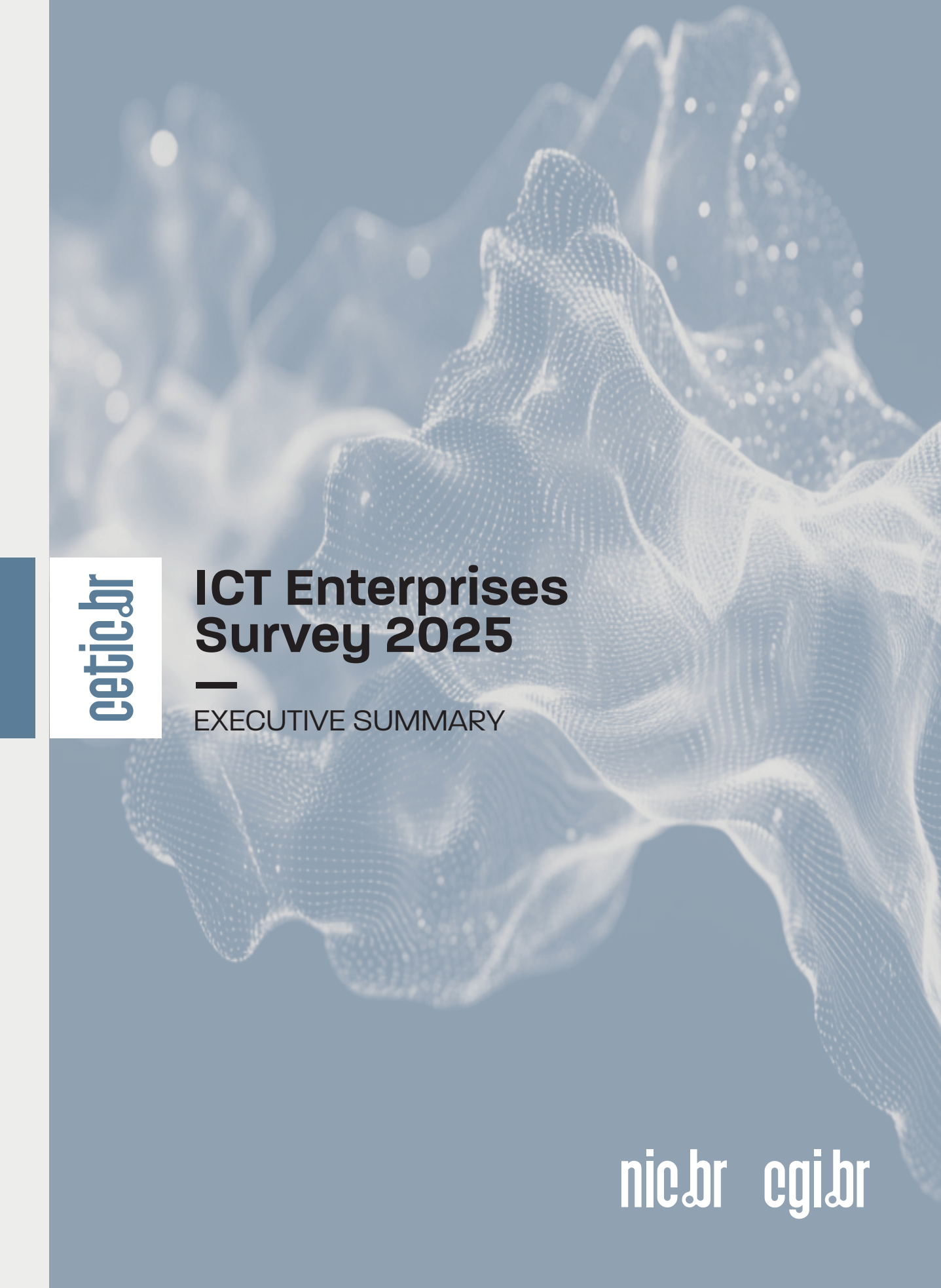




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ICT Enterprises Survey 2025

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Executive Summary

ICT Enterprises 2025

In its 17th edition, ICT Enterprises 2025 provides an overview of the use of information and communication technologies (ICT) among Brazilian enterprises. The survey was conducted between February 2025 and January 2026 and collected data from Brazilian enterprises with more than ten employed persons. This edition expands the investigation into the state of the digital economy in Brazil, exploring aspects of enterprise connectivity, online presence, and electronic commerce. In addition, the survey presents indicators on the use of advanced technologies, such as the Internet of Things (IoT) and Artificial Intelligence (AI).

Connectivity

In the 2025 edition, fiber-optic connections remained the most widely used type of connection among Brazilian enterprises, a trend observed since 2019. In 2025, 93% of enterprises were connected to the Internet via fiber optics, compared with 92% in 2024, indicating stability in this indicator. Regarding the distribution of enterprises by download speed range, 53% had connections of up to 500 Mbps in 2025, compared with 71% in 2023. The proportion of enterprises with connection speeds above 500 Mbps increased from 21% in 2023 to 35% in 2025, with growth observed across enterprises of all sizes (Chart 1).

THE ESTIMATED
TOTAL NUMBER
OF ENTERPRISES
THAT USED AI
APPLICATIONS IN
BRAZIL IS 93,475

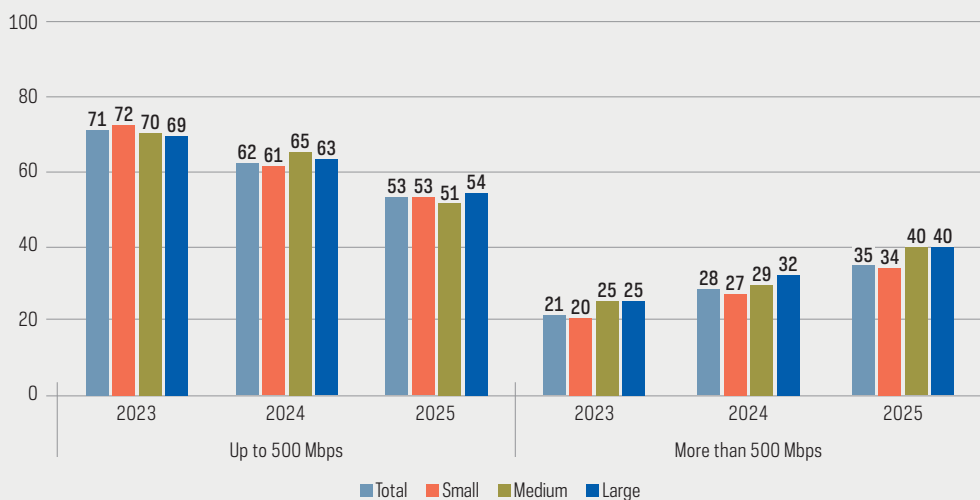
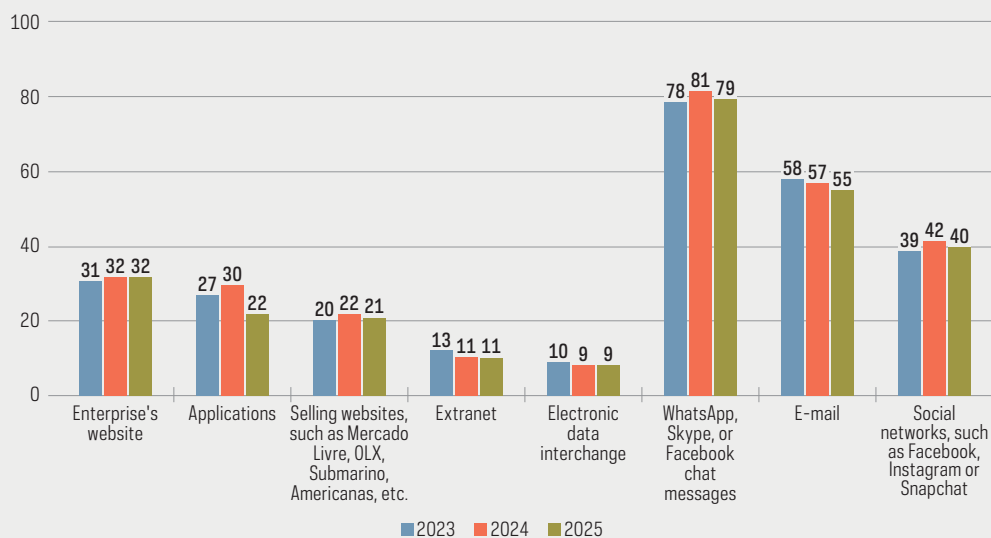
Electronic commerce

The means used by Brazilian enterprises to sell online continued to follow the pattern observed in past survey editions. Most enterprises reported selling goods and services online via WhatsApp, Skype, or Facebook chat messages, while more automated forms of electronic commerce, such as Extranet, electronic data exchange, and their websites, accounted for smaller proportions. In 2025, the proportion of enterprises that sold online returned to the

2023 level, with 68% reporting sales through some online channel, compared with 61% in 2024 and 70% in 2023. Among enterprises that sold online, 79% used WhatsApp or Telegram. In contrast, channels specifically developed for online sales, such as websites, Extranet, and electronic data exchange, were used by fewer enterprises (Chart 2).

New technologies

In 2025, the ICT Enterprises survey showed an increase in the use of AI applications among Brazilian enterprises: 17% reported using them, compared with 13% in 2024. The estimated total number of enterprises that used AI applications in 2025 was 93,475. There was growth among small enterprises, from 10% in 2024 to 15% in 2025, and among large

CHART 1**Enterprises, by range of maximum download speed and size (2023–2025)***Total number of enterprises with Internet access (%)***CHART 2****Enterprises, by online media used for transactions (2023–2025)***Total number of enterprises that sold on the Internet (%)*

enterprises, which reached 50% in 2025, up from 38% in 2024 (Chart 3).

Among the types of AI applications used by Brazilian enterprises, the most frequently mentioned was workflow automation, reported by 68% of enterprises that used AI, a proportion that remained stable compared with previous years. On the other hand, this edition of the survey showed growth in two types of AI: text mining and written language analysis, and natural language generation (NLG) for written or spoken language. The first was used by 38% of enterprises that adopted AI, compared with 22% in 2024, while the second increased from 20% in 2024 to 30% in 2025 (Chart 4).

The ICT Enterprises survey also collects indicators on how Brazilian enterprises acquire or develop AI software and systems. In 2025, among enterprises that used AI, 80% chose ready-to-use solutions, up from 76% in 2024, indicating stability. Regarding development, 54% of enterprises hired external suppliers to develop or modify AI systems in 2025, a proportion that stood at 56% in 2024. Among large enterprises that used AI, 37% reported that the systems they used were developed in-house, up from 2024. According to the survey results, the pattern of AI use among Brazilian enterprises indicates a predominance of ready-to-use solutions, with limited in-house application development (Chart 5).

AMONG LARGE ENTERPRISES THAT USED AI, 37% REPORTED THAT THE SYSTEMS THEY USED HAD BEEN DEVELOPED IN-HOUSE, REPRESENTING AN INCREASE COMPARED WITH 2024

Survey methodology and access to data

The ICT Enterprises 2025 survey maps the incorporation of ICT, especially new technologies such as AI, among Brazilian

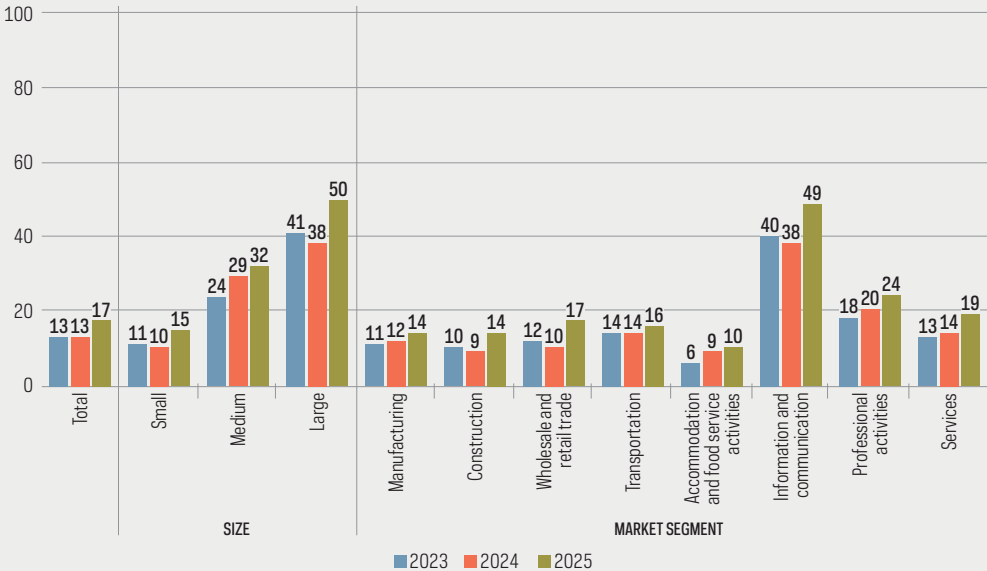
enterprises with more than 10 employed persons. The survey also investigates practices related to electronic commerce, digital security, connectivity, and online presence, examining the realities of Brazilian enterprises and comparing them with international indicators. Data collection for the 2025 edition, conducted by telephone, took place between February 2025 and January 2026. A total of 4,174 enterprises were interviewed,

providing results by size, geographic region, and market segment. The results of the ICT Enterprises survey, including tables of proportions, total values, and margins of error, are available on the website of the Regional Center for Studies on the Development of the Information Society (Cetic.br): <https://www.cetic.br>. The “Methodological Report” and the “Data Collection Report” can be accessed in both the printed publication and on Cetic.br|NIC.br’s website.

CHART 3

Enterprises that used AI, by size and market segment (2023–2025)

Total number of enterprises (%)



BOX

ONLINE PRESENCE

Brazilian enterprises, especially small enterprises, continue to show a tendency to focus on a single digital communication channel, generally social media, interacting less frequently with customers and users through websites. In 2025, 53% of Brazilian enterprises had a website, compared with 54% in 2019, indicating stability over recent years.

Social media is the main form of online presence among Brazilian enterprises. There was significant growth in the proportion of enterprises with their own profile or account on social media: use of WhatsApp and Telegram increased from 74% in 2024 to 79% in 2025. Among large enterprises, LinkedIn use also increased, from 70% of enterprises in 2024 to 78% in 2025.

An estimated
77,316
enterprises in Brazil used
smart or IoT devices

53%
of Brazilian enterprises had a digital security
policy, with the indicator remaining stable
compared with previous years

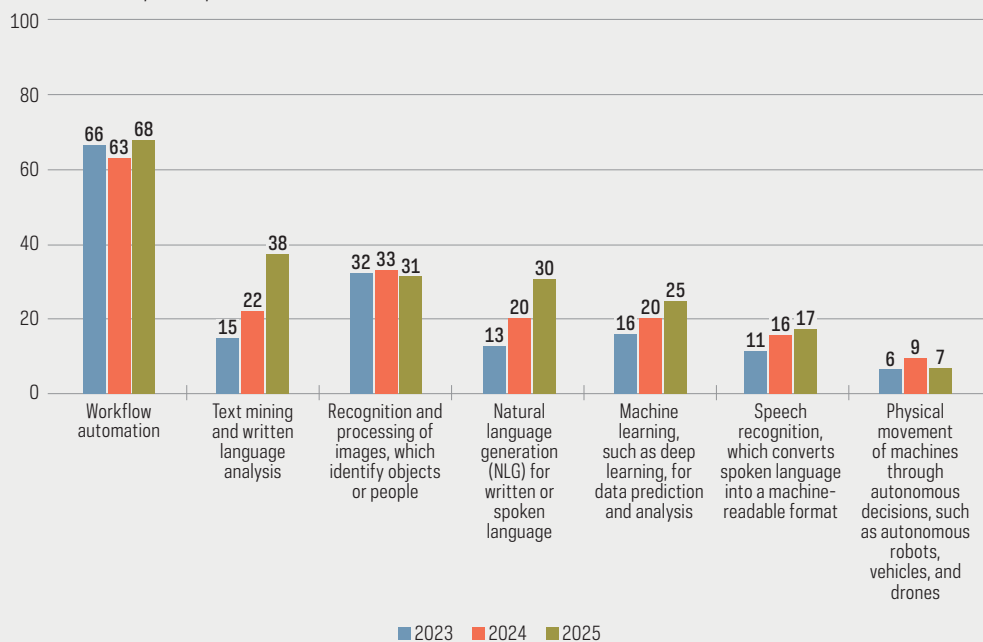
Among enterprises that used smart or IoT devices,
90%
reported that their use was
related to facility security

20%
of enterprises collected data internally through
processes and staff, while
16%
collected data from customers and users

CHART 4

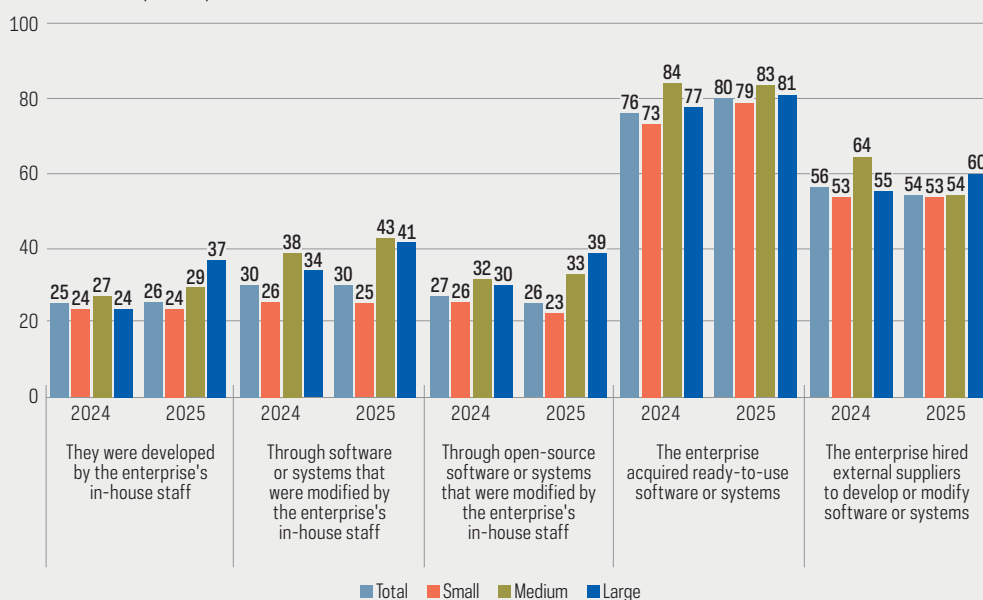
Enterprises that used some type of AI, by type (2023–2025)

Total number of enterprises that used AI (%)

**CHART 5**

Enterprises that used AI, by how they acquired the AI software or systems they use and size (2024–2025)

Total number of enterprises that used AI (%)



Access the full survey data!

In addition to the results presented in this publication, tables of indicators, questionnaires, information on how to access the microdata, and the presentation of the results of the launch event are available on the Cetic.br|NIC.br website, as well as other publications on the topic of the survey.

The tables of results (<https://cetic.br/en/pesquisa/empresas/indicadores/>), available for download in Portuguese, English, and Spanish, present the statistics produced, including information on the data collected and cross-referencing for the variables investigated in the study. The information available in the tables follows the example below:

Code and indicator name

Population to which the results refer

B3 - ENTERPRISES WITH INTERNET ACCESS BY TYPE OF CONNECTION

Total number of enterprises with Internet access

PERCENTAGE (%)		DIAL-UP CONNECTION	CONNECTION VIA TELEPHONE LINE (DSL)	FIBER OPTIC CONNECTION	CABLE CONNECTION	RADIO CONNECTION
TOTAL		10	37	93	52	6
SIZE	10 to 49 employed persons	10	38	92	52	5
	50 to 249 employed persons	8	32	96	55	10
	250 or more employed persons	7	27	97	52	23
REGION	North	11	29	95	52	7
	Northeast	11	34	94	51	7
	Southeast	9	38	92	53	6
	South	11	36	94	52	5
	Center-West	12	41	91	49	5
MARKET SEGMENT	Manufacturing	9	34	94	49	7
	Construction	11	30	92	55	5
	Transportation and storage	10	32	92	48	9

Results tabulation cut-outs: total (population as a whole) and characteristics of analysis (region, age group, etc.), different in each survey

Results: can be in % or totals

Source: Brazilian Network Information Center. (2026). Survey on the use of information and communication technologies in Brazilian enterprises: ICT Enterprises 2025 [Tables].

How to reference the tables of indicators



This publication is also available in Portuguese on the Cetic.br|NIC.br website.