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BRAZILIAN BOT ECOSYSTEM MAP 2024

OCTOBER | 2024

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My name is Márcia, and I want to know more about the Pet ASC plans. 12:00

Of course, right away! 🌼 Can you tell me your pet's name, breed, and age? 12:00

My pet is Juquinha, she is a Siamese cat, and she is 3 years old. 12:00

Thank you for the information! ❤️ It will be a pleasure to have you both with us! 12:00

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General Overview

Brazil is one of the largest conversational robot markets in the world. Automated digital customer service has spread across various sectors, particularly those with a high volume of daily contacts, such as banks, telecom operators, retail chains, and healthcare providers. In these sectors, chatbots handle simpler, repetitive issues, leaving more complex requests to human agents. This balance between robots and humans has yielded positive results, increasing service efficiency and, consequently, customer satisfaction.

More recently, the advent of generative artificial intelligence has expanded the use cases for conversational robots. It's as if chatbots have become smarter — and in fact, they have. Now they can act as consultants, engage in longer, more fluid conversations, and even

serve as salespeople. There is still some resistance from companies to use this technology directly with customers due to the risk of "hallucinations." However, increasingly sophisticated techniques, such as "guardrails," which limit the bot's knowledge, are being developed to minimize these risks. As a first step, many companies are opting to use generative AI as a copilot to assist human agents. A natural next step is to apply the technology to direct customer interaction in more controlled situations.

Mobile Time estimates that 820,000 chatbots have already been developed in Brazil, based on data provided by the 64 companies that responded to this year's survey, combined with historical data from previous editions, representing a 22% growth in one year (Chart 1). Of this total, 164,000 bots are in operation in Brazil, conducting 705 million sessions per month,

CHART 1

THE BRAZILIAN MARKET IN THE NUMBER OF BOTS PRODUCED
(CUMULATIVE FIGURES)

Question: How many bots has your company helped develop to date?

Base in 2024: 64 bot-producing companies
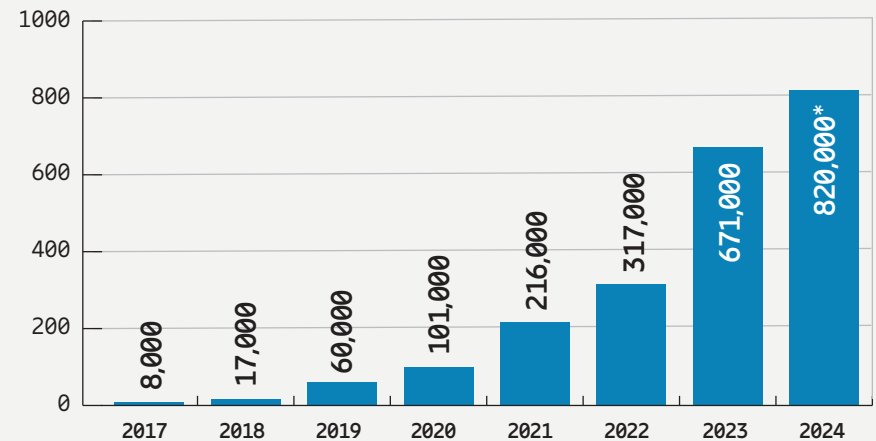
*Estimate based on data collected this year and the history from previous years.

ABOUT THIS REPORT AND ITS AUTHOR

This research was developed based on responses from 64 companies that either develop conversational robots or provide tools for such, collected through an online questionnaire between June and August 2024. The data analysis and report writing were carried out by journalist **Fernando Paiva**, editor of **Mobile Time** and organizer of the **Super Bots Experience** seminar. Paiva is a telecommunications industry journalist with 24 years of experience in this field.

CHART 2

CURRENT SCENARIO IN BRAZIL

Questions: How many bots developed by your company or using your company's platform are currently active in Brazil? Considering all the bots created by your company or using your platform that are active in Brazil, what is their average monthly session volume?

Base: 64 bot-producing companies

12:00

164,000
bots in operation*

705
million sessions per month*

An average of **4,300** sessions/month per bot

*Estimate based on data collected this year and the history from previous years.

with an average of 4,300 sessions per bot per month (Chart 2).

Starting with this edition, the number of sessions per month will replace the number of messages per month as the main operational metric for bots. Measuring the number of conversations is more relevant than counting the number of messages exchanged. In the conversational interface, what matters is the quality and assertiveness of the conversation, not the number of messages exchanged.

The Consolidation of Generative AI

Chatbots can be categorized into three generations based on their conversational technology. The first generation consists of decision trees, also known as text IVRs. In these systems, the conversation is guided by a predefined script, where the user selects from preset options, and the bot's responses are already written.

The second generation is marked by the use of Natural Language Processing (NLP), an AI technique capable of identifying the user's intent through predefined keywords. The bot's responses are still pre-written but can be complemented with real-time data fetched from system APIs. Some well-known NLP engines include IBM's Watson, Google's DialogFlow, and Microsoft's Luis.

The third generation of bots emerges with Generative AI. With this, robots use Large Language Models (LLMs) to instantly generate responses, instead of using pre-written texts. Additionally, they can store conversation context and history, making the dialogue more fluid and natural.

The launch of ChatGPT at the end of 2022 was a technological milestone that profoundly changed the bot market worldwide, popularizing the concept of generative AI. This new technology has transformed the virtual assistant experience. Previously, journeys could be interrupted if a particular path was not anticipated in the decision tree, or if the NLP engine failed to identify the user's intent. With generative AI, this rarely happens—unless the developer has specifically programmed the bot to restrict certain topics. The new approach is the opposite: rather than defining what the bot can discuss, it's necessary to define what it should not address.

In less than two years, generative AI has consolidated itself as the main conversational technology used by bot developers in Brazil, surpassing NLP and decision tree/text IVRs. Currently, 88% of companies that produce bots in the country use generative AI, compared to 80% that still use decision trees and 75% that employ NLP (Chart 3). A year ago, 60% of developers were already using generative AI, according to the previous edition of this report.

CHART 3

CONVERSATIONAL TECHNOLOGIES

Question: Conversational robots can be divided into three groups based on the technology behind their conversational abilities: **1)** Decision tree / Text IVR: the conversation is guided by the bot, which offers options in the form of buttons or menus; **2)** Natural Language Processing (NLP): the bot is integrated with an AI engine capable of recognizing the user's intent in each message (examples of NLP engines: IBM Watson, Microsoft Luis, etc.). Depending on the identified intent, the bot returns pre-written responses; **3)** Generative Artificial Intelligence: the bot is integrated with one or more LLMs (large language models) and is capable not only of understanding what the user writes/speaks but also generating a new response for each request, instead of using pre-written responses. Which of these technologies does your company currently use in the conversational bots it develops?

Base: 64 bot-producing companies

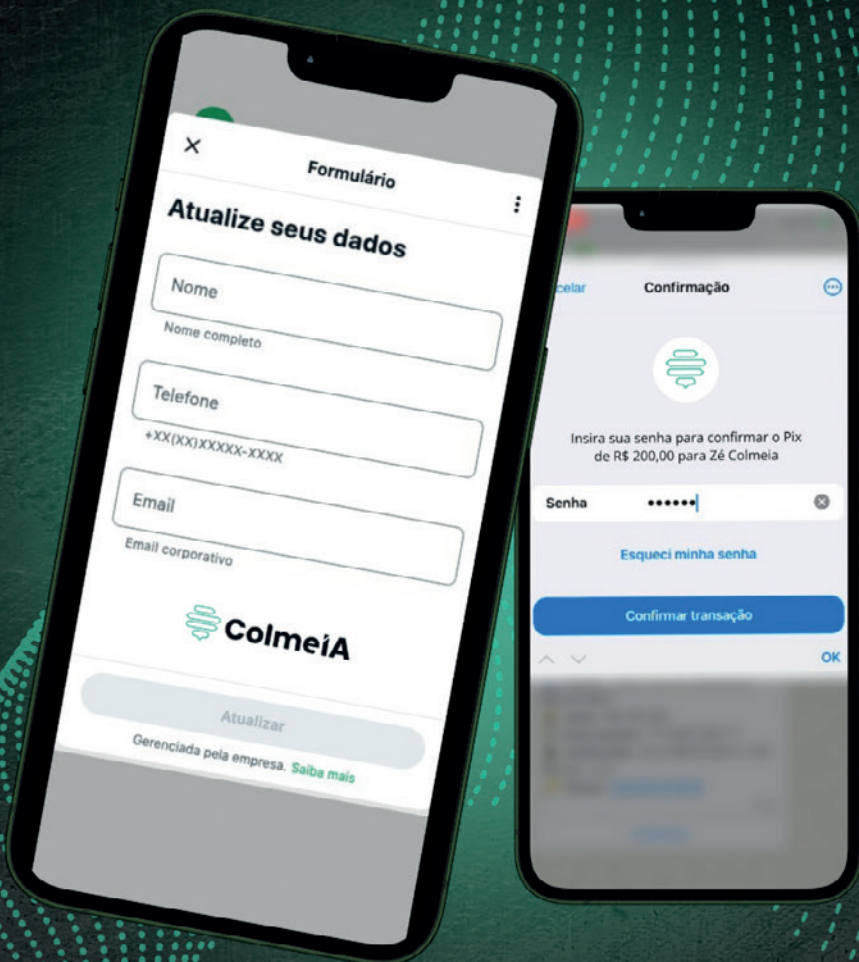| Technology	Value
Decision tree / Text IVR	80%
Natural Language Processing	75%
Generative Artificial Intelligence	88%

ColmeiA
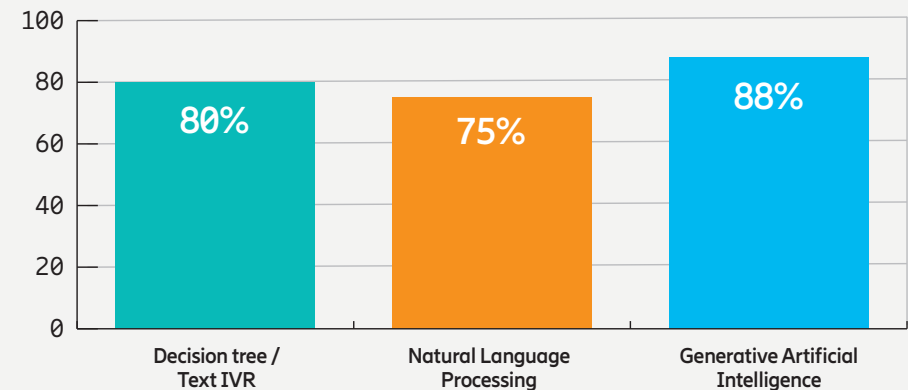
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Email corporativo

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Atualizar

Gerenciada pela empresa. **Saiba mais**

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Cancelar   Confirmação

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Senha   ••••••

Esqueci minha senha

Confirmar transação

OK

AVERAGE PROPORTION OF BOTS WITH GENERATIVE AI PER DEVELOPER

Question: Of the total bots created by your company that are currently in operation, approximately how many use Generative AI?

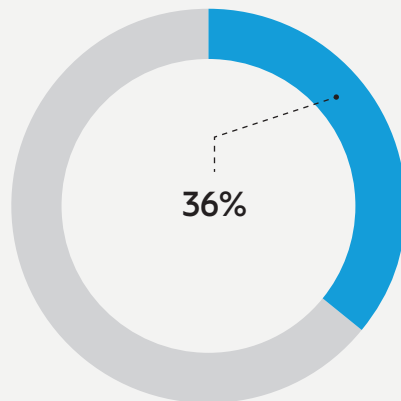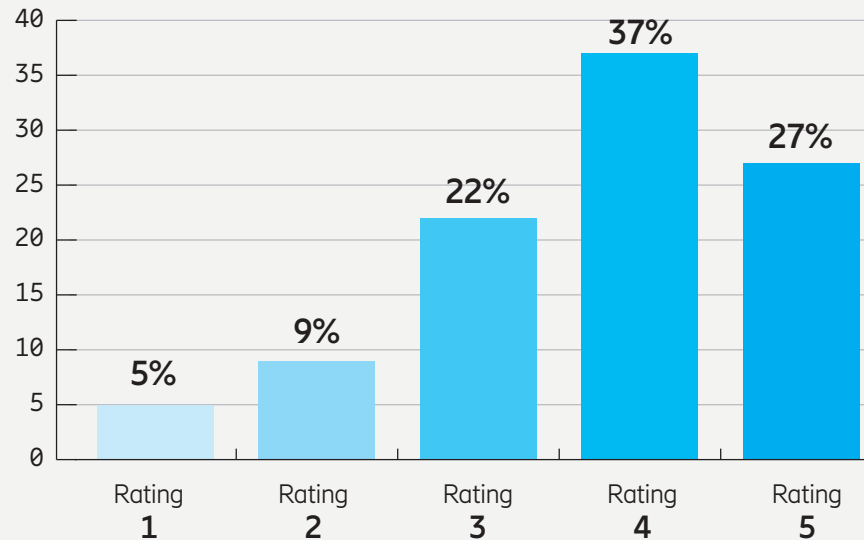**Base:** 59 bot-producing companies working with LLMs

36%

EXPECTED DEMAND FOR BOTS WITH GENERATIVE AI

Question: In your opinion, on a scale from 1 to 5, where 1 is "very low" and 5 is "very high," what is the current demand for bots with Generative AI in your company this year in Brazil?

Base: 64 bot-producing companies

Rating 1	Rating 2	Rating 3	Rating 4	Rating 5
5%	9%	22%	37%	27%

Another indicator of this technology's consolidation is that among developers who have adopted it, in average, 36% of bots created use generative AI to some degree (Chart 4). A year ago, this percentage was negligible.

Market demand for bots with generative AI has grown significantly in just one year. On a scale of 1 to 5, where 1 means very low, and 5 means very high, 64% of developers rated the demand as 4 or 5 (Chart 5). In the 2023 edition of the report, this percentage was 49%.

The most used LLM provider by Brazilian developers is OpenAI, cited by 68% of respondents, followed by Meta (10%), Google (10%), and Anthropic (5%) (Chart 6). It's increasingly common to work by combining multiple LLMs from different providers, activated based on predefined criteria for each solution.

It's also important to note that these three generations of conversational technologies can be combined in a single chatbot. One does not exclude the other. Depending on the moment in the

journey or the information requested by the customer, it might be faster, cheaper, and simpler to work with a decision tree or NLP than with generative AI. Many developers have realized this and are offering clients hybrid chatbot solutions, mixing the three technologies according to the situation.

In the NLP market, it's common for developers to use engines developed in-house (57% of respondents)—typically combinations of various engines available on the market (Chart 7).

CHART 6
MAIN LLM PROVIDERS

Question: Who is the main LLM provider used in your bots?

Base: 59 bot-producing companies working with LLMs

- Anthropic (Claude) **5%**
- Multiple models combined **5%**
- Others **2%**
- Google (PaLM, LaMDA etc.) **10%**
- Meta (LLaMa) **10%**
- OpenAI (GPT) **68%**
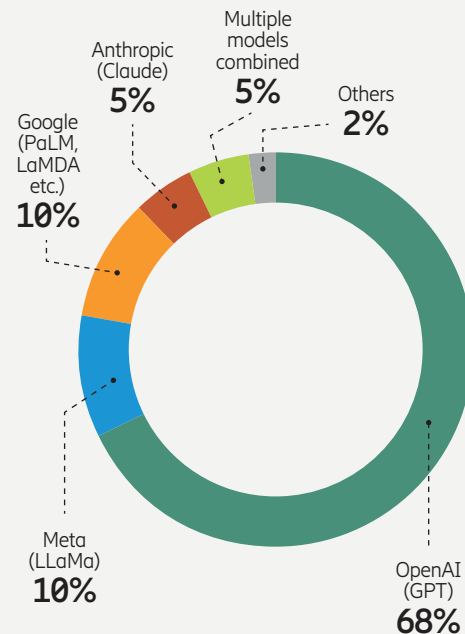
CHART 7
MAIN NLP PROVIDERS

Question: Who is the provider of your Natural Language Processing engine?

Base: 54 bot-producing companies working with NLP

- IBM Watson **2%**
- Others **15%**
- Varies by project **2%**
- Amazon **7%**
- Google DialogFlow **17%**
- In-house engine **57%**
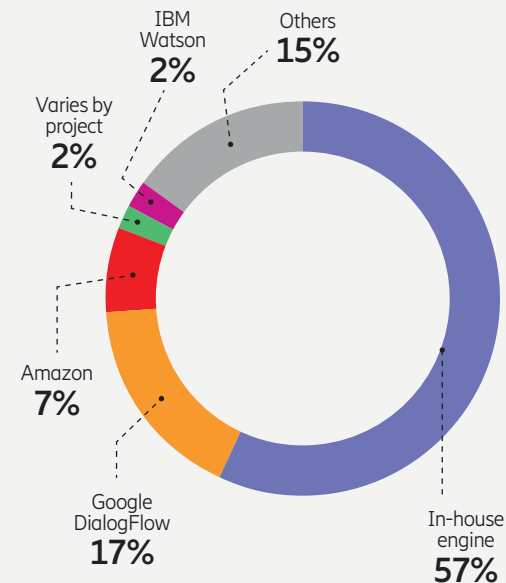
Other technologies: from transactional bots to biometric authentication

The first conversational robots were purely informational, primarily answering questions about products and services with pre-written responses based on FAQs or other similar data sources.

Gradually, these bots became more complex and began integrating with corporate systems such as CRMs, ERPs, billing platforms, etc. As a result, beyond retrieving real-time information, they also became capable of performing tasks such as updating user profiles, scheduling technical visits, processing purchases, changing service plans, and canceling services. These are known as transactional bots. Currently, 66% of bots active in Brazil are transactional (Chart 8).

Alongside the rise of transactional bots, conversational commerce has grown—this refers to the use of bots to make sales within messaging apps, integrated with payment systems. The pandemic significantly boosted conversational commerce, and the recent launch of WhatsApp's native payment feature is expected to contribute further to this trend. 72% of developers have already created sales bots (Chart 9).

User authentication is essential for performing certain transactions with bots. One method of authentication is through digital biometrics, using device features such as cameras for facial recognition. 39% of developers who participated in this report have already developed bots with facial or voice biometrics (Chart 10), up from 29% a year ago

Another increasingly common technology associated with bots is sentiment analysis, which identifies whether the customer is satisfied or dissatisfied with the company. This is done through AI, analyzing the words used by the customer. Sentiment analysis can be performed in real-time or after the fact, for generating reports. 63% of bot developers now work with sentiment analysis (Chart 11).

CHART 8

PROPORTION OF TRANSACTIONAL BOTS

Question: Transactional bots are those capable of performing transactions/operations integrated with one or more company systems, beyond merely retrieving information. Examples include sales, registrations, plan changes, scheduling technical visits, canceling services, etc. Of the total bots in operation created by your company, approximately how many are transactional?

Base: 64 bot-producing companies

66%
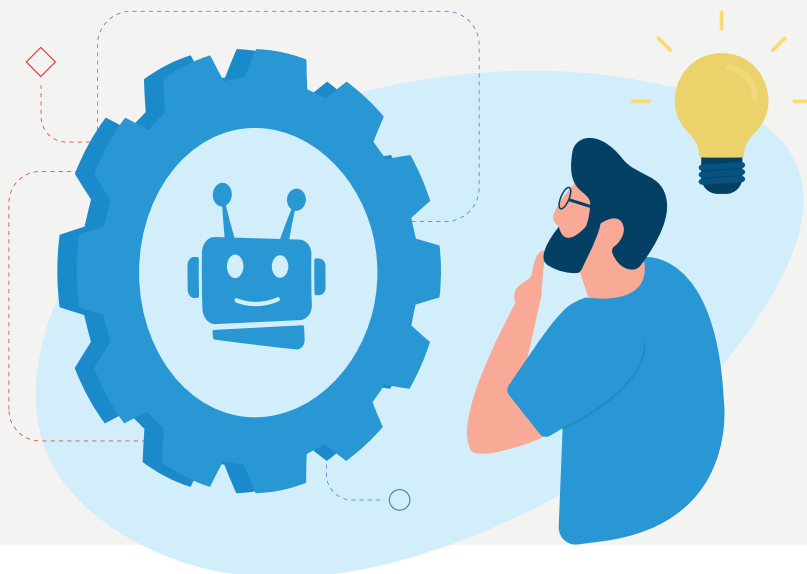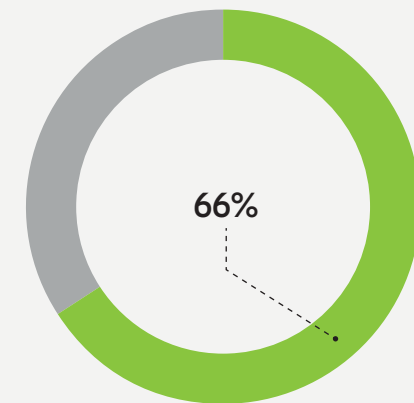
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CHART 9

PROPORTION OF COMPANIES THAT HAVE DEVELOPED SALES BOTS

Question: Has your company developed bots that execute sales?

Base: 64 bot-producing companies

YES
72%
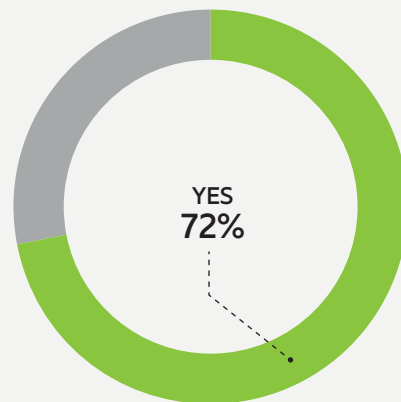
CHART 10

PROPORTION OF COMPANIES USING DIGITAL BIOMETRICS IN BOTS

Question: Has your company developed bots with facial or voice biometrics for customer authentication?
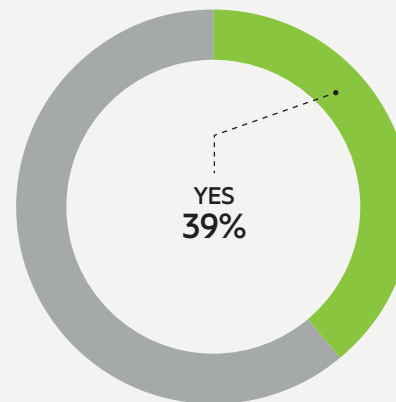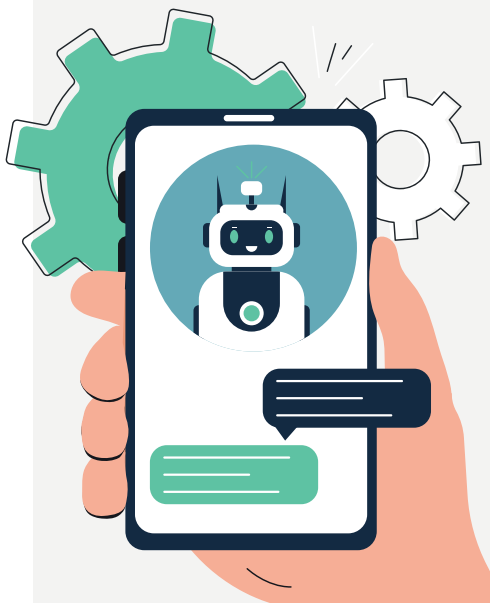
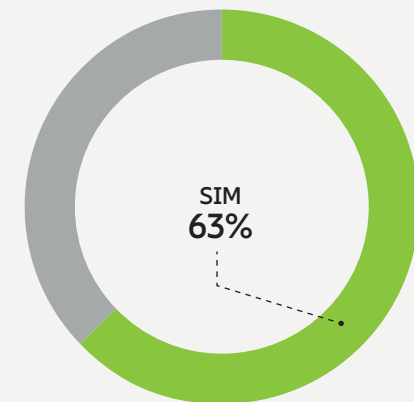**Base:** 64 bot-producing companies

YES
39%

CHART 11

PROPORTION OF COMPANIES CONDUCTING SENTIMENT ANALYSIS ON BOT CONVERSATIONS

Question: Does your company conduct sentiment analysis on the messages received by your bots?

Base: 64 bot-producing companies

SIM
63%

Main verticals and use cases

Retail remains the vertical with the highest demand for bots: 25% of developers report that most of their projects this year come from retail (Chart 12). The digital transformation of this sector, which gained significant traction during the pandemic, is still ongoing. Many store chains adopted WhatsApp during social isolation to maintain operations while their physical stores were closed. Initially, human salespeople responded to customers, but gradually these conversations were automated, first to capture orders and later to process payments.

The financial sector is the second-largest in demand for bots, cited by 19% of respondents. The proliferation of fintechs, payment institutions, and financial services in recent years in Brazil, driven by regulatory incentives such as the introduction of services like Pix, has increased competition. Today, it's estimated that each Brazilian has, on average, more than four digital bank accounts. This growth has created a need for digital and preferably automated customer service—at least for simple and repetitive tasks, where allocating human agents would be too costly. This explains the financial sector's significant use of bots. Notably, it's not just new players using conversational robots: traditional banks, such as Bradesco and Banco do Brasil, are also among the largest users of this technology.

A notable change this year was the growth in the health sector. Compared to the 2023 edition of this report, the proportion of developers identifying the health sector as having the highest demand for bots increased from 8% to 14%. Conversely, the telecommunications sector, which for a long time was among the top three in terms of projects, dropped to fourth place this year, cited by 11% of developers as the main sector.

In 2024, customer service remains the primary use case for bots in Brazil, according to 59% of developers (Chart 13). However, it is trending downward: last year, the figure was 64%. Other use cases are gaining strength, such as sales, which ranked second, with 13% of respondents indicating it as the main purpose of bot projects this year.
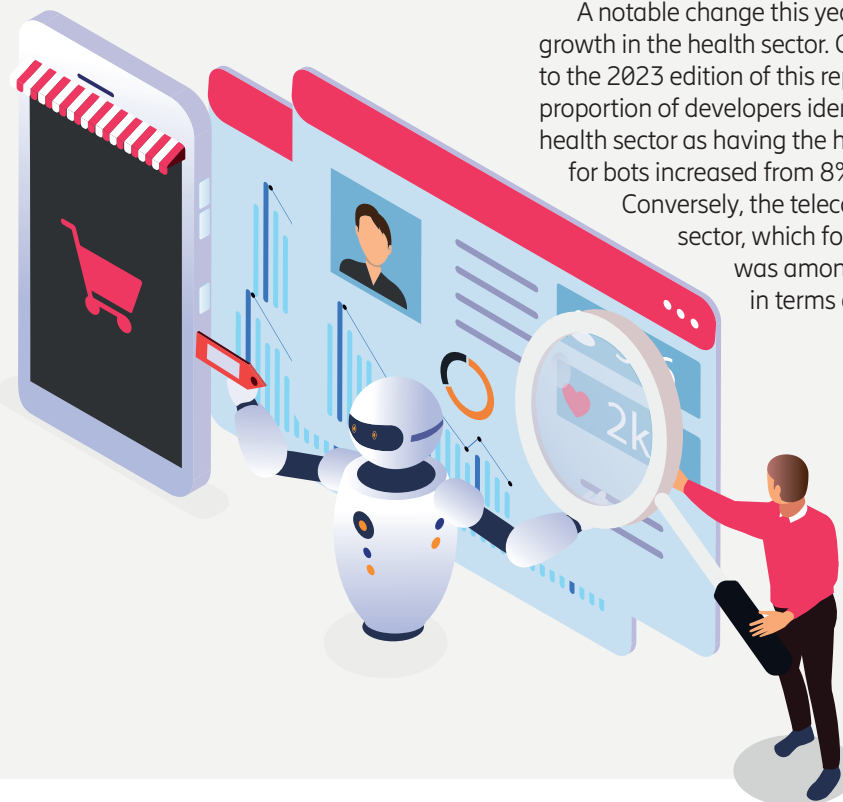
CHART 12

VERTICAL WITH THE HIGHEST DEMAND FOR BOTS IN 2024

Question: Which vertical has your company developed the most bots for this year in Brazil?

Note: 64 bot-producing companies

Obs.: Only verticals mentioned by at least 3% of respondents are highlighted

- Others **13%**
- Education **3%**
- Government **3%**
- Utilities **6%**
- Industry **6%**
- Telecommunications **11%**
- Healthcare **14%**
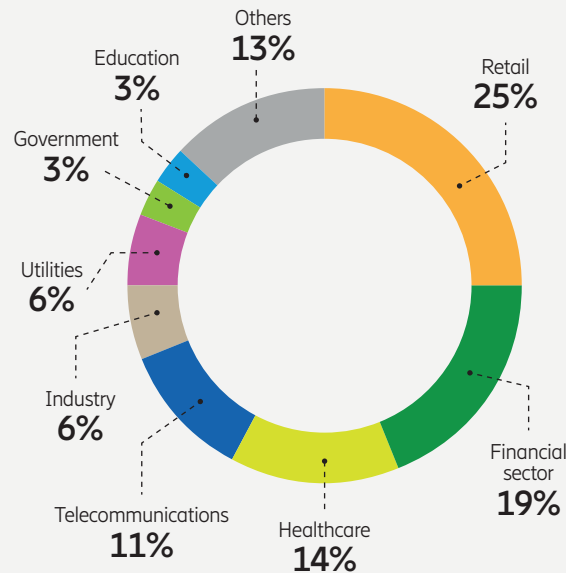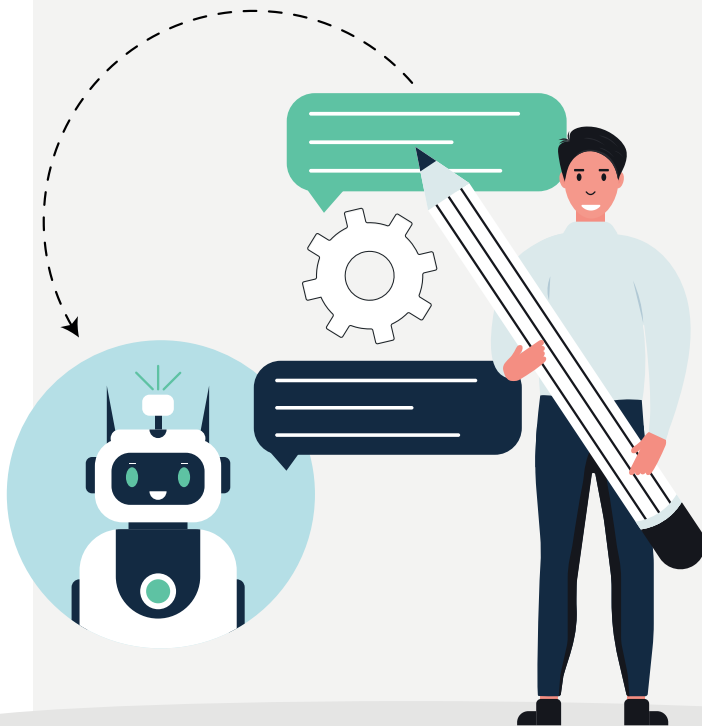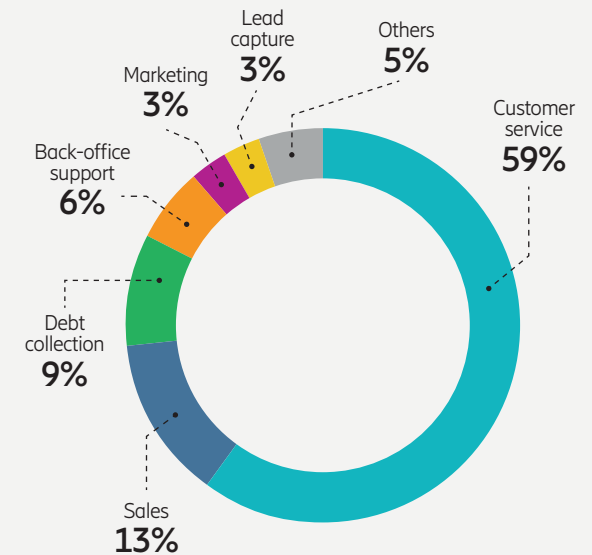- Financial sector **19%**
- Retail **25%**

CHART 13

PRIMARY PURPOSE WITH THE HIGHEST DEMAND FOR BOTS IN 2024

Question: For what purpose has your company developed the most bot projects this year in Brazil?

Base: 64 bot-producing companies

- Lead capture **3%**
- Marketing **3%**
- Back-office support **6%**
- Others **5%**
- Customer service **59%**
- Debt collection **9%**
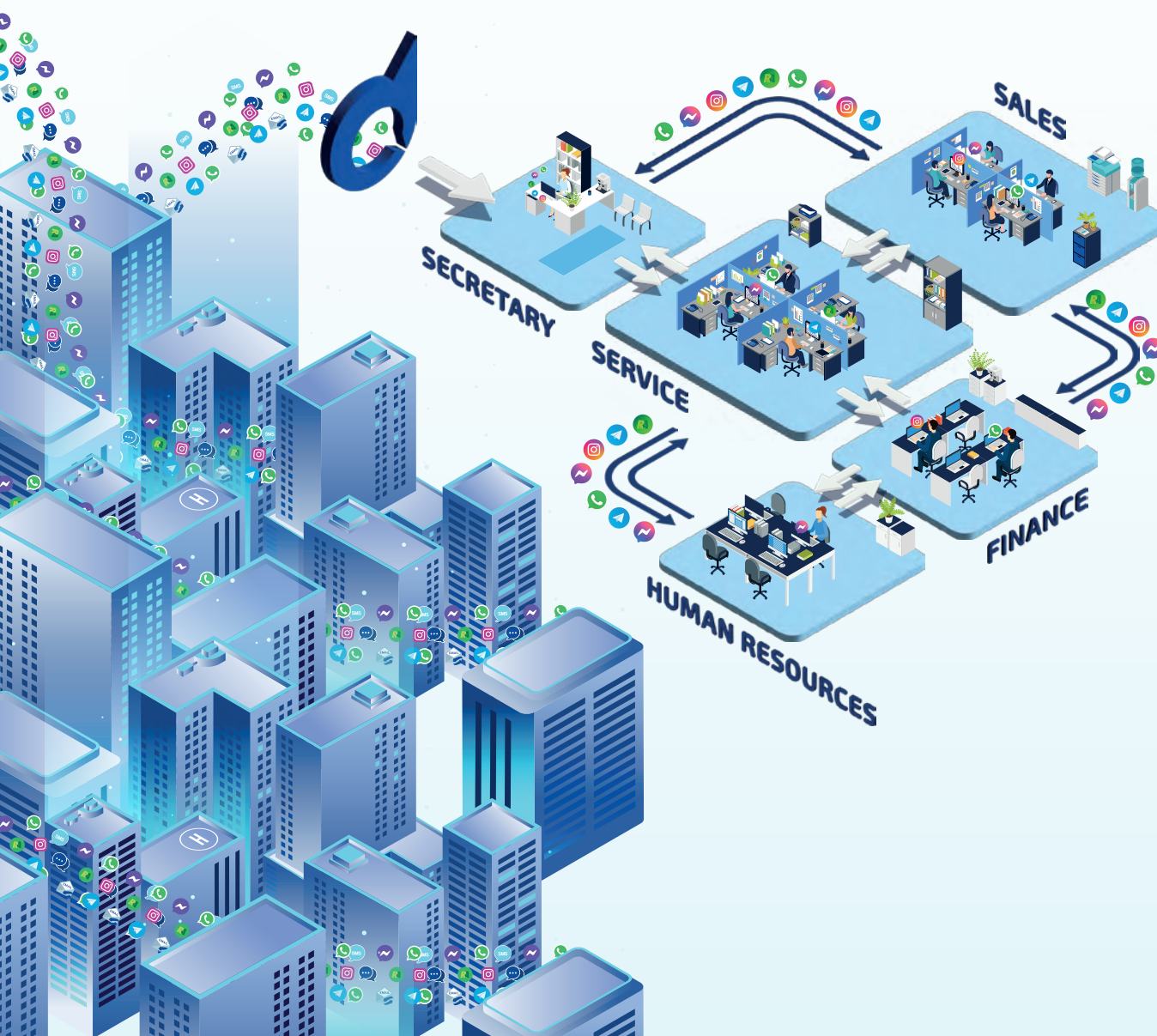- Sales **13%**

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Demand for different channels

Over the past year, the proportion of bot developers who claim that WhatsApp is the channel with the most bots in operation has risen from 63% to 77% (Chart 14). The messaging app is installed on 98% of Brazilian smartphones and is present on the home screen of more than 50% of these devices, according to the Panorama Mobile Time/Opinion Box survey. It is also the channel that most developers have worked with, as 94% of respondents have already built a bot for WhatsApp in Brazil (Chart 15).

On the other hand, there has been a significant drop in the proportion of developers identifying the phone as the main channel for which they are developing bots—these would be voice bots for automated calls. The percentage fell from 12% in 2023 to 6% in 2024. This decline can be attributed to Anatel's efforts to combat the abusive use of telemarketing, imposing stricter rules on the channel, such as the mandatory prefix for identifying sales calls.

Developers' expectations for demand on alternative channels,

such as Apple Business Chat, Google Business Messages, and RCS, remain low. On a scale of 1 to 5, where 1 means very low demand and 5 means very high demand, 95% of developers gave scores of 1 or 2 for demand for Apple Business Chat this year (Chart 16). For Google Business Messages, which was discontinued by Google in July (during the data collection process for this report), 87% gave scores of

1 or 2 (Chart 17). For RCS, 78% rated demand with scores of 1 or 2 (Chart 18).

The best performance comes from Instagram, with 47% giving scores of 1 or 2 and 20% giving scores of 4 or 5 (Chart 19). Even so, the overall expectation is more negative than positive.
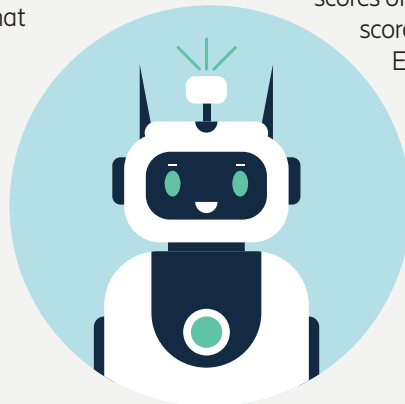
WHICH CHANNEL HAS THE MOST BOTS FROM YOUR COMPANY TODAY?

Question: Among the channels below, which one has the most bots created by your company currently?

Base: 64 bot-producing companies

Phone (voice bots) **6%**

Others **4%**
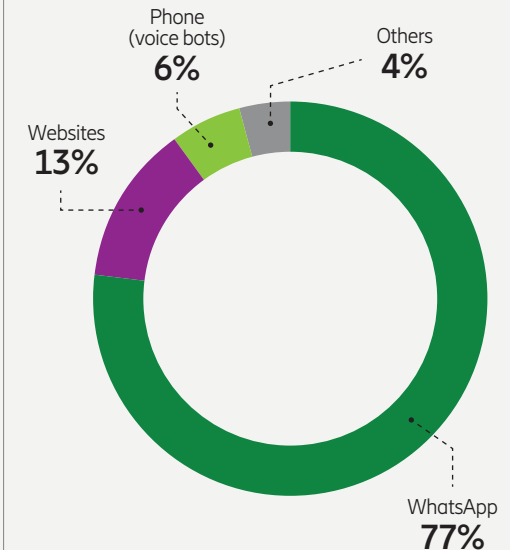
Websites **13%**

WhatsApp **77%**

CHART 15

FOR WHICH CHANNELS HAS YOUR COMPANY DEVELOPED BOTS?

Question: Select the channels for which your company has produced bots

Base: 64 bot-producing companies

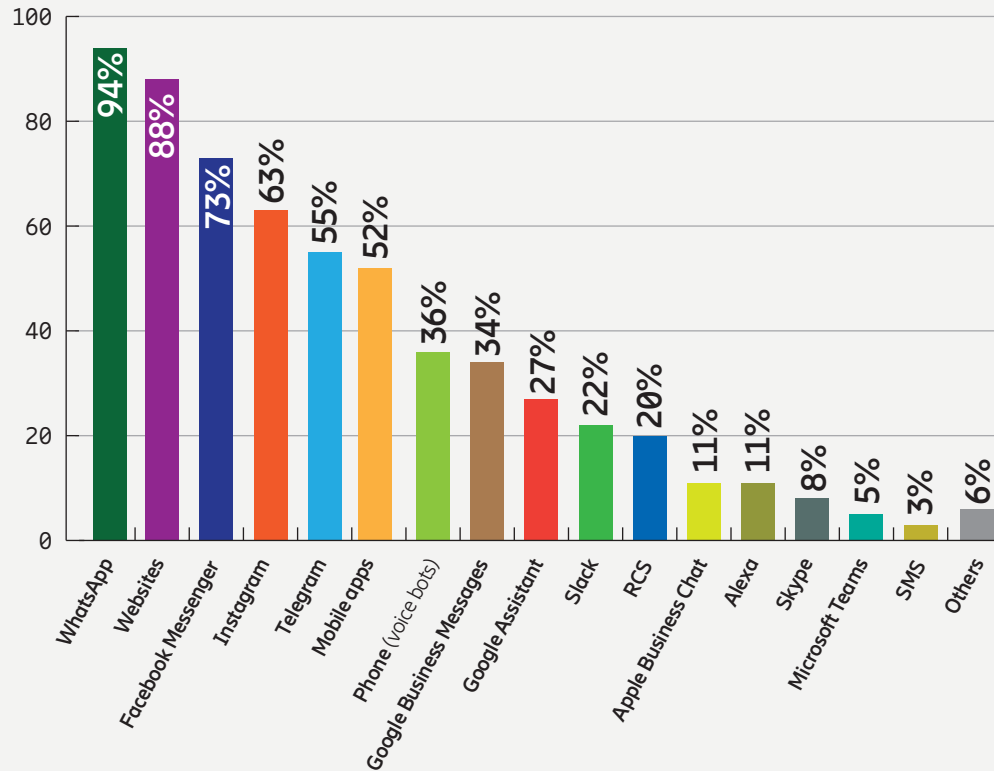| Channel	%
WhatsApp	94%
Websites	88%
Facebook Messenger	73%
Instagram	63%
Telegram	55%
Mobile apps	52%
Phone (voice bots)	36%
Google Business Messages	34%
Google Assistant	27%
Slack	22%
RCS	20%
Apple Business Chat	11%
Alexa	11%
Skype	8%
Microsoft Teams	5%
SMS	3%
Others	6%

CHART 16

EXPECTED DEMAND FOR BOTS ON APPLE BUSINESS CHAT

Question: In your opinion, on a scale from 1 to 5, where 1 is "very low" and 5 is "very high," what is the demand for bots on Apple Business Chat in your company this year in Brazil?
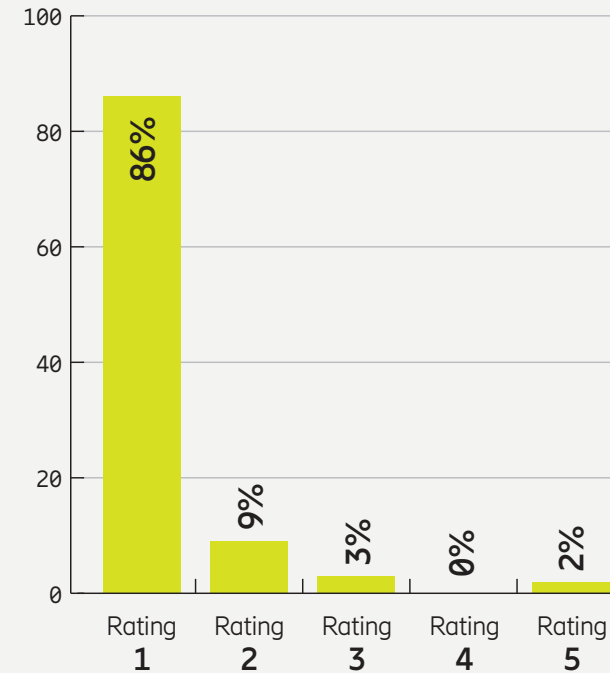
Base: 4 bot-producing companies

Rating	%
Rating 1	86%
Rating 2	9%
Rating 3	3%
Rating 4	0%
Rating 5	2%

CHART 17
EXPECTED DEMAND FOR BOTS ON GOOGLE BUSINESS MESSAGES

Question: In your opinion, on a scale from 1 to 5, where 1 is "very low" and 5 is "very high," what is the demand for bots on Google Business Messages in your company this year in Brazil?
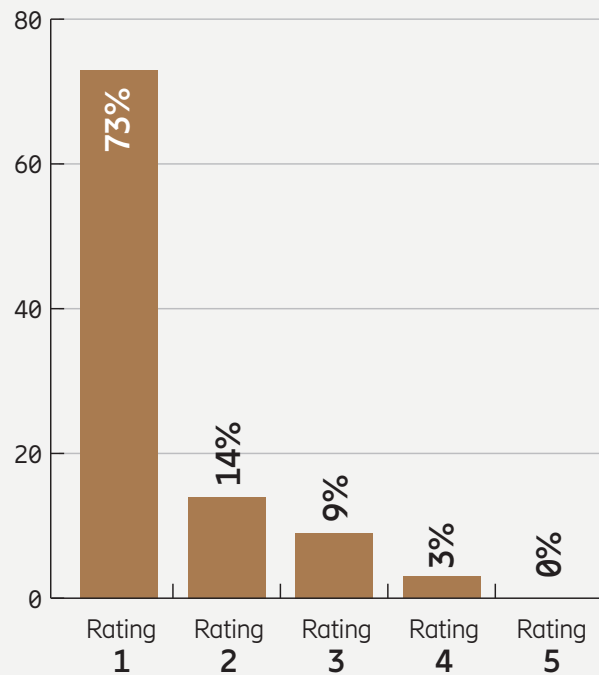
Base: 64 bot-producing companies

Rating 1	Rating 2	Rating 3	Rating 4	Rating 5
73%	14%	9%	3%	0%

CHART 18
EXPECTED DEMAND FOR BOTS ON RCS

Question: In your opinion, on a scale from 1 to 5, where 1 is "very low" and 5 is "very high," what is the demand for bots on RCS in your company this year in Brazil?
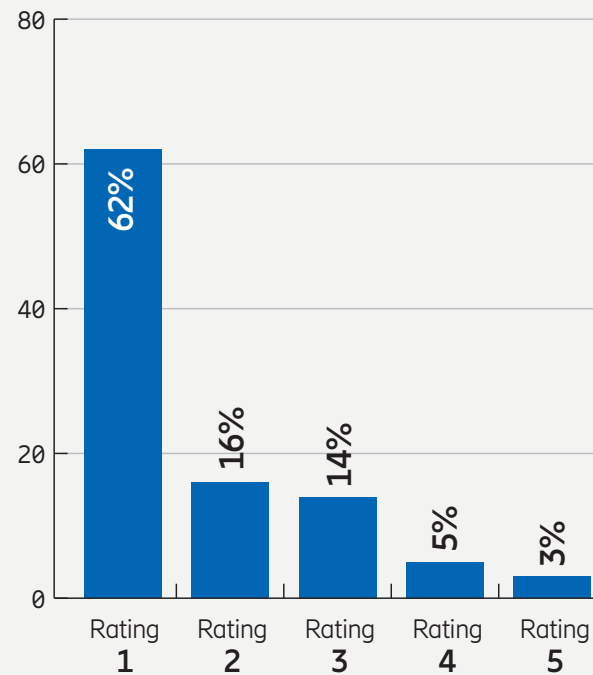
Base: 64 bot-producing companies

Rating 1	Rating 2	Rating 3	Rating 4	Rating 5
62%	16%	14%	5%	3%

CHART 19
EXPECTED DEMAND FOR BOTS ON INSTAGRAM

Question: In your opinion, on a scale from 1 to 5, where 1 is "very low" and 5 is "very high," what is the demand for bots on Instagram in your company this year in Brazil?

Base: 64 bot-producing companies

Rating 1	Rating 2	Rating 3	Rating 4	Rating 5
16%	31%	33%	14%	6%
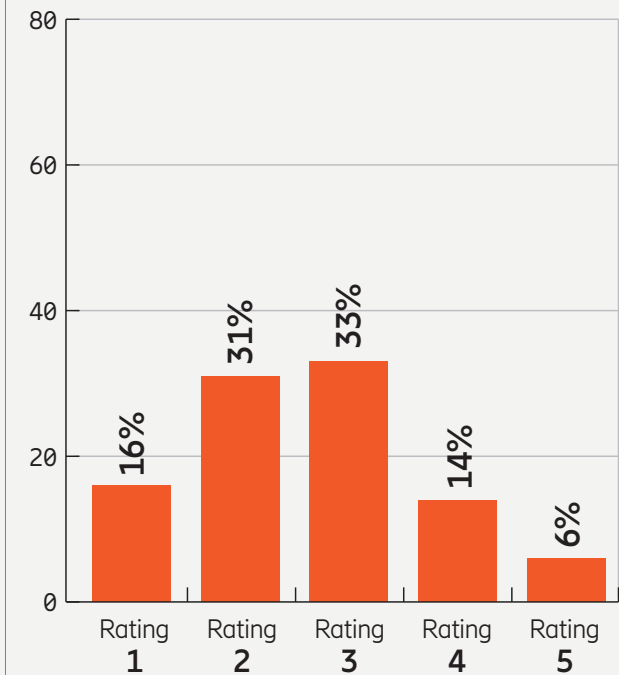
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The profile of bot developers in Brazil

The vast majority of bot developers in Brazil are concentrated in São Paulo, where half of the respondents for this edition of the Map are headquartered (Chart 20). Minas Gerais ranks second, partly due to the success of Blip, the largest national player in this sector, which has built an ecosystem of developers around its platform. Developers are also present in the South, Northeast, and Midwest regions.

Most bot developers in Brazil are small or medium-sized companies in terms of the number of employees. Only five respondents reported having more than 1,000 employees (Chart 21).

The preferred business model is charging per conversation session, following the standard used by WhatsApp, which is the main channel for bots in Brazil: 61% of respondents operate this way (Chart 22). However, many still charge per message (34%) or per project (30%). A key feature of this sector is its flexibility: most developers use more than one business model, adapting to client preferences.

CHART 20

DISTRIBUTION OF BOT DEVELOPERS IN BRAZIL
(NUMBER OF COMPANIES PER STATE)

Base: 64 bot-producing companies

OUTSIDE BRAZIL **4**

RN **1**
PB **2**
PE **2**
AL **1**
BA **1**
GO **1**
MG **9**
SP **32**
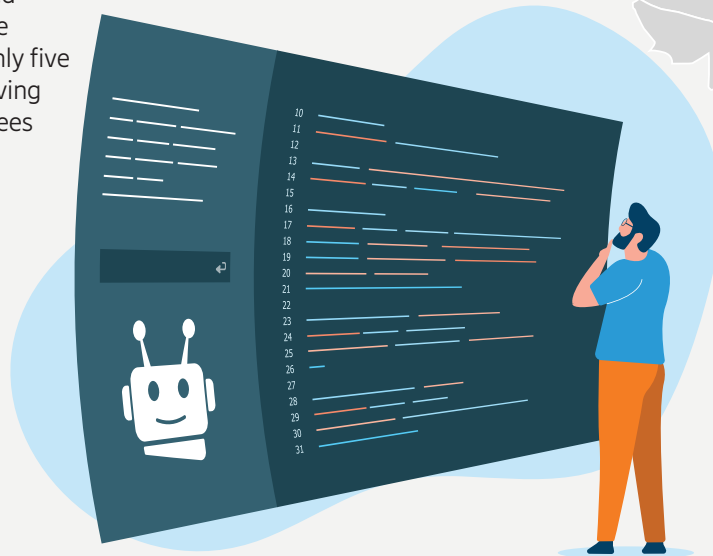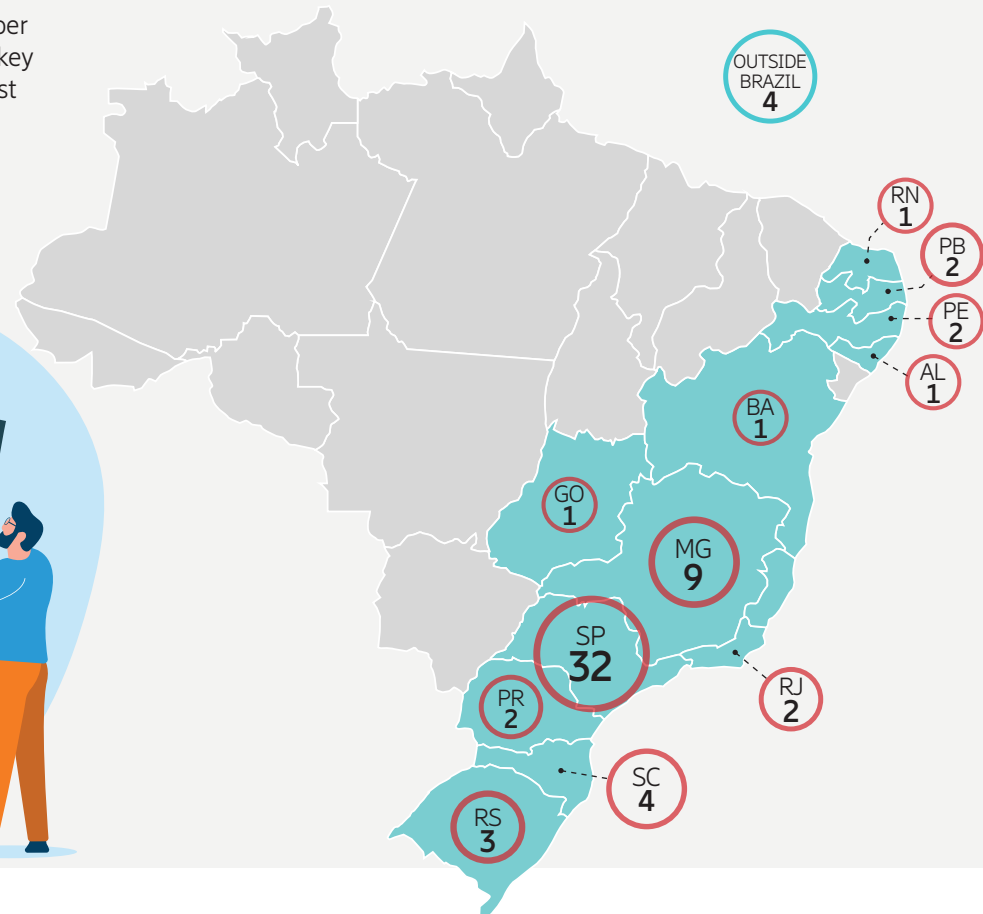RJ **2**
PR **2**
SC **4**
RS **3**

CHART 21

THE SIZE OF DEVELOPERS
(BY NUMBER OF EMPLOYEES)

Question: How many direct employees does your company have in Brazil?
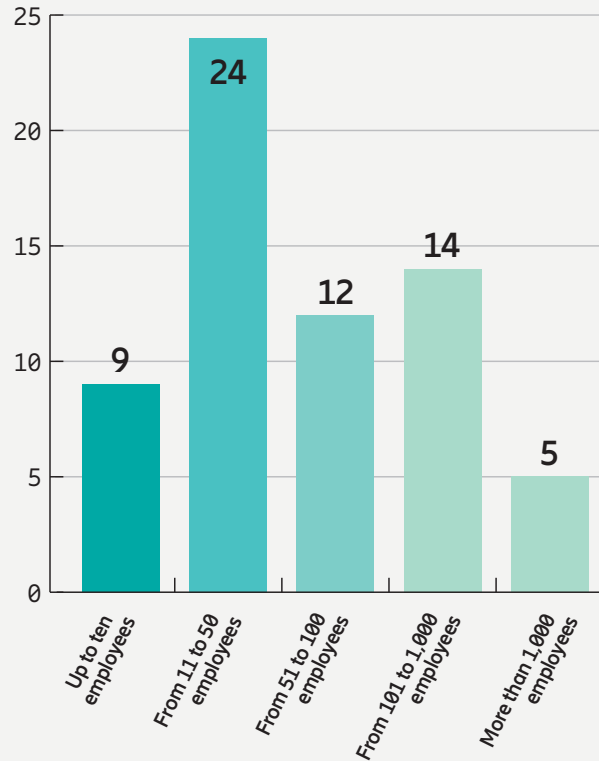
Base: 64 bot-producing companies

Up to ten employees	9
From 11 to 50 employees	24
From 51 to 100 employees	12
From 101 to 1,000 employees	14
More than 1,000 employees	5

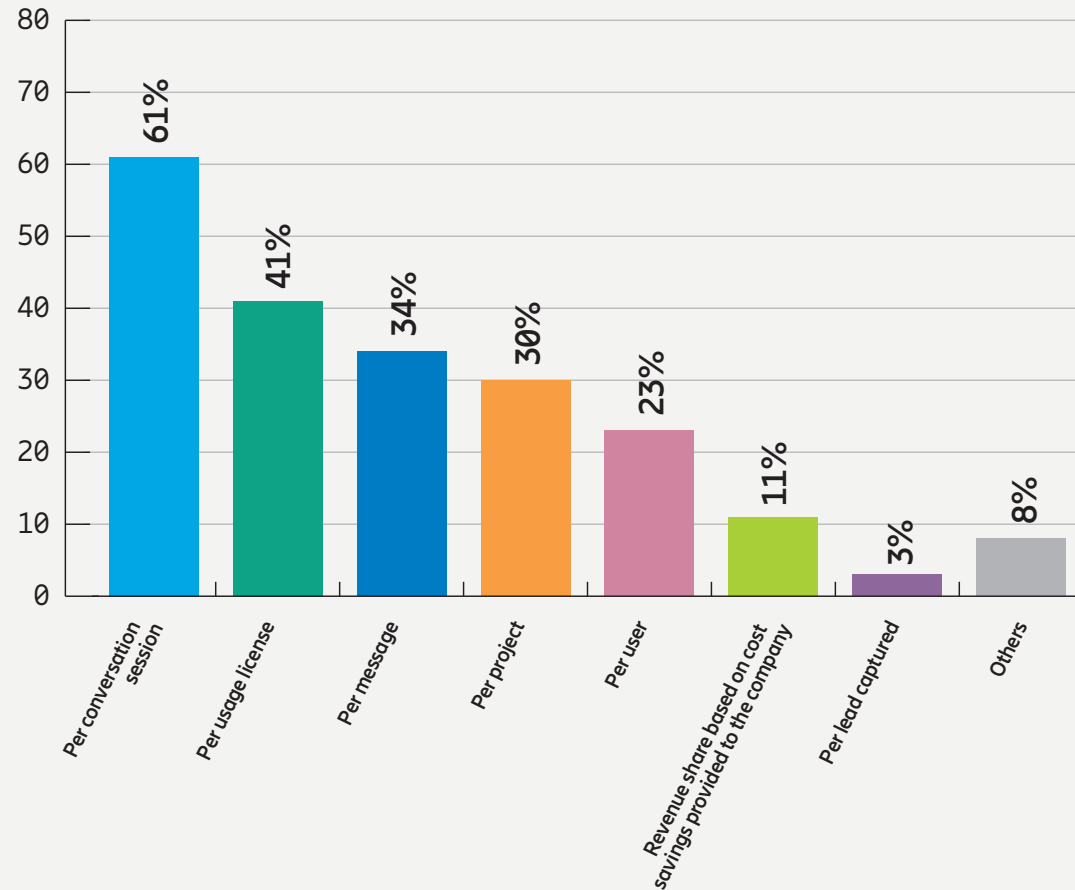## CHART 22

BUSINESS MODEL

Question: What is your company's business model for bot development?

Base: 64 bot-producing companies

Per conversation session	61%
Per usage license	41%
Per message	34%
Per project	30%
Per user	23%
Revenue share based on cost savings provided to the company	11%
Per lead captured	3%
Others	8%

Bots: an export product

Over the past few years, Brazil has established itself as a hub for the production of conversational robots. Several factors have contributed to this, including: 1) a highly connected population, engaged with new digital platforms and interested in conversational interfaces, as evidenced by the success of social networks in Brazil; 2) a messaging platform with massive and nearly ubiquitous usage on smartphones in the country, WhatsApp; 3) a strong local ecosystem of value-added services and SMS integrators that swiftly transitioned to bots over the past decade; 4) significant academic output in conversational AI in Portuguese; 5) an increasingly digital economy, with various sectors demanding automated digital customer service solutions, such as retail, finance, and telecommunications.

Today, Brazil is one of the most advanced markets in the world in terms of the adoption of automated customer service through conversational robots by brands and companies across different verticals. As a result, national players are beginning to expand their operations abroad, opening offices in other countries in Latin America and Europe. In many of these markets, the bot adoption level is far behind Brazil's, and competition is less intense.

More than half of bot developers operating in Brazil have already worked on projects for the international market, with 73% of respondents to this Map reporting such experience (Chart 23). It's important to note that setting up an office in another country is not always necessary to meet this demand; in many cases, international clients seek out Brazilian developers to export their services.
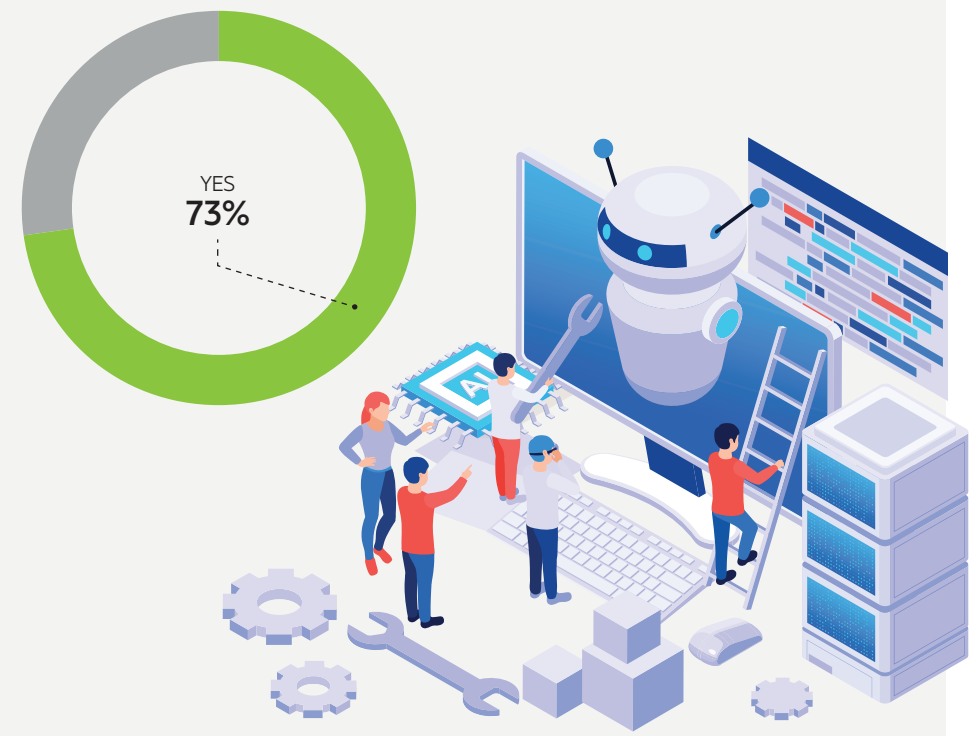
Brazil's performance in this sector has also attracted the attention of international investors. Some of the leading national players have already received investments from foreign funds. One of these players, Zenvia, is even listed on Nasdaq.

YES
73%

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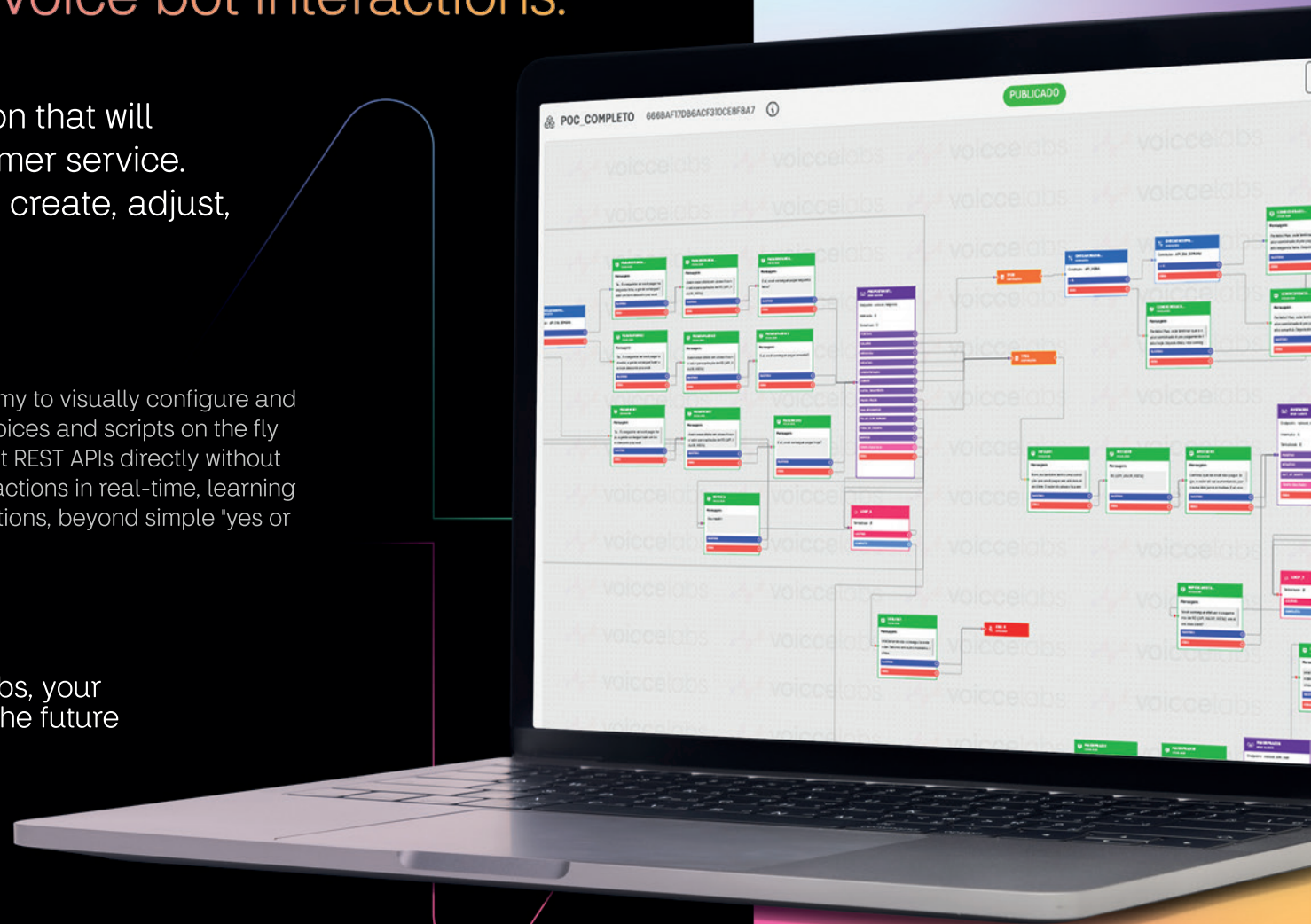
Medium-term trends

There are at least four trends currently taking place in Brazil's bot market. These trends are happening simultaneously, and none excludes the others. They are expected to continue advancing in the short and medium term. The trends are as follows:

1. Generative AI: Even though this technology may not be necessary for all bots, or it can be combined with other automated conversational methods, having generative AI in the portfolio has become essential. Those who don't incorporate it will struggle to remain competitive. However, simply having it isn't enough—it's crucial to know how to use it effectively. The advantage will go to those who can find efficient combinations of LLMs at the lowest possible cost.

2. Conversational Commerce: AI-powered sales bots capable of offering consultative sales within websites, apps, or messaging platforms like WhatsApp will become more common. Conversational interfaces can provide a better experience than visual or search-based interfaces, especially for consumers who aren't sure what they need or when the product catalog is extensive.

3. Consolidation: Gradually, this market is becoming a battleground for major players. More mergers and acquisitions are expected in the coming years, reducing the number of players. However, there will still be space for specialists focused on certain verticals or use cases, charging per project and profiting from quality over quantity.

4. International Expansion: In addition to exporting services, prominent developers in Brazil are starting to open offices in other countries, often driven by their clients operating abroad.

One point to watch is WhatsApp's pricing strategy and its competition with RCS. While developers' expectations for RCS are still low, this channel is growing significantly in Brazil, with a trend toward further growth, especially after Apple's adoption. Initially, RCS is taking a share of the notification market previously dominated by SMS, but it also has the potential to gain ground for marketing campaigns, as WhatsApp's price—$0.06 per session initiated by a message sent from a company to a consumer—remains high.

Finally, it's worth noting that a day before this report's publication, Meta announced that it will stop charging for conversations initiated by users with companies. Starting in April 2025, Meta will begin charging per message instead of per conversation for those initiated by businesses. This strategic repositioning is seen by many in the market as a response to RCS's growth. It remains to be seen what the new per-message prices will be and how major brands using messaging services to communicate with their audiences will react to this change.
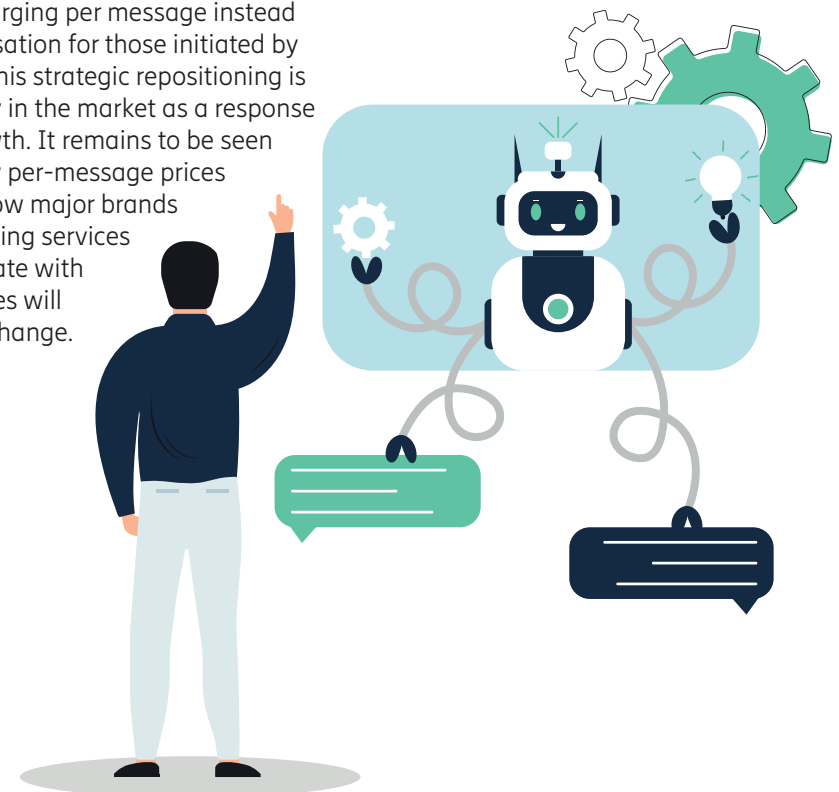
BRAZIL´S BOT DEVELOPERS GUIDE

This guide consists of companies that are part of the Brazilian bot ecosystem, covering those that develop bots for third parties, provide solutions for bot development, or are directly or indirectly associated with this ecosystem.

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