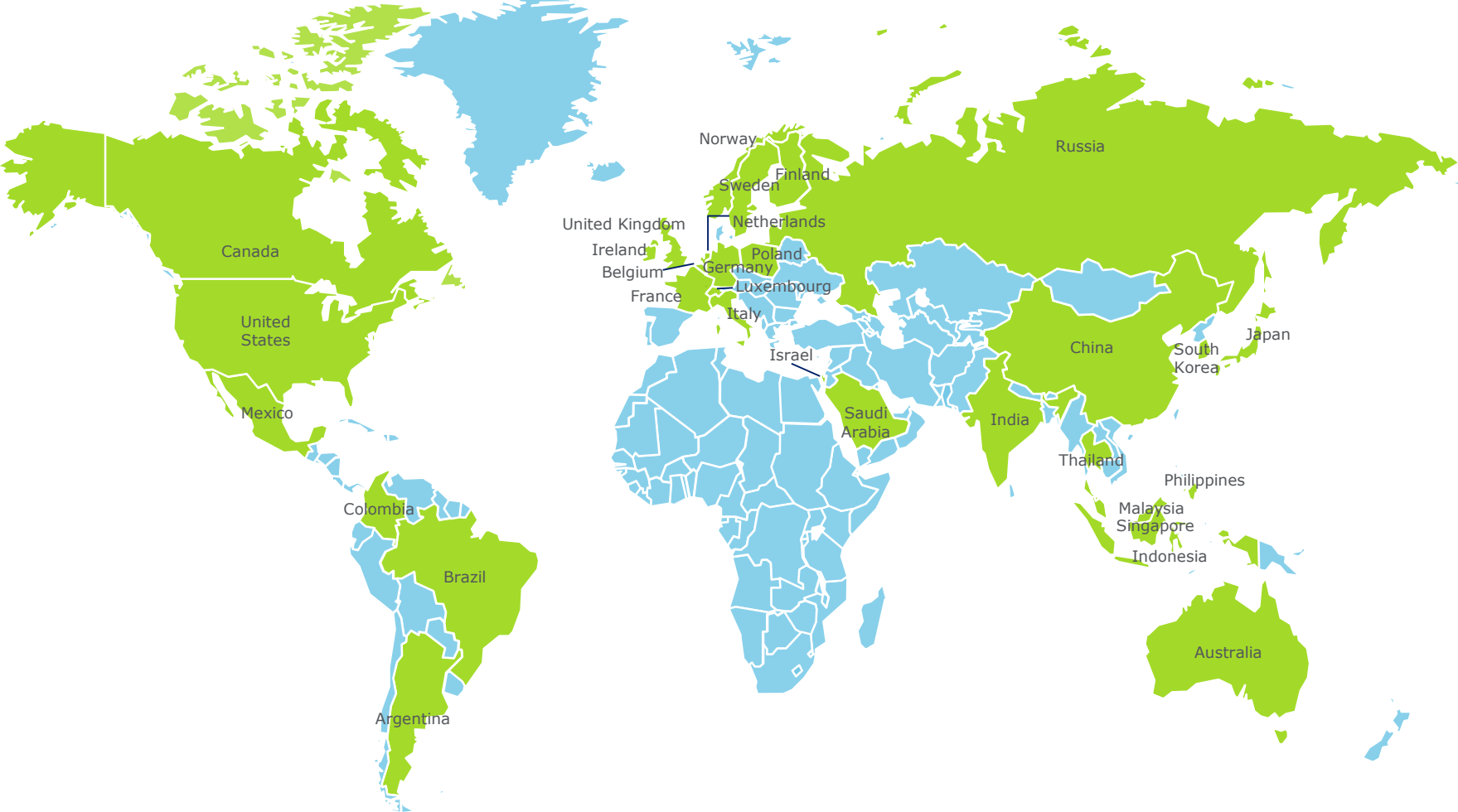
Deloitte Mobile Consumer Survey 2016

For more information, contact:

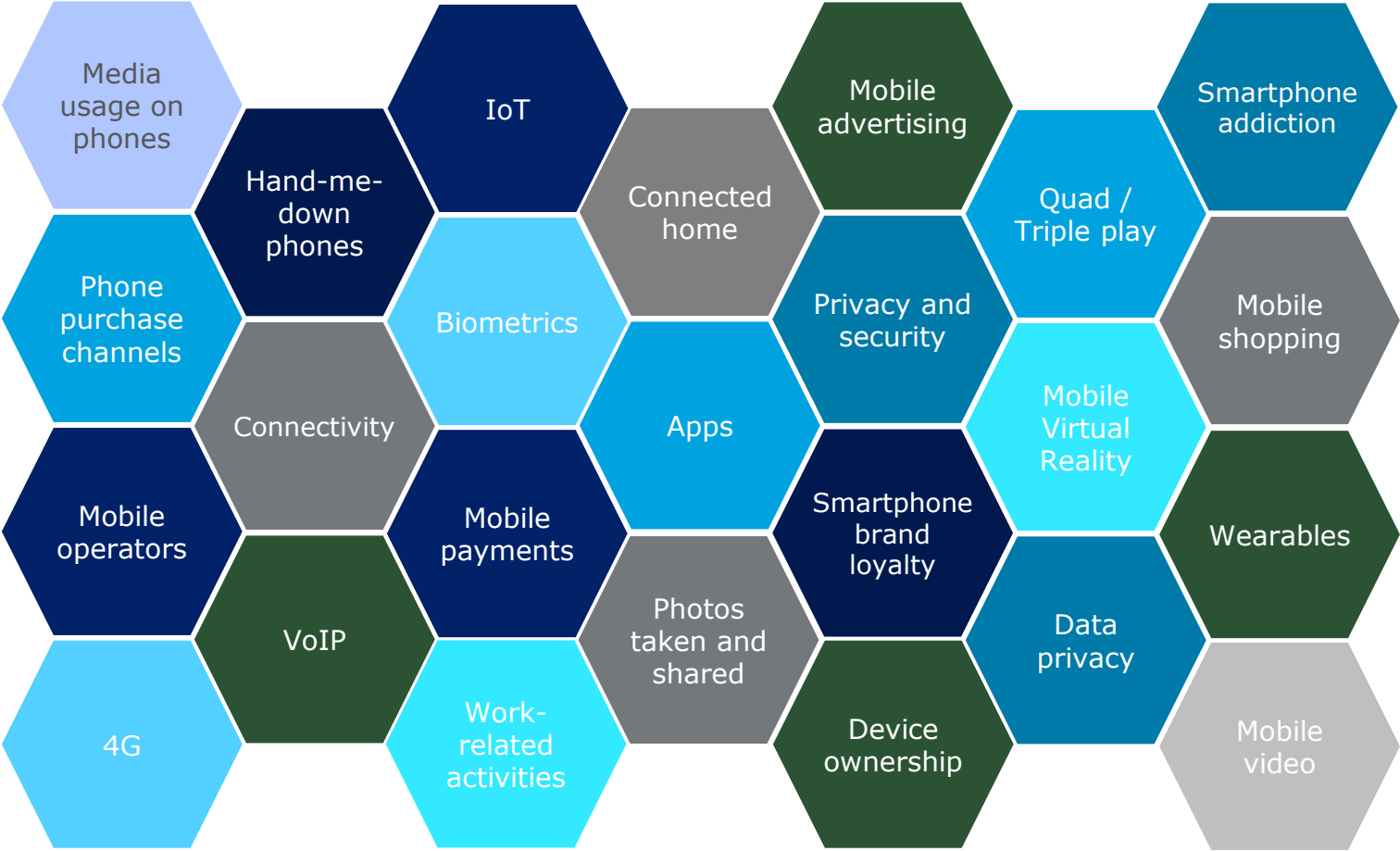
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About the survey

Deloitte Global Mobile Consumer Survey 2016: 5 continents, 31 countries, 53,000 respondents. Brazil data: 2,005, nationally representative, adults 18-55. Online polling.



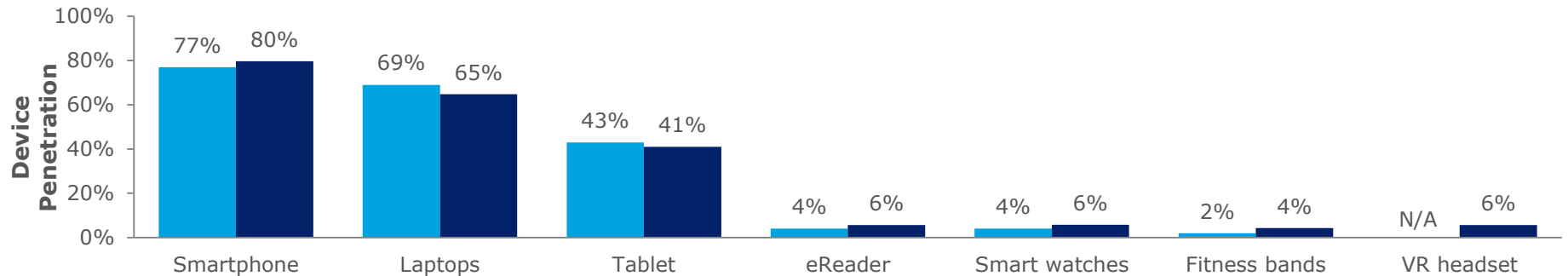
Topics covered in GMCS 2016



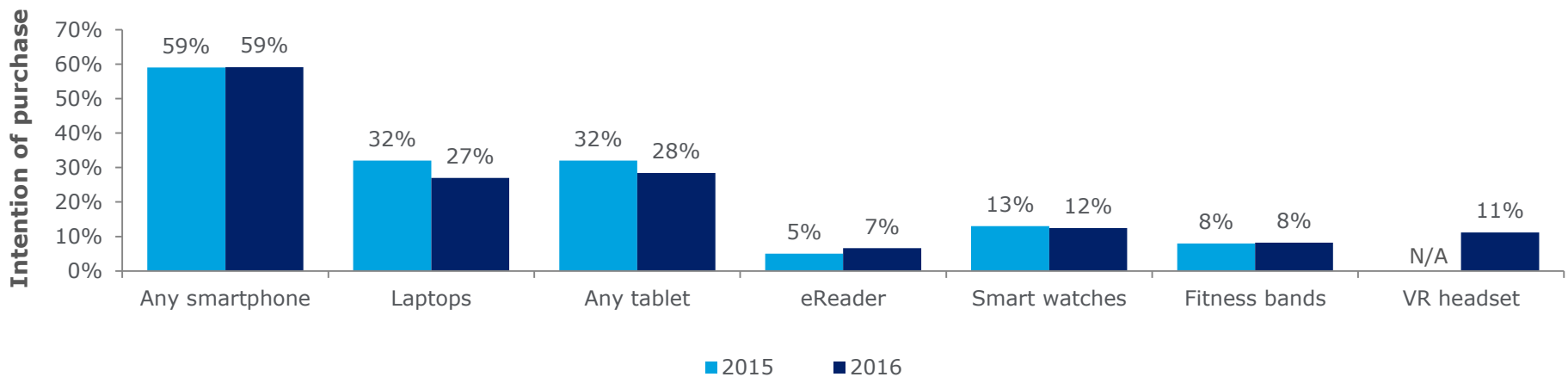
Device ownership

Smartphones surpass laptop penetration; 1 in 10 interested in VR

Q. Which, if any, of the following devices do you own or have ready access to?



Q. Which of the following devices, if any, are you likely to buy in the next 12 months?



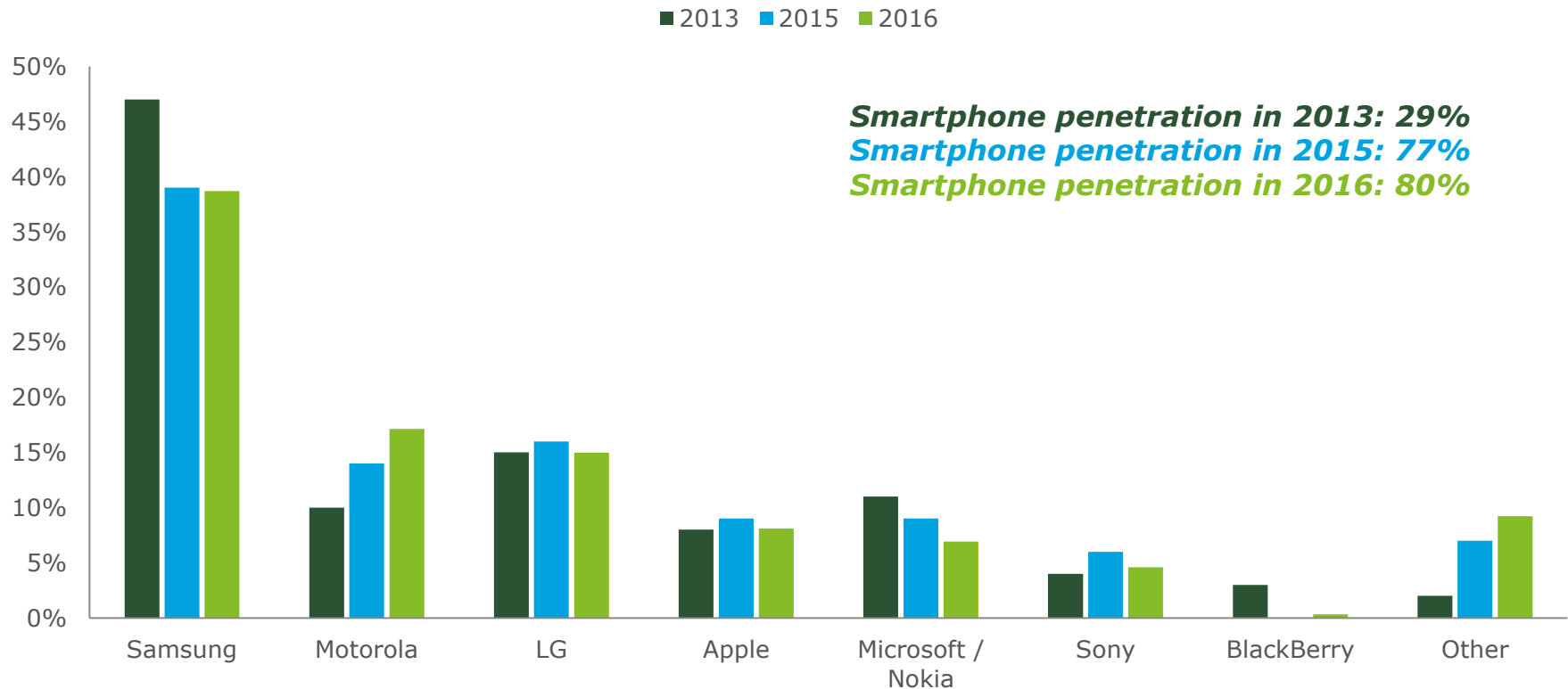
Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015, May - Jun 2016
 Base: All respondents, Brazil, 2015: 2000, 2016: 2005

The smartphone base

Smartphone market shares have remained fairly steady over the last two years...

Q. Thinking about your main smartphone, what is the brand and model of your current handset?

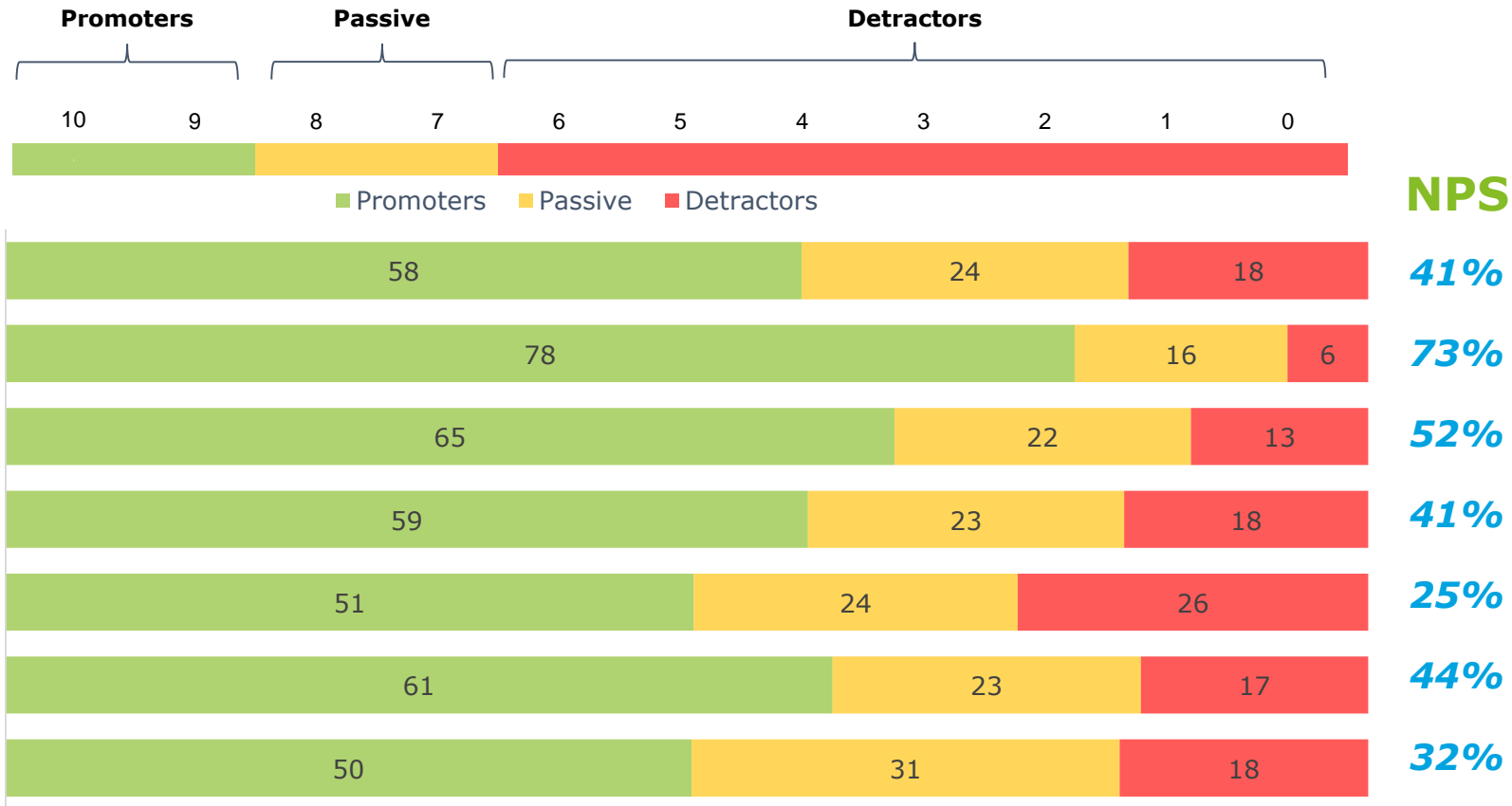
Brand Market Share over 4 years



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May-June 2013, May - Jun 2015, May - Jun 2016
Base: All smartphone owners 2013:577, 2015: 1547, 2016: 1598

Respondents with Apple and Samsung Galaxy S brand handsets are more likely to recommend their handsets to friends /colleagues /relatives

Q. How likely would you be to recommend the brand of your current handset to a friend, colleague or relative?



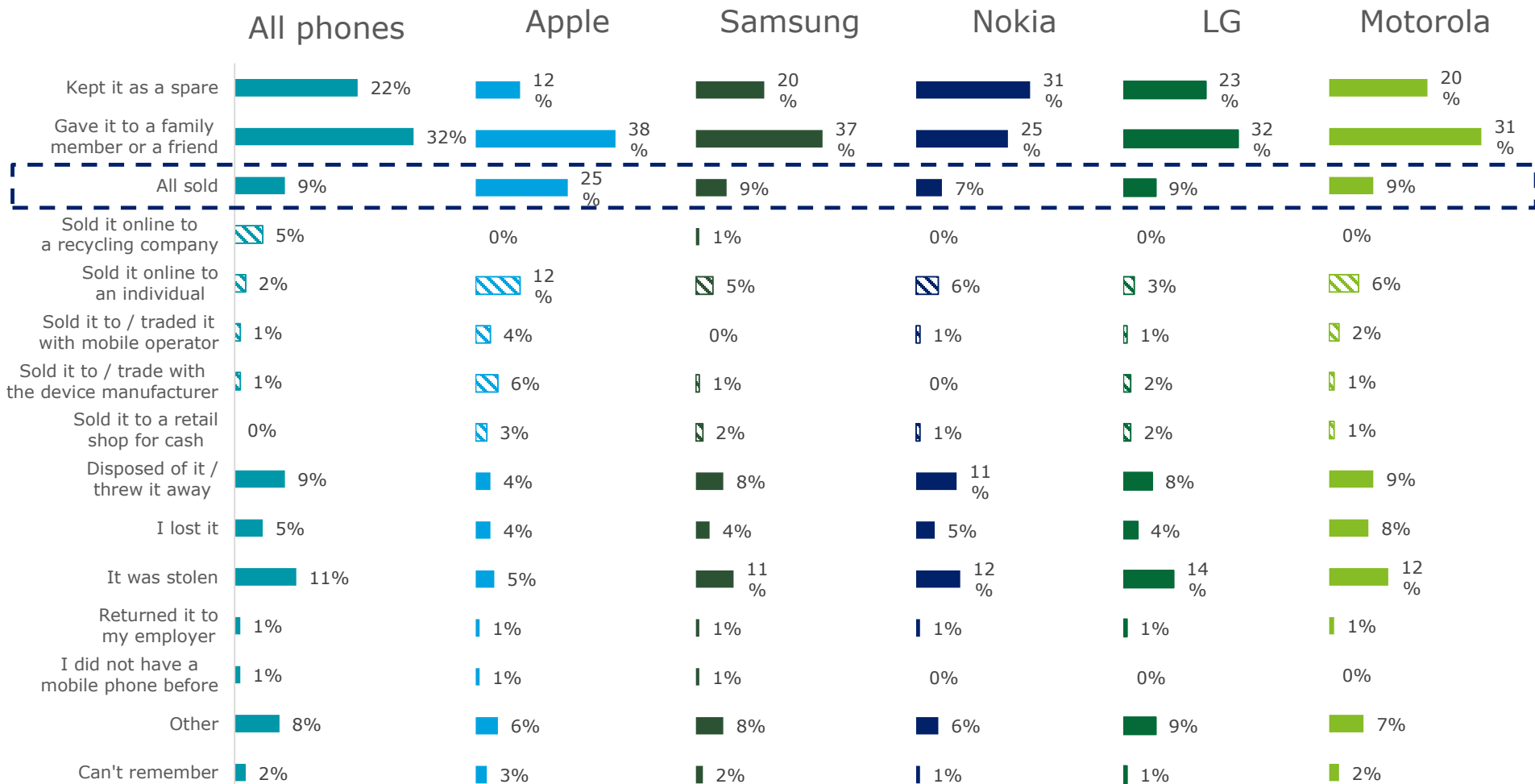
Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016

Base: Smartphone owners who mentioned their handset brand: All: 1581, Any iPhone: 130, Samsung Galaxy S: 283 Any Samsung: 619, Nokia smartphone: 92, Motorola: 274, LG: 240

Note: Net promoter score (NPS) = Promoters - Detractors

About two thirds of iPhones have an “after life”; this compares to an average 40% across the base

Q. What did you do with your previous mobile phone when you last upgraded?



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016

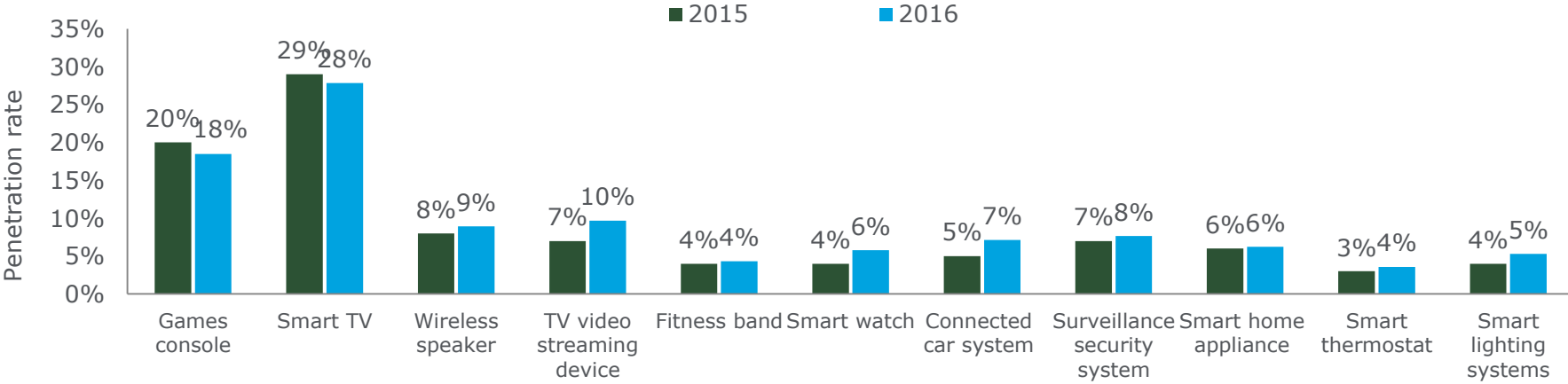
Bas: All phone owners: 1743, previous iPhone owners: 74, previous all Samsung owners: 585, previous Nokia owners: 268, previous LG owners: 291, previous Motorola owners: 261

Note: All sold is the sum of 'Sold it online to a specialist recycling company', 'Sold it online to an individual', 'Sold it/traded it in for a new phone to the mobile operator', 'Sold it/traded it in for a new phone to the mobile manufacturer' and 'Sold it to a retail shop for cash'

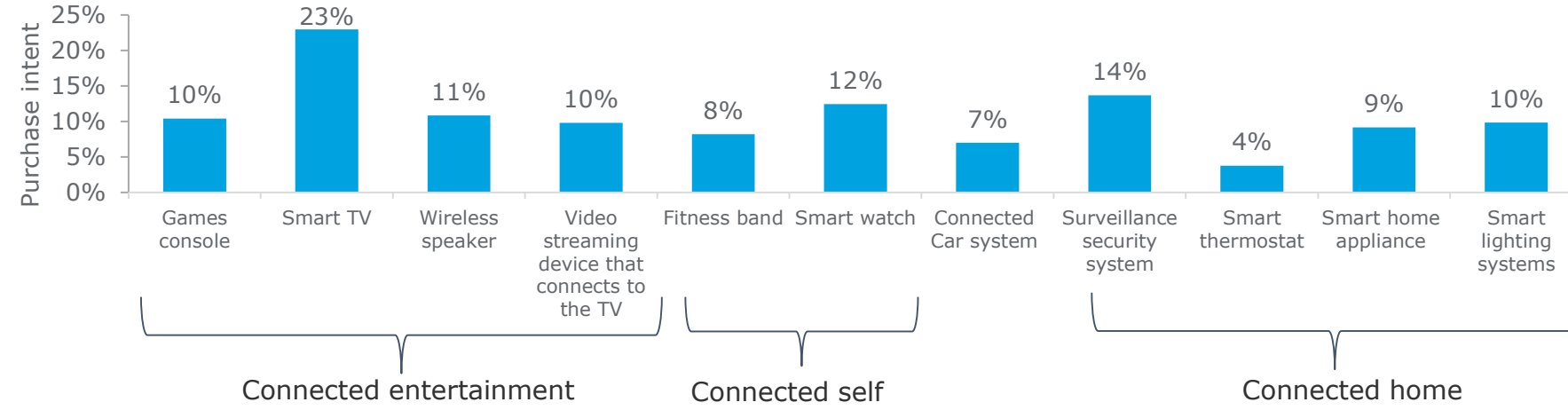
IoT / connected devices

Connected entertainment (consoles, Smart TVs, video streaming devices, wireless speakers) are most popular connected devices; other categories remain lacklustre

Q. Which, if any, of the following devices do you own or have ready access to?



Q. Which of the following devices, if any, are you likely to buy in the next 12 months?

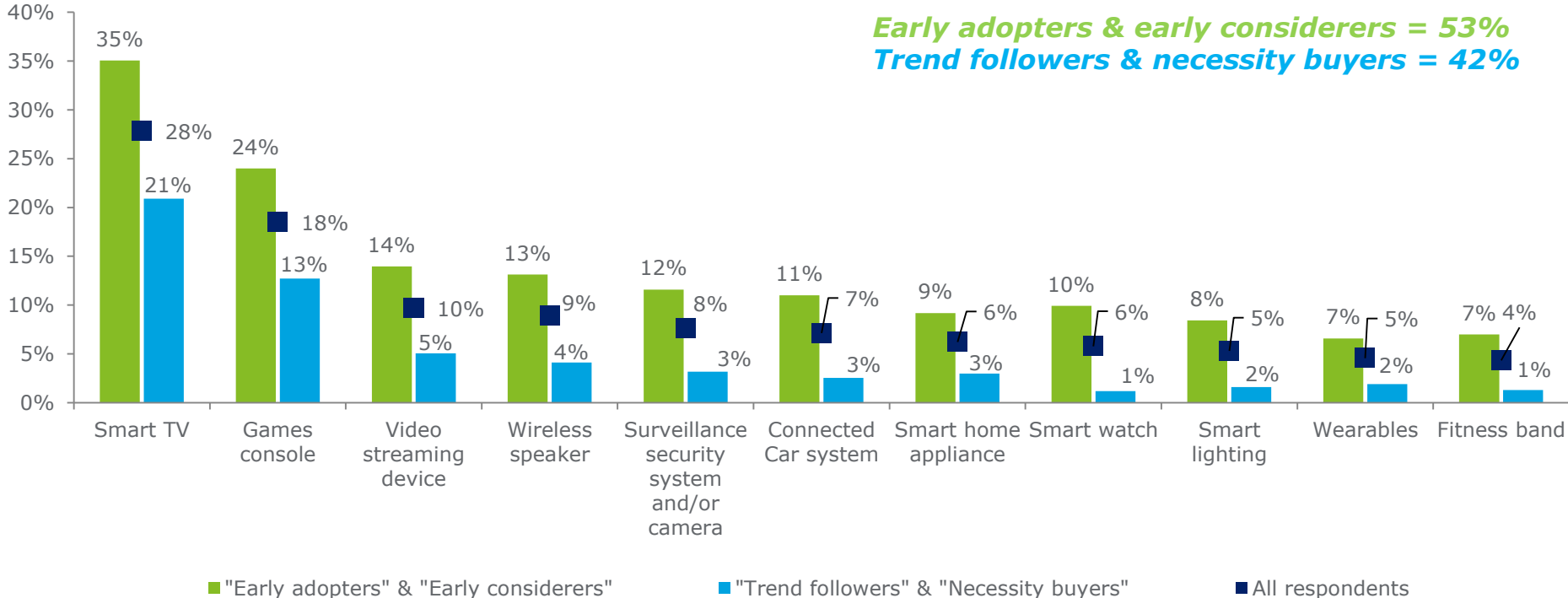


Source: Brazil edition, Deloitte Global Mobile Consumer Survey: May - Jun 2015, May - Jun 2016
 Base: All respondents, Brazil, 2015: 2000, 2016: 2005

IoT devices penetration remains low even among “early adopters” and “early considerers”

Q. Which, if any, of the following devices do you own or have ready access to?

Penetration of connected home devices (by type of technology adopter)



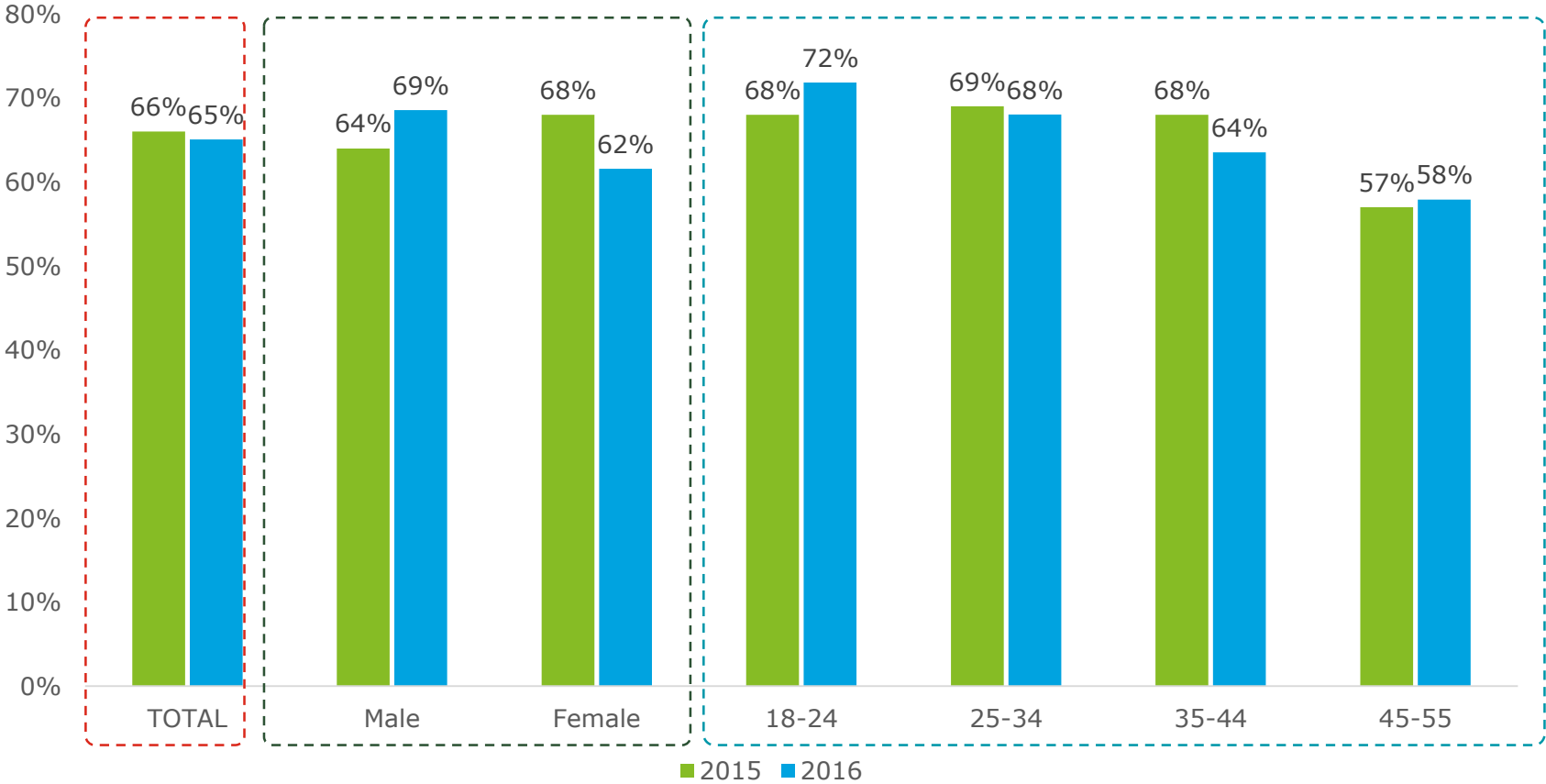
Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May – Jun 2016

Base: All respondents: 2005, Early adopters & Early considerers: 1068, Trend followers & Necessity buyers: 844

Note: “Early adopters” are consumers who buy new devices as soon as they enter the market; “early considerers” are consumers who buy the latest devices if they really like them; “trend followers” are consumers who buy devices once they’ve been out for a while and “necessity buyers” are consumers who replace their devices when they go wrong or broken

Similar to 2015, around two-thirds are willing to share information; men are more willing to share than women

Q. To what extent, if at all, are you willing to share the usage information generated by a device that you own? - All willing to share

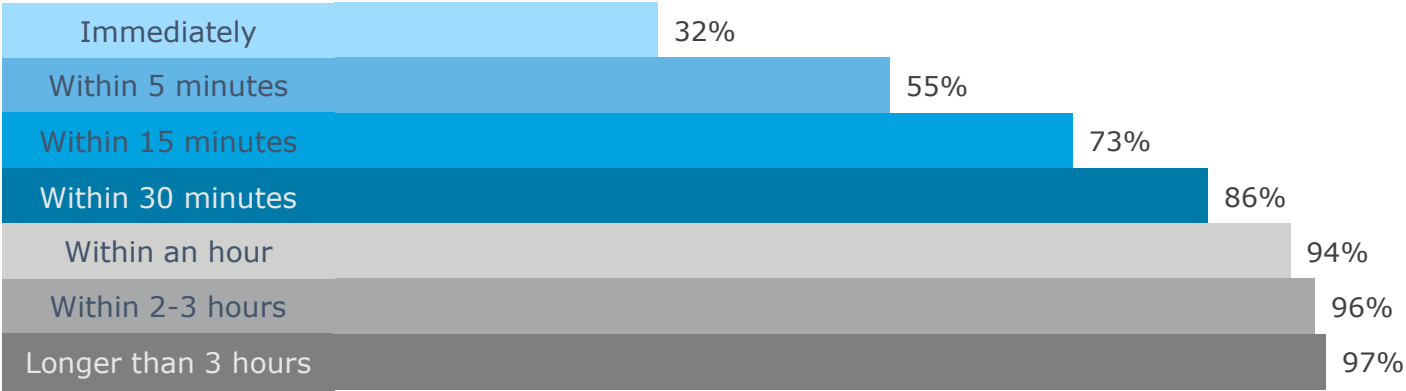


Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015, May - Jun 2016
Base: Those who use or are interested in using smart devices 2015: 1514, 2016: 1419

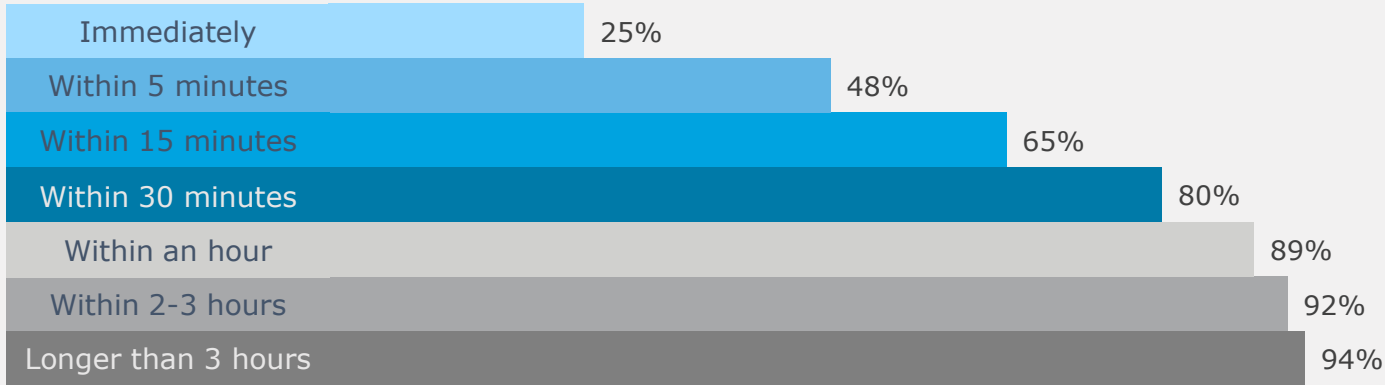
Smartphone behaviours

For most smartphone owners, checking their phones is among the first and last things they do in a day

Q. Typically how long is the interval between waking up and looking at your phone for the first time?



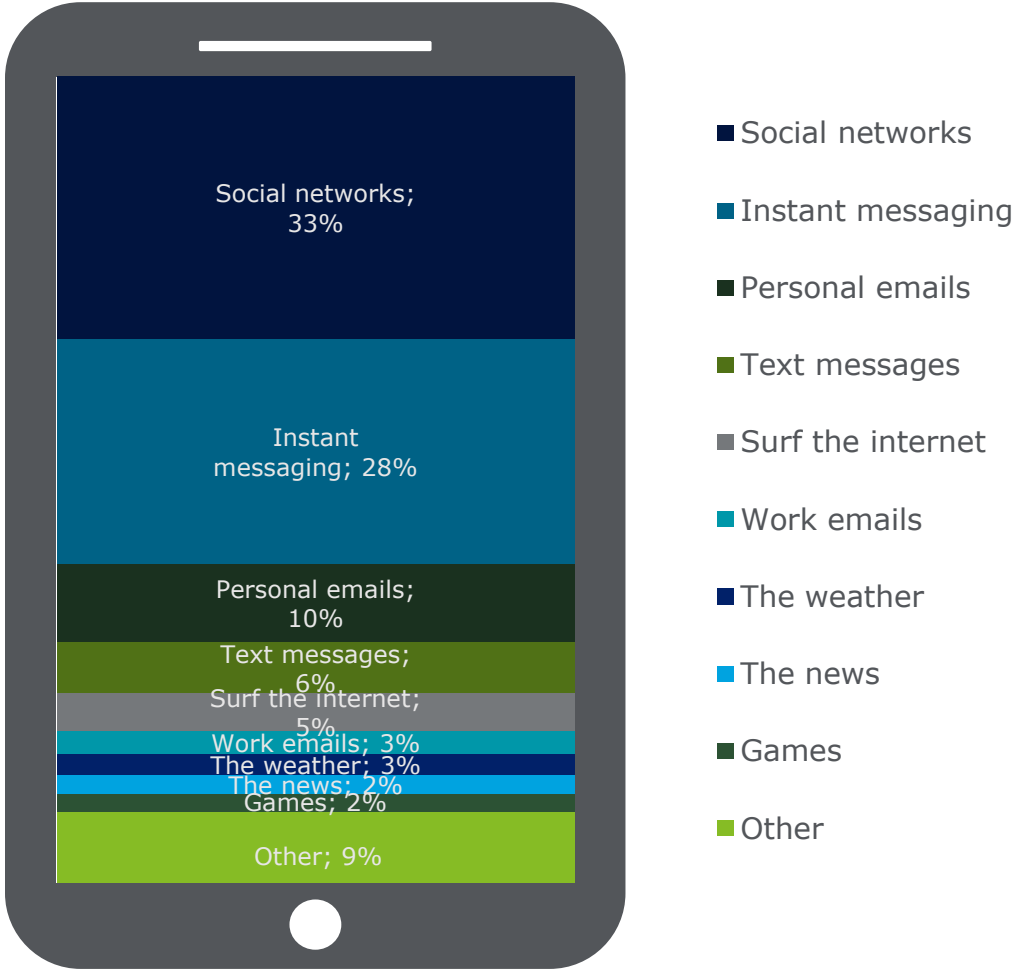
Q. At the end of the day, typically how long is the interval between looking at your phone for the last time and preparing to sleep?



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
Base: Smartphone owners: 1598

Social networks, followed by IM, are the first thing consumers check on their smartphones in the morning

Q. Typically what is the first thing you access on your phone every day?



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
Base: Smartphone owners: 1598

37% of people check their instant messages in the middle of the night and 28% respond to them

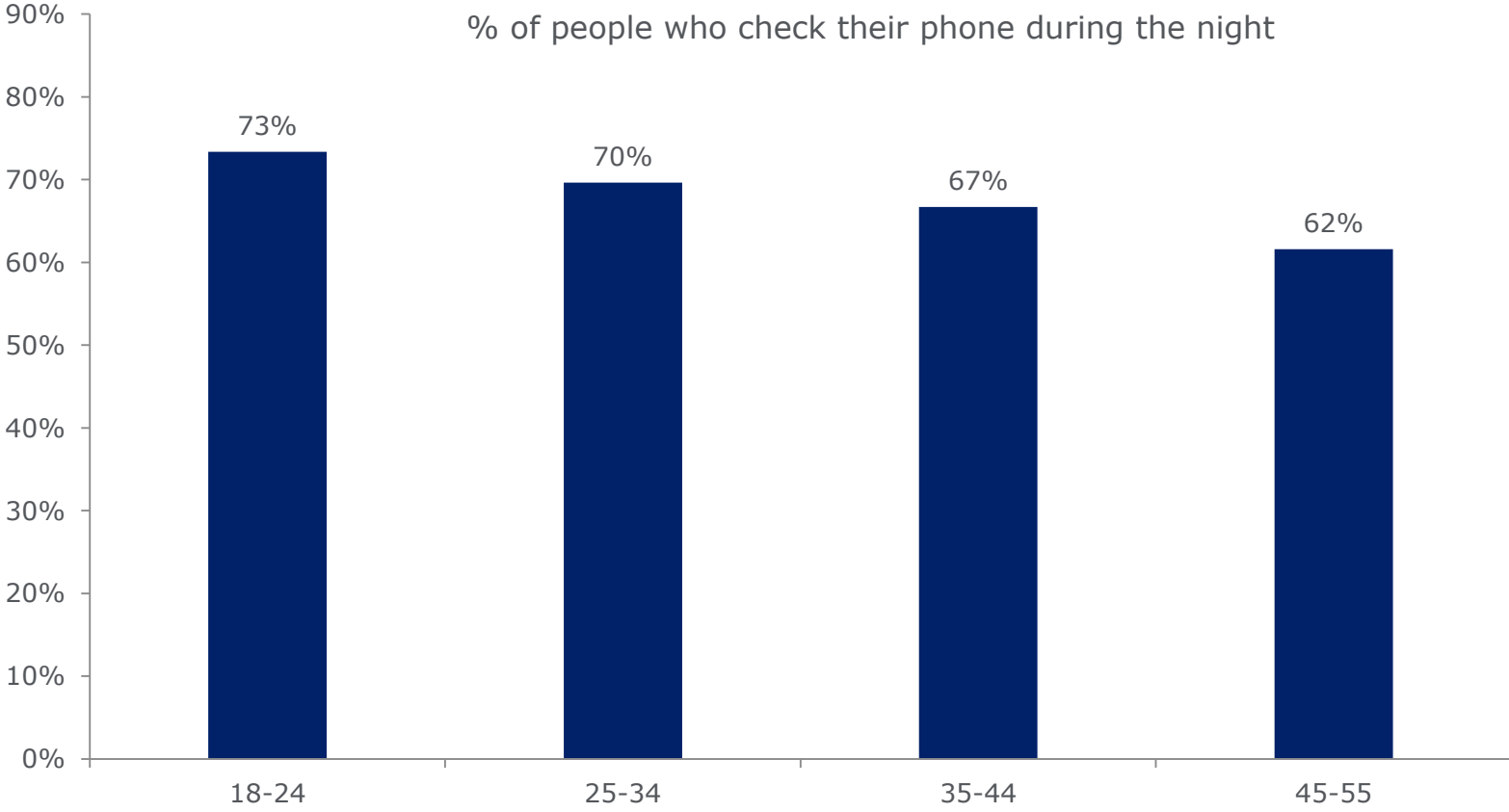
Q. Which of the following activities do you do if you check your phone in the middle of the night?



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
Base: All smartphone owners: 1598

Interrupted sleep increases with youth, with almost three-quarters of 18-24 year olds checking their phone during the night

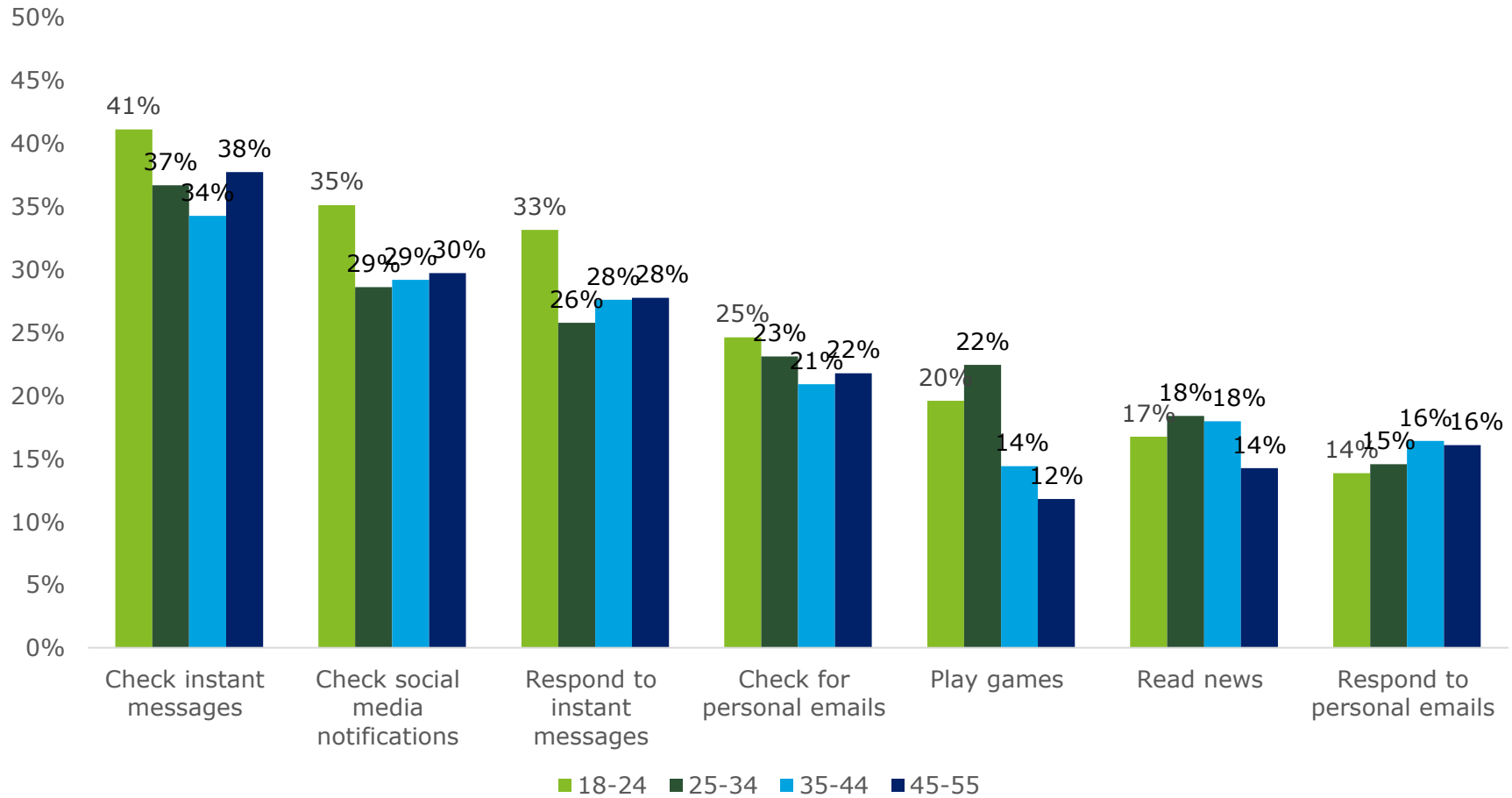
Q. Which of the following activities do you do if you check your phone in the middle of the night? (Not: I don't check my phone)



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
Base: All smartphone owners: 1598, 18-24: 348, 25-34: 477, 35-44: 397, 45-55: 375

Two-fifths of 18-24 year olds check instant messages during the night, a third reply

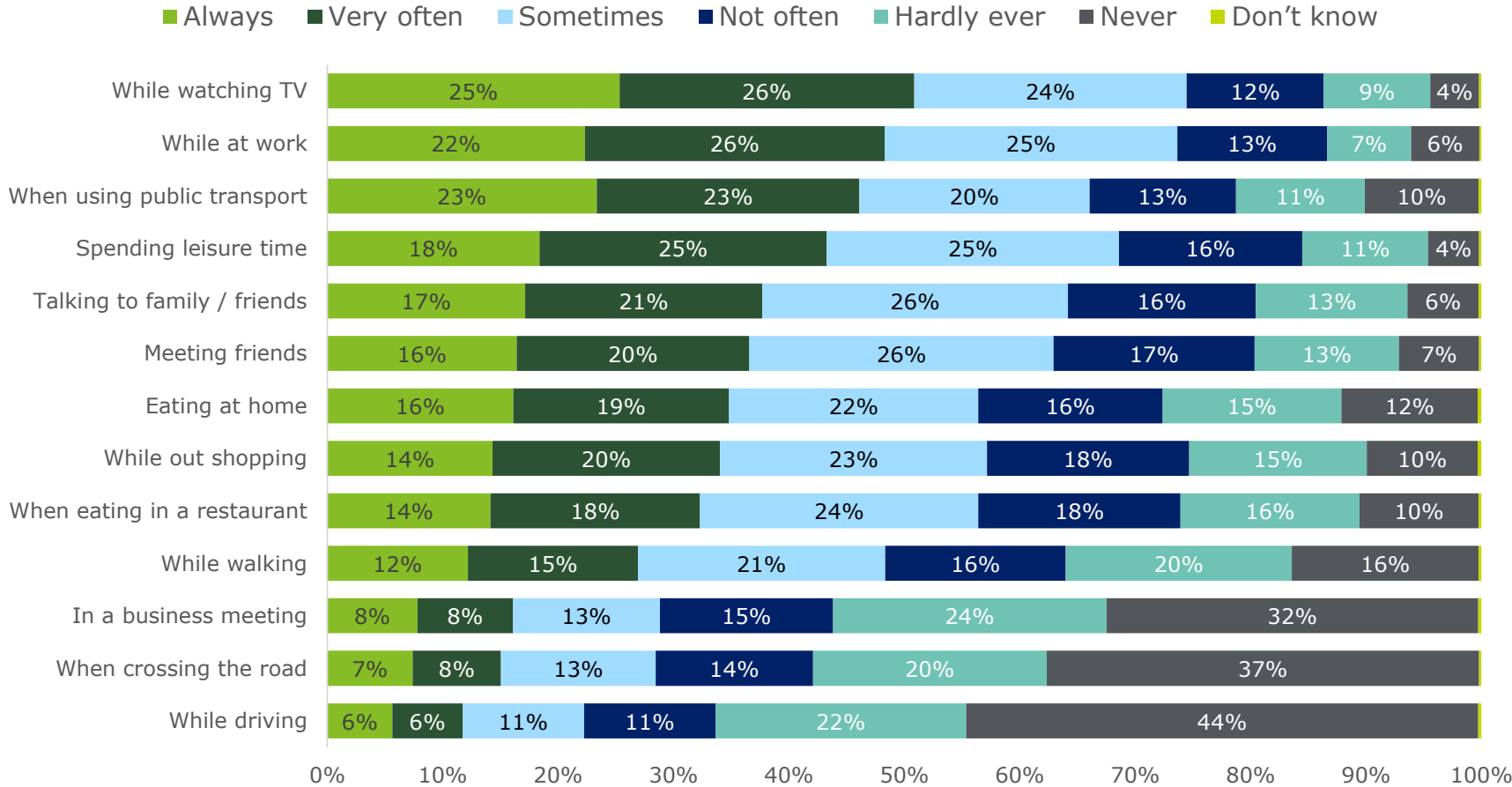
Q. Which of the following activities do you do if you check your phone in the middle of the night?



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
 Base: All smartphone owners 1598, 18-24: 348, 25-34: 477, 35-44: 397, 45-55: 375

Smartphone usage embellishes / disrupts many common daily activities

Q. How often, if at all, do you use your mobile phone while doing the following?



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016

Base: Smartphone owners: 1598

Note: Respondents for which a particular activity does not apply have been excluded from this analysis (i.e. respondents who do not work have not been asked if they use their phone in a business meeting.)

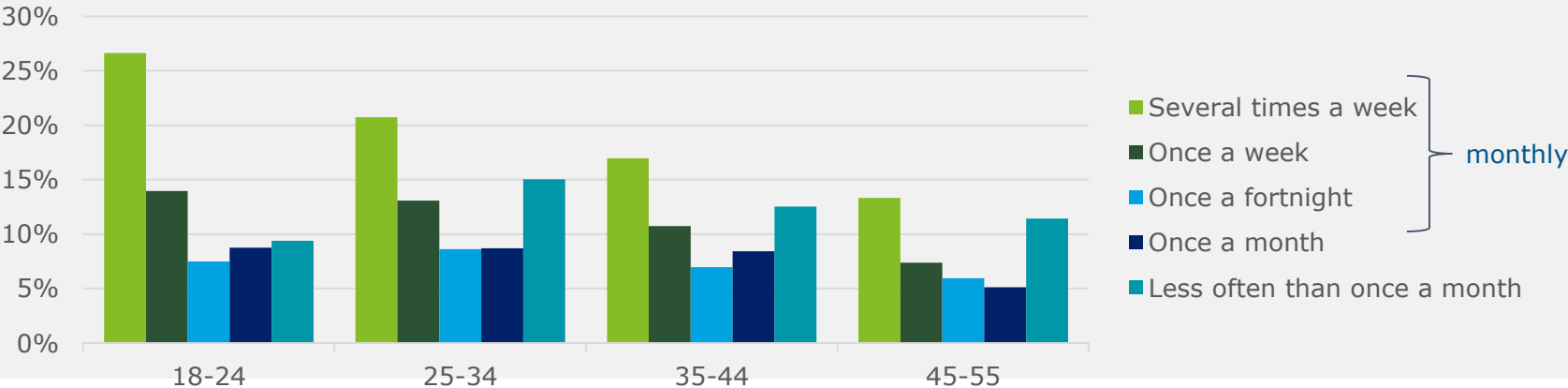
Deloitte Global Mobile Consumer Survey, 2016

3 in 10 phone owners have disagreements with their partner on a weekly basis over their phone usage

Q. How often, if at all, do you have disagreements with each of the following people because they think that you use your mobile phone too much? With partner



Q. How often, if at all, do you have disagreements with each of the following people because they think that you use your mobile phone too much? With partner

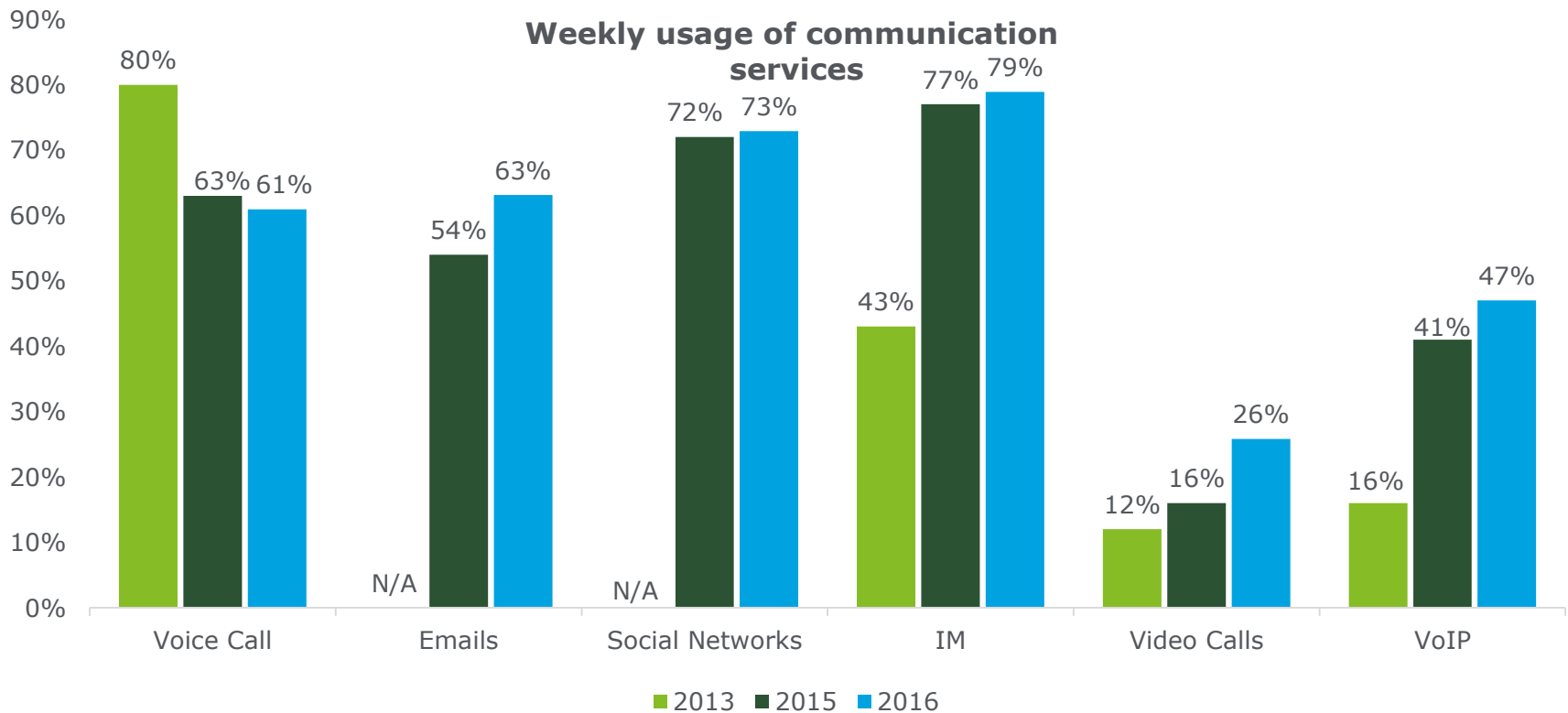


Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
 Base: All phone owners 1743

Communications

Over the same period most forms of data communication have become more widespread, with the exception of voice calls

Q. In the last 7 days, in which, if any, of the following ways did you use your phone to communicate with others? (Smartphones users)



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May-June 2013, May - Jun 2015, May - Jun 2016

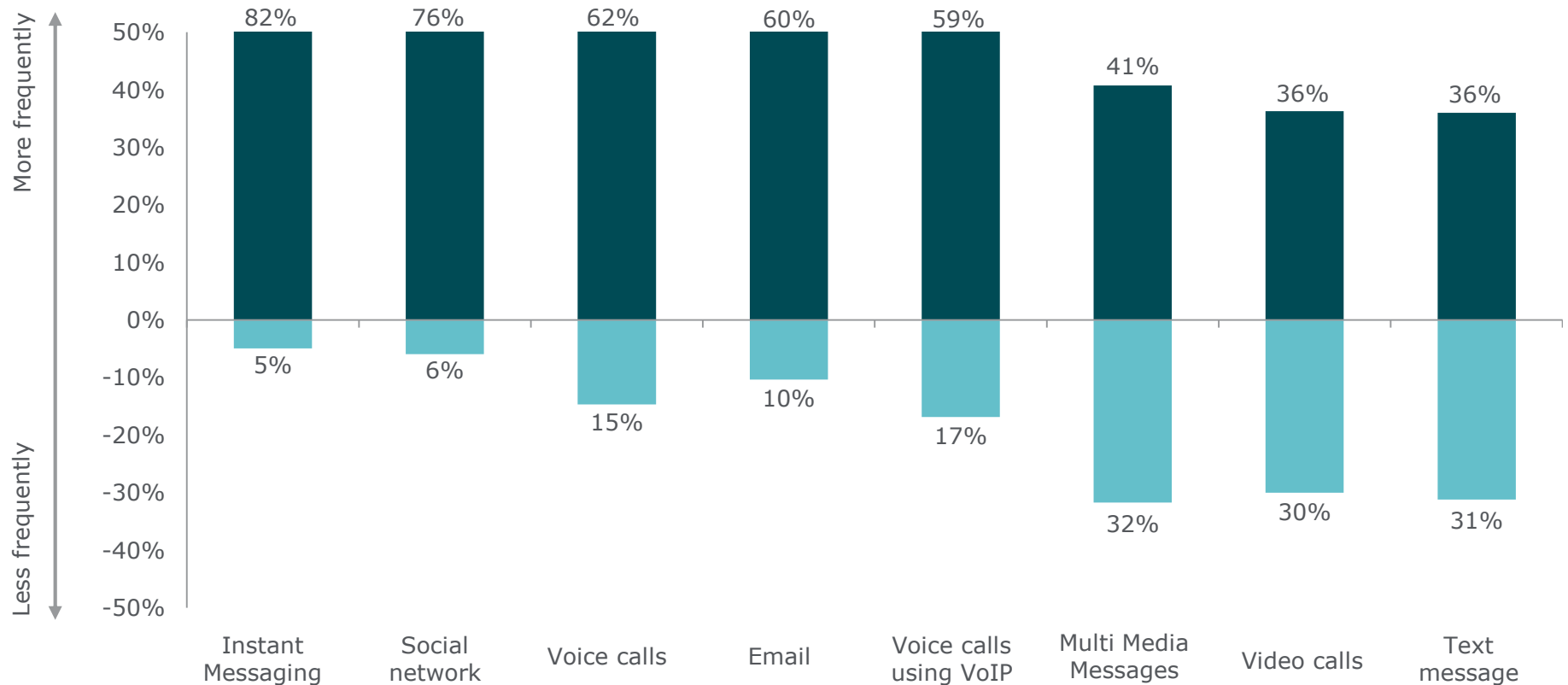
Base: Smartphone owners: 2013: 577, 2015: 1547, 2016: 1598

Note: The options "emails" and "social networks" were not available in the 2012 and 2013 questionnaire

Deloitte Global Mobile Consumer Survey, 2016

Usage frequency has also increased for most data communications services

Q. For each of the following ways of communicating via your mobile devices overall, please say whether you do them more, less or about the same as you did 12 months ago.



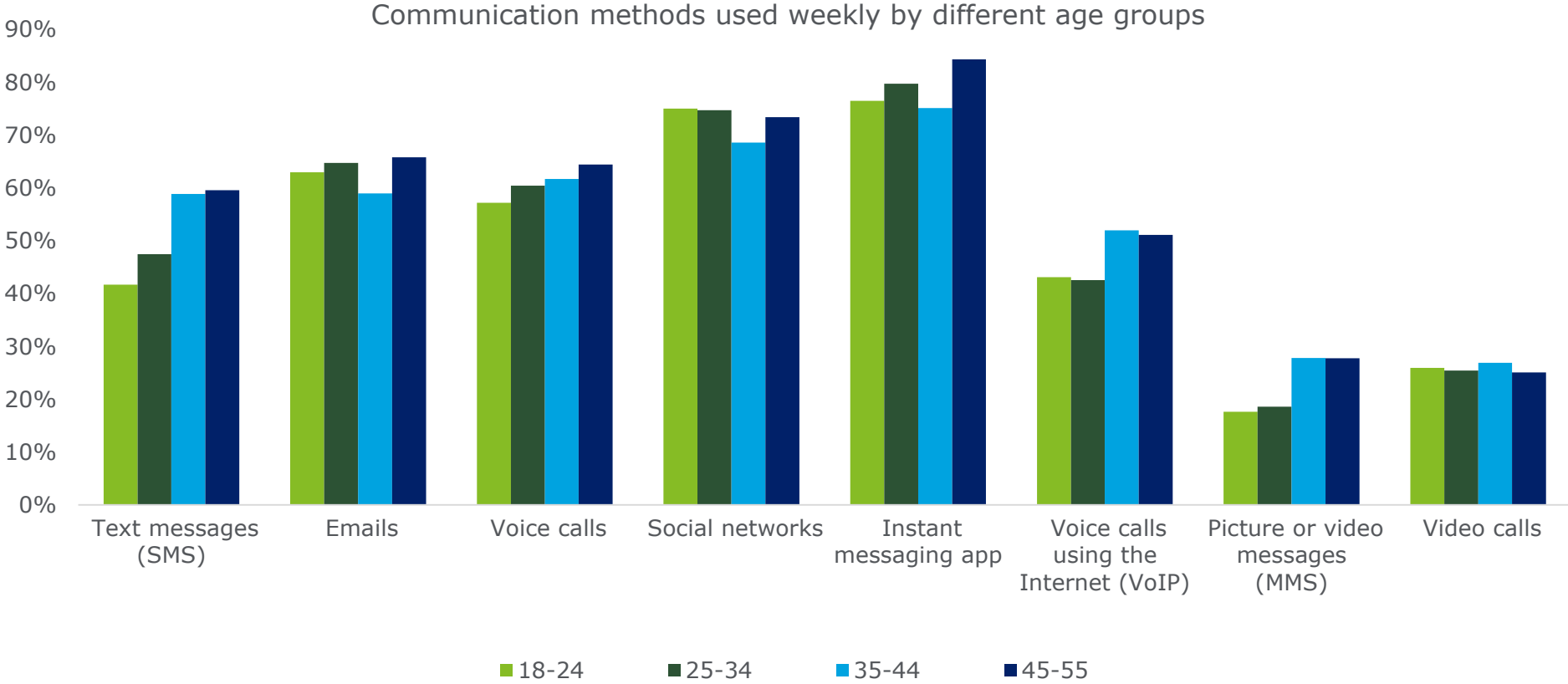
Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016

Base: who have used their phone to communicate in the last 7 days: Instant messaging: 1214, Social network: 1114, Voice calls: 939, Email: 968, VoIP: 702, Multi Media Message: 304, Video calls: 375, Text messages: 781

Note: Respondents who have not used a particular service and those who don't know how their usage compares to 12 months ago were excluded from this analysis

IM and Social networks are the most used type of communication on a weekly basis across all age groups

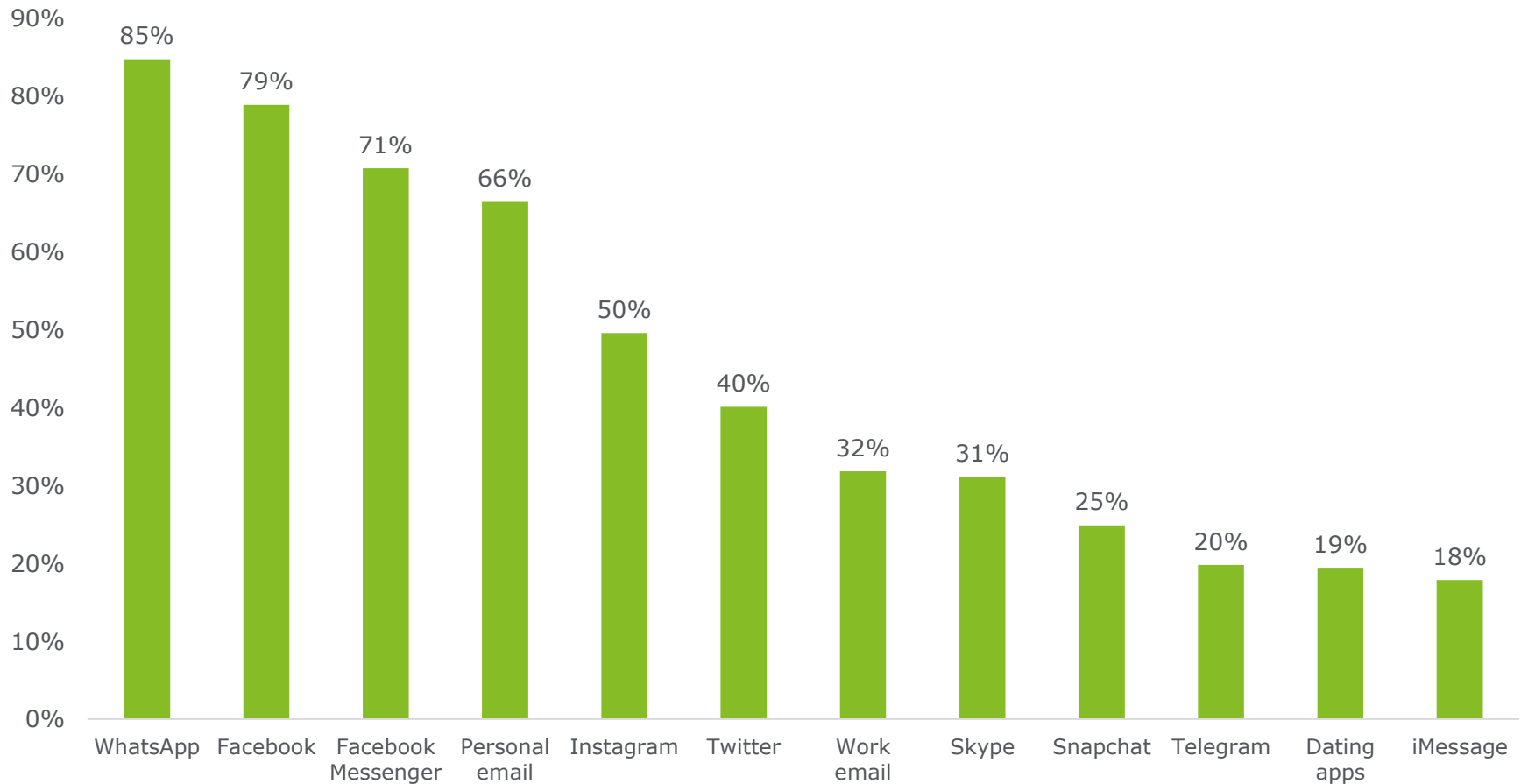
Q. Please state which, if any, you have used?



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
 Base: All smartphone owners: 1598, 18-24: 348, 25-34: 477, 35-44: 397, 45-54: 375

WhatsApp is the most popular communications app; Facebook properties dominate communications

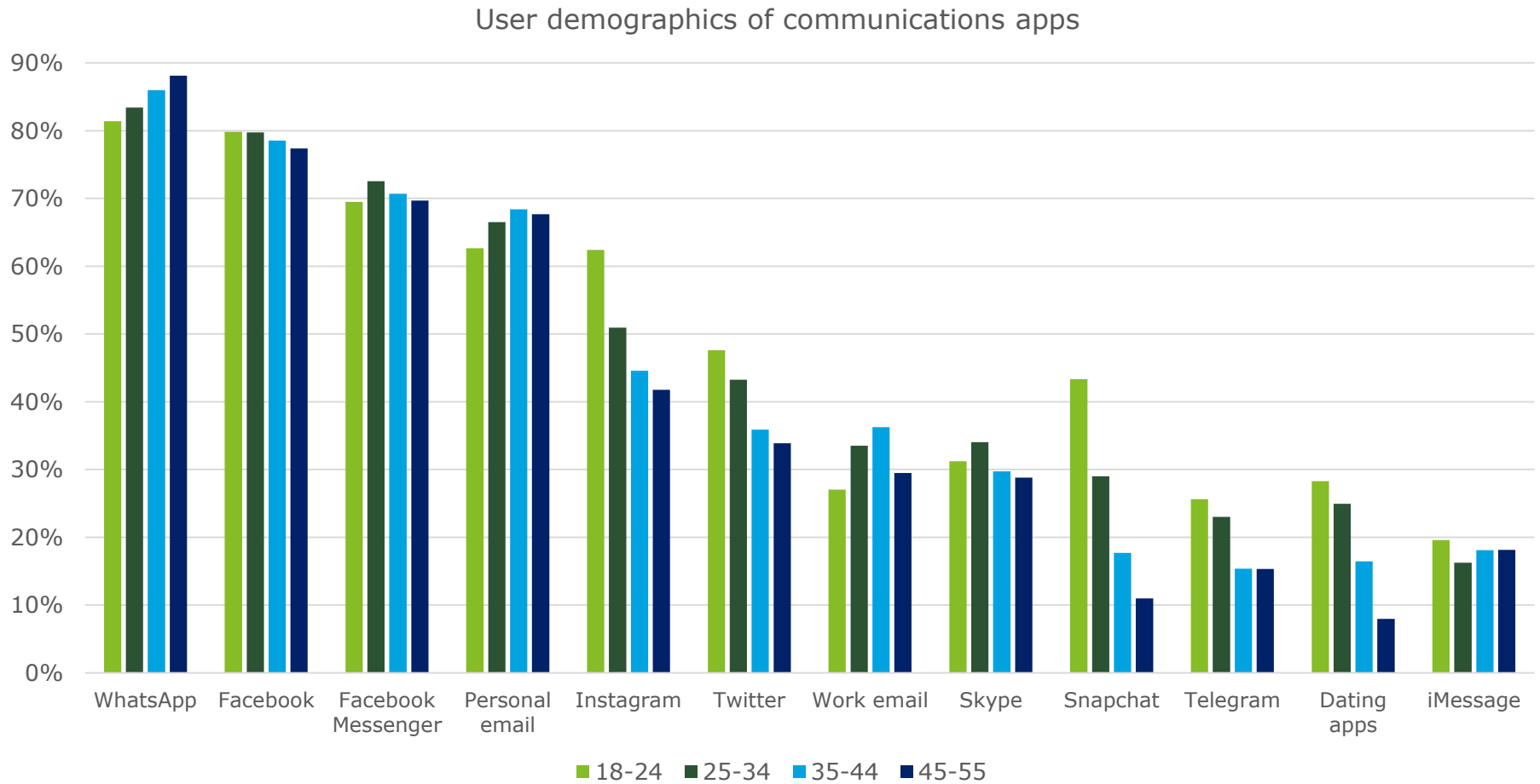
Q. Below is a list of apps which you may have on your mobile phone. Please state which you use.



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
Base: All phone owners who use IM, social networks or emails 1640

Snapchat has the most “extreme” usage demographic (followed by Instagram then Twitter). Whilst Facebook, WhatsApp and Skype are more widespread

Q. Below is a list of apps which you may have on your mobile phone. Please state which you use.

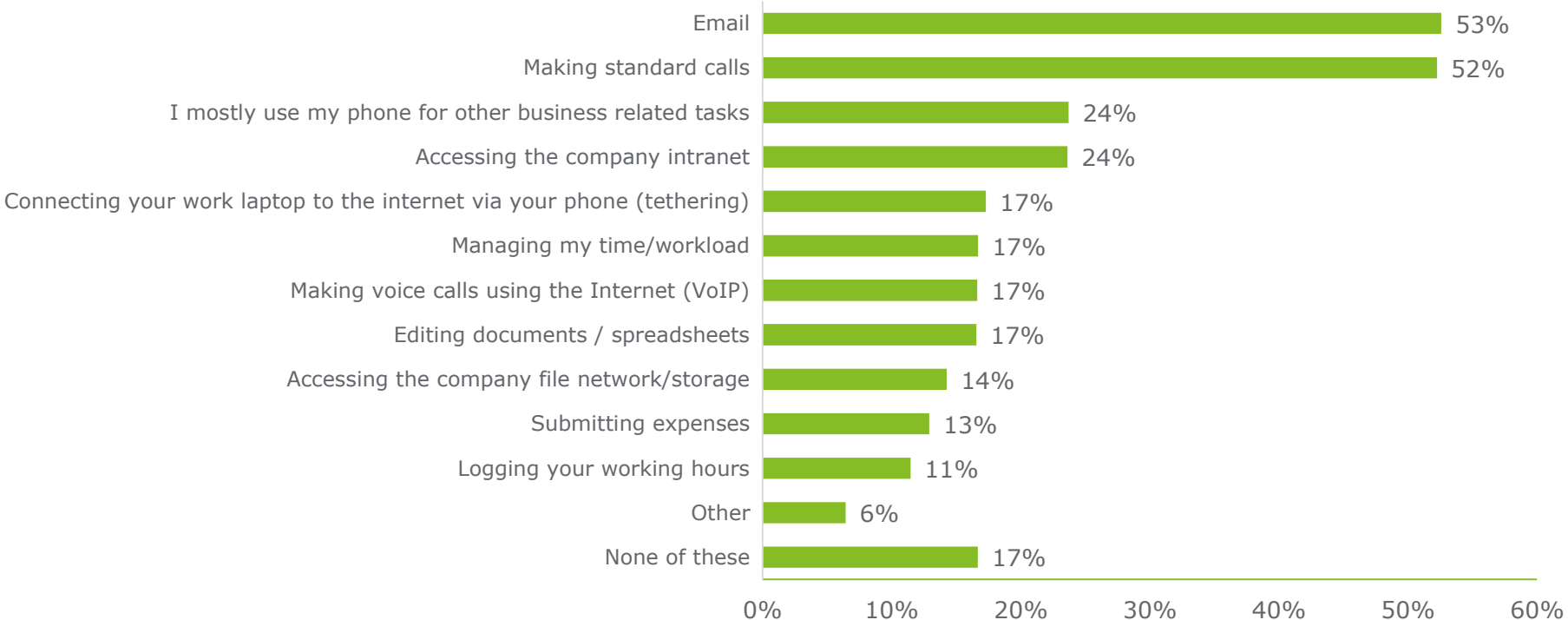


Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016

Base: All phone owners who use IM, social networks or emails 1640, 18-24: 351, 25-34: 486, 35-44: 405, 45-55: 398

Despite the investment of companies in mobile technology to enable submitting of expenses via mobile tech, the only 2 significant activities are email and standard voice calls.

Q. Do you use your smartphone for any of the following work-related business activities?

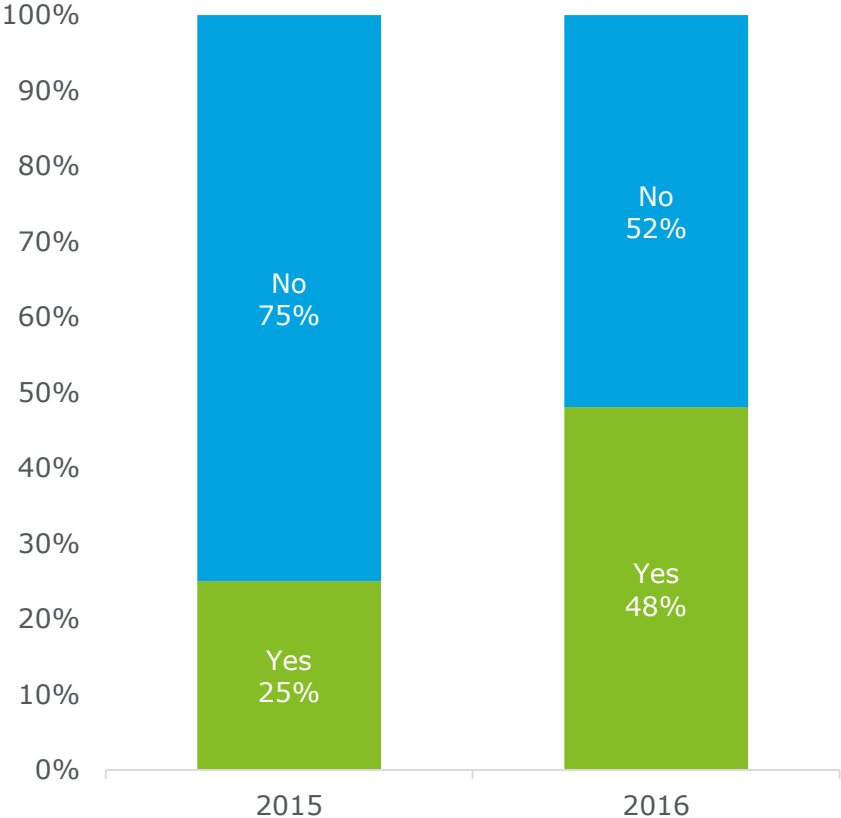


Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
Base: All smartphone owners who work: 1105

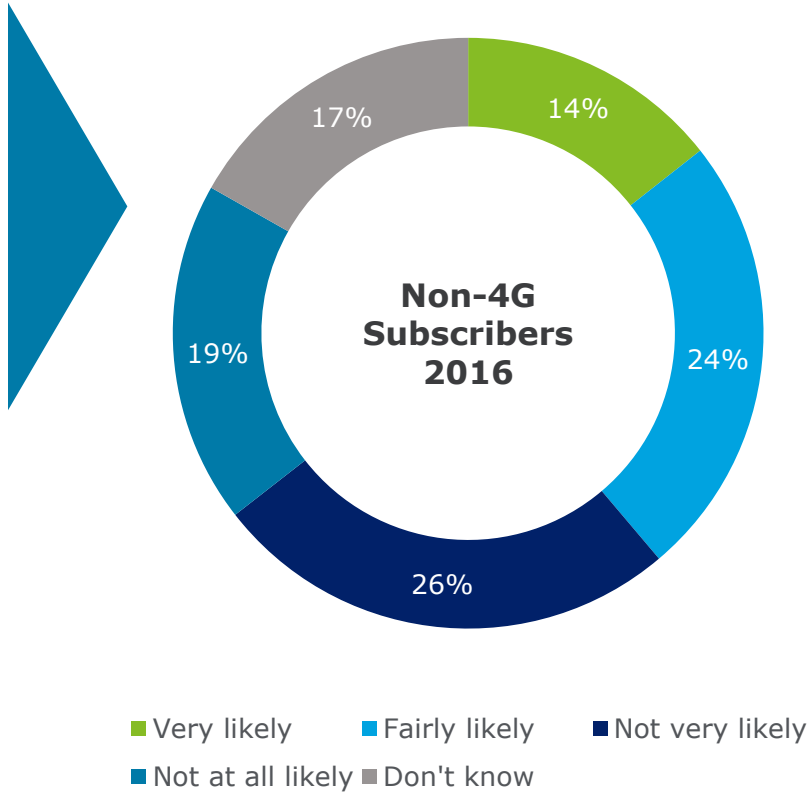
Connectivity

4G adoption has leapt in the last year to become the predominant data network, and should grow strongly over the next year

Q. Is your mobile on a 4G/LTE network?



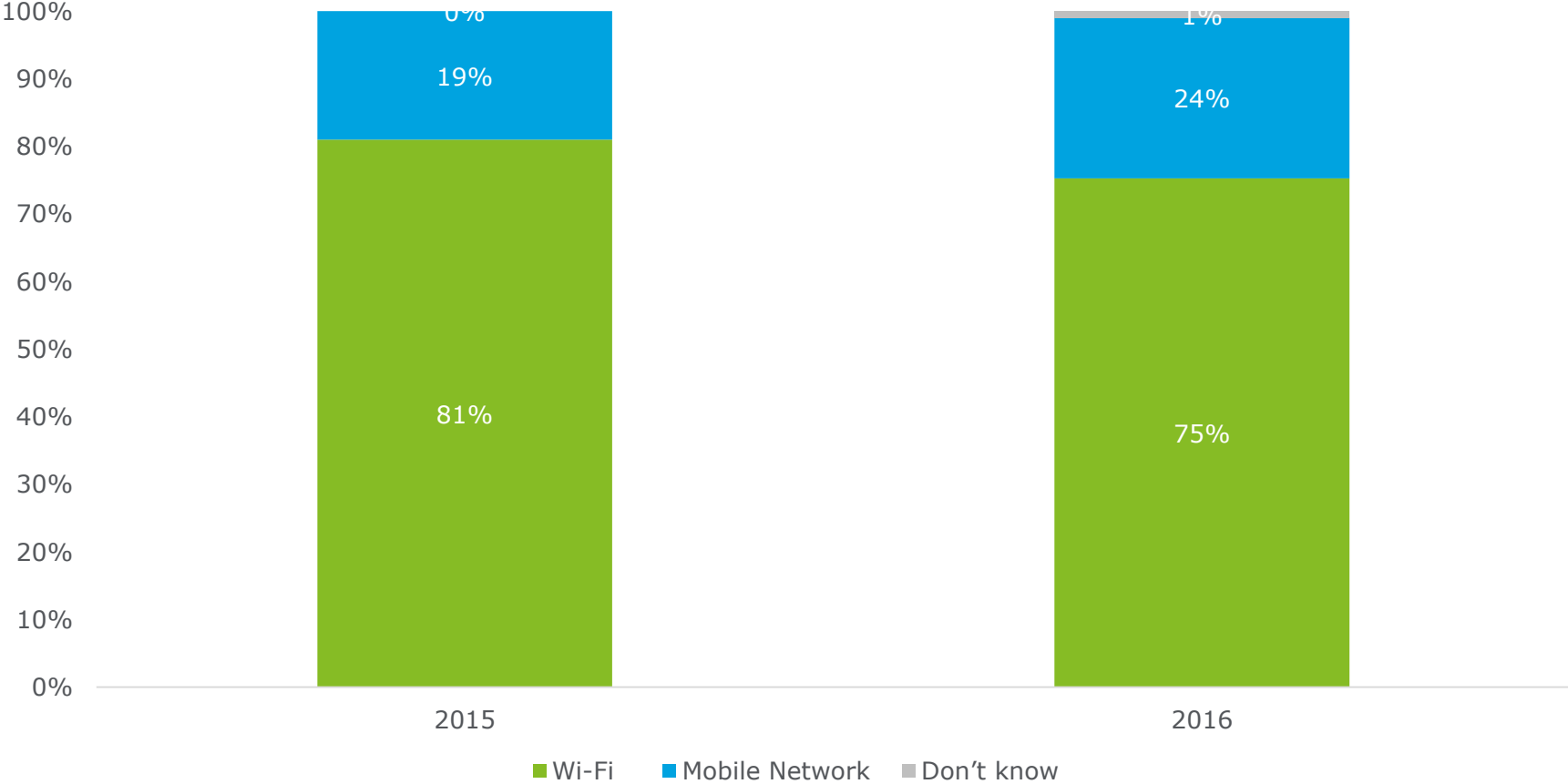
Q. How likely are you to subscribe to 4G/LTE in the next 12 months?



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015, May - Jun 2016
 Base: All phone owners: 2015: 1767, 2016: 1743, Those who do not subscribe to 4G in 2016 : 1009
 Note: "I don't know" was not an answer option in 2015 or 2014 GMCS. Assume "I don't know" respondents are included in "No" responses for those years
 Deloitte Global Mobile Consumer Survey, 2016

A higher 4G penetration rate has reduced the reliance on Wi-Fi among smartphone owners

Q. Thinking about how you connect your devices to the Internet, which, if any of the following, types of connectivity do you use MOST OFTEN?

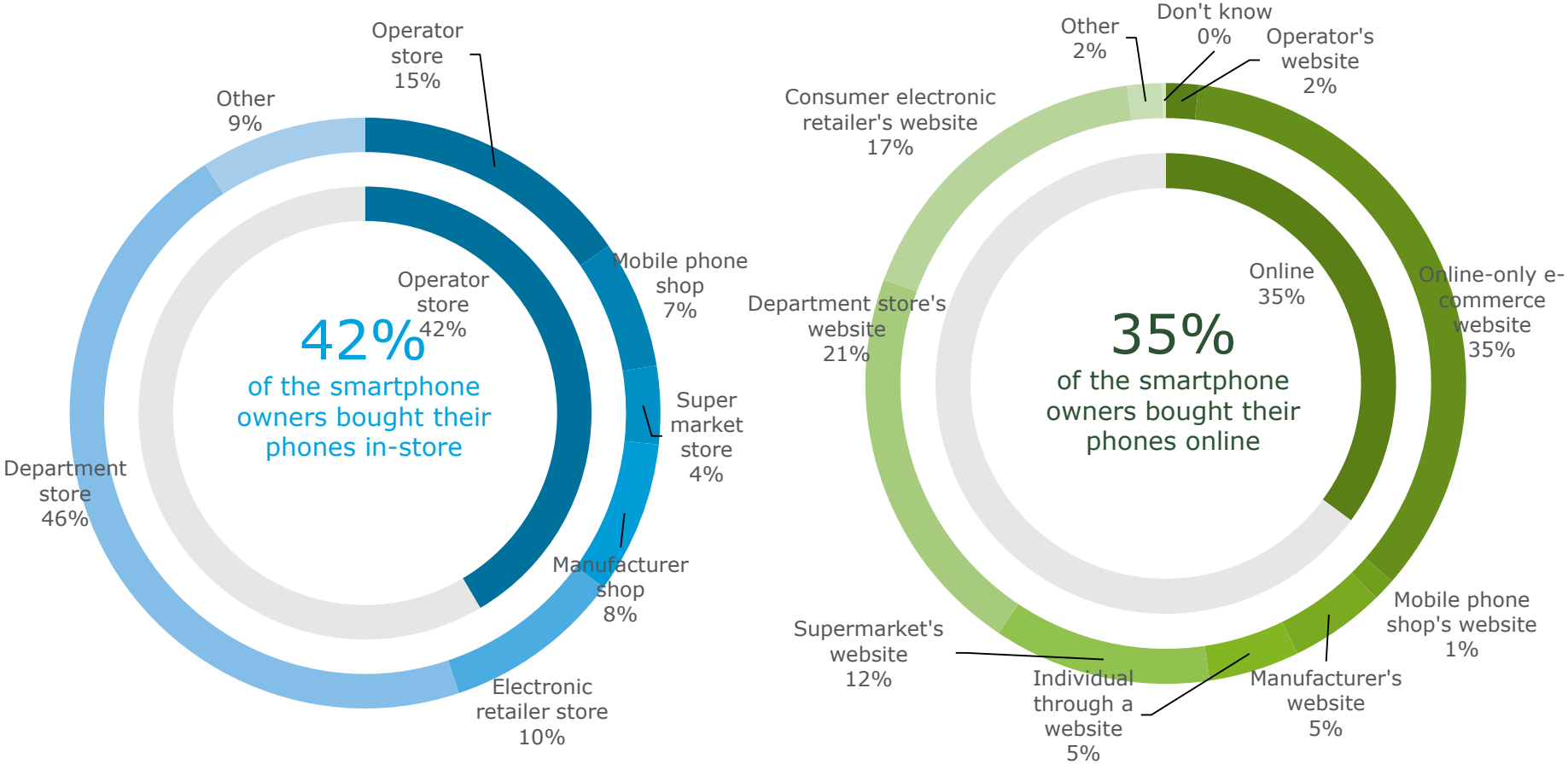


Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015, May - Jun 2016
Base: All smartphone users who connect their devices to both WiFi and Mobile networks, 2015: 1512, 2016: 1598
Note: In 2015 survey, there was a pre-cursor question "How do you connect each of your device(s) to the Internet? Please select all that apply"
Deloitte Global Mobile Consumer Survey, 2016 32
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Smartphone purchasing channel

Department stores are the #1 choice for smartphone purchase offline; and online only e-commerce websites for online purchasers

Q. How did you purchase your current phone? You said you purchased your current phone online/in-store, which of the following best describes where you purchased it from?

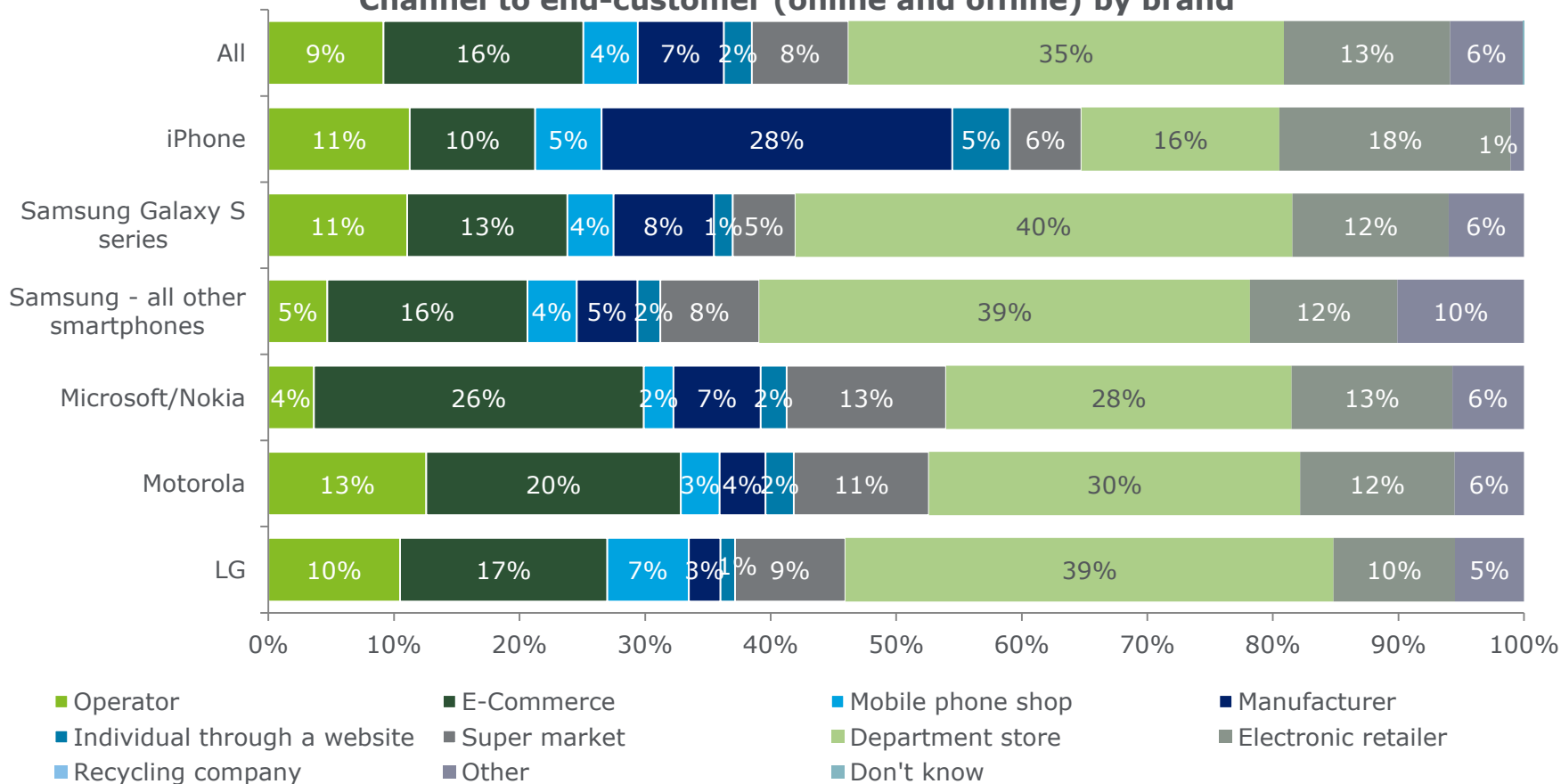


Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
 Base: Smartphone owners who bought their own phones: 1592; online purchase 559; In-store purchase: 661

The department store is the most popular channel for smartphone purchase

Q. How did you purchase your current smartphone?

Channel to end-customer (online and offline) by brand



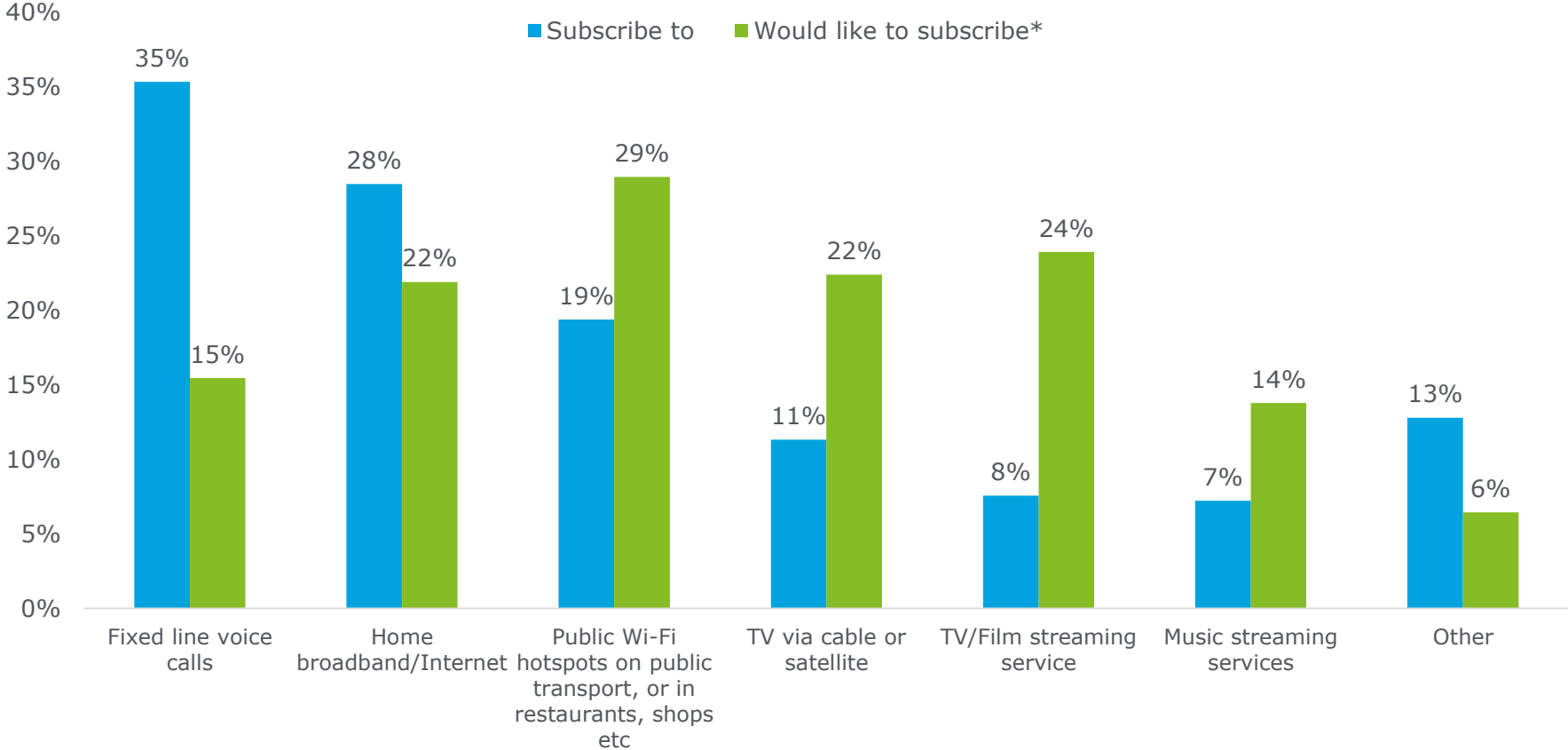
Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016

Base: Smartphone owners who purchased the current phones of these brands- All: 1220, Any iPhone: 90, Samsung all Galaxy S: 222; Samsung- all other smartphones: 227, Nokia Smartphone: 73, Motorola: 222, LG: 184

Operators & operator specific services

Over two-thirds use additional services provided by their mobile operator and a similar level would be interested more services

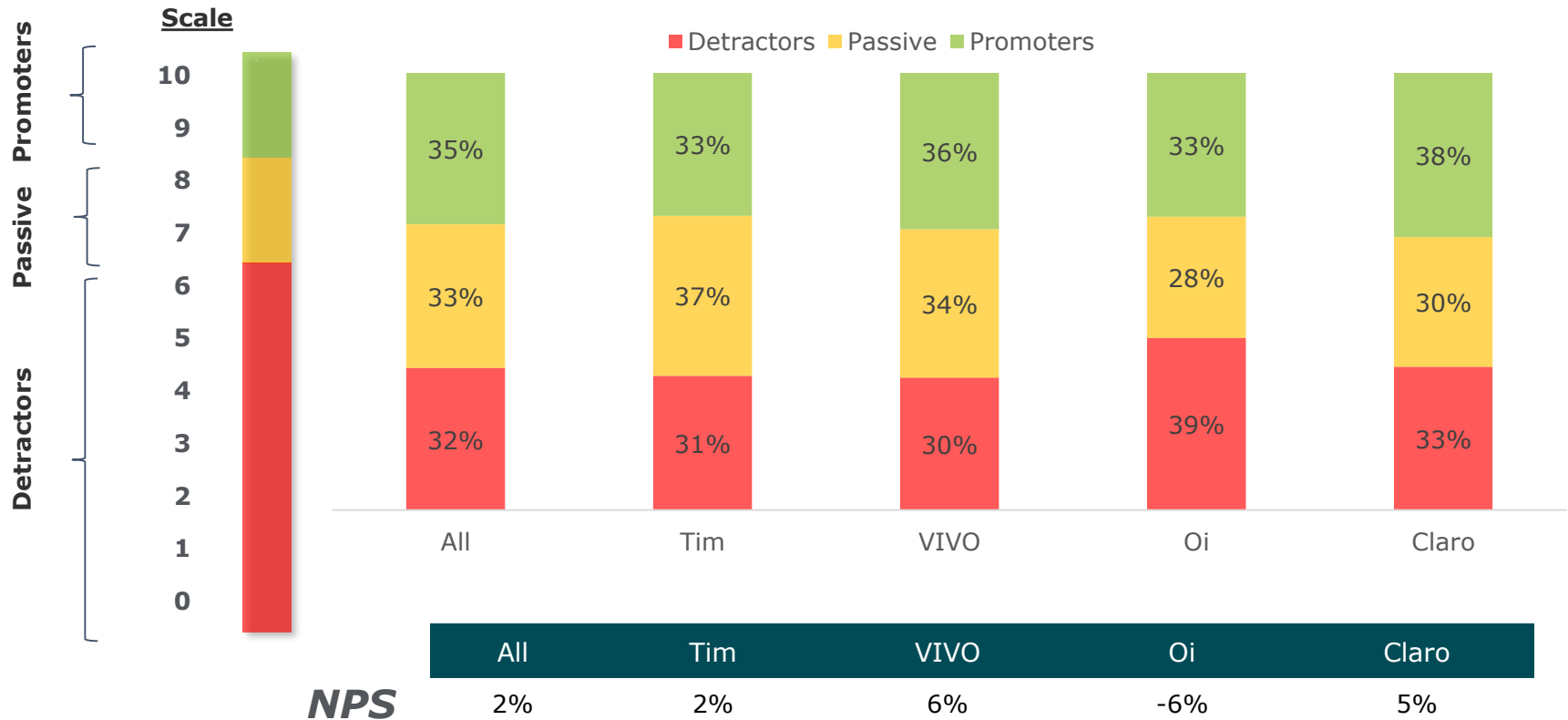
Q. Which of the following services offered by your mobile operator do you subscribe to/are you using? Which, if any, of the following would you like to add to your existing package with your mobile operator.



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
Base: All phone owners 1743
Note: * Respondents who don't yet subscribe
Deloitte Global Mobile Consumer Survey, 2016

Across networks more than 3 in 10 respondents recommend their network to their friend, colleague or relative

Q. How likely would you be to recommend your provider to a friend, colleague or relative?



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016

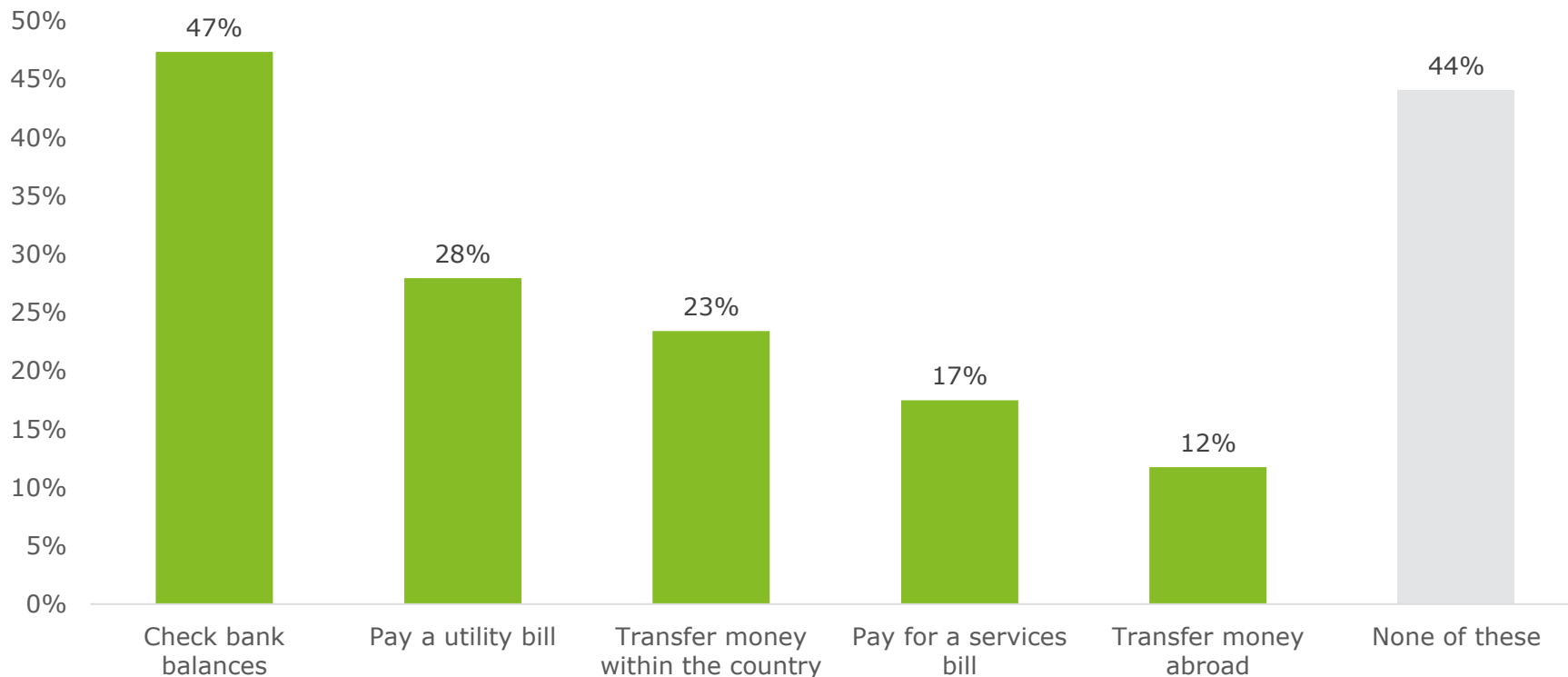
Base: All phone/smartphone owners who mentioned their current operator: All: 1738, Tim: 570, VIVO: 466, Oi: 345, Claro: 332

Note: Net Promoter Score (NPS) = Promoters - Detractors

Mobile financial transactions & commerce

The majority of phone owners undertake some type of financial transaction on their phone

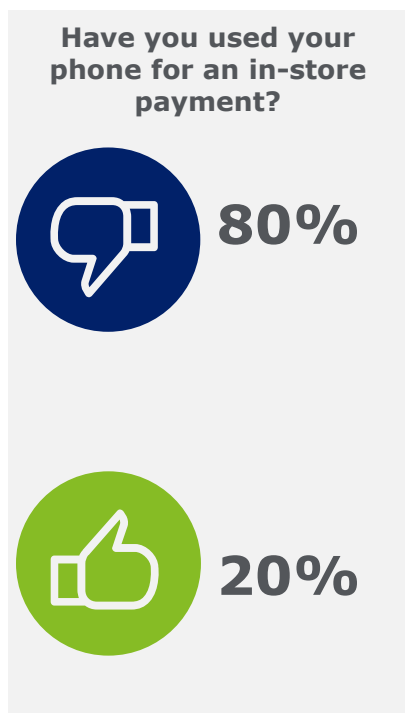
Q. In the last 3 months, have you used your phone to do any of the below?



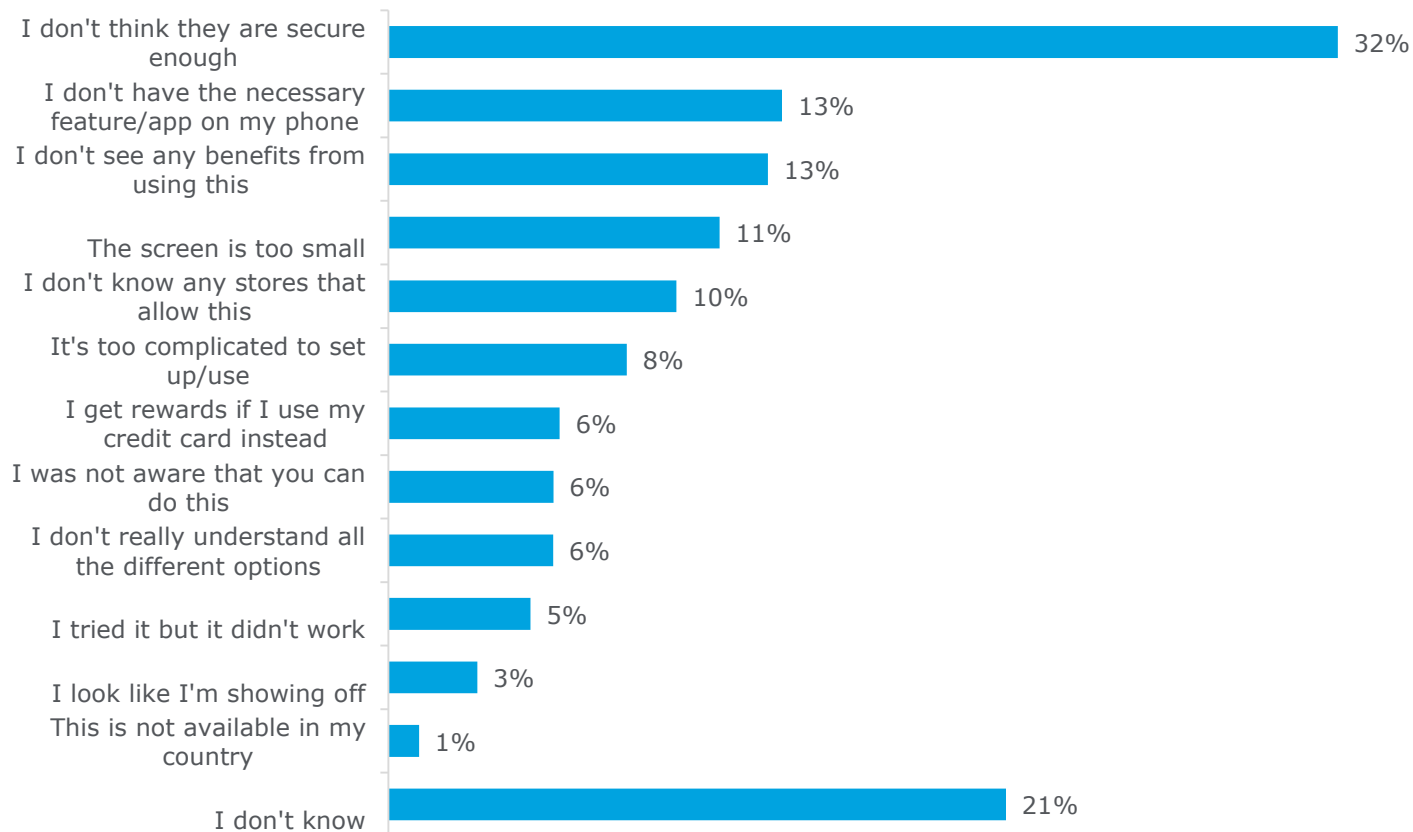
Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
Base: All phone owners 1743

Fear about security is the key barrier for in-store payments uptake

Q. What are the main reasons why you don't use your phone to make payments in-store?



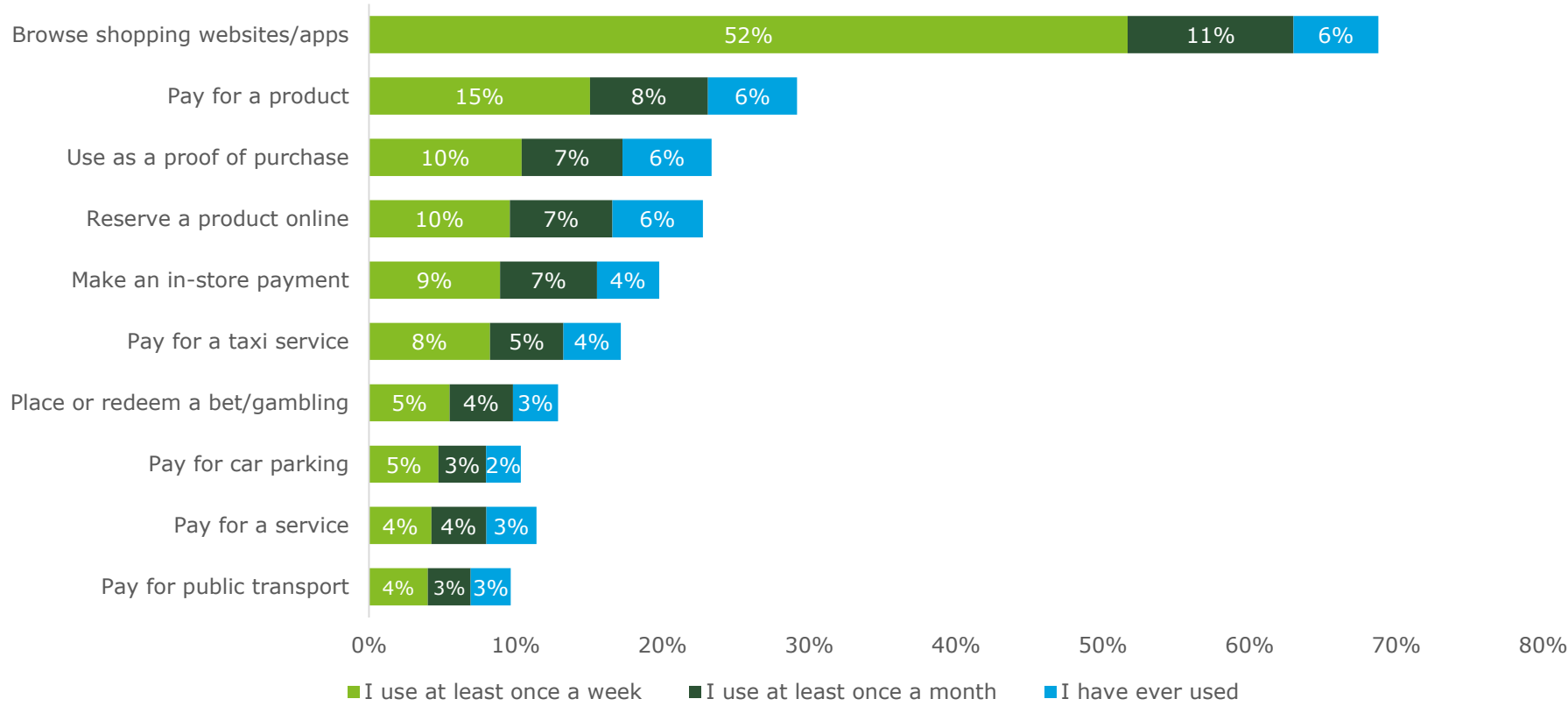
Those that have never made an in-store payment



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
Base: Smartphone owners that have never made an in-store payment: 1265

Among all shopping related activities, browsing a shopping website/app is the most popular

Q. which, if any, you ever use your phone to do, which you use at least once a month and which you use at least once a week?

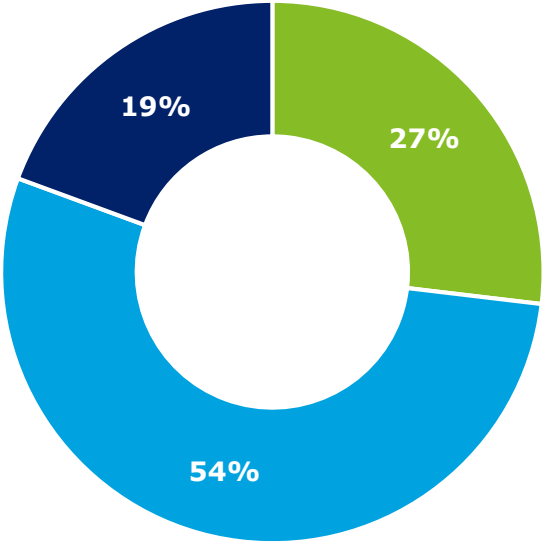


Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
 Base: All phone owners 1743

Privacy and Security

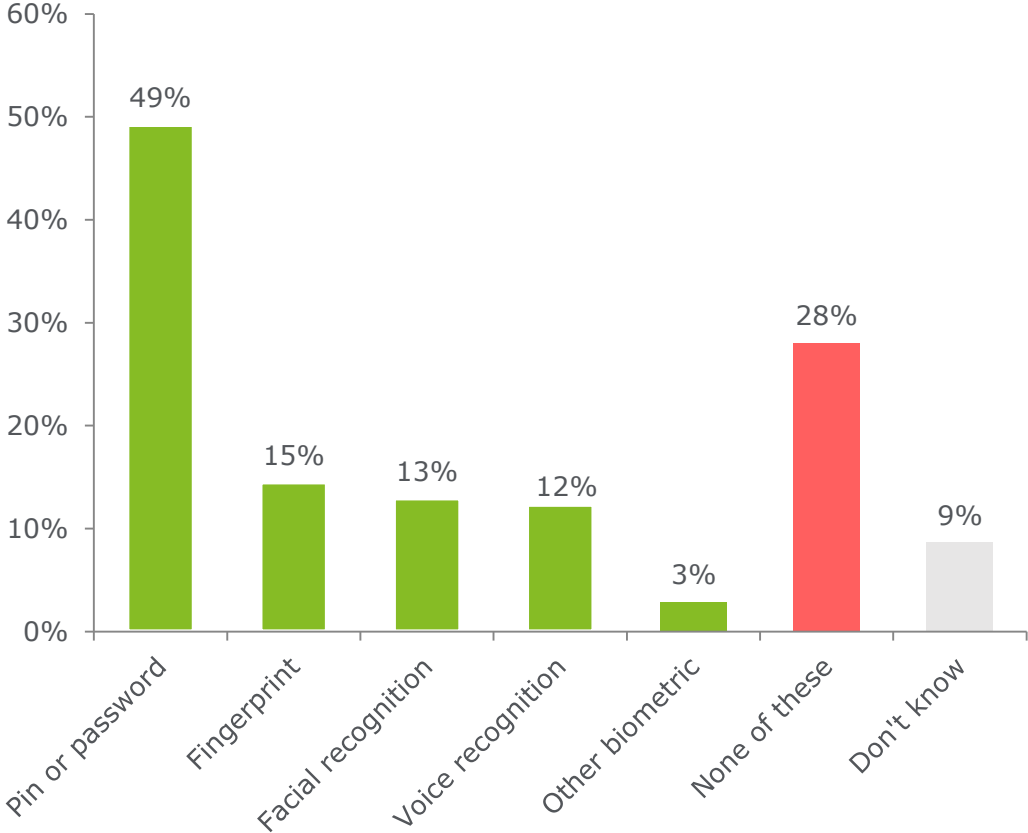
Pin/password is the most used authentication type to unlock your phone, authorise mobile payments or other transactions; nearly one in every three people do not use any form of authentication

Q. Does your mobile phone have a fingerprint reader?



- Yes, my mobile phone has a fingerprint reader
- No, my mobile phone does not have a fingerprint reader
- I don't know

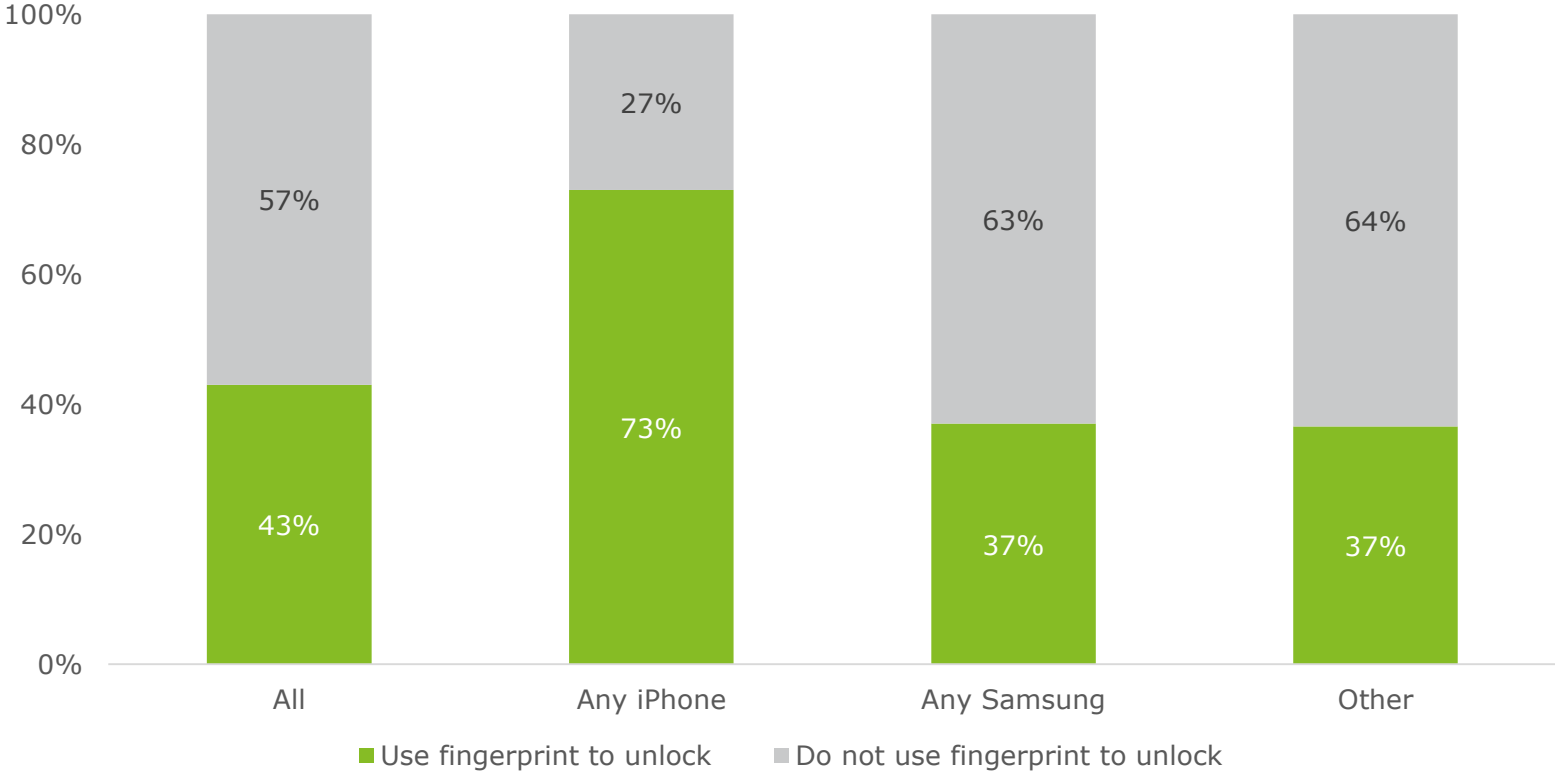
Q. Which, if any, of the methods listed below have you used to identify yourself when unlocking your phone, authorising mobile payments or other transactions?



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
 Base: Smartphone owners 1598

Around two-fifths of respondents with fingerprint compatible devices use fingerprint to unlock or authorise their mobile payments

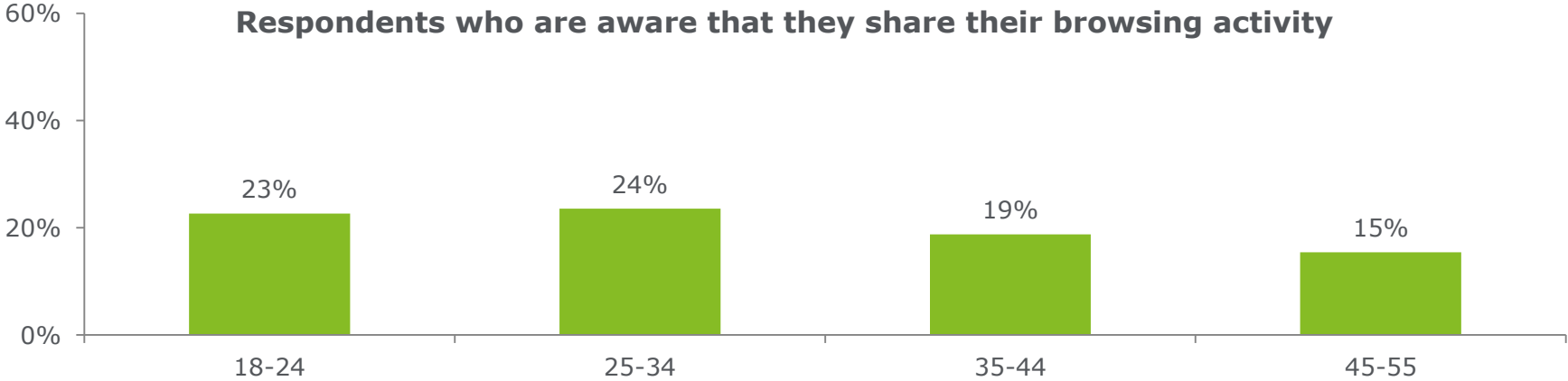
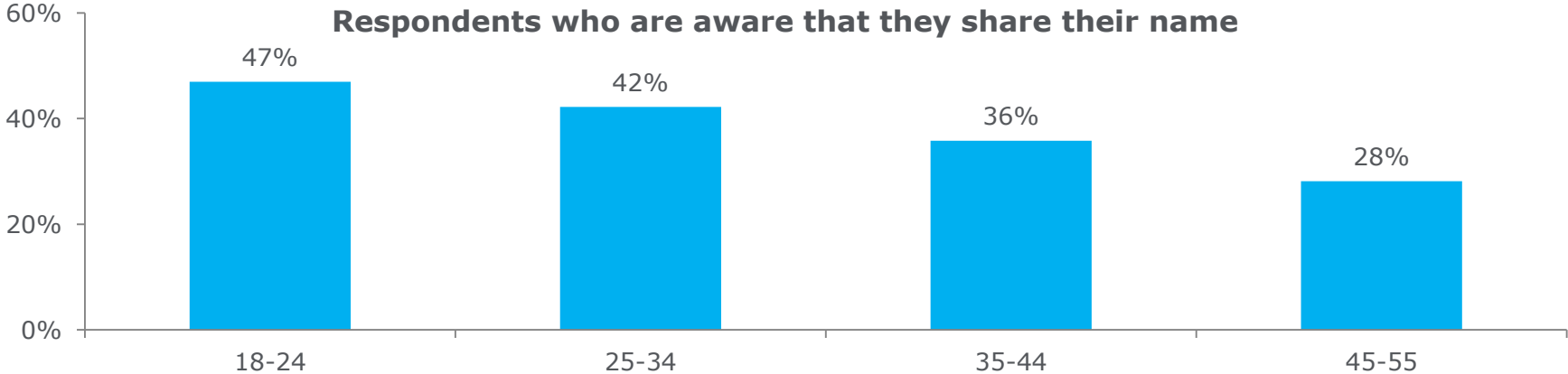
Q. Which, if any, of the methods listed below have you used to identify yourself when unlocking your phone, authorising mobile payments or other transactions?



Source: Brazil edition, Deloitte Global Mobile Consumer Survey May-Jun 2016
Base: Fingerprint compatible device All: 427, Any iPhone: 67, Any Samsung: 160, Other: 200

Nearly half of 18-24 year olds think that they share their name, and 1 in 5 think that they give companies access to their browsing activity

Q. As far of you are aware, which, if any of the following types of information do you already share with at least one organisation online?

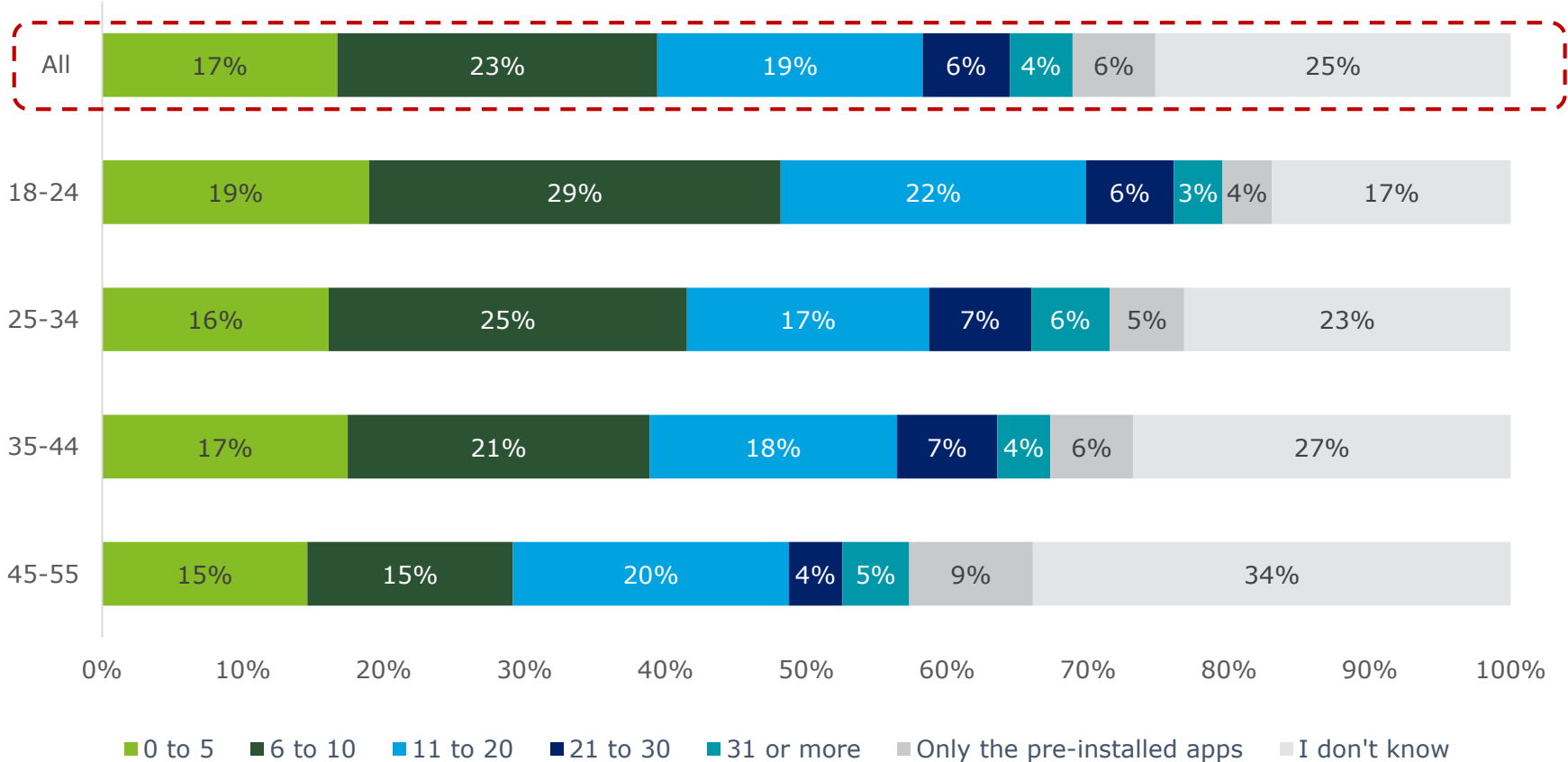


Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
Base: Smartphone owners in age groups 18-24: 348, 25-34: 447, 35-44: 397, 45-55: 375

Apps versus browsers

Among people who have an estimate, the majority of respondents have installed 20 apps or less

Q. Excluding any pre-installed apps, approximately how many apps are currently installed onto your phone?

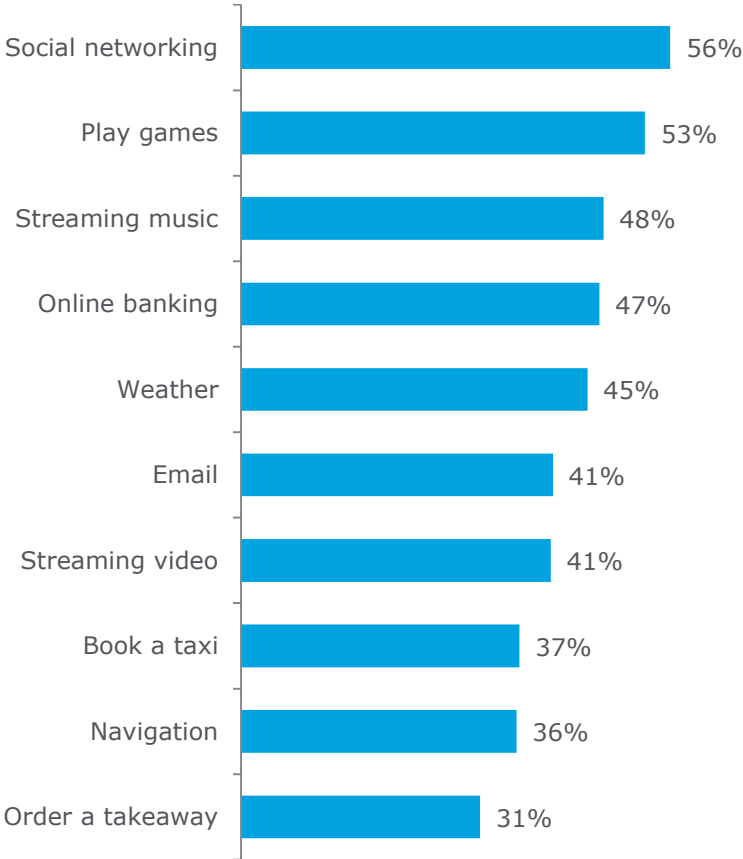


Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
 Base: All smartphone owners age group: All: 1598, 18-24: 348, 25-34: 477, 35-44: 397, 45-55: 375

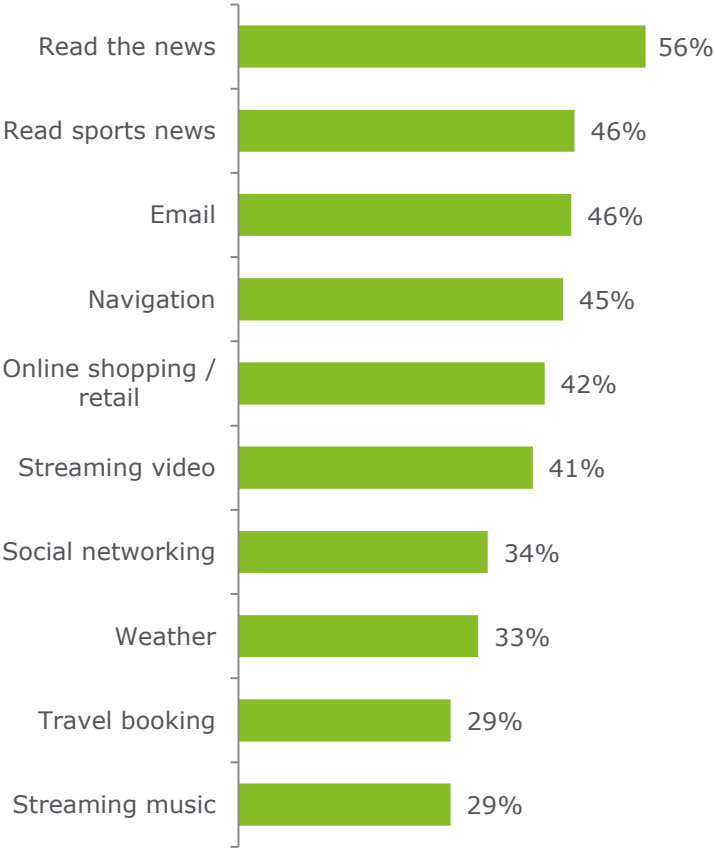
Apps are used in preference to browsers for interactions such social networking and playing games

Q. For each of the mobile activities below, would you typically use an app or a browser?

Top 10 App Activities



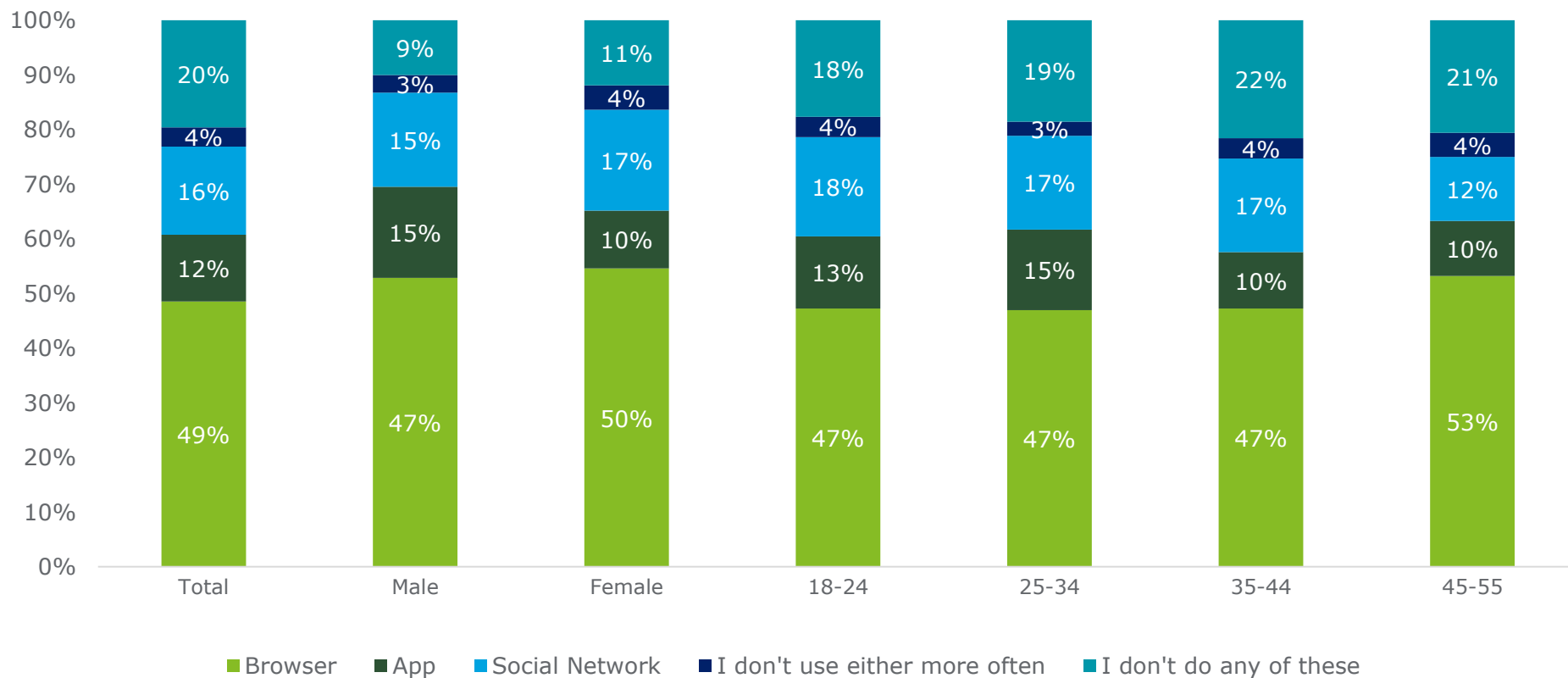
Top 10 Browser Activities



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
Base: All smartphone owners: 1598

Apps can't compete with browsers in the retail space. Consumers are at least 3 times more likely to start their online purchasing channel via the browser...

Q. Which of the following do you prefer to use on your phone when searching online for a product that you are likely to buy?

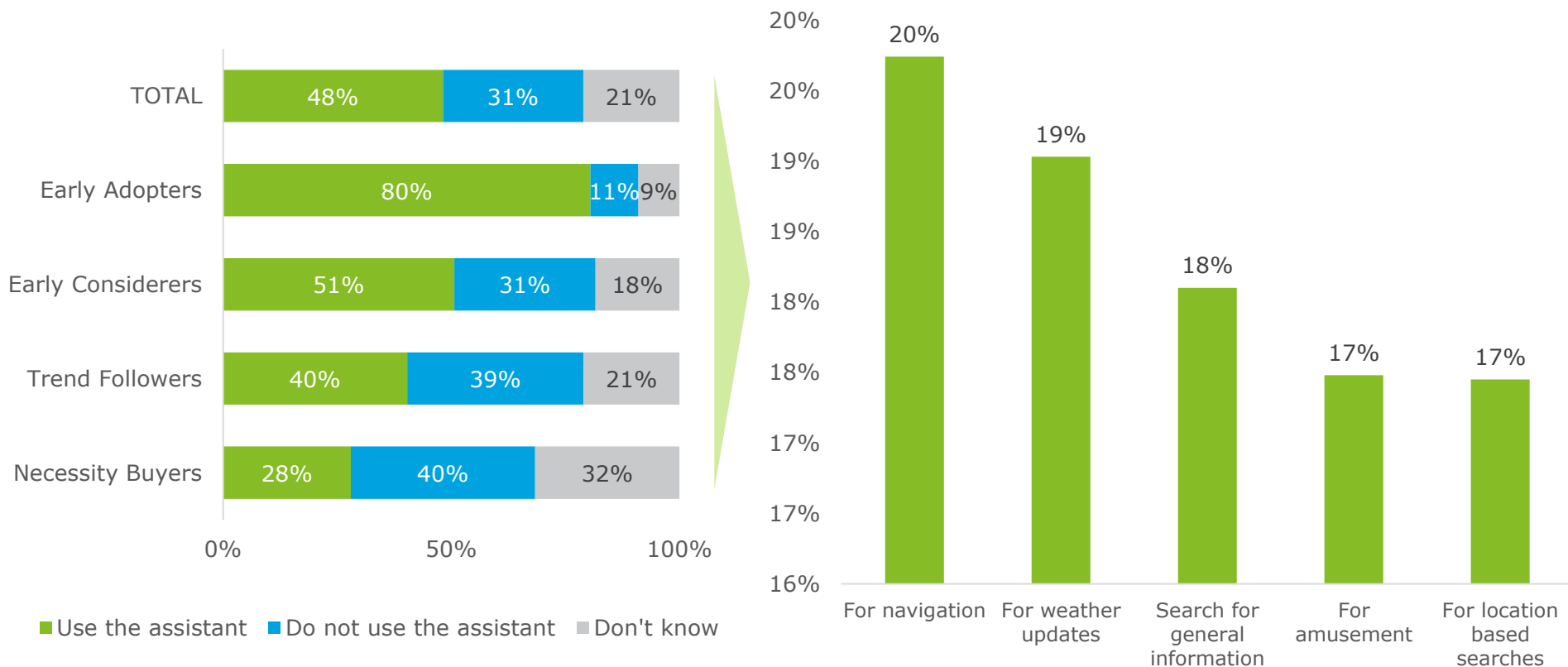


Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016

Base: All smartphone owners: 1598, 18-24: 348, 25-34: 477, 35-44: 397, 45-55: 375, Male: 767, Female: 830

17% use for voice assistant apps is "for amusement"; four-fifths of early adopters use assistant app

Q. For which, if any, of the following reasons do you ever use the assistant app provided on your mobile phone?



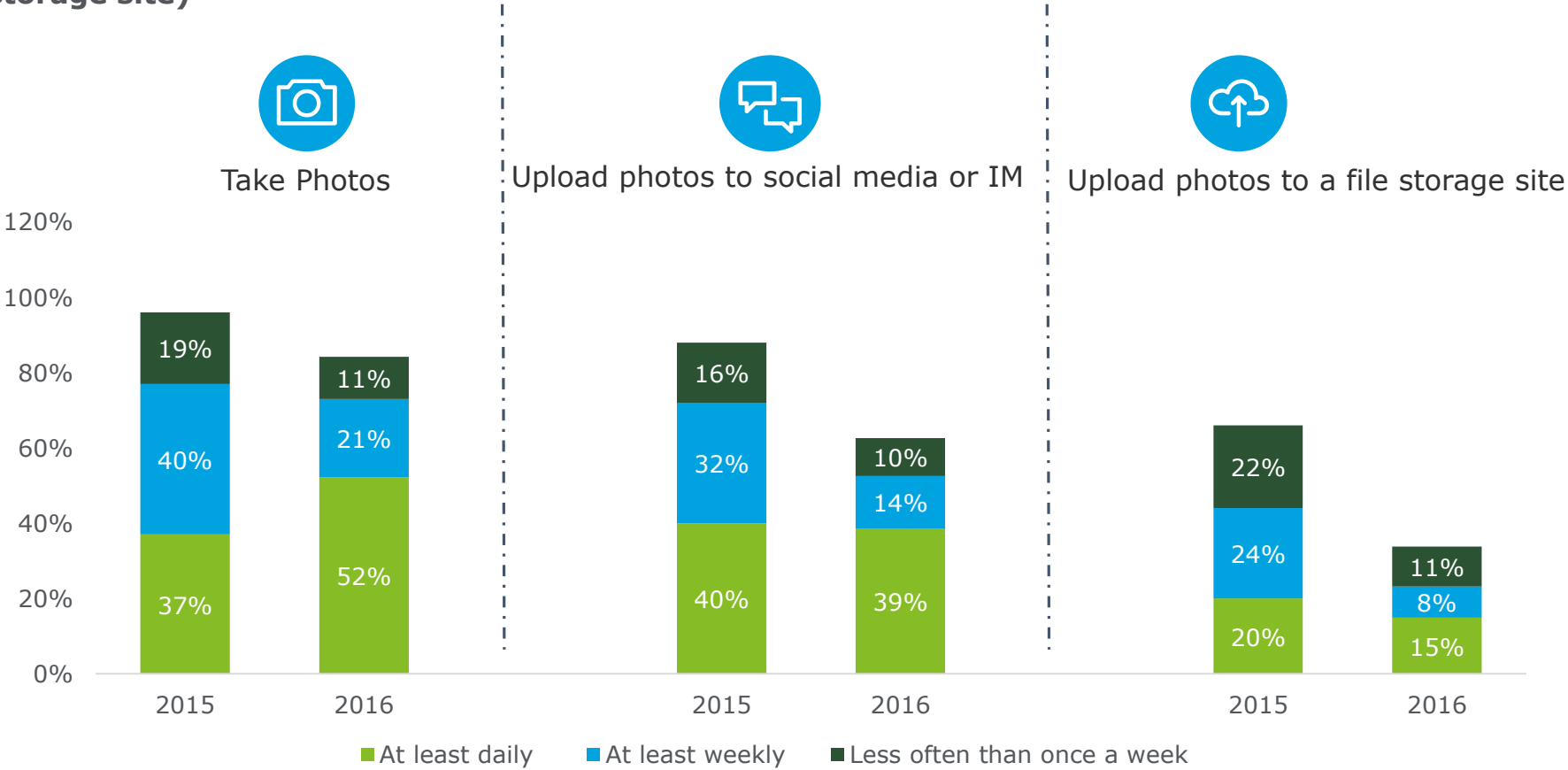
Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016

Base: All smartphone owners: 1598, Early Adopters: 250, Early Considerers: 668, Trend Followers: 325, Necessity Buyers: 312

Media creation and consumption

Around a half of smartphone owners take photos daily; an additional fifth take photos at least once per week

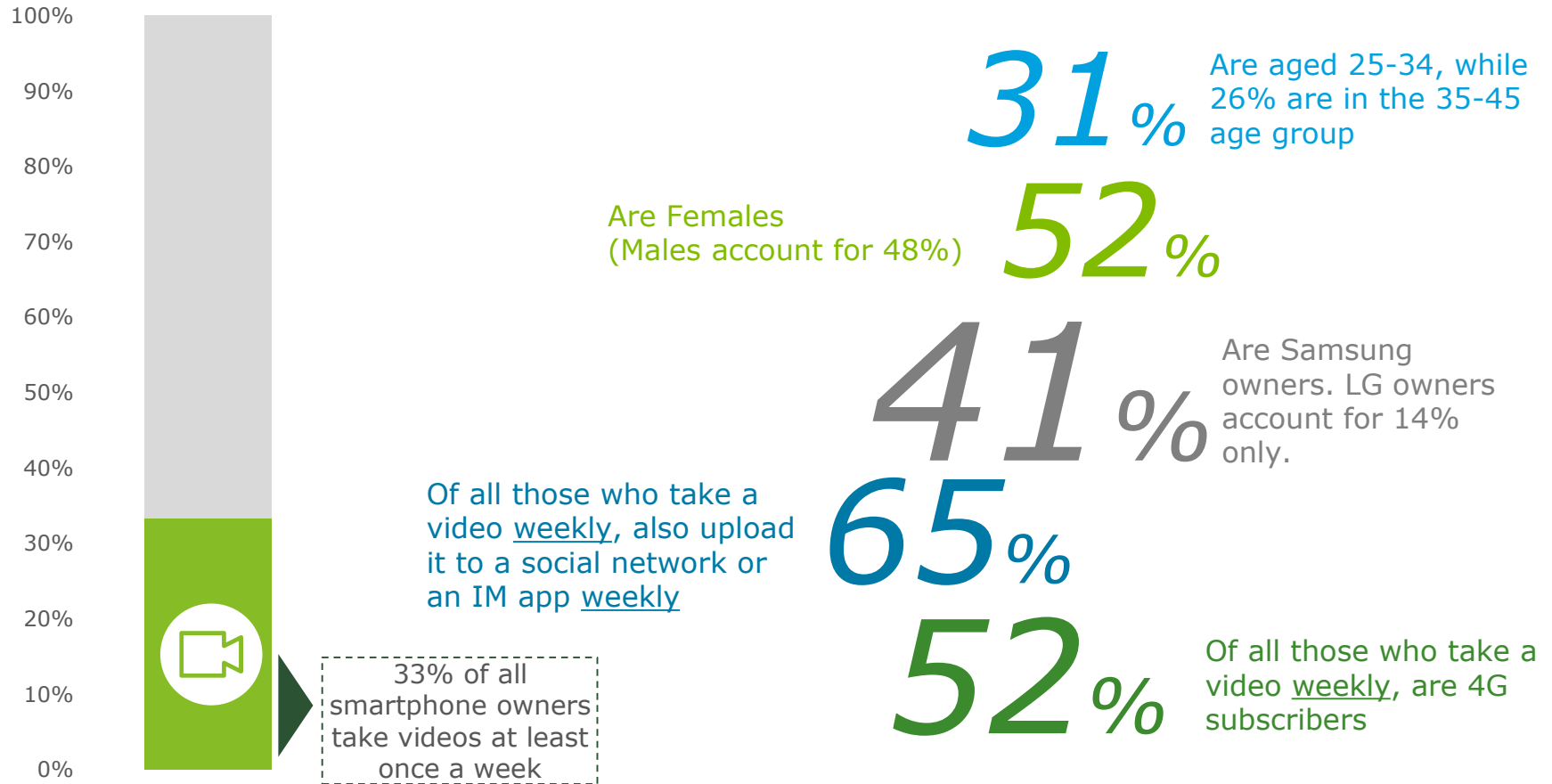
**Q. Please state which, if any, you ever use your phone to do, which you use once a week and which you use at least once a day.
(Take photos; Upload / share photos on social networks or IM apps; Upload photos to a file storage site)**



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015, May - Jun 2016
Base: Smartphone owners 2015: 1547, 2016: 1598

The most intense video takers are either aged 25-34, female, Samsung owners or 4G subscribers (in some cases all)

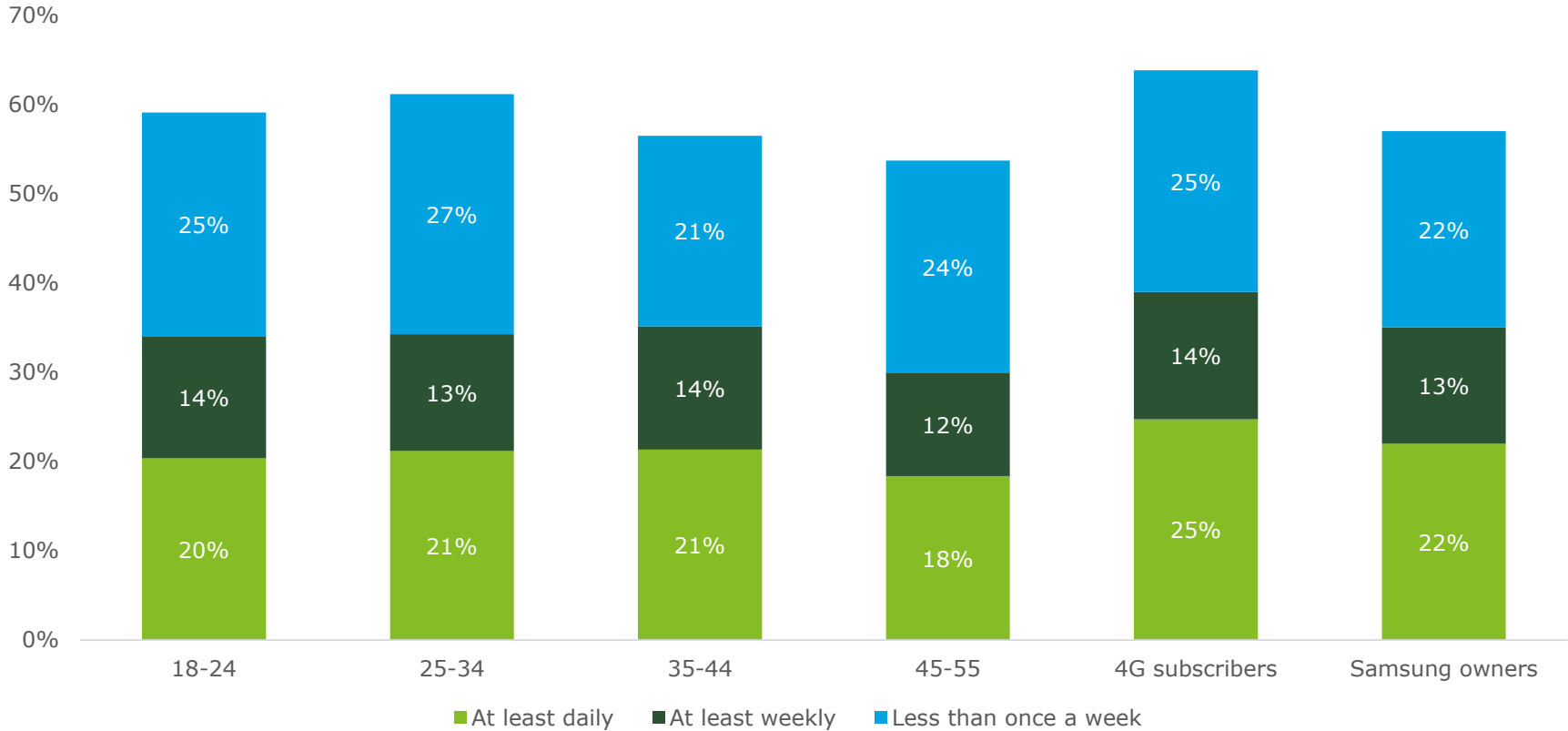
Q. Which, if any, you ever use your phone to do, which you use once a week and which you use at least once a day. (Take videos; Upload / share videos on social networks or IM apps)



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May – Jun 2016
Base: All smartphone owners : 1598, Those who take videos weekly : 534

4G subscribers are capturing more videos on phone; similar levels of video capture across the 18-44 age groups

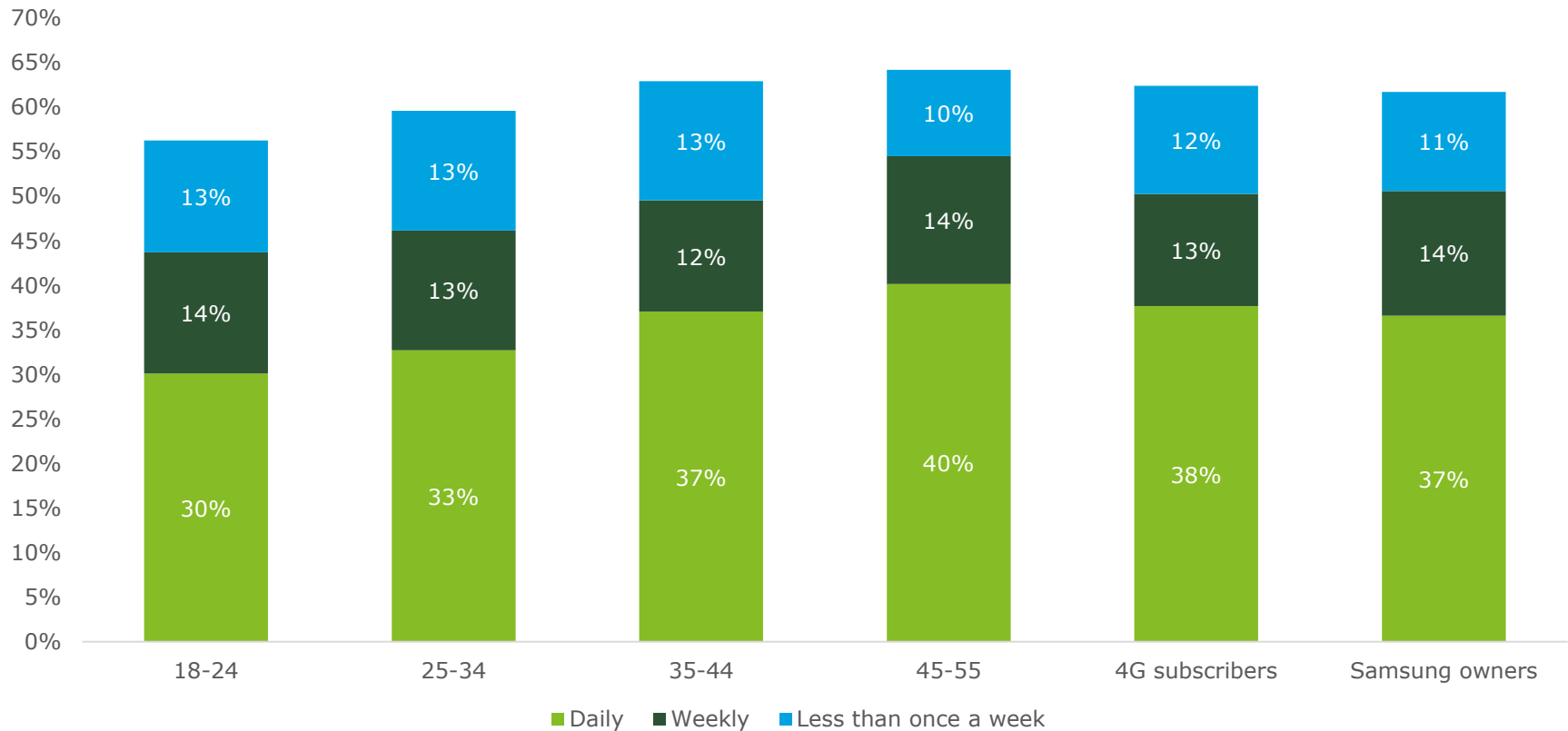
Q. Please state which, if any, you ever use your phone to do, which you use at once a week and which you use at least once a day. – Take videos



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
 Base: Smartphone owners 1598; Smartphone owners in the age group 18-24: 348, 25-34: 477, 35-44: 397, 45-55: 375; 4G subscribers: 711;
 All Samsung owners: 619

Two-fifths of 45-55 year olds are uploading or sharing videos on a daily basis

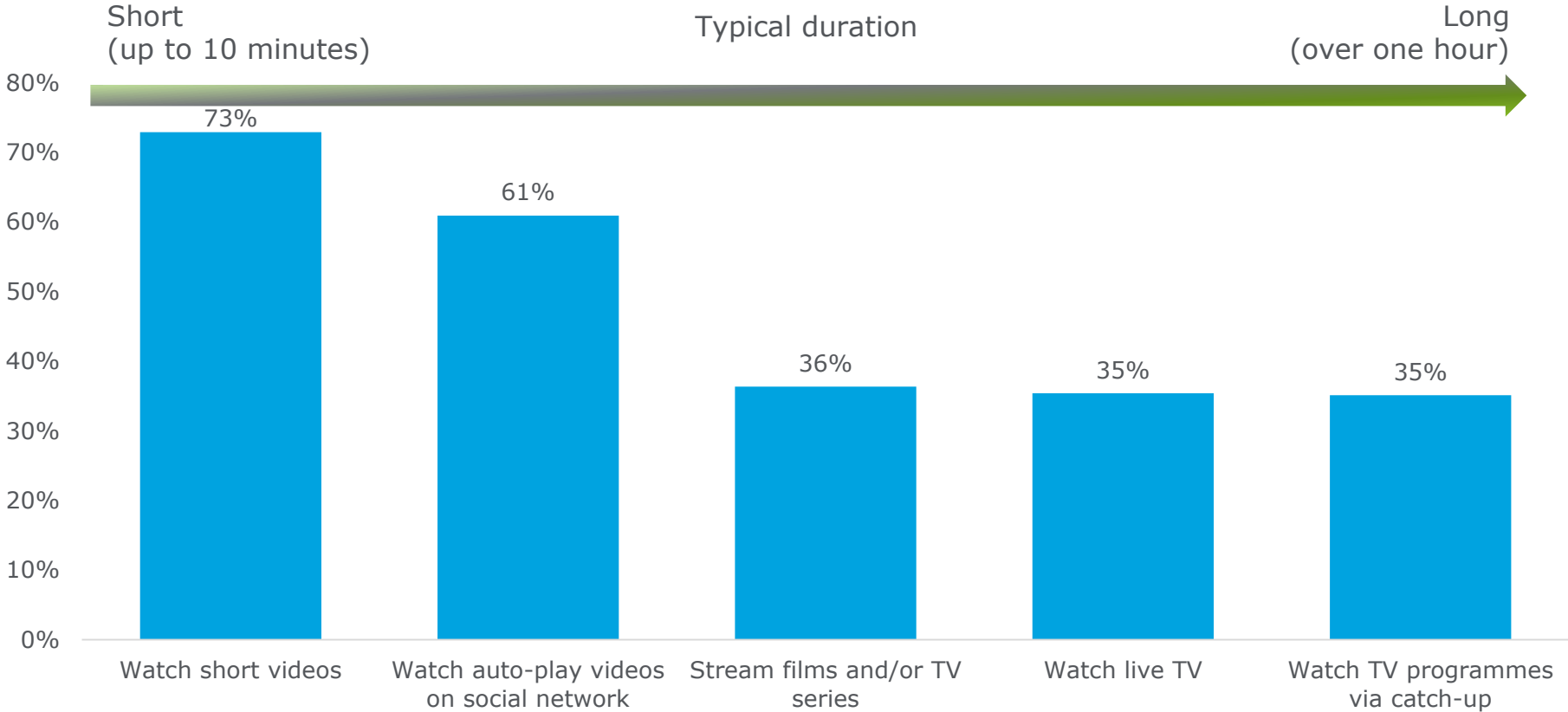
Q. Please state which, if any, you ever use your phone to do, which you use at once a week and which you use at least once a day. – Upload or share videos from phone using a social network or IM app



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
 Base: Smartphone owners 1598; Smartphone owners in the age group 18-24: 348, 25-34: 477, 35-44: 397, 45-55: 375; 4G subscribers: 711;
 All Samsung owners: 619

Video usage declines as the length of video increases; the shorter the more popular

Q. Please state which, if any, you ever use your phone to do, which you use at once a week and which you use at least once a day.

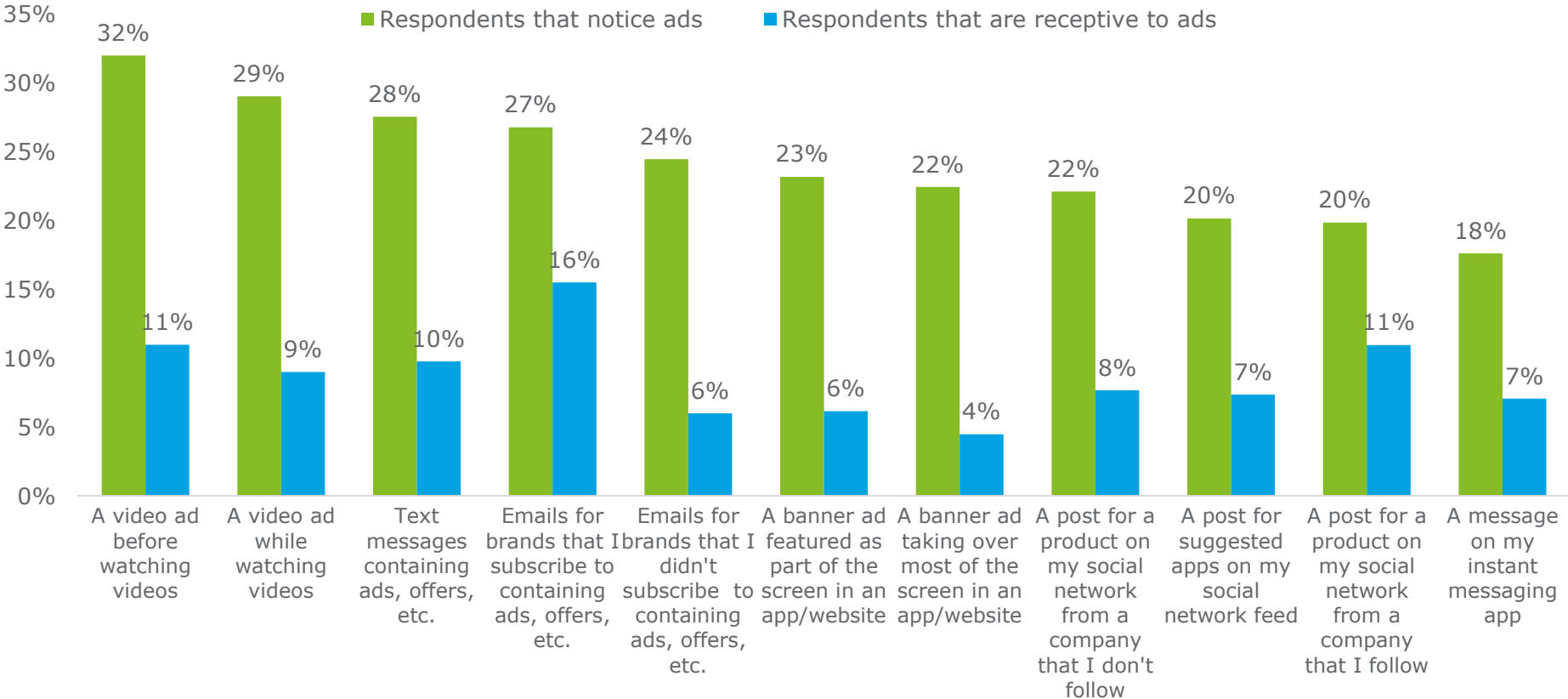


Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016
Base: Smartphone owners: 1598

Mobile advertising

Respondents have always been highly negative about mobile advertising; they are most receptive to advertising via email sent to mobile phones.

Q. Which, if any, of the following forms of advertising have you noticed while using your phone? And which, if any, of the following forms of mobile advertising are you most receptive to?



Source: Brazil edition, Deloitte Global Mobile Consumer Survey, May - Jun 2016

Base: All phone/smartphone owners: 1743

Note: 27% of respondents did not notice any of the listed ads, and 44% of respondents were not receptive to any of the listed ads