EXECUTIVE SUMMARY

ICT HOUSEHOLDS SURVEY

2020

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Executive Summary ICT Households 2020

COVID-19 Edition – Adapted methodology

Carried out during a challenging context for Brazil and the world, the 16th edition of the ICT Households survey highlights, in an unprecedented way, the connectivity of Brazilian households and Internet use in Brazil during the COVID-19 pandemic. The survey data show that the migration of in-person activities to the digital environment, as a consequence of social distancing measures, led to an increase in Internet demand in households and in the proportion of Internet users and activities carried out online in this period. Nonetheless, the data also reveals the persistence of digital inequalities that affect the appropriation of ICT and the opportunities arising from their adoption by different segments of the population.

IN 2020, THE PROPORTION OF HOUSEHOLDS WITH INTERNET ACCESS REACHED 83%, REPRESENTING APPROXIMATELY 61.8 MILLION HOUSEHOLDS WITH SOME KIND OF INTERNET CONNECTION

Internet access in households

In 2020, the proportion of households with Internet access reached 83% (Figure 1), which represents approximately 61.8 million households with some kind of Internet connection. It represented an increase of 12 percentage points compared to 2019 (71%). This trend was observed in virtually all segments analyzed in the survey but was more pronounced among the most vulnerable socioeconomic strata: classes C (from 80%, in 2019, to 91%, in 2020) and DE (from 50% to 64%).

Among connected households, the survey identified an increase in the proportion of those with fixed broadband (from 61%, in 2019, to 69%, in 2020), with cable or fiber-optic (56%) being the types of fixed broadband connection most present among households with Internet access.

The cost of connection persisted as the main barrier to access. Among households without Internet access, the main reasons mentioned by residents were the high cost of connection (28%), the fact that they did not know how to use the Internet (20%), and lack of interest (15%).

Interrupting the downward trend observed in the last years of the survey, the proportion of households with computers increased, reaching 45% in 2020. Unlike the increase recorded in Internet access, this rise was concentrated among households in urban areas (from 43% to 50% in 2020) and classes A (from 95% to 100%) and C (from 44% to 50%).

Internet use

An estimated 152 million Brazilians were Internet users in 2020, which represents 81% of the population 10 years old or older. This was an increase of seven percentage points compared to 2019 (74%), or the equivalent of 19 million more Internet users in the period. This trend was driven by residents of both rural (from 53% to 70%) and urban (from 77% to 83%) areas, which resulted in the lowest gap

between the areas in the survey's historical series (Chart 1). Among the socioeconomic classes, the most significant increase in Internet use occurred in classes C (from 78% to 85%) and DE (from 57% to 67%), allowing for a decrease in the difference between the classes with the highest and lowest proportion of users, from 66 to 30 percentage points over the last five years.

Mobile phones remained the main devices used to access the Internet, reaching almost the entire Internet user population 10 years old or older (99%). For over half of these users (58%), access took place exclusively via mobile phones, a proportion that reached 90% among those who had a Preschool Education or were from classes DE (Chart 2). Exclusive mobile phone use was also predominant among those in the Northeast (72%) and those who self-reported as Black (65%) or Brown (60%).

Internet access via televisions reached 44% in 2020, about the same level as Internet use via computers (42%). However, this access continued to be concentrated among users in class A (73%) and those with Tertiary Education (61%), displaying proportions significantly higher than the levels recorded among those in classes DE (26%) and those who had Preschool Education (20%).

Internet activities

Similar to the context prior to the COVID-19 pandemic, the communication activities most carried out online by Brazilian Internet users were sending instant messages (93%), talking to people using voice or video calls (80%), and using social networks (72%).

Looking up information on health or healthcare services also presented a significant growth in comparison to 2019, from 47% to 53%. This increase was observed especially among Internet users who had Secondary Education (from 51% to 60%).

There was also a significant growth in financial activities carried out online among Internet users: searching for financial information, making payments, and other financial transactions grew 10 percentage points, from 33% to 43%. The greatest differences compared to 2019 were among users in classes C (from 31% to 44%) and DE (from 9% to 19%). However, this type of activity was still more common among users in class A (86%) and those with Tertiary Education (79%).

More than half (55%) of Brazilian Internet users had followed an audio or video live streaming. Approximately three out of four Brazilian Internet users said they had watched videos, programs, movies, or series (77%) and listened to music online (73%). Also noteworthy was the growth in the proportion of people who read newspapers, magazines, or news online, from 56% in 2019 to 64% in the current edition.

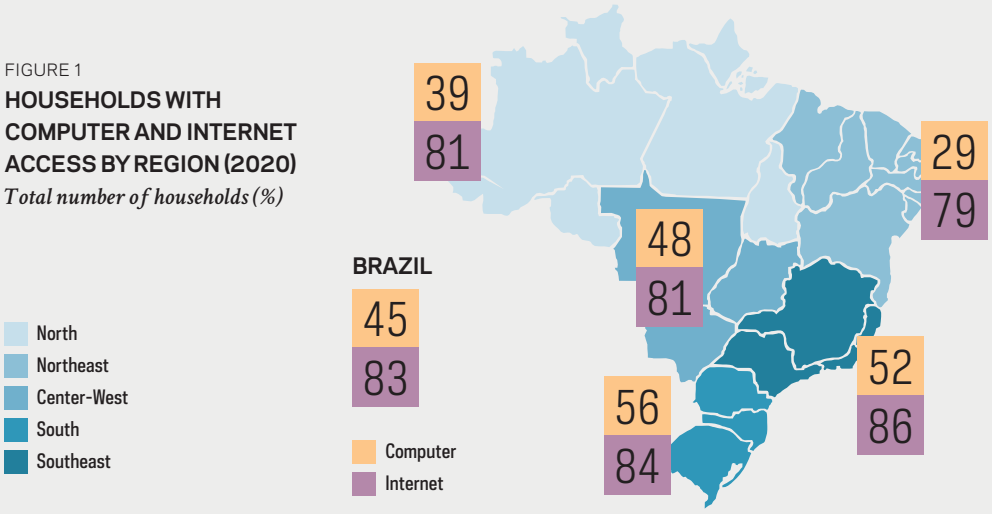
The multiple layers of digital inequalities

Social inequalities are also manifested in the digital environment, with the potential to restrict opportunities and even the conditions to comply with measures to combat the pandemic. Black women accessed the Internet exclusively by mobile phone (67%) at greater proportions than White men (42%). On the other hand, they carried out financial transactions (37%), used e-government services (31%), and took courses (18%) over the Internet at much lower proportions than White men (51%, 49% and 30%, respectively). This highlights the multiple layers of inequality and their combined effects on the appropriation of digital opportunities by different segments of the population.

FIGURE 1

HOUSEHOLDS WITH COMPUTER AND INTERNET ACCESS BY REGION (2020)

Total number of households (%)

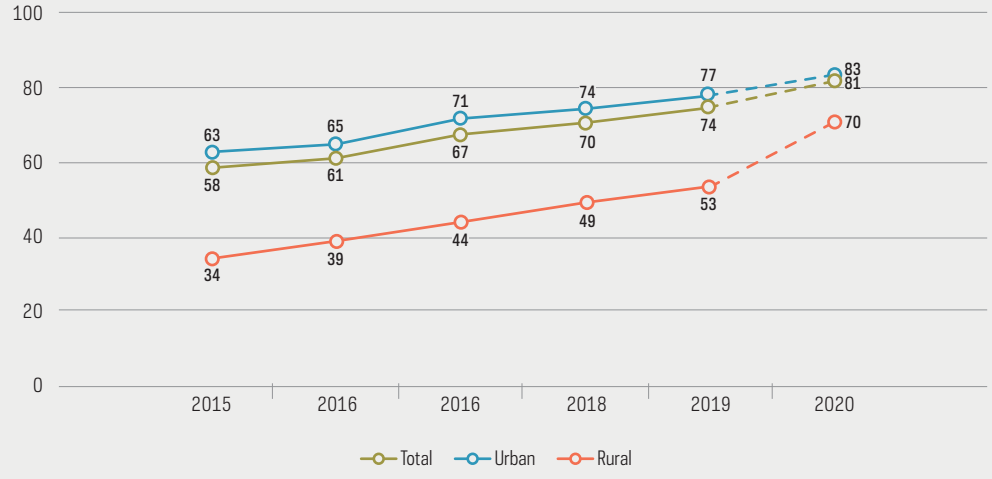


28.8 million	676 thousand	33 million	11.8 million
households with Internet only	households with computers only	households with computers and Internet	households without computers or Internet

CHART 1

INTERNET USERS BY AREA (2015 – 2020)

Total population (%)



ELECTRONIC GOVERNMENT

There was an increase in the proportion of users who looked up information offered by government websites (from 28% to 42%) and who carried out e-government services (from 28% to 37%) (Chart 3). However, these activities were more frequently carried out by those who already performed a greater variety of activities on the Internet. Carrying out e-government services, for instance, was more mentioned by users in urban area (39%), in class A (63%) and by individuals with Tertiary Education (68%).

EDUCATION AND WORK

The online activities related to education most commonly mentioned by respondents were completing school activities or research (45%) and studying on their own (44%), with a significant increase among Internet users 10 to 15 years old (91% and 66%, respectively). Taking distance learning courses reached one-fifth (21%) of Internet users in 2020, with an emphasis on the increase observed among Internet users 16 to 24 years old (12% in 2019 to 33% in 2020) and in class B (from 24% to 38%). In class C, there were increases not only in the percentage of people taking e-learning courses (10% in 2019, to 18% in 2020), but also in studying online on their own (from 36% to 45%).

THERE WAS A SIGNIFICANT GROWTH IN THE PROPORTION OF INTERNET USERS WHO CARRIED OUT ONLINE FINANCIAL ACTIVITIES IN CLASSES C AND DE.

The use of the Internet for work activities – greatly impacted by the COVID-19 pandemic – was reported by 38% of Internet users, being more recurrent among Internet users in class A (72%) or with Tertiary Education (66%), than among those in classes C (36%) or DE (21%), or those with Elementary (22%) or Secondary Education (35%).

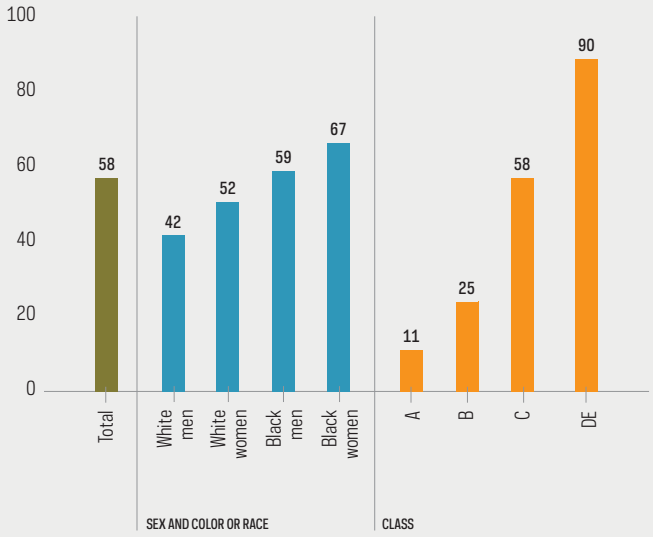
Research methodology and access to data

The ICT Households survey has been conducted since 2005 and investigates access to ICT in households and its use by individuals 10 years old or older. For this edition, interviews were conducted with 5,590 households and 4,129 individuals throughout Brazil. Using a methodology adapted to the COVID-19 period, the data was collected through telephone interviews, complemented by face-to-face interviews, between October 2020 and May 2021. The survey results, including tables for proportions, totals and margins of error, are available on Cetic.br|NIC.br's website (https://www.cetic.br). The "Methodological Report" can be accessed both in the publication and on the website. Although the indicators are in line with those published in previous editions of the survey, comparisons should be made with caution, due to the greater margins of error in the current edition and to changes in the mode of collection.

CHART 2

INTERNET USERS WHO USED MOBILE PHONES EXCLUSIVELY, BY INTERSECTION OF SEX AND COLOR OR RACE AND CLASS (2020)

Total number of Internet users (%)



80% of Internet users made voice or video calls

53% looked up health information

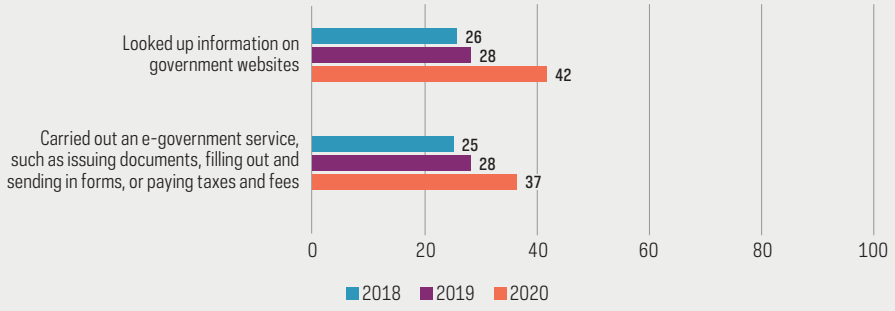
43% carried out financial transactions

37% carried out e-government services

CHART 3

INTERNET USERS, BY INTERACTION WITH PUBLIC AUTHORITIES (2018 – 2020)

Total number of Internet users (%)



ABOUT CETIC.br

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

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

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.

ACCESS
WWW.CETIC.BR