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Abstract

Revenues for Mobile Learning products and services in Brazil reached $338.3 million in 2014. The growth rate is a robust 25.7% and revenues will surge to over $1.0 billion by 2019. Brazil generates the largest revenues for Mobile Learning in Latin America by a wide margin. Revenues in Brazil are four times higher than Mexico, the region’s second-largest buying country.

As of April 2015, Brazil had a population of just over 200 million people and a mobile penetration rate of 142%. Brazil accounts for one third of all mobile users in Latin America and is adding one million mobile subscriptions users a month. Over 38% of the population access the web via mobile devices as of May 2015; 8.7 million of them used mobile devices exclusively to access the Internet.

According to the Associação Brasileira da Indústria Elétrica e Eletrônica (ABINEE) trade group, just over 52 million smartphones were sold in Brazil in 2014 alone; this is 16 million more than 2013. ABINEE reported in May 2015 that 14 million smartphones were sold in the first quarter of 2015. Over 95% of phones sold in Brazil are now smartphones. Most of these smartphones are running on 3G networks, but 4G is gaining traction fast.

Fast 4G networks are relatively new in Brazil; the mobile network operators (MNOs) started rolling out 4G in late 2012 and had commercial networks in operation by early 2013. User uptake has been brisk. According to the government telecommunications regulator Agência Nacional de Telecomunicações (ANATEL), there were 6.7 million 4G-enabled smartphones in use in the country by the end of 2014, which was a stunning 416.5% increase from the year before. The 4G users are heavily concentrated in São Paulo (31.7%) and Rio de Janeiro (16.3%).

In April 2015, the government (in partnership with the telecoms) announced an ambitious $16.5 billion program called Broadband for All (Banda larga para todos) that will attempt to connect 95% of the population to fixed and wireless broadband by 2018.

Tablet sales in Brazil reached 5.4 million by the end of 2013, an increase of more than 70% over the 3.2 million sold in 2012. According to ABINEE, over 9.9 million tablets were sold in Brazil in 2014.

Until recently, imported smartphones and tablets were prohibitively expensive due to steep import tariffs. This was an inhibitor in the market. The government passed a law in September 2011 that offers tax incentives for device makers that set up manufacturing plants in Brazil. **Smartphones and tablets prices have dropped 36% since late 2011; over 80% of all tablets sold in Brazil are sold for the equivalent of $160 or less.**

Consumers dominate the Mobile Learning market in Brazil. Despite a near-recessionary economy, consumers are still buying Mobile Learning apps and edugames and are avid subscribers of Mobile Learning value added services (VAS). As of May 2015, the economy in Brazil was essentially flat.
and very close to recession levels. Consumer discretionary spending usually drops dramatically is struggling economies, but the economy has not had a discernable impact on consumer spending on Mobile Learning products in Brazil.

Consumer spending was heavily concentrated in language learning and early childhood learning products in 2014. Yet, other content types have higher growth rates and the consumer demand for content is evolving fast. An revenue analysis of consumer spending by nine content types is provided in this report.

**Figure 1 - Catalysts Driving the 2014-2019 Mobile Learning Market in Brazil**

Despite an anemic economy, the government will be a major buyer of Mobile Learning content during the forecast period as they continue to fund their digitization efforts and large-scale tablet deployments.

**Catalysts Driving the Brazil Mobile Learning Market**

In additional to the strong mobile ecosystem in Brazil, there are five major catalysts directly impacting the Mobile Learning market in Brazil:

- The strong demand for custom content development services, particularly in the corporate and government segments
- The migration to mobile formats by the major education publishers and commercial training and education providers
- The adoption of tablets in the academic segments
The continuing boom in the demand for Mobile Learning value-added services (VAS)

and the massive demand for Mobile Learning content in the consumer segment.

These catalysts combined have created lucrative revenue opportunities for Mobile Learning suppliers competing in Brazil. This report identifies those opportunities by buyer segment and product type.

**Corporate and Government Spending on Custom Services**

The growth rate for custom Mobile Learning content development in Brazil is 29.2%, the highest growth rate for any Mobile Learning product type in the country.

Revenues will nearly quadruple by 2019, driven primarily by corporate and government spending on custom learning apps built by Brazilian developers.

The legacy educational publishers and the commercial training and education providers in Brazil are corporations; they pay developers to port their print and eLearning content into Mobile formats. For example, a company called mLearn created the content for several of the Mobile Learning VAS products sold by the MNOs Vivo and Oi.

The Federative Republic of Brazil is a union of twenty-seven federative units (unidades Federativas) twenty-six states (estados), one federal district (that includes Brasília, the capital of Brazil), and over 5,550 municipalities. All of the states provide mobile apps on public portals. The states spent a great deal of money on custom apps for the 2014 World Cup and are ramping up for the 2016 Summer Olympics with tourism and public safety apps.

The federal government in Brazil maintains a mobile app portal called Portal Brasil with over 65 custom apps as of May 2015 on a range of topics including tourism, education, health, science, and technology.

The 2016 Summer Olympics will be held in Rio in August 2016 and both the federal government and the Rio de Janeiro government have already started hiring developers to create custom apps for government public safety employees, venue workers and volunteers, and for the tourists that will come to Rio.

EF Education First has been selected as the Official Language Training Services Supplier for the Olympics in Brazil. EF claims it is the largest language learning project in history; EF is tasked with teaching over a million people English (including a half a million high school student volunteers). The training is provided in classrooms, in live online classes, and in self-paced digital formats. EF's online platform is called Englishtown is now available in Brazil in Portuguese and is accessible on both Android and iOS devices via the EF Englishtown App.
The federal government is also funding programs to support the app development market in the country; they have a particular focus on Mobile Learning apps. In August 2014, The Brazilian Ministry of Communications launched a contest called INOVApps to promote and fund Brazilian mobile app developers. The equivalent of $1.9 million was awarded in various amounts to 50 developers (half were mobile edugame developers) in November 2014. Apps that were eligible had to map to specific criteria including serious games, education and training, tourism, large events, and health.

Migration to Mobile Formats by Commercial Education Providers

There is a thriving $30 billion private education market in Brazil. Brazil’s for-profit higher education segment was an early adopter of distance learning and now eLearning is common in for-profit universities. These companies are now building out their digital catalogs with Mobile Learning content.

The commercial private education providers and the major educational publishers in Brazil are now moving fast to digital formats. Online classes, digital courses, and digital reference-ware are now an integral part of their product catalogs. In the context of the booming smart device market and the rapid adoption of mobile devices in the schools, these commercial suppliers have begun to port courses and content to mobile formats.

Santillana is the largest education publisher in Latin America; 35% of their global revenues are generated in Brazil. In August 2011, Santillana launched their tablet-based product via subscription called Sistema UNO (System One) in Brazil. Sistema UNO targets private schools and includes content from Santillana and Discovery Education preloaded on tablets. "The program aims to improve the quality and relevance of education by providing tools that improve teaching practices and promote English-language learning." The package costs the equivalent of $325.00 per year, per student.

Abril Educação is the largest private PreK-12 supplier in Brazil. By the end of 2014, they were serving "30 million students and over 125,000 schools with its services in 2010, as well as running elementary and high schools. Over 70% of the country of primary and secondary school use Abril's materials."

Abril Educação launched a Mobile Learning content subsidiary called Edumobi Tecnologia de Ensino Móvel in late 2012. Edumobi sells a wide range of mobile courses (including adult education) on a subscription basis directly to consumers and schools for the equivalent of one dollar a week. Edumobi also provides custom development services to organizational buyers.

Minha Biblioteca (My Library) is a consortium of four leading educational publishers in Brazil: Grupo A, Atlas, Grupo Editorial Nacional (GEN), and Saraiva. Minha develops digital eTextbooks for the higher education segment and all of their digital titles are compatible with Android and iOS.
devices. Minha Biblioteca had 74 institutional customers in Brazil by April 2015. The consortium uses the eTextook platform called Vital Source by US-based Ingram Content Group.

FTD Editora is a major educational publisher in Brazil and they launched their digital media production division in 2012; they now have a large catalog of digital content. They launched their first native Mobile Learning app in the Apple app store in 2013.

The language learning chains in Brazil are expanding their digital catalogs with mobile content. English language learning apps are the best revenue opportunity. By the end of 2014, over 2.8 million people (from children to adults) were taking English lessons in Brazil. Private English language learning is a $3.1 billion industry according to the Brazilian Franchising Association. Brazil had over 70 brands and 6,215 branches of private English language schools by the end of 2014.

Wizard Education (acquired by Pearson in late 2013) is the largest private language school chain in Brazil. In early 2012, they launched an SMS-based English language learning service. In September 2014, Wizard announced a partnership with US-based Knewton to integrate Knewton’s adaptive learning technology into their Wizard Plus app, which runs on tablet devices. The app is primarily used in physical learning centers across the country.

**Adoption of Tablets in the PreK-12 Schools**

The state and federal educational agencies have begun to buy tablets as they phase in digital content. In February 2012, the Brazilian federal government announced that they would purchase 900,000 tablets for use in 58,000 public schools. The tablets are manufactured by two domestic firms – Positivo Informática and Digibras.

In late 2012, the Ministry of Science, Technology and Innovation (MCTI) and the Ministry of Education (MEC) announced that they were co-developing a national education platform called the Brazilian Educational Platform. The platform is being developed as a "mobile first" platform and supports all the major mobile operating systems; the content can be accessed on smartphones and tablets.

In 2014, the federal government spent $60 million for tablets and another $24 million for content for the devices. This is a fraction of the expenditures on legacy products indicating a large revenue opportunity for suppliers.

Brazil’s federal government spends over $400 million a year (48% of the entire Brazilian publishing industry) on textbooks for schools and announced that they will begin buying digital content in 2015. The government estimates that they will have 80 million copies of digital textbooks delivered to 7 million students by 2015, which is still only 12% of the entire PreK-12 population. The goal is to have all books and instructional content in the high schools in digital formats by 2017.
Tablet procurements are also occurring at the state and municipal level. In 2011, the State of Pernambuco purchased 170,000 devices for their schools. In late 2013, the State of Pará launched 12,000 tablets with content from US-based Magna Gyan. The state intends to distribute over 100,000 tablets to the schools by 2017. Magna Gyan manufactures the tablets in Brazil and provisions the tablets with educational content from third-party publishers.

In June 2014, the State of São Paulo, the largest state in Brazil announced that they had selected Google Apps for Education "for more than 4 million students, 5000 schools, and close to 300,000 educators and staff." The Google Apps for Education suite is compatible with mobile devices and now includes a mobile app called Classroom, which is an authoring tool.

Samsung launched their first Smart School platform in Brazil in Manáos, the capital city of the State of Amazonas in northern Brazil in April 2014. Samsung Smart School is a tablet-based learning platform with preloaded education content. Samsung launched a second Smart School project in São Paulo in August 2014.

There are many tablet deployments on smaller scales across Brazil. The Rio-based private provider called Sistema MV1 Total distributed 4,000 iPads across their schools in 2013 with content from Cambridge University Press and Discovery Education. In August 2014, the Secretariat of Science, Technology, and Higher Education in the State of Minas Gerais announced a deal with Samsung to buy 3,000 tablets for teachers and students of the University of Minas Gerais (UEMG) and the State University of Montes Claros (Unimontes). According to the company, the tablets will be used by more than 10,000 teachers and students.

**Boom in Demand for Mobile Learning VAS**

Brazilian consumers are still flocking to Mobile Learning VAS subscriptions. These subscriptions have relatively low prices averaging the equivalent of $2.50 to $6.00 a month and are attracting millions of subscribers.

Four mobile network operators (MNOs) account for 95% of all mobile subscribers in Brazil: Vivo, Claro, Oi, and TIM Brasil. All of them offer Mobile Learning VAS products and most of them are English language learning services. Vivo was first to market in late 2009 with the launch of their Kantoo Inglês product. Oi, Claro, and TIM Brasil launched their first Mobile Learning VAS products in Brazil in 2011 and 2012.

Combined, these four MNOs have over 10 million active Mobile Learning users. Churn (the constant cancelation of subscriptions and the addition of new subscribers) is a challenge for these MNOs. Even with churn factored into the equation, it is clear that even at very low subscription prices, the MNOs that have large customer bases in the millions are generating a significant amount of revenues each year. These new Mobile Learning revenue streams did not exist prior to 2009 in Brazil.
By the end of 2014, there were 34 commercial Mobile Learning VAS products available in Brazil and 21 of them were for English language learning; six of the 34 were language learning for other languages.

Oi launched their first English language learning VAS in June 2012. Oi launched an mHealth VAS and a Portuguese language learning VAS in May 2013 with content from Editora Positivo, a major Brazilian education publisher. In January 2015, Oi launched Oi Languages with content from the language-learning supplier busuu. Oi Languages costs the equivalent of $1.65 a month for unlimited access to a range of language learning apps for many languages.

Vivo (legally Telefônica Brasil) is the Brazilian subsidiary of Spain-based Telefônica. Vivo has been one of the most active Mobile Learning VAS providers in Brazil. In May 2013, Vivo combined all their Mobile Learning VAS offerings into a platform called Plataforma de Educação Móvel. They had over 70 Mobile Learning apps on the mobile platform by July 2014. In September 2014, Vivo claimed to have 5.6 million subscribers on their platform.

In February 2015, Vivo announced that their "value-added service (VAS) revenues in Brazil increased 42.6% in 2014, driven by services such as Plataforma de Educação Móvel, Vivo Segurança, Vivo Sync, and Vivo Som de Chamada."

TIM Brasil is the Brazilian subsidiary of Telecom Italia Mobile and is also active in the Mobile Learning VAS market in Brazil. They partnered with Pearson language learning chain Wizard in August 2014 and offer three types of English language learning products: SMS-based, voice-activated, and live video streaming of classroom instructors. TIM launched their newest Mobile Learning VAS in March 2015; it was a VAS for young children called TIM Kids Brincar (Kids Play).

The telecoms and device makers that offer Mobile Learning VAS products in Brazil get their content from third-party suppliers. This represents a lucrative new distribution channel for digital education publishers and Mobile Learning content suppliers. Significant revenue opportunities are now present in the Mobile Learning VAS market in Brazil.

One of the most successful Mobile Learning VAS content suppliers in Latin America is Kantoo, a subsidiary of La Mark; they have over 3 million subscribers in Brazil on Vivo's mobile network alone.

**Consumer Demand for Mobile Learning Content**

The consumer segment in Brazil has the second-highest growth rate for Mobile Learning in Brazil at 27.5%, virtually on par with the 28.0% growth rate in the PreK-12 segment. All consumers expenditures on Mobile Learning are for content (both packaged and Mobile Learning VAS); they do not but services or tools.

Consumers have reduced their discretionary spending on many things in Brazil's current stagnant economy, but they have increased their spending...
on Mobile Learning apps and edugames. By 2019, the consumer segment will account for over 60% of all Mobile Learning revenues in Brazil. In the consumer section of this report, five-year revenues are forecast for nine types of Mobile Learning content purchased by consumers in Brazil:

1. Language learning
2. Early childhood learning
3. General education, study guides, and reference
4. Test prep for standardized exams
5. How-to guides and procedural manuals
6. Medical, health, wellness, nutrition, and fitness (including brain trainers)
7. Business, investment, and finance
8. Continuing Education (CE) and Continuing Medical Education (CME)
9. Training and professional development

Six of these Mobile Learning content types have growth rates above 20%; language learning has the highest growth rate at 31.7% and will generate the highest revenues for suppliers throughout the forecast period.

The test prep type in highest demand is for the ENEM (Exame Nacional do Ensino Médio), the national high school exam used by high schools to certify graduation and used by universities in the admissions process. Over 8.7 million high school students take the ENEM each year.

**Figure 2 - 2014-2019 Growth Rates for Mobile Learning Content by Content Type in the Brazil Consumer Segment**

For more information about this research, email: info@ambientinsight.com
There is a very clear line of demarcation in the demographics for Mobile Learning content in the Brazil consumer segment. The current market is dominated by content for young children and students. Yet, this is shifting fast. The adult demographic is now a lucrative revenue opportunity for suppliers.

**Sources of Data on the Brazil Mobile Learning Market**

The financial reports from the domestic and international online education companies that operate in Brazil provide invaluable insight into the rapidly evolving market conditions and revenue opportunities in the country.

There are dozens of publicly-traded online education suppliers in Brazil including Kroton Educacional, Anima Educação, Abril Educação, Grupo Positivo, Ser Educacional, Saraiva, and Estácio. All of them are diversifying into Mobile Learning and disclose their mobile-related initiatives in their financial reports.

Most of these learning technology companies focus on particular products, buying segments, and specific types of content so their financial reports provide details on specific buying behavior patterns in each of the six buying segments analyzed in this report.

The mobile network operators (MNOs) Oi, Claro, TIM Brasil, and Vivo all sell Mobile Learning VAS subscriptions and post the VAS prices on their sites. They often issue press releases that identify the total number of subscribers. Their content partners also issue press releases on the total number of subscribers.

The major international educational publishers are active in Brazil. Pearson, McGraw-Hill, Santillana, Cambridge University Press, Houghton Mifflin Harcourt, Oxford University Press, and Macmillan all have significant market presence in Brazil and their financial reports provide detailed data on the academic segments in Brazil.

There are several analytics firms that track the top selling mobile apps in the major app stores in countries across the planet. All of them have an education category. App Annie and Distimo (now owned by App Annie) are the best-known global app analytics firms; they provide extensive data on the top selling and top downloaded Mobile Learning apps in Brazil. Their top 100 rankings provide insight on the demand for specific types of content.

There are several professional and trade associations that provide extensive information about the uptake of digital education products in Brazil.

- The Associação Brasileira das Empresas de Software (ABES) tracks the Brazilian software industry and has a separate category for educational software and edugames. ABES identifies members by product type and publishes an annual industry report. They have over 200 technology members competing in the education and training markets in Brazil.
The Associação Brasileira de Educação a Distância (ABED) is a good source of information on the use of educational technology in the higher education segment in the country.

The Associação Brasileira dos Desenvolvedores de Jogos Digitais (ABRAGAMES) - The Brazil Association of Digital Game Developers - is a good source of information on the booming digital game market in Brazil. According to ABRAGAMES, the digital game market in Brazil was a $300 million industry by the end of 2014; the number of game companies has tripled in the last five years and 75% of the new companies develop mobile games.

The Brazilian Game Developers program was created in partnership with ABRAGAMES and the government trade agency Apex-Brasil to promote (and fund) Brazilian digital game idevelopers in domestic and international markets; the program has over 40 affiliates including Movile (the top early childhood learning Mobile Learning company in the country) and Sioux, which provides custom Mobile Learning development in Brazil.

Another source of information on the game industry in Brazil is the Game Reporter portal, which has dedicated section on mobile edugames. A portal called G2, or Geração Gamer (Generation Gamer) provides a wide range of information about the Brazilian gaming industry including government programs and initiatives (like the Rouanet Law) that support and tax incentives to the industry.

TechTudo (a division of the media conglomerate Globo) is a technology eCommerce site and includes technology news and product reviews; it has dedicated sections on mobile language learning apps and mobile edugames. The site reviews Mobile Learning apps and identifies the top selling mobile language learning apps and edugames in Brazil on a weekly basis.

**What You Will Find in This Report**

There are two sections in this report: a demand-side analysis and a supply-side analysis. In the demand-side analysis, a detailed breakout of revenue forecasts by six buyer segments. Additionally, the consumer analysis in the demand-side section has a five-year breakout for nine types of Mobile Learning content for that segment. The supply-side section breaks out the addressable revenues for four Mobile Learning product types in Brazil.

**Who is the Buyer?**

This report breaks out five-year forecast for six buyer segments including consumers, corporations, PreK-12 systems, higher education institutions, federal government agencies, and state/municipal government agencies.

Except for the federal government segment, Mobile Learning revenues will more than double by 2019 in all the other buying segments. The growth rate for Mobile Learning in the federal government segment is 9.4%, which
is a healthy rate for any digital education product. It only appears low in the context of the high growth rates in the other segments.

The growth rate for Mobile Learning in the state and municipal segment is also quite healthy at 15.0%. These agencies are expanding their so-called eGov initiatives with custom mobile apps on a wide range of subjects.

**Figure 3 - 2014-2019 Brazil Five-year Growth Rates for Mobile Learning by Sixe Buyer Segments**

![Graph showing growth rates for Mobile Learning by segments](image)

The major buyers in Brazil throughout the forecast period are consumers; in 2014, consumers accounted for more than half of all expenditures on Mobile Learning. By 2019, consumers will account for just under 60% of all expenditures.

The growth rates in the consumer and PreK-12 segments are on par at 27.5% and 28.0%, respectively. The growth rate in the higher education segment is 22.7%. The high growth rate in the PreK-12 segment reflects to government commitment to buy digital content for the ongoing large-scale tablet deployments in the country.

The corporate segment in Brazil has a 20.2% growth rate for Mobile Learning; this is one of the highest corporate growth rates in the world. Mobile Learning has experienced slow adoption rates in most countries in the world. Brazil is one of the exceptions.
What Are They Buying?
The supply-side section provides revenue forecasts for four types of Mobile Learning products and services including:

- Packaged digital content
- Value added services
- Custom content development services
- Authoring tools and platforms

The Mobile Learning revenues in Brazil are heavily concentrated in packaged content. Revenues will more than triple for packaged mobile educational content by 2019. The growth rate for packaged Mobile Learning content is 25.5%, second only to custom content development services.

Revenues for custom content development services will quadruple by 2019. The growth rate is the highest of all product types at 29.2%, being driven in large part by the demand from corporations and government agencies.

Figure 4 - 2014-2019 Mobile Learning Five-year Growth Rates in Brazil by Four Product Types

The growth rate for specialized authoring tools and native Mobile Learning platforms is flat at 0.5%; this is not a negative trend, but rather means that revenues will remain steady throughout the forecast period. Despite the flat growth rate, new native Mobile learning tools and platforms continue to come on the market in Brazil. Brazil has the second-highest number of native Mobile learning tool/platform suppliers after India.