

GLOBAL MOBILE MESSAGING 2020

How the Pandemic Is Changing Adoption and Usage of OTT Messaging Services

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GLOBAL MOBILE MESSAGING 2020: HOW THE PANDEMIC IS CHANGING CONSUMER ADOPTION AND USAGE OF OTT MESSAGING SERVICES

Mobile messaging apps were already gaining ground before the pandemic, but stay-at-home mandates accelerated their adoption. Engagement has slowed since earlier this year, but many new users will stick around, boosting the global monthly user base.

How has the pandemic changed our forecast for global mobile messaging app users?

We have increased our 2020 forecast for monthly users from 2.70 billion to 2.77 billion. Voice and video calling as well as group chatting have driven both adoption and engagement during the pandemic, particularly during the quarantine period earlier this year.

Which countries are driving mobile messaging growth?

For the most part, the top 10 growth countries are the same as they were pre-pandemic: India, Indonesia, Russia, China, Brazil, Argentina, and Mexico. Spain and Finland are new entrants to the list this year, while Italy will move up to the No. 4 spot. In the latter three countries, early stay-at-home measures increased the need to communicate via mobile.

Why has our US forecast only increased slightly?

Existing mobile behaviors, such as the widespread use of regular SMS and voice calling, have continued to hold back adoption of OTT messaging and calling during the pandemic. For consumers who want to video chat, Apple's built-in FaceTime feature and even Zoom have been more popular than standalone messaging apps.

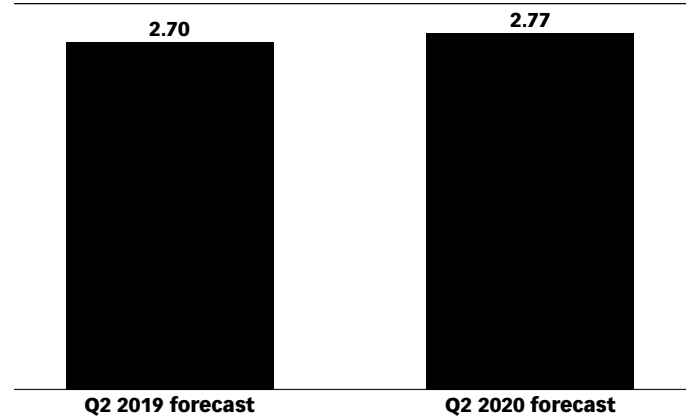
What are the leading messaging apps?

WhatsApp leads in most markets we track except the US, where Messenger is the No.1 app. WeChat continues to dominate in China, while Line and KakaoTalk are favored in Japan and South Korea, respectively. Telegram is a fast-growing player in Russia.

WHAT'S IN THIS REPORT? This report explores our latest forecast for global mobile messaging app users, including breakouts by country and platform.

How Has Our Forecast for Worldwide Mobile Messaging App Users Changed?

billions, 2020



Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

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KEY STAT: We have increased our 2020 forecast for worldwide monthly mobile messaging app users from 2.70 billion to 2.77 billion due primarily to the effects of the pandemic.

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MOBILE MESSAGING USAGE SOARS ... AND THEN PLATEAUS

In the early days of the pandemic, there was a significant increase in engagement with mobile messaging apps. Cooped up at home and cut off from friends and relatives, people turned to these services to keep in touch. But heightened engagement hit a ceiling relatively quickly, after reaching its pandemic-induced peak in late March and April.

Our complete estimates for global mobile messaging users can be found in this report's [accompanying spreadsheet](#).

In an April 22-27 survey conducted by GlobalWebIndex, for example, 45% of internet users worldwide said they were spending more time with messaging services like WhatsApp and Messenger because of the pandemic, with that figure reaching more than half in India (57%), South Africa (57%), Brazil (56%), Spain (54%), Italy (51%), and the Philippines (51%).

Coronavirus Impact: Internet Users Worldwide Who Are Spending More Time with Social Media Sites and Messaging Services, April 2020

% of respondents

| | Spending longer on messaging services | Spending longer on social media |
|--------------|---------------------------------------|---------------------------------|
| Australia | 27% | 39% |
| Brazil | 56% | 55% |
| Canada | 33% | 39% |
| China | 50% | 42% |
| France | 34% | 36% |
| Germany | 31% | 22% |
| India | 57% | 57% |
| Iran | 43% | 40% |
| Italy | 51% | 44% |
| Japan | 6% | 25% |
| New Zealand | 37% | 43% |
| Philippines | 51% | 64% |
| Singapore | 46% | 45% |
| South Africa | 57% | 51% |
| Spain | 54% | 45% |
| UK | 37% | 32% |
| US | 19% | 33% |
| Total | 45% | 44% |

Note: ages 16-64; at home; social media sites such as Facebook, Instagram, Twitter, etc.; messaging services such as WhatsApp, Facebook Messenger, etc.

Source: GlobalWebIndex, "Coronavirus Research: Multi-Market Research Wave 3," April 29, 2020

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Not every country experienced such substantial increases, however; 19% of US respondents and just 6% of those in Japan said they were spending more time with messaging services.

When GlobalWebIndex repeated the same survey in May, it found that, in many countries, the share of internet users who were spending more time on messaging services was essentially unchanged from April. In the US, for instance, it grew by 1 percentage point to 20%, while in Brazil it remained the same at 56%.

In the fifth wave of the survey, conducted from June 29-July 2, the number of internet users worldwide spending more time on mobile messaging apps had fallen slightly to 42%. While that's still a sizable increase, it suggests the period of strong engagement growth had ended.

What's more, just 18% of respondents said they expected to continue spending more time using messaging services post-pandemic. To be fair, however, none of the activities included in the survey apart from spending more time socializing with family were cited by more than one-quarter of respondents.

Internet Users in Select Countries Who Are Spending More Time with Messaging Apps During the Coronavirus Pandemic and Plan to Keep Doing So Afterward, July 2020

% of respondents

| | During coronavirus pandemic | Plan to continue |
|--------------|-----------------------------|------------------|
| Australia | 24% | 10% |
| Belgium | 30% | 10% |
| Brazil | 56% | 26% |
| Canada | 46% | 20% |
| France | 30% | 11% |
| Germany | 24% | 7% |
| India | 55% | 28% |
| Italy | 48% | 12% |
| Japan | 5% | 2% |
| New Zealand | 30% | 8% |
| Philippines | 59% | 29% |
| Poland | 38% | 15% |
| Romania | 48% | 21% |
| Singapore | 45% | 21% |
| South Africa | 57% | 28% |
| Spain | 47% | 15% |
| UK | 35% | 9% |
| US | 12% | 4% |
| Total | 42% | 18% |

Note: ages 16-64; messaging apps include WhatsApp, Facebook Messenger, etc.; respondents were asked about at-home activities

Source: GlobalWebIndex, "Coronavirus Research: Multi-Market Research Wave 5," July 9, 2020

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It's also important to note that countries with above average rates of expected future engagement also tended to be ones with already-high usage of mobile messaging services, such as Brazil, China, and India. That means pre-existing mobile behaviors are also an indicator of whether the pandemic bump in time spent with mobile messaging will last long term.

VOICE AND VIDEO CALLING DRIVE ENGAGEMENT

One of the biggest drivers of mobile messaging app usage during the pandemic has been the ability to voice and video call or group chat with loved ones. Without in-person interactions, mobile messaging services quickly became an alternative way to communicate "face-to-face" and in larger groups.

On March 24, Facebook said that voice and video calling on WhatsApp and Messenger more than doubled over the previous month in countries hit hardest by the coronavirus, with a more than 1,000% increase in calls with three or more people in Italy alone. Overall, total messaging across Facebook's services in those countries grew by more than 50% during the same period.

In late April, Facebook added that more than 700 million people worldwide were participating in calls via Messenger and WhatsApp daily.

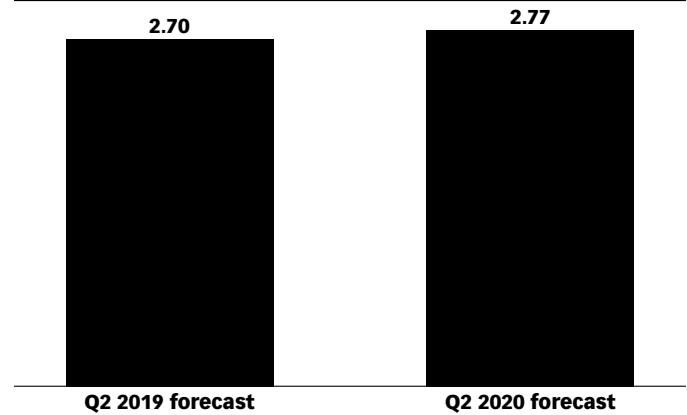
At the time of this writing, mandatory quarantine measures have been lifted in most parts of the world, diminishing the need for as-heavy use of messaging apps. Even so, there's no question that the rise in engagement on messaging apps in most countries during H1 2020 was dramatic and that it has had a significant impact on the global mobile messaging market.

OUR 2020 FORECAST FOR GLOBAL MOBILE MESSAGING APP USERS

Not only has the pandemic heightened engagement on messaging apps, it's also helped convert new users. According to our latest forecast, there will be 2.77 billion monthly mobile messaging app users worldwide in 2020, a 9.1% year-over-year (YoY) increase.

We previously expected the number of mobile messaging app users worldwide to rise by 7.3% to 2.70 billion. That means that the pandemic will help add roughly 70 million new monthly users this year. (Our previous forecast was completed in June 2019).

How Has Our Forecast for Worldwide Mobile Messaging App Users Changed? billions, 2020



Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

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We define mobile messaging app users as mobile phone users of any age who use an OTT messaging service at least once per month. An OTT messaging app provides one-to-one or one-to-many communication between registered users via a mobile phone number or user ID, where messages and calls (voice or video) are then transmitted via data connections and the mobile web.

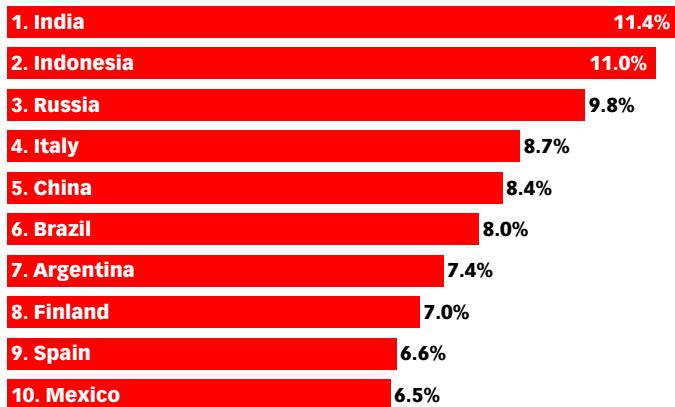
Examples of OTT mobile messaging apps include Facebook Messenger, Line, WeChat, WhatsApp, Skype, and iMessage. Anonymous social sharing apps like Whisper are not included because communication within these apps is "broadcast" in nature and users are anonymous. Also excluded are apps that solely provide OTT voice/video calling, and social networking apps like Twitter and Instagram that offer private messaging capabilities as a secondary feature.

User growth will be largely driven by the same countries as before the pandemic: India, Indonesia, Russia, China, Brazil, Argentina, and Mexico. But there are also two new entrants to our list of the top 10 growth countries: Spain and Finland. Meanwhile, Italy will become fourth fastest-growing market worldwide, up from 10th place last year.

Not coincidentally, many of the countries with the strongest growth rates are those that were hardest hit by the pandemic, or where their respective governments took extraordinary measures to contain the virus early on. Italy, for example, entered a nationwide quarantine on March 9, days before the World Health Organization (WHO) declared the coronavirus a pandemic on March 11, followed by Spain on March 15.

Top 10 Mobile Messaging App Countries, Ranked by User Growth, 2020

% change vs. 2019



Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

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Note that our forecast was completed before Facebook’s September announcement that it would integrate Instagram’s Direct messaging service with Messenger. That means that Instagram users can now opt in to send messages to friends on Messenger, and vice versa, without having to download both apps. The feature is currently available in a select number of countries.

Once the feature is rolled out worldwide, it’s likely to increase the number of mobile messaging app users. We expect at least some Instagram users will start using Messenger (or begin using it more frequently) due to the integration, boosting Messenger’s total monthly user base.

Our forecasts also exclude desktop usage of messaging services—an activity that has seen a resurgence this year. In early April, for example, Facebook released a desktop app for Messenger, noting that there had been a 100% increase in people using desktop browsers for voice and video calling via Messenger.

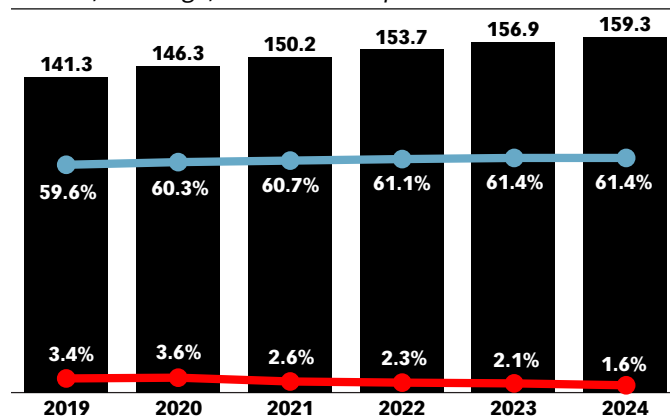
For more on Instagram Direct’s integration with Messenger and what it means for marketers, read our October report, [“Social Media Update Q3 2020: From TikTok to the US Presidential Election, Politics Take Center Stage.”](#)

US AND CANADA

The US is one country where the pandemic has had little impact on our forecast. This year, there will be 146.3 million monthly messaging app users, up 3.6% from 2019. That growth rate is only a few 10ths of a point higher than our previous estimate of 3.1%.

US Mobile Messaging App Users and Penetration, 2019-2024

millions, % change, and % of smartphone users



■ Mobile messaging app users
■ % change ■ % of smartphone users

Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

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The limited new uptake in mobile messaging has to do with the fact that people already have well-established ways of communicating via mobile, such as traditional SMS and phone calls, that have persisted throughout the pandemic.

A CivicScience survey conducted in March 2020, for example, showed that 50% of US adults stayed connected during the pandemic primarily via phone calls.

And in a May survey by Morning Consult, 72% of US adult internet users relied on regular text messaging for social app connection during the pandemic, making it the most-cited platform or method. Among Gen Z respondents only, that figure was 81%, on par with YouTube. Facebook Messenger, the only mobile messaging app per our definition on the list, was cited by 49% of adults and 30% of Gen Zers.

Platforms/Methods Used by US Gen Z vs. Adult Internet Users for Social Connection During the Coronavirus Pandemic, May 2020
% of respondents

| | Gen Z | Total |
|--------------------|-------|-------|
| YouTube | 81% | 54% |
| Text messaging | 81% | 72% |
| Instagram | 68% | 34% |
| Snapchat | 60% | 21% |
| TikTok | 45% | 16% |
| Facetime | 52% | 35% |
| Zoom | 50% | 28% |
| Facebook | 37% | 60% |
| Facebook Messenger | 30% | 49% |

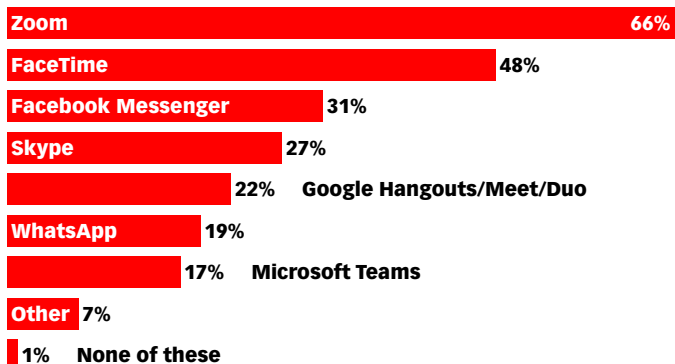
Note: Gen Z ages 13-23; all adults ages 18+; "often" and "sometimes"
Source: Morning Consult, "How COVID-19 Is Changing Gen Z's Worldview," eMarketer calculations, June 22, 2020

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The US is also an iPhone-heavy country; 45.6% of US smartphone users will be iOS users this year. iPhones already have a built-in video calling feature, FaceTime, reducing the need for a standalone app to video chat during the pandemic.

And then there is Zoom, a primarily enterprise-facing videoconferencing app, that was quickly adopted by consumers for after-work happy hours, family get-togethers, and even church services. According to an April 2020 poll conducted by Ipsos for Mozilla, 66% of US video chat users used Zoom, making it the most popular platform. It was followed by Facetime (48%), Messenger (31%), Skype (27%), Google Hangouts/Meet/Duo (22%), and WhatsApp (19%).

Coronavirus Impact: Video Chat Platforms that US Video Chat Users Currently Use, April 2020
% of respondents



Note: n=521 ages 18+
Source: Mozilla poll conducted by Ipsos, May 7, 2020

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In late April, Facebook introduced a new Zoom-like feature called Messenger Rooms, which allows people to start a video call through Facebook or Messenger with up to 50 participants for free. Rooms is primarily consumer-facing, and users can open a room and invite friends (including those who aren't on Facebook) to drop in. Unlike Zoom, which limits calls to 40 minutes on its free version, Rooms has no time limit.

So far, the introduction of Rooms has not had a significant impact on our forecast for US Messenger users. We're expecting a 3.9% rise for monthly Messenger users this year (compared with 3.1% in our previous forecast), but most of that growth is likely coming from more-traditional messaging and calling use cases.

Meanwhile, our forecast for US WhatsApp users is unchanged at 75.1 million in 2020, up by 10.0% from 2019.

US Users of Mobile Messaging Apps, Facebook Messenger, and WhatsApp, 2019-2024
millions

| | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|-----------------------|-------|-------|-------|-------|-------|-------|
| Mobile messaging apps | 141.3 | 146.3 | 150.2 | 153.7 | 156.9 | 159.3 |
| Facebook Messenger | 118.1 | 122.7 | 124.4 | 126.3 | 128.0 | 129.7 |
| WhatsApp | 68.2 | 75.1 | 78.8 | 82.4 | 86.0 | 88.6 |

Note: mobile phone users of any age who use an OTT messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

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For more on how our US forecast for mobile messaging compares with that of other digital activities, read our October report, "US Digital Users 2020: Some Media Activities Got a Pandemic Bump, Others Didn't. Here's Why."

In Canada, the rollout of Messenger Rooms will have more of an impact on Messenger use. Messenger was already the most popular mobile messaging app in the country according to our forecast, with 15.6 million monthly users in 2019 versus 8.0 million for WhatsApp.

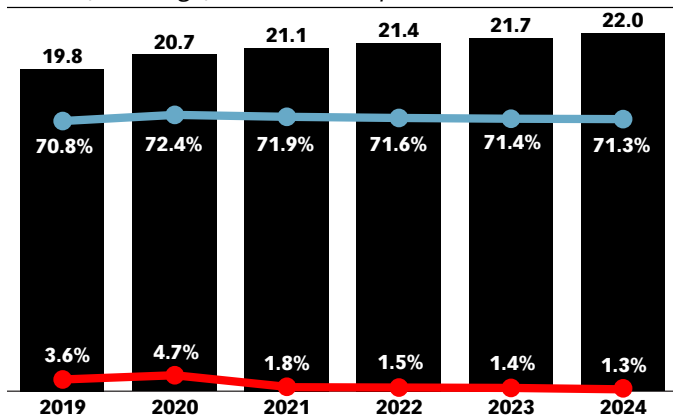
It's also been the leading digital video calling service during the pandemic. In a May 2020 Media Technology Monitor and CBC/Radio Canada survey, 51% of adult digital video callers in Canada had used Messenger, making it the most-cited platform on the list. (That figure may actually be higher since 46% of respondents said they used Facebook, and calls via Facebook are routed through Messenger). Meanwhile, 41% said they had used Zoom.

Given Messenger's existing popularity for video calling, Rooms is likely to help it add even more users.

We expect the number of Messenger users in Canada to rise 5.4% this year to 16.5 million. WhatsApp's user base will be roughly half of that of Messenger, at 8.5 million in 2020. Still, it's growing at a slightly quicker pace than Messenger, at 6.6% YoY. (This is the first time we are forecasting Messenger and WhatsApp users in Canada.)

Mobile Messaging App Users and Penetration in Canada, 2019-2024

millions, % change, and % of smartphone users



■ Mobile messaging app users
■ % change ■ % of smartphone users

Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

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Total monthly mobile messaging app users in Canada will reach 20.7 million in 2020, up by 4.7% from 2019. In our pre-pandemic forecast, we predicted that the number of mobile messaging users would rise by 3.0% to 20.3 million this year.

Users of Mobile Messaging Apps, Messenger, and WhatsApp in Canada, 2019-2024

millions

| | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|-----------------------|------|------|------|------|------|------|
| Mobile messaging apps | 19.8 | 20.7 | 21.1 | 21.4 | 21.7 | 22.0 |
| Facebook Messenger | 15.6 | 16.5 | 16.8 | 17.0 | 17.3 | 17.5 |
| WhatsApp | 8.0 | 8.5 | 8.8 | 9.1 | 9.4 | 9.6 |

Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

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Growth will decelerate starting in 2021, though it will come from a new, elevated base.

WESTERN EUROPE

Mobile messaging apps were already well penetrated across Western Europe before the pandemic. But mandatory stay-at-home orders in major countries, including France, Spain, and Italy, as well as quarantine recommendations adopted voluntarily in other countries like the Netherlands have helped propel their adoption to new heights.

This year, 86.8% of smartphone users in Western Europe will use a mobile messaging app at least monthly, up from 82.7% in 2019.

Overall, we forecast that the number of monthly mobile messaging app users in Western Europe will rise by 7.0% to 261.6 million. That's nearly double the 3.8% growth rate and 11.4 million more people than the 250.2 million users we previously expected.

Mobile Messaging App Users and Penetration in Western Europe, by Country, 2020

millions and % of smartphone users

| | Mobile messaging app users | % of smartphone users |
|-----------------------|----------------------------|-----------------------|
| Austria | 5.4 | 88.7% |
| Denmark | 3.9 | 79.5% |
| Finland | 3.8 | 93.7% |
| France | 34.7 | 75.0% |
| Germany | 50.1 | 87.4% |
| Italy | 36.7 | 93.2% |
| Netherlands | 12.8 | 96.2% |
| Norway | 3.7 | 83.2% |
| Spain | 34.7 | 92.3% |
| Sweden | 6.5 | 79.0% |
| Switzerland | 5.6 | 84.5% |
| UK | 41.9 | 89.0% |
| Other | 20.3 | 78.2% |
| Western Europe | 261.6 | 86.8% |

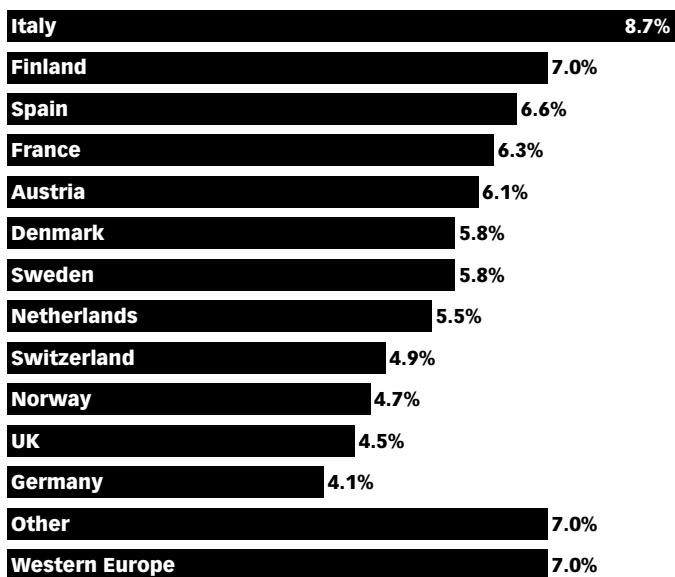
Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

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Italy, Finland, Spain, and France will be the fastest-growing countries for mobile messaging app usage in Western Europe this year. The largest market for mobile messaging will be Germany, at 50.1 million monthly users, but it will bring up the rear in terms of growth.

Mobile Messaging App User Growth in Western Europe, by Country, 2020

% change vs. 2019



Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

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Given the already-high penetration rate for mobile messaging services, current growth in the region is coming primarily from older people, some of whom may not have started using those services without the pandemic. This is especially true for WhatsApp, which is the most popular mobile messaging app in most parts of Western Europe.

We don't break out WhatsApp users by age, but data from Germany's federal telecommunications agency Bundesnetzagentur, for example, shows that more than 96% of OTT messaging services users ages 16 to 44 used WhatsApp in 2019, indicating that future growth must come from older cohorts.

Of the Western European countries we track, Germany, France, and Spain will be WhatsApp's largest markets this year, but the strongest growth will come from France, Italy, and Finland.

WhatsApp Users and Growth in Western Europe, by Country, 2020

millions and % change vs. 2019

| | WhatsApp users | % change |
|-------------|----------------|----------|
| Austria | 5.3 | 7.3% |
| Finland | 3.6 | 7.5% |
| France | 16.4 | 16.6% |
| Germany | 48.3 | 4.7% |
| Italy | 35.5 | 7.7% |
| Netherlands | 12.0 | 5.0% |
| Spain | 33.0 | 6.7% |
| Sweden | 2.2 | 6.9% |
| Switzerland | 5.5 | 6.5% |
| UK | 30.1 | 5.6% |

Note: mobile phone users of any age who access their WhatsApp account via mobile phone app at least once per month
Source: eMarketer, Aug 2020

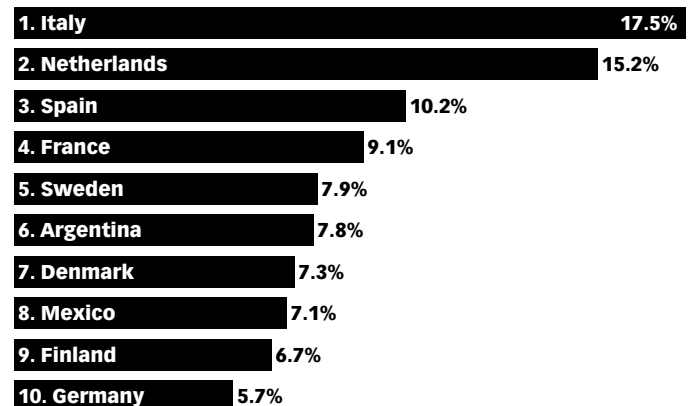
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The pandemic has given more of a boost to Messenger in most places in Western Europe than it has to WhatsApp, in part because it simply has more room to grow. In fact, eight of the 10 fastest-growing Messenger countries will be in Europe: Italy, the Netherlands, Spain, France, Sweden, Denmark, Finland, and Germany. The top three will also grow at double-digit rates this year.

Top 10 Messenger Countries, Ranked by User Growth, 2020

% change vs. 2019



Note: mobile phone users of any age who access their Messenger account via mobile phone app at least once per month
Source: eMarketer, Aug 2020

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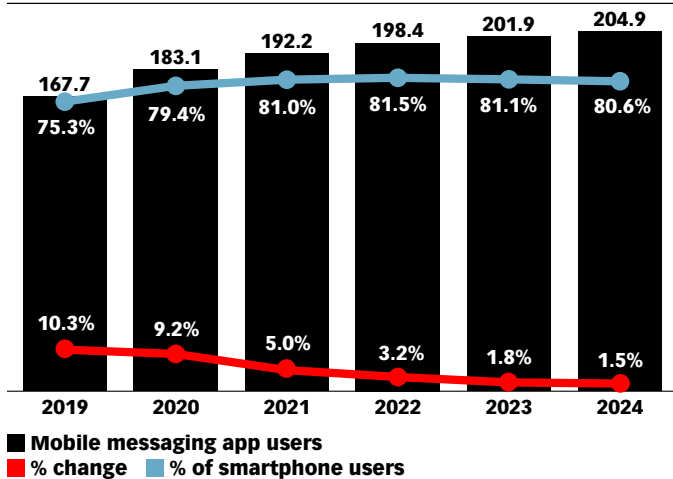
In all, we expect the number of Messenger users in the region to rise by 10.2% to 128.4 million. (We don't forecast WhatsApp users in Western Europe as a region yet.)

CENTRAL AND EASTERN EUROPE

This year, there will be 183.1 million monthly mobile messaging app users in Central and Eastern Europe, up by 9.2% over 2019. We previously expected the number of mobile messaging app users in the region to rise by 7.2% to 178.2 million.

Mobile Messaging App Users and Penetration in Central and Eastern Europe, 2019-2024

millions, % change, and % of smartphone users



Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

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Four in 10 (40.5%) of Central and Eastern Europe's messaging app users will be in the region's largest country, Russia. There, we expect the number of monthly messaging app users will grow by 9.8% to 74.2 million this year.

That's a notable increase from our previous forecast of 6.7% growth to 70.6 million users. Part of that is due to the pandemic—Russia imposed a total lockdown in most areas of the country in late March—but it's also because the government lifted a two-year ban on local messaging service Telegram in June, driving more users to the platform.

Our first-ever forecast for Telegram users in Russia shows that the number of users will rise by 27.0% to 14.9 million. Its growth rate will be 10 percentage points higher than that of Russia's current No.1 messaging app, WhatsApp, and nearly nine times that of Messenger (3.1%).

Mobile Messaging App, Messenger, Telegram, and WhatsApp Users in Russia, 2020

millions and % change vs. 2019

| | Mobile messaging app users | % change |
|--------------------|----------------------------|-------------|
| WhatsApp | 64.7 | 17.0% |
| Telegram | 14.9 | 27.0% |
| Facebook Messenger | 4.2 | 3.1% |
| Total | 74.3 | 9.8% |

Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

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Messenger has long struggled to gain a foothold in Russia due to its ties to Facebook, which has a more popular local competitor, VK, in the country. According to our August forecast, 73.8% of social network users in Russia will use VK at least once per month this year versus just 7.8% for Facebook. Telegram will also hamper future growth for Messenger, which we expect will hit just 2.6% next year.

LATIN AMERICA

Government responses to the pandemic in Latin America have varied. In Brazil, for example, shutdown and quarantine measures were left to city and state officials to decide, while in Argentina, a nationwide lockdown was ordered in March. As of September, some stay-at-home measures were still in place in Buenos Aires, the nation's capital.

Despite the differences, both countries, along with Mexico, rank among our top 10 countries for mobile messaging app growth thanks to pre-existing mobile usage trends in the region.

According to our forecast, there will be 286.0 million messaging app users in Latin America in 2020, a 4.6% YoY increase. We previously expected that figure to rise by 5.6% to 276.4 million.

Mobile Messaging App Users and Growth in Latin America, by Country, 2020

millions and % change vs. 2019

| | Mobile messaging app users | % change |
|----------------------|----------------------------|-------------|
| Argentina | 24.5 | 7.4% |
| Brazil | 109.7 | 8.0% |
| Mexico | 65.6 | 6.5% |
| Other | 86.1 | 8.1% |
| Latin America | 286.0 | 7.6% |

Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

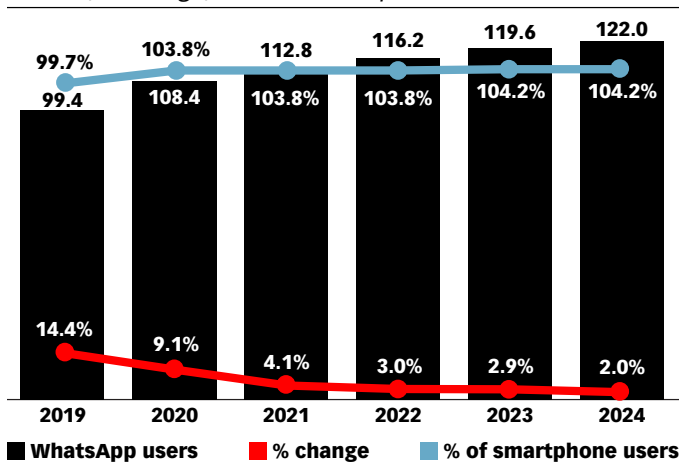
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While each of the three countries we track will experience increases in user adoption, the main growth story is Brazil. There, the total number of mobile messaging app users will surpass 50% of the population this year, a milestone we had previously slated for 2021.

The same is true for WhatsApp. We expect 51.2% of Brazil's population to use WhatsApp at least once per month this year, up from our previous estimate of 48.9%. Overall, there will be 108.4 million WhatsApp users in Brazil, which is 2.7 million more than we had previously predicted.

WhatsApp Users and Penetration in Brazil, 2019-2024
millions, % change, and % of smartphone users



Note: mobile phone users of any age who access their WhatsApp account via mobile phone app at least once per month
Source: eMarketer, Aug 2020

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That corresponds to a growth rate of 9.1% versus our previous estimate of 4.6%. Some of that additional growth will be driven by pandemic-related gains, but we expect some of it to also result from the rollout of WhatsApp payments in late June.

While Brazil's central bank shut down the payments service just one week after its launch, citing inadequate time to review the service and its impact on competition, it's likely that people had already downloaded the app in anticipation. Many are also likely to continue using it without the payments feature given WhatsApp's popularity in the country.

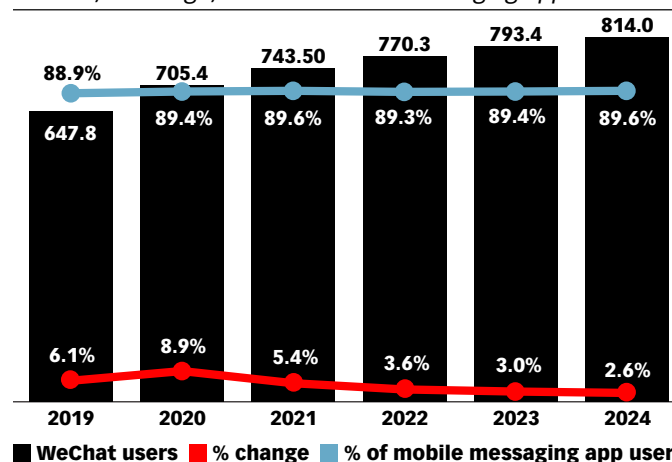
For more on the suspension of WhatsApp payments in Brazil, read our July report, "[Social Media Update Q2 2020: Facebook Ad Boycott, Instagram's IGTV Ads, Snapchat's Partner Summit, Twitter's Declining Ad Revenues and More.](#)"

ASIA-PACIFIC

The mobile messaging app landscape in Asia-Pacific is drastically different than most of the rest of the world. For one, there are a range of local players that either dominate or directly compete with international apps like Messenger and WhatsApp.

Take China, for instance. Tencent-owned super app WeChat will remain the country's leading mobile messaging app with 705.4 million monthly users in 2020, according to our forecast. That equates to 89.4% of mobile messaging app users. (Messenger and WhatsApp are banned in China).

WeChat Users and Penetration in China, 2019-2024
millions, % change, and % of mobile messaging app users



Note: mobile phone users of any age who access their WeChat account via mobile phone app at least once per month
Source: eMarketer, Aug 2020

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WeChat will also pass a major usage milestone this year; for the first time, more than half (50.6%) of China's population will use the app at least once per month. We had previously expected WeChat to surpass the 50% mark in 2021.

We have also raised our forecast for WeChat's 2020 user growth from 6.3% to 8.9%. The increase is partially due to pandemic-related lockdowns, but also because recently released features like embedded apps called Miniprograms continue to draw new users.

WeChat's strong growth has also caused us to increase our forecast for total mobile messaging app users in China by 2 percentage points to 8.4%. That's puts it behind only India (11.4%) and Indonesia (11.0%) in terms of growth, despite already having the largest messaging app user base in the region and worldwide, at 789.4 million in 2020.

Mobile Messaging App Users and Growth in Asia-Pacific, by Country, 2020

millions and % change vs. 2019

| | Mobile messaging app users | % change |
|---------------------|----------------------------|-------------|
| Australia | 14.6 | 2.5% |
| China | 789.4 | 8.4% |
| India | 402.6 | 11.4% |
| Indonesia | 90.4 | 11.0% |
| Japan | 66.5 | 5.7% |
| South Korea | 35.3 | 2.2% |
| Other | 316.0 | 13.4% |
| Asia-Pacific | 1,714.7 | 9.8% |

Note: mobile phone users of any age who use an over-the-top (OTT) messaging app via mobile phone (browser or app) at least once per month
Source: eMarketer, Aug 2020

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India's strong growth will again be driven primarily by WhatsApp. The country is already WhatsApp's biggest market worldwide, with 390.1 million monthly users this year. That's up 16.6% YoY, putting India in second place behind Russia for WhatsApp growth.

Top 10 WhatsApp Countries, Ranked by Users vs. Growth, 2020

millions and % change vs. 2019

| WhatsApp users | | % change | |
|----------------|-------|--------------|-------|
| 1. India | 390.1 | 1. Russia | 17.0% |
| 2. Brazil | 108.4 | 2. India | 16.6% |
| 3. US | 75.1 | 3. France | 16.6% |
| 4. Indonesia | 68.8 | 4. Indonesia | 15.1% |
| 5. Russia | 64.7 | 5. US | 10.0% |
| 6. Mexico | 62.3 | 6. Argentina | 10.0% |
| 7. Germany | 48.3 | 7. Brazil | 9.1% |
| 8. Italy | 35.5 | 8. Italy | 7.7% |
| 9. Spain | 33.0 | 9. Finland | 7.5% |
| 10. UK | 30.1 | 10. Austria | 7.3% |

Note: mobile phone users of any age who access their WhatsApp account via mobile phone app at least once per month
Source: eMarketer, Aug 2020

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That also represents a significant increase of 4.6 percentage points from our previous forecast. That's likely due in part to pandemic-related effects: India began a countrywide lockdown on March 24, which was later extended several times. But it's also because of WhatsApp's investments into the country, including payments and ecommerce through its partnership with JioMart, as well as India's fast-growing smartphone user base.

Aside from Indonesia, the rest of the countries we track in Asia-Pacific will see minimal monthly user growth this year. That's not to say that people aren't sending more messages, particularly at the height of the pandemic, but that it hasn't necessarily translated into new monthly users.

In South Korea, for example, the number of mobile phone messaging app users will rise by just 2.2% this year to 35.2 million. Most growth will come from local platform KakaoTalk, but even that will be at just 2.3%. The weak growth is primarily due to already widespread usage; we expect 80.8% of smartphone users to use a mobile messaging app monthly.

The same is true in Japan. This year, 85.5% of smartphone users will use mobile messaging apps, leaving little room for growth. Of Japan's 66.5 million monthly users, 90.4% will use domestic platform Line.

KEY TAKEAWAYS

- **The pandemic has converted new mobile messaging app users.** We have increased our forecast for global messaging app users, and much of the growth can be attributed to shelter-in-place measures that barred in-person interactions. Overall, the pandemic will help add 70 million new monthly mobile messaging app users worldwide this year.
- **Sky-high engagement won't persist.** Time spent on mobile messaging increased substantially in the early days of the pandemic, but it has since plateaued. Video and OTT voice calling have been the main drivers of mobile messaging app usage and adoption, but there is less need for those features now that face-to-face interactions have returned in most places.
- **And many of the strongest growth countries are unchanged from before the pandemic.** That indicates that pre-existing mobile trends, as well as the need to communicate during quarantine, play a role in messaging adoption this year.
- **Not all countries will experience a pandemic-driven user bump.** That's not to say that people haven't been communicating more, simply that they are doing so via alternative means. In the US, for instance, standard text messaging and voice calling continued to be the most-used channels for mobile communication, even during the quarantine period. Meanwhile, FaceTime and Zoom have been more popular than standalone messaging apps, such as Messenger and WhatsApp, for video and group calling.

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