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EXECUTIVE SUMMARY

ICT HOUSEHOLDS SURVEY

2019

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Brazilian Internet
Steering Committee

Brazilian Network Information Center – NIC.br

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Chief Advisory Officer to CGI.br : Hartmut Richard Glaser

Regional Center for Studies on the Development of the Information Society – Cetic.br

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ICT Households Survey Coordination : Fabio Storino

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Editing support team : Comunicação NIC.br : Caroline D'Avo, Carolina Carvalho and Renato Soares

Proofreading and Revision in Portuguese : Magma Editorial Ltda, Aloisio Milani, Christiane Peres, Lúcia Nascimento and Alexandre Pavan

Translation into English : Prioridade Consultoria Ltda, Grant Borowik, Isabela Ayub, Lorna Simons, Luana Guedes, Luísa Caliri and Maya Bellomo Johnson

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Coordinator

Marcio Nobre Migon

Counselors

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Cláudio Benedito Silva Furtado

Demi Getschko

Domingos Sávio Mota

Evaldo Ferreira Vilela

Franselmo Araújo Costa

Heitor Freire de Abreu

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Nivaldo Cleto

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Executive Secretary

Hartmut Richard Glaser

Executive Summary

ICT Households 2019

Now in its 15th edition, the ICT Households survey provides an overview of household and individual access to information and communication technologies (ICT) in Brazil. The COVID-19 pandemic has made even more evident the digital gap among the Brazilian population. Data from ICT Households 2019 survey, collected before the public health crisis hit, showed that lack of Internet access affected one in four people in Brazil. Among individuals who have overcome the access barrier, a second digital divide persists. Internet use exclusively via mobile phones, for instance, is associated with less enjoyment of online opportunities, including cultural activities, school research, distance learning courses, telework, and access to electronic government services.

DESPITE A SIGNIFICANT INCREASE IN RECENT YEARS, ONE OUT OF FOUR PEOPLE DID NOT USE THE INTERNET IN THE COUNTRY IN 2019

Internet access in households

In 2019, 50.7 million Brazilian households had Internet access (71% of the total), an increase of 5.2 million connected households in relation to 2018. This progress was driven, above all, by the dissemination of access in classes C and DE: For the first time, more than half of the households in classes DE were connected to the Internet, proportion that went from 30% in 2015 to 50% in 2019. Regional disparities persisted, with a difference of 10 percentage points between the proportion of connected households in the Southeast (75%) and the Northeast (65%) (Figure 1).

Between 2017 and 2019, there was an increase of 11 million households with only Internet access

and no computers, which reveals the importance of mobile phones as the main devices for Internet access. The presence of computers was associated with sociodemographic factors: While 95% of households in class A had some type of computer, these were present in only 44% of households in class C and in 14% of households in classes DE in 2019. And, while 95% of households in class A had both technologies, this proportion was only 12% in classes DE.

Even with the increase in the number of connected households, about 20 million Brazilian households did not have Internet access in 2019, a phenomenon which was more concentrated, in absolute numbers, in the Southeast (7.8 million households) and Northeast (6.4 million).

Among socioeconomic segments, 13 million households in classes DE did not have Internet access in 2019.

Internet access by individuals

In 2019, Brazil had approximately 134 million Internet users, or 74% of the population 10 years old or older. Despite a significant increase in users in recent years, one out of four people did not use the Internet in the country, which represents nearly 47 million non-users. Of these, 40 million had only an Elementary Education, and almost all of them – 45 million – belonged to classes C and DE, an indication of the close relationship between digital and social inequalities in the country.

For the first time in the time series of the survey, more than half of the population living in rural areas were Internet users, reaching 53%; however, still lower than the

proportion observed in urban areas, of 77% (Chart 1). In classes DE, the proportion went from 30% in 2015 to 57% in 2019. However, an important contingent of individuals remains disconnected: nearly 35 million people in urban areas (23%) and 12 million in rural areas (47%). Among the population in classes DE, almost 26 million (43%) were not Internet users.

Mobile phones were the main devices used to go online, used by almost all Internet users (99%). For 58% of users, access was exclusively carried out on mobile phones, a proportion that reached 85% in classes DE. Exclusive mobile phone use also predominated among the black (65%) and brown (61%) populations, in comparison with 51% of the white population (Chart 2). Internet access on computers, which was 80% in 2014, has been falling since then, and reached 42% in 2019. This reduction was even more pronounced in the case of desktop computers (from 54% to 23%). There was a seven percentage point increase in relation to 2018 in the use of Internet on televisions (37%), more frequent among younger users and those from higher income classes.

Online activities

Communication activities were the most common type of activity carried out online: 92% of Internet users sent instant messages, followed by using social networks (76%) and talking to people using voice or video programs (73%), which has been growing in recent years.

Searching for information was also among the main activities carried out online, especially looking up information on goods and services (59%), followed by information on health or healthcare services (47%). The latter presented a lower proportion among Internet users 60 years old or older (39%) and in classes DE (31%).

Furthermore, 41% of Internet users said they completed school activities or research online, 40% studied on their own and 12% took distance learning courses. Only one-third of users (33%) carried out work activities on the Internet, a proportion that represented less than half of users in the work force (45%).

In 2019, 39% of Internet users purchased goods or products on the Internet in the 12 months prior to the survey, almost 53 million people. This proportion reached 79% in class A and 16% in classes DE. Regional differences were also observed: 45% in the Southeast region, and 26% in the North.

Electronic government

In 2019, 68% of Internet users 16 years old or older used electronic government services in the 12 months prior to the survey, an activity that saw an increase in recent years. The online government services most carried out were those related to labor rights and social security (36%), taxes and fees (28%), and personal documents (28%). Only 23% searched for or carried out public health services.

Online activities and Internet access conditions

Users who accessed the Internet on multiple devices carried out cultural, educational, work and e-government activities in greater proportion than those who used mobile phones exclusively.

Watching videos online, for example, was an activity carried out in greater proportion by those who used televisions, computers, and mobile phones to access the Internet than by mobile-only users. The same occurred with users with broadband connections at home, in comparison to those with mobile connections. In addition to factors related to class, family income and level of education of individuals, the type of devices used and the quality of Internet access seems to add a new layer to the digital inequalities and potential for Internet use in Brazil.

FIGURE 1
HOUSEHOLDS WITH COMPUTER AND INTERNET ACCESS BY REGION (2019)
Total number of households (%)

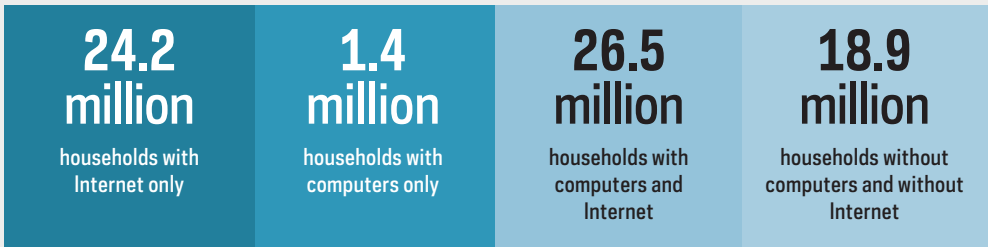
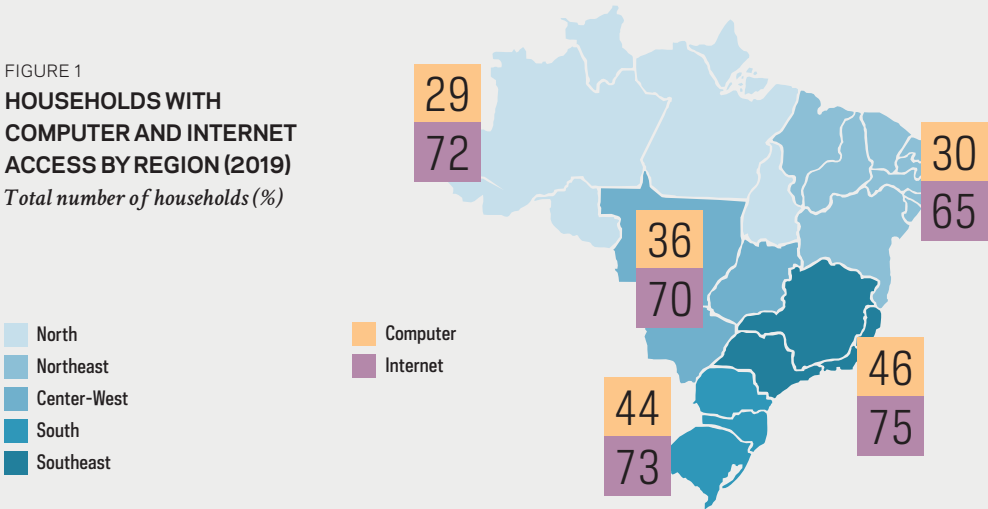
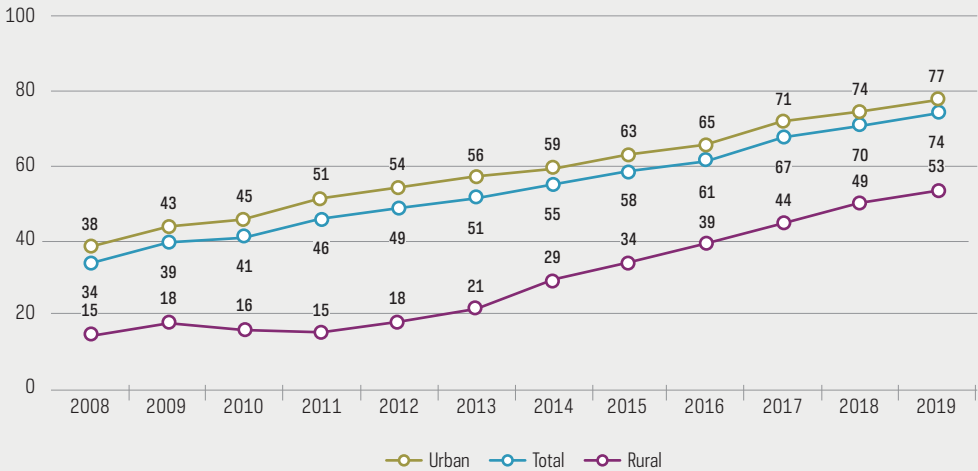


CHART 1
INTERNET USERS BY AREA (2008 - 2019)
Total of the population (%)



Despite advances in the provision of e-government services by the Brazilian government, the most vulnerable segments of the population are the ones who least use this possibility of online access: 46% of individuals 60 years old or older, reaching 75% among those 25 to 34 years old. Significant differences were also observed between those with Elementary Education (46%) and Tertiary Education (87%). In terms of class, the proportion reached 88% of those in class A and 48% in classes DE.

Despite growth in use of e-government services, the proportion of those who carried out services entirely online (without having to go to a physical location) was still low.

Cultural activities on the Internet

Three out of four Brazilian Internet users watched videos, shows, movies or series online (74%) and listened to music online (72%) in the three months prior to the survey. The survey also investigated for the first time the proportion of Internet users who listened to podcasts (13%), practiced the most among users in class A (37%) and with Tertiary Education (26%).

There were increases in consumption via streaming and reductions or stability in downloading practices in recent years (Chart 3), trend that points to a larger role played by platforms that provide online content.

Considering the population as a whole, more than half of Brazilians over 10 years old watched videos and listened to music online (56%). The frequency was higher among younger individuals: Among those 10 to 15 years old, more than half (52%) listened to music every day, and about one-third watched movies (29%) and series (30%) every day or almost every day.

The videos most viewed on the Internet were music concerts or videos (44%), and news (38%). In the latter case, access was significantly higher among individuals with Tertiary Education (70%) than those with Elementary Education (20%), which demonstrates that dimensions of access to information on the Internet are still very unequal.

Videos, shows, movies and series were most watched on video sharing sites or apps (46%) and instant messaging apps (44%), followed by social networks (38%) and subscription services (33%). Almost half of those in class A and about one-third in class B

paid to watch movies and series online, while this proportion was unusual among classes C and DE.

Sharing texts, images, videos, and music (73%) was more common among Brazilian Internet users than posting content they created (36%), practice that predominated in class A (46%) and among those with Tertiary Education (47%).

Research methodology and access to data

The ICT Households Survey has been conducted since 2005 and investigates access to information and communication technologies in households and their use by individuals 10 years old or older. For this edition, interviews were conducted in 23,490 households throughout Brazil. The data was collected through face-to-face interviews between October 2019 and March 2020. The survey results, including tables for proportion, total and margins of error, are available on Cetic.br's website (<https://www.cetic.br>) and in the data visualization portal (<https://data.cetic.br/cetic>). The methodological report and the data collection report can be accessed both in the publication and on the website.

ALMOST HALF OF BRAZILIANS IN CLASS A PAID TO WATCH MOVIES AND SERIES ONLINE, A MUCH LESS COMMON PRACTICE IN CLASSES C AND DE

CHART 2
INTERNET USERS WHO USED MOBILE PHONES EXCLUSIVELY, BY AREA, REGION, SEX, COLOR OR RACE, AGE GROUP, LEVEL OF EDUCATION, AND CLASS (2019)

Total number of Internet users (%)

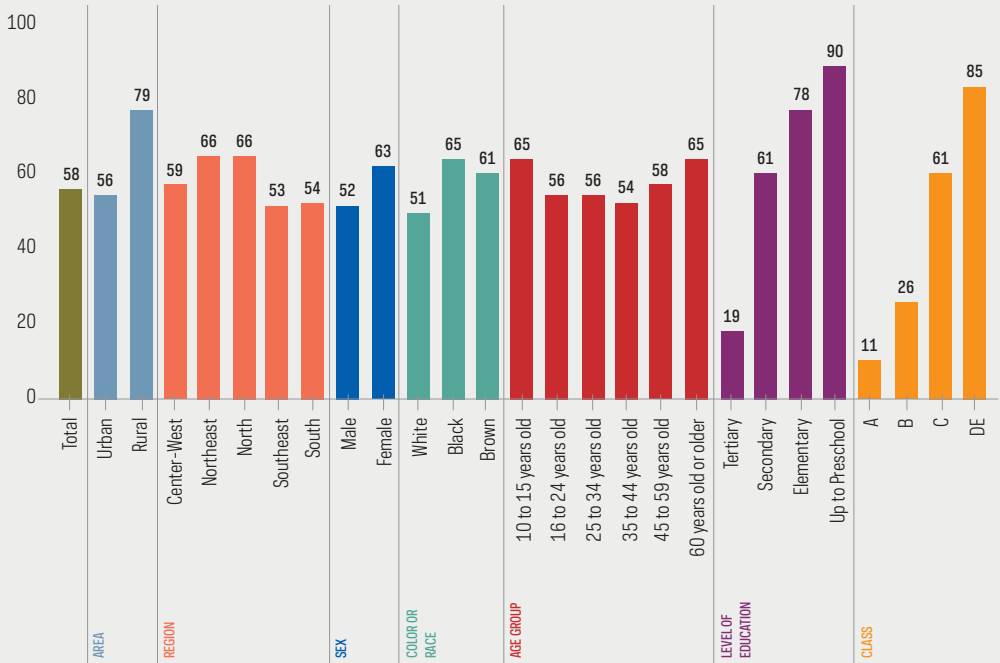
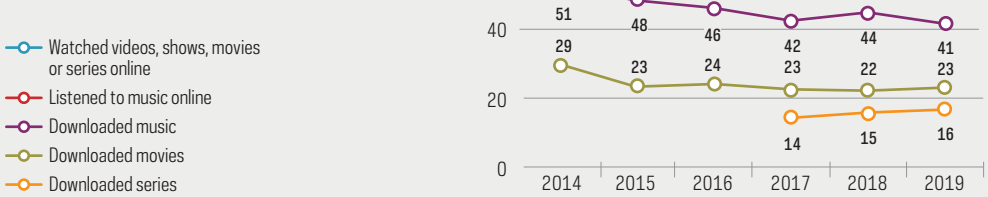


CHART 3
INTERNET USERS BY ACTIVITIES CARRIED OUT ON THE INTERNET - STREAMING VS. DOWNLOADING (2014 - 2019)

Total number of Internet users (%)



<p>56% read newspapers, magazines, or news online</p>	<p>37% played games online</p>	<p>13% listened to podcasts</p>	<p>11% saw exhibitions or museums online</p>
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ABOUT CETIC.br

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The Regional Center for Studies on the Development of the Information Society, a department of NIC.br, is responsible for producing indicators and statistics on the access and use of the Internet in Brazil, disseminating analyzes and periodic information on the Internet development in the country. Cetic.br is a Regional Study Center, under the auspices of UNESCO. More information at <http://www.cetic.br/>.

ABOUT NIC.br

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The Brazilian Network Information Center – NIC.br (<http://www.nic.br/>) is a non-profit civil entity, which in addition to implementing the decisions and projects of the Brazilian Internet Steering Committee, has among its attributions: coordinate the registration of domain names – Registro.br (<http://www.registro.br/>), study, address and handle security incidents in Brazil – CERT.br (<http://www.cert.br/>), study and research network technologies and operations – CEPTRO.br (<http://www.ceptro.br/>), produce indicators on information and communication technologies – Cetic.br (<http://www.cetic.br/>), implement and operate Internet Exchange Points – IX.br (<http://ix.br/>), enable the participation of the Brazilian community in the global development of the Web and support the formulation of public policies – Ceweb.br (<http://www.ceweb.br/>), and host the Brazilian W3C office (<http://www.w3c.br/>).

ABOUT CGI.br

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The Brazilian Internet Steering Committee, responsible for establishing strategic guidelines related to the use and development of the Internet in Brazil, coordinates and integrates all Internet service initiatives in the country, promoting technical quality, innovation and dissemination of the services offered. Based on the principles of multistakeholderism and transparency, CGI.br represents a democratic Internet governance model, internationally praised, in which all sectors of society participate equitable in the decision-making. One of its formulations is the 10 Principles for the Governance and Use of the Internet in Brazil (<http://www.cgi.br/principios>). More information at <http://www.cgi.br/>.



Access complete data from the survey

The full publication and survey results are available on the **Cetic.br** website, including the tables of proportions, totals and margins of error.

