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ICT Providers Survey 2024

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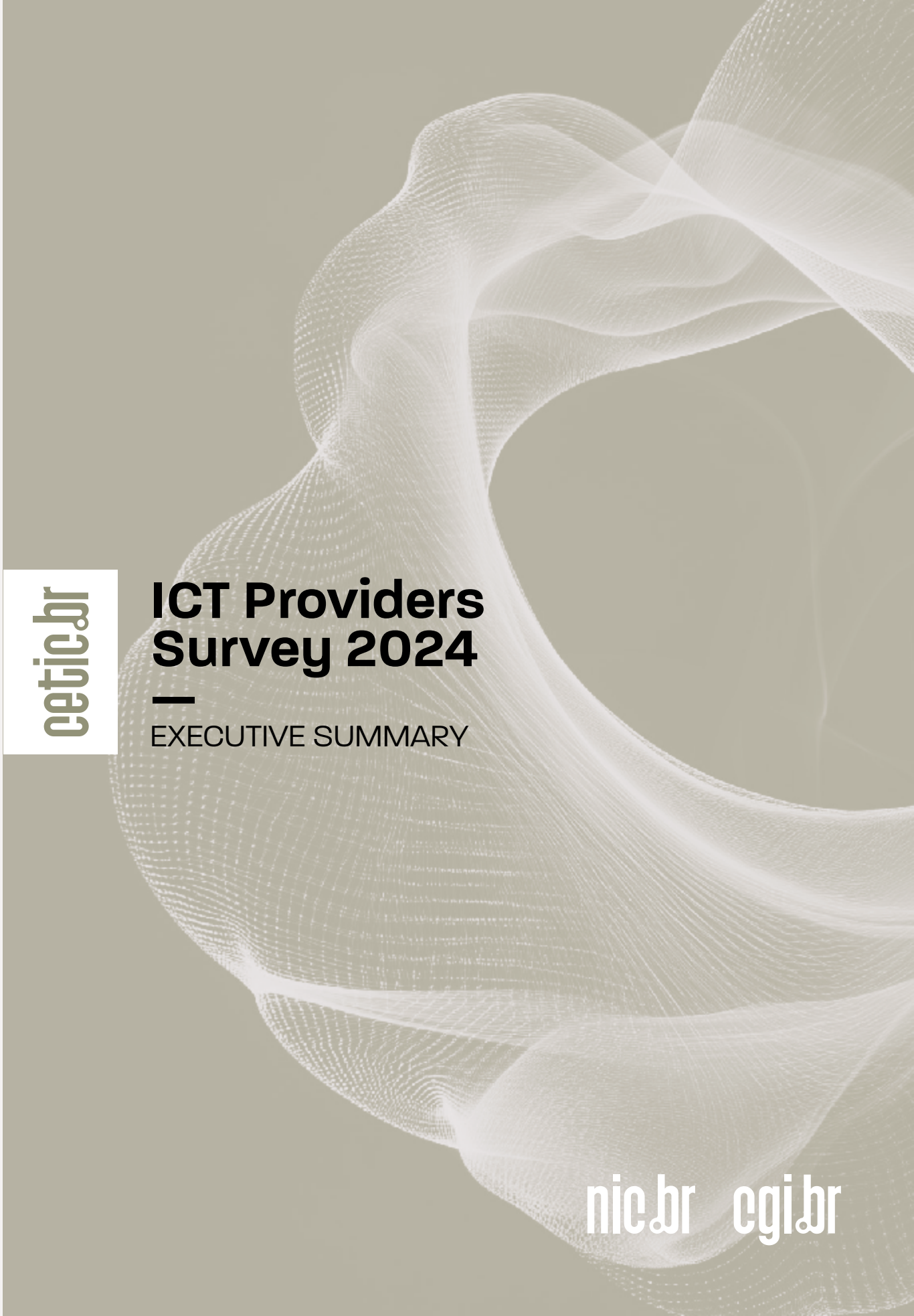
EXECUTIVE SUMMARY



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Executive Summary ICT Providers 2024

The sixth edition of ICT Providers indicated important changes in the ISP market in Brazil. This edition of the survey, conducted in 2024, reinforces the trend seen in the previous version, with stability in the total number of active enterprises and evidence of sector consolidation. The transformations in the ISP market in Brazil signal a new era, with significant impacts on enterprises' traditional operations. Since 2017, the provider's successful business model has been characterized by bringing initial connectivity to locations with little economic interest. Currently, it is necessary to go further, focusing on connection quality parameters and offering more diverse service packages to customers.

THE ICT PROVIDERS 2024 SURVEY ESTIMATED THAT THERE WERE 11,853 ENTERPRISES OPERATING IN THE COUNTRY

Quantity, size, and services offered

In 2024, the ICT Providers survey estimated that 11,853 enterprises were operating in the ISP market in Brazil. This edition of the survey consolidates some results presented in 2022. Regarding the types of clientele served by providers, the number of municipalities served reveals the maintenance of a characteristic of the sector: In 2024, 41% of enterprises operated in only one municipality, a proportion that was 47% in 2022. That same year, 46% of providers were microenterprises, a proportion that rose to 45% in 2024. The same trend towards stability occurred among medium-sized enterprises, following changes from the 2020 edition: While the proportion of medium-sized enterprises was 5% in 2020, it rose to 8% in 2022 and settled at 10% in 2024 (Chart 1). These results highlight the operational profile of a microenterprise market, characterized primarily by limited service to a single locality.

Another relevant piece of data regarding the performance of ISPs was the diversification of services offered compared to the 2022 edition. At a time when the main characteristic of market expansion—the opening of small enterprises in municipalities with little commercial interest for already established enterprises—seems to be showing signs of exhaustion, the results of this edition suggest that a provider's competitive advantage will be the ability to increase its customer base by offering services that complement Internet access.

In 2024, four types of services showed significant increases compared to 2022 (Chart 2): IP-based telephone service, which was offered by 23% of enterprises in 2022, rising to 35%; digital security, increasing from 24% to 32%; IP-based TV broadcasting, rising from 20% to 32%; and finally, applications (ASP), rising from 9% to 13%. The results indicate greater diversification, suggesting that this is a time of adaptation to a more competitive market.

IX.br and IPv6 access technologies

In 2024, 34% of ISPs participated in some IX.br, with the highest frequency among

enterprises in the Southeast region and those of medium or large size (Chart 3). It is important to emphasize that, once on IX.br, the provider can directly access the content most sought after by customers, especially that from streaming companies, ensuring faster and more stable connections.

According to the results of the ICT Providers 2024 survey, the reasons why ISP enterprises seek out IX.br are related to the features that provide a competitive advantage compared to enterprises that do not. For 34% of the providers participating in IX.br, their presence in the initiative is related to improving the quality of their Internet services. 32% stated that the reason for participating was to improve the organization of local Internet traffic. It is also worth highlighting that 28% of the providers on IX.br stated that the reason was to have access to a content delivery network (CDN), a crucial initiative for centralizing the main content accessed by Internet users, such as video calls and streaming services.

IN 2024, 72% OF PROVIDERS OFFERED IPV6 TO CUSTOMERS, A PROPORTION THAT WAS 64% IN 2022

Another important aspect for improving the quality of the connection offered to customers is the delivery of IPv6. The results of the ICT Providers 2024 survey demonstrate an effort to improve their performance, evidenced by the increased availability of IPv6: In 2020, 40% of ISPs offered IPv6 to their clients, a proportion that rose to 64% in 2022 and reached 72% in 2024. Although IPv6 adoption is increasing in the country, the high supply of IPv4 remains (Chart 4), indicating that providers have room to accelerate this transition. Among the most frequently reported difficulties, 13% were related to high investment costs, difficulties in creating an activation plan, and a lack of appropriate equipment.

Security and protection of personal data

Since providers can be both the victims and the means for various cyberattacks, it is important for enterprises to qualify themselves to manage digital security risks, both avoiding the compromise of their routine activities and reducing the chances of serving as a means of amplifying attacks. In 2024, 70% of providers used their network operations teams to handle cases of abuse or security incidents. In addition, but to a lesser extent, providers sought to internalize this expertise, with 57% maintaining persons or teams exclusively dedicated to handling cases of abuse or security incidents.

In the ICT Providers 2024 survey, the proportion of enterprises that suffered denial-of-service attacks also increased, from 23% in 2022 to 30% in 2024. This growth was influenced by the increase in the number of attack reports from providers in the Northeast region, rising from 14% in 2022 to 25% in 2024. One of the effects of denial-of-service attacks is precisely the congestion of the provider's network, which can cause slowness for end users. Therefore, this type of attack can compromise the quality of the enterprise's service, leading to complaints or even changes in the contracted provider. Among the ISPs that reported suffering attacks in 2024, 69% stated that they kept operating, but with greater delay; followed by quitting the service entirely (32%); and, less frequently, they reported being the victims of extortion (4%).

Furthermore, enterprises' compliance with the Brazilian General Data Protection Law (LGPD) has become increasingly crucial, both from a legal standpoint and in their relationships with clients. In 2024, 42% of providers had some kind of structure dedicated to protecting personal data, a proportion that was 40% in 2020.

CHART 1

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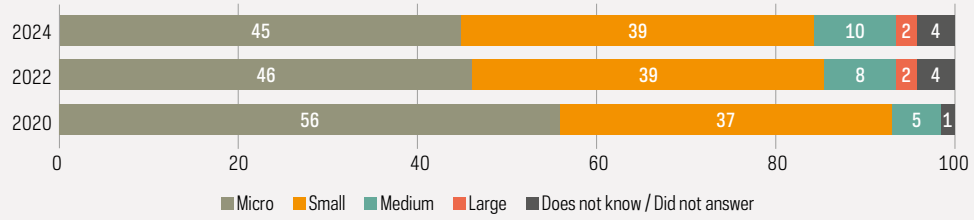
ISPs by size (2020–2024)

Total number of ISPs (%)



70%

of providers used their network operations teams to handle cases of abuse or security incidents

66%

of providers reported having customers in rural areas

42%

of providers had some form of structure dedicated to protecting personal data

CHART 2

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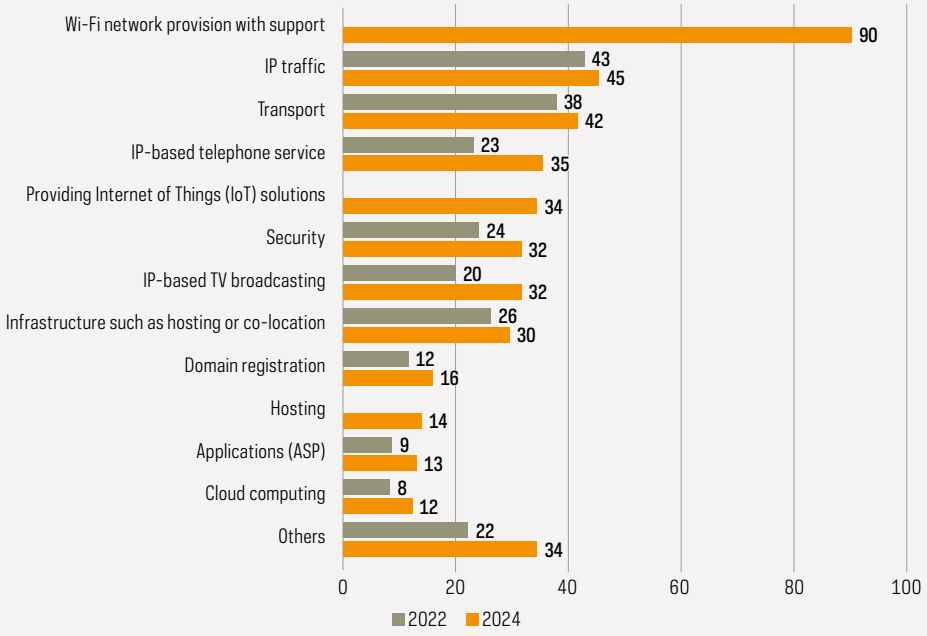
ISPs by type of service offered (2022–2024)

Total number of ISPs (%)



In both years, in most cases, those responsible for the topic came from enterprises' information technology (IT) areas (Chart 5).

Survey methodology and access to data

Conducted since 2011, the ICT Providers survey monitors the performance of the Internet access provider sector in Brazil. In its sixth edition, the initial sample registry was created based on the number of connections declared to the National Telecommunications Agency (Anatel) between August 2021 and July 2024, and the data was collected between September 2024 and April 2025, with 1,719 enterprises interviewed across the country. The information was collected through telephone interviews using a structured questionnaire. The results, including tables for proportions, totals, and margins of error, are available on Cetic.br's website (http://www.cetic.br). The "Methodological Report" and the "Data Collection Report" can be consulted in both the printed publication and on the website.

BOX 1

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INTERNET INFRASTRUCTURE IN RURAL AREAS

For the first time, an indicator on the operating model of ISPs regarding customer service in rural areas was included in the ICT Providers survey. Among ISPs, 66% reported having clients in rural areas, with the highest proportion in the South region (80%). Furthermore, in terms of size, the profile shows a greater presence of medium-sized and large enterprises, indicating limitations in infrastructure and investment for smaller enterprises to reach areas further away from the municipal centers where they operate. Another new indicator in this edition of the survey is the service provided to corporate clients in rural areas: Approximately 4,278 ISPs serve this population, with most of them located in the South (73%) and Center-West (77%) regions.

CHART 3

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ISPs by participation in IX.br (2024)

Total number of ISPs (%)

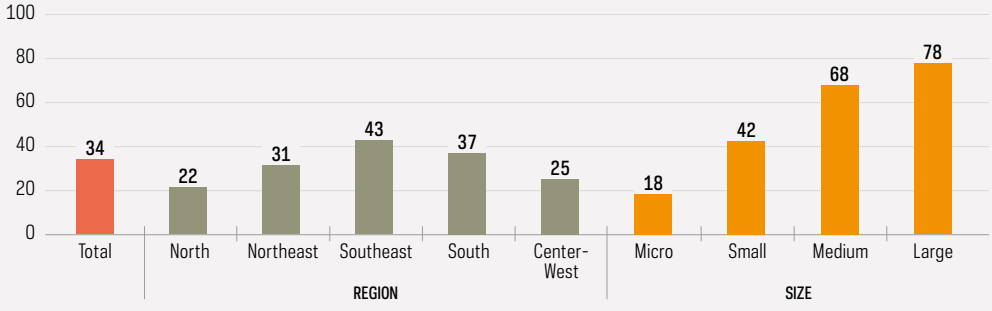

CHART 4

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ISPs by service delivery method (2020–2024)

Total number of ISPs (%)

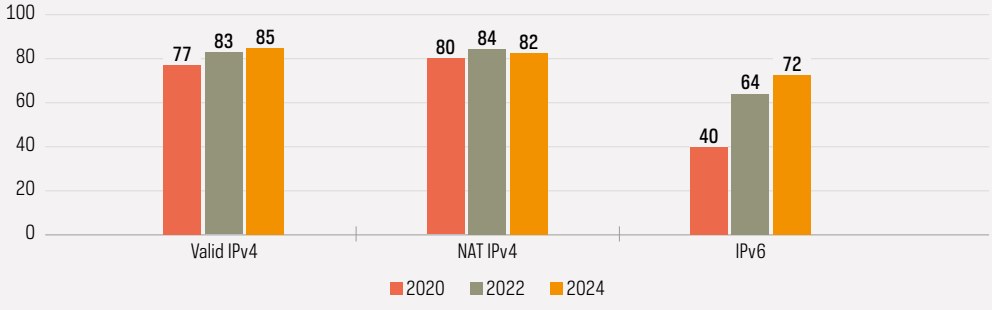

CHART 5

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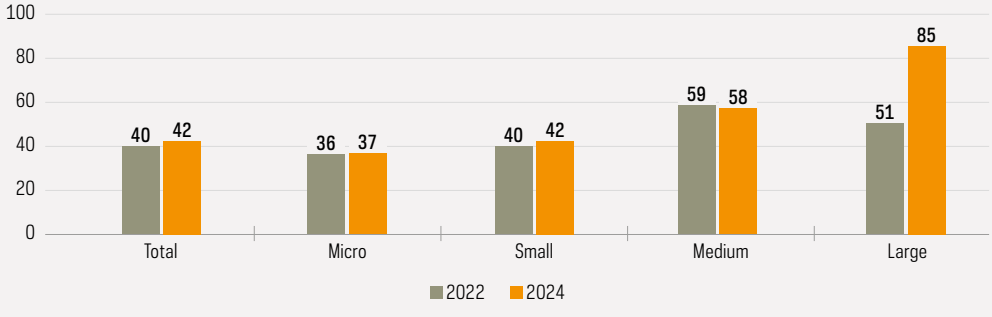
ISPs by presence of specific areas or persons responsible for the topic of personal data protection, by size (2022–2024)

Total number of ISPs (%)



Access the full survey data!

In addition to the results presented in this publication, further information is available on the Cetic.br|NIC.br website, such as indicator tables, the questionnaires, information on how to access the microdata, and a presentation of the launch event results, as well as other publications on the survey topic. The tables and results (https://www.cetic.br/pt/pesquisa/provedores/indicadores/) are available for download in Portuguese, English, and Spanish. They present the statistics produced, including information about the data collected and cross-tabulations for 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

E1A - ISPs THAT PARTICIPATED IN IX.BR

Total number of ISPs

PERCENTAGE (%)		YES	NO	DOES NOT KNOW	DID NOT ANSWER
TOTAL		34	55	11	0
REGION	North	22	68	11	0
	Northeast	31	59	10	1
	Southeast	43	48	9	0
	South	37	50	13	0
	Center-West	25	58	17	0
SIZE	Micro (up to 9 employed persons)	18	72	9	0
	Small (10 to 49 employed persons)	42	48	9	0
	Medium (50 to 249 employed persons)	68	21	11	0
	Large (250 or more employed persons)	78	12	10	0
	No information	35	26	38	1

Indicator responses

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. (2025). *Survey on the Internet service provider sector in Brazil: ICT Providers 2024* [Tables].

How to reference the tables of indicators

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