

the new 
standard

Social Media and Influencer Marketing in **Latin America** 2026:

A TNS Study

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29 October 2026

ARGENTINA BRAZIL CHILE COLOMBIA
ECUADOR MEXICO PANAMA PERU

Chapters

00	Opening	3
	What changed in social media in Latin America in 2026, and what does it mean for brands?	
01	The scale	7
	How many people use social media in Latin America?	
02	Where people talk	10
	Where do people in Latin America talk to each other online?	
03	The platform map	14
	Which social platforms grew in Latin America in the past year, and which shrank?	
04	The two giants	19
	How large are Instagram's and TikTok's audiences in Latin America?	
05	The growth race	23
	Is TikTok growing faster than Instagram in Latin America?	
06	Video beyond TikTok	28
	How big is YouTube in Latin America, and which other video apps matter?	
07	Where news travels	30
	Which social networks do Latin Americans use for news?	
08	Creators, money and trust	32
	How many influencers are there in Latin America, and do people trust them?	
09	The feed becomes a shop	38
	Can people buy inside social apps in Latin America?	
10	The rules tighten	40
	How must paid creator posts be labelled in Latin America, and what changed in 2026?	
11	What it means for brands, and the full study	47
	What should brands entering Latin America do with these findings?	



What changed in social media in Latin America in 2026, and what does it mean for brands?

In September 2026 Brazil, the largest market, issued a government order on disclosing paid relationships, which applies from late October 2026, and banned all advertising for fixed odds betting, paid creator posts included, by a provisional measure Congress has not yet voted on (official texts, chapter 10). The audiences were already shifting: in DataReportal's Digital 2026 reports, X's ad reach shrank in all eight markets in a year while TikTok's grew in all eight, faster than Instagram's in every one (one year periods ending in October 2025 or late 2025, with different age bases; ad reach estimates, not users, and a change can reflect platform revisions; the source flags X's figures as fluctuating).

Before a brand hires creators in Latin America, it needs three things: a picture of where people spend their time online, a sense of which platforms' audiences are moving, and the rules on how paid posts must be labelled. This study sets out all three for the eight markets TNS works in: Argentina, Brazil, Chile, Colombia, Ecuador, Mexico, Panama and Peru.

It is a journey in eleven chapters: the scale of social media, where people talk, which platforms grew, the two giants and their race, video, news, creators, shopping and the rules, and what it all means for brands.



Map: TNS.

288M

Instagram ad audience
(ages 13+)

TNS sums of DataReportal's Digital
2026 figures

360M

TikTok ad audience
(adults 18+)

TNS sums of DataReportal's Digital
2026 figures

51%

Brazil

Share of the eight market
Instagram total

TNS calculation: each market's
audience divided by the sum of
the eight.

What this study measures, and what it does not

What it measures. The advertising audiences of Instagram, TikTok and nine other platforms in each market, and how they changed in a year; what national surveys and polls say people use for messaging, video, news and shopping; and how each market expects paid creator posts to be labelled.

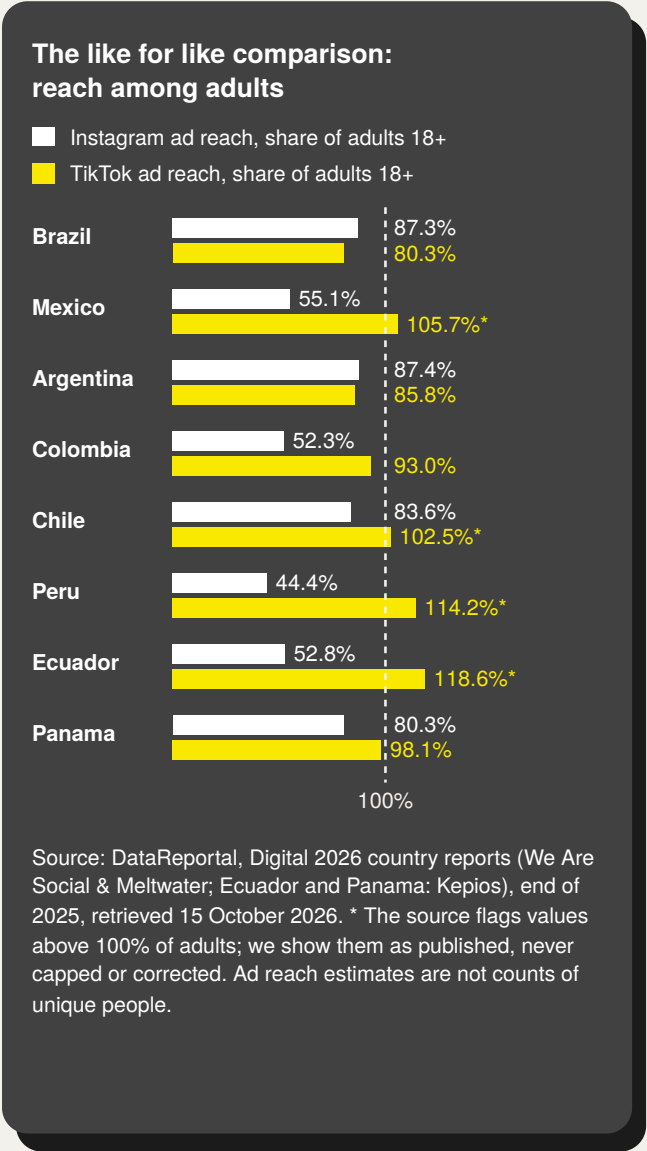
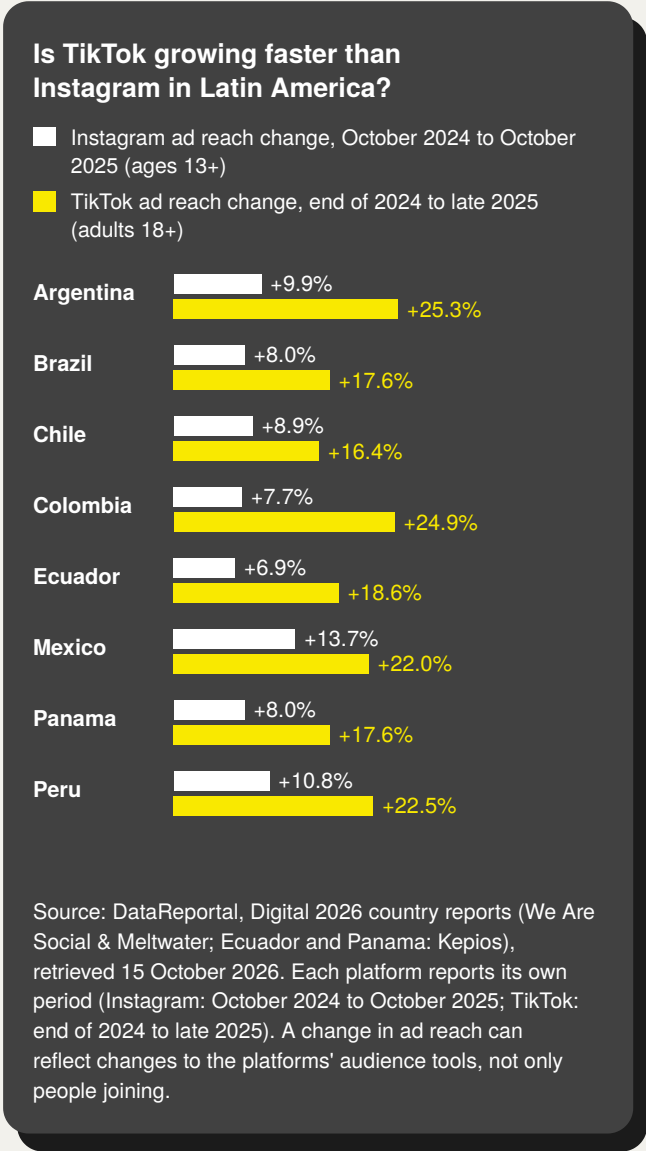
What it does not measure. It does not count creators. TNS publishes no creator totals of its own. Where other organisations have counted creators, chapter 08 reports their figures with credit, and those figures are theirs, not ours.

What the audience figures are. Ad audiences are advertising reach estimates from the platforms' own ad tools, as published by DataReportal. They are not monthly

active users or unique people, and a change in ad reach can reflect platform revisions, not people joining or leaving. Instagram's figures count people aged 13 and over; TikTok's count adults 18 and over.

What the surveys are. National statistics offices, regulators, survey firms and an international news survey tell us what people say they do online. Each survey has its own age base, period and question. They cannot be compared with each other or with ad reach, and markets must not be ranked against each other on them.

What the rules chapter is. A summary of public rules as we read them on 15 and 16 October 2026. It is not legal advice.



The study **in eight findings**

Each finding below stands on its own, with its source and the caveat that goes with it.

1. Instagram and TikTok each offer advertisers a very large audience across the eight markets, and Brazil dominates Instagram's. Instagram's ad audience across the eight markets adds up to about 288 million (ages 13+); TikTok's adds up to about 360 million (adults 18+). Brazil alone holds 51% of the eight market Instagram total. Source: TNS calculation from DataReportal, Digital 2026 country reports. Ad audiences are reach estimates, not users, and the two platforms count from different ages, so the two totals are not a like for like comparison.

2. Instagram, TikTok, YouTube and LinkedIn grew their ad reach in all eight markets in a year, and X's shrank in all eight. Reddit's reported ad reach rose too, but the source flags those changes as unusually large, so we leave them aside; X fell in every market, by 19.1% in Brazil. Source: DataReportal, Digital 2026 country reports; periods: Instagram October 2024 to October 2025, TikTok, YouTube and X end of 2024 to late 2025, LinkedIn end of 2024 to end of 2025. The source flags X's figures as fluctuating and marks every decrease with an asterisk: a fall in ad reach may not mean fewer people. LinkedIn counts registered members, not active users.

3. TikTok's ad reach grew faster than Instagram's in all eight markets, adding about 61.3 million in a year against about 24.6 million for Instagram (TNS sums; different periods and age bases). In Colombia it grew 24.9% against 7.7% for Instagram, about 3.2 times as fast; in Argentina, 25.3% against 9.9%. Source: DataReportal, Digital 2026 country reports; the two totals are TNS sums of the market figures and "times as fast" is a TNS calculation. The periods differ (Instagram: October 2024 to October 2025; TikTok: end of 2024 to late 2025), and so do the age bases (Instagram 13+, TikTok 18+), so read the totals as a direction, not a precise comparison. Ad reach is not a count of users, and a change in ad reach can reflect platform revisions, not people joining or leaving.

4. In Brazil, Instagram is the network named by the largest share of the Reuters Institute's 2026 online sample as one they use for news: 49%, up 12 points on a year earlier. WhatsApp follows at 46% and YouTube at 42%. Source: Reuters Institute Digital News Report 2026, Brazil page (16 June 2026). These are shares of an

online sample surveyed by YouGov, not of all Brazilians, and not user counts or reach; online samples tend to under-represent the news habits of older and less affluent people. The institute asked its network questions again in March 2026 after a display problem in the original fieldwork, and we did not find the age base or the question wording for this table. Not comparable with ad reach.

5. Brazil tightened its rules in September 2026: a government order on disclosing paid relationships, which applies only from late October 2026, and a ban on all advertising for fixed odds betting, paid creator posts included, which is in force but provisional and challenged in court. A joint order of three Ministry of Justice secretariats (Portaria Conjunta SENACON/SEDIGI/SPDIGI No. 3 of 22 September 2026) requires anyone who distributes content because of a payment or other benefit, in cash or in kind, to tell the public prominently, for as long as the content stays up; that duty (Article 9) applies only from late October 2026. It is a government order under the Consumer Code, not a law passed by Congress. Provisional Measure 1.394 of 25 September 2026 bans all advertising of fixed odds betting in any medium, whatever the format or the form of pay. It has the force of law but lapses unless Congress converts it (first period to 23 November 2026), and it has been challenged at the Supreme Court, with no suspension as of 15 October 2026, as reported by Agência Brasil, Exame and iGaming Brazil. Status checked 16 October 2026; rechecked before publication. Neither text uses the word "influencer". Source: the official texts (chapter 10). Not legal advice.

6. Six of the eight markets have a rule or guide written for influencer advertising; Panama has only a bill, and for Ecuador we found none. Industry self regulation covers Argentina (CONARP, 2020), Brazil (CONAR, 2026) and Chile (CONAR Chile, 2025); official guidance covers Chile (SERNAC, 2022), Colombia (SIC, 2020), Mexico (PROFECO, 2023) and Peru (INDECOPI, 2024); Brazil also has the September 2026 government order on disclosing paid relationships, whose disclosure duty applies only from late October 2026 (finding 5). Panama's Bill 654 was sent to a subcommittee by 8 September 2026 at the latest and is not law. Of the general consumer and fair competition laws we checked, only Brazil's (Consumer Defence Code, Art. 36) and Peru's

(Legislative Decree 1044, Art. 16) say in words that an ad must be recognisable as an ad; the other six ban misleading advertising, which is a different test. Source: TNS reading of the official and issuer texts, checked on 15 and 16 October 2026 (chapter 10). This is not a ranking and not legal advice.

7. The influencer guides in Brazil, Mexico and Peru steer creators to clear local language labels and away from "#ad". Brazil's industry guide (CONAR, self regulation) lists "#publi" and "#publicidade" and says foreign tags such as "#ad" should be used with caution, because the audience may not understand them. The government agency guides in Mexico (PROFECO) and Peru (INDECOP) list both "#Ad" and "#Publi" among the references to avoid, and recommend labels such as "#Publicidad". So a short tag accepted in Brazil is one

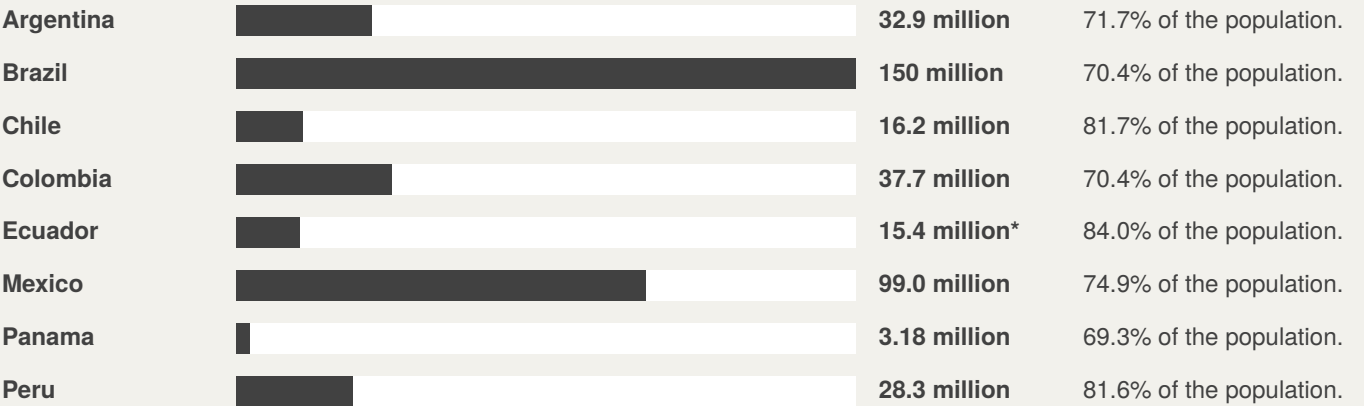
these two guides advise against. Source: the guides' own texts, read on 15 October 2026 (chapter 10).

8. Chile's tax office identified more than 31,000 taxpayers who met its classification of influencer or content creator in the 2025 income tax season (an administrative count, not a census). Source: SII, Chile's tax office, 13 October 2025. This counts taxpayers the SII identified; it is not a count of all creators in Chile, nor of people who filed or paid tax. The SII's other influencer counts measure different things (chapter 08), so they cannot be compared with this one or read as a trend.

The chapters that follow give the evidence, starting with scale. Next: how many people use social media in each market.

How many people use social media in Latin America?

In Brazil, DataReportal counts 150 million social media user identities, equal to 70.4% of the population; in Mexico, 99.0 million, or 74.9% (Digital 2026 country reports, Kepios analysis; counts for October 2025, shares at the end of 2025). User identities may not represent unique individuals.



Market	Social media user identities (October 2025)	Share of total population (end of 2025)	One year change (late 2024 to end of 2025)
Argentina	32.9 million	71.7%	+700 thousand (+2.2%)
Brazil	150 million	70.4%	+6.0 million (+4.2%)
Chile	16.2 million	81.7%	+1.4 million (+9.7%)
Colombia	37.7 million	70.4%	+1.6 million (+4.4%)
Ecuador	15.4 million*	84.0%	+2.4 million (+18.6%)
Mexico	99.0 million	74.9%	+8.4 million (+9.3%)
Panama	3.18 million	69.3%	+475 thousand (+17.6%)
Peru	28.3 million	81.6%	+4.4 million (+18.5%)

Source: DataReportal, Digital 2026 country reports (Kepios analysis), retrieved 15 October 2026. User identities may not represent unique individuals. * The source marks Ecuador's count with an asterisk, which we keep wherever the figure is shown.

People, age and income

The eight markets differ hugely in size, age and income, and that shapes what an audience figure means. According to DataReportal's Digital 2026 country reports (United Nations population data), Brazil has 213 million people and Panama 4.58 million. Median age runs from 29.3 in Ecuador and 29.6 in Mexico to 36.9 in Chile.

GDP per person in 2025 was highest in Panama, at about US\$19,790, and lowest in Ecuador, at about US\$7,125.

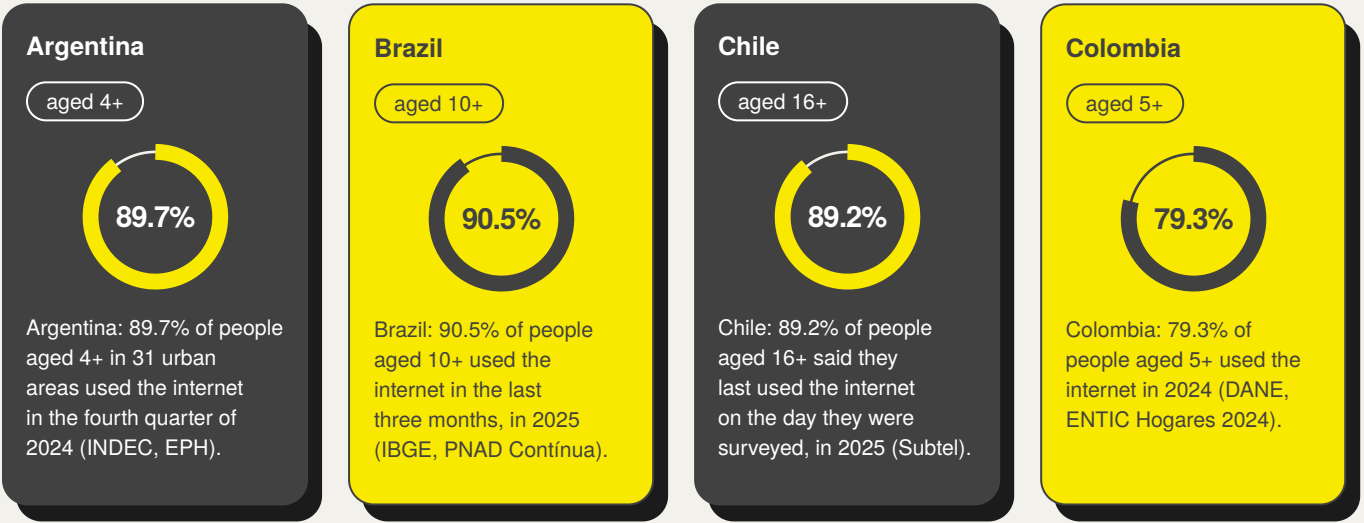
Market	Population (October 2025)	Median age (end of 2025)	GDP per capita, 2025 (current US\$)	Instagram ad reach, share of total population (end of 2025)
Argentina	45.9 million	32.9	14,898	67.7%
Brazil	213 million	34.8	10,713	69.0%
Chile	19.9 million	36.9	17,995	67.9%
Colombia	53.6 million	32.5	8,562	40.2%
Ecuador	18.3 million	29.3	7,125	38.2%
Mexico	132 million	29.6	13,889	40.5%
Panama	4.58 million	30.3	19,790	58.9%
Peru	34.7 million	30.2	9,684	32.6%

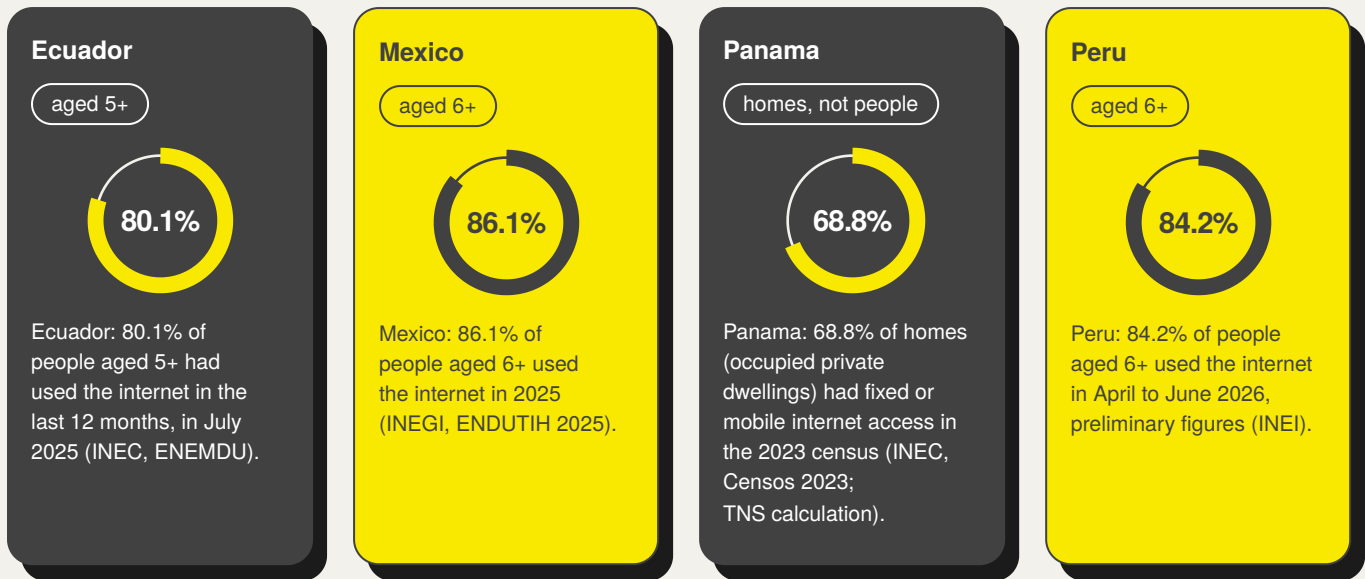
Sources: population (United Nations data), median age and Instagram ad reach from DataReportal, Digital 2026 country reports (We Are Social & Meltwater; Ecuador and Panama: Kepios), retrieved 15 October 2026. GDP per capita: World Bank, NY.GDP.PCAP.CD, 2025, current US dollars, retrieved 15 October

2026, rounded to the nearest dollar by TNS. Instagram's reach of the total population counts ages 13+ against the whole population; it is not comparable with the adult reach figures in chapter 04. We describe these figures side by side; with only eight markets, we draw no statistical link between income, age and audience size.

What official surveys say **about internet use**

For all eight markets, this study gives an official figure on internet use, each with its own age base, period and publisher. In Panama the figure counts homes, not people.





The ages, periods, questions and units differ, so these figures cannot be compared or ranked.

Argentina. In the fourth quarter of 2024, 89.7% of people aged 4+ used the internet in the 31 urban areas the survey covers (INDEC, Acceso y uso de tecnologías de la información y la comunicación, EPH, 15 May 2025). The survey covers urban areas only, not the whole country.

Brazil. In 2025, 90.5% of people aged 10+, or 168.7 million people, used the internet in the last three months (IBGE, PNAD Contínua: Acesso à Internet e à televisão e posse de telefone móvel celular para uso pessoal 2025, released 2 July 2026). Cetic.br's TIC Domicílios 2025, a different survey, counts 85% of people aged 10+ as internet users (results launched 9 December 2025); the two surveys are not one series.

Chile. In Subtel's twelfth survey of internet access and use (Duodécima Encuesta sobre acceso, usos y usuarios de Internet en Chile, November 2025, 5,000 in person household interviews, fieldwork ending 7 September 2025), 89.2% of people aged 16+ said they last used the internet on the day they were surveyed ("Hoy"). Subtel publishes no single share of people who use the internet, so we give this answer as printed. In the same survey, 84.9% of people aged 16+ say they can check social networks by themselves: 90.2% at ages 16 to 29, 90.8% at 30 to 44, 84% at 45 to 59 and 69.5% at 60 and over. 57.7% say they can upload content or post on social networks (73.5% at 16 to 29, 25.9% at 60 and over). This is what people say they can do by themselves, not a usage figure, and the base is not printed on the slide.

Colombia. 79.3% of people aged 5+ used the internet in 2024. Of internet users aged 5+, 80.2% used it for social networks and 18.4% to upload their own content to a

website to share it (DANE, ENTIC Hogares 2024, 1 August 2025, 53,570 households; more than one answer allowed). The same survey's figures for messaging and for buying are in chapters 02 and 09.

Ecuador. 80.1% of people aged 5+ had used the internet in the last 12 months in July 2025, up from 77.2% in 2024 (urban 85.3%, rural 68.5%), and 59.3% had an activated smartphone (57.7% in 2024) (INEC, ENEMDU, July 2025). This report has no social network or platform figures.

Mexico. In 2025, 86.1% of people aged 6+ used the internet, or 104.9 million people, up 28.7 percentage points from 57.4% in 2015, and 84.6% used a mobile phone (INEGI, ENDUTIH 2025, 16 June 2026).

Panama. In the 2023 census, 840,311 of 1,221,528 occupied private dwellings had fixed or mobile internet access, or 68.8% (TNS calculation; the access count is from Cuadro 20, the number of occupied private dwellings from Cuadro 3). Of the 4,017,507 people living in occupied private dwellings, 2,827,110 lived in one with access (INEC, Censos 2023, Cuadro 20). This counts homes, not people who use the internet; we found no official figure for people in Panama.

Peru. 84.2% of people aged 6+ used the internet in April to June 2026. Among internet users aged 6+, 93.1% went online for recreation such as video games, films or music, 90.9% to communicate by email, instant messaging or social networks, and 90.2% went online through a mobile phone (INEI, Informe Técnico N° 03, September 2026, ENAHO sample of 9,134 dwellings). These are preliminary figures, and the communication category bundles email, messaging, calls and social networks without splitting platforms.

These counts measure accounts, reach and internet use, not conversation. Next: where people in Latin America talk to each other online.

Where do people in Latin America talk to each other online?

On WhatsApp: 54% of Brazilian internet users aged 16+ say they use it "practically all the time" (Cetic.br, fieldwork August to September 2025), and WhatsApp leads the usage surveys we found for Brazil and Mexico and the messaging app answers for Colombia. Each figure below comes from its own survey, with its own age base, period and question. They cannot be compared with each other or with DataReportal's ad reach, and markets must not be ranked against each other on them.

Survey values and bases

Brazil: three answers, never one total.

54%

Mexico: an active account.

91%

Colombia: the messaging app.

99%

Argentina, Brazil and Mexico: older data, the same lead.

90%

Panama: where people get information.

74.8%

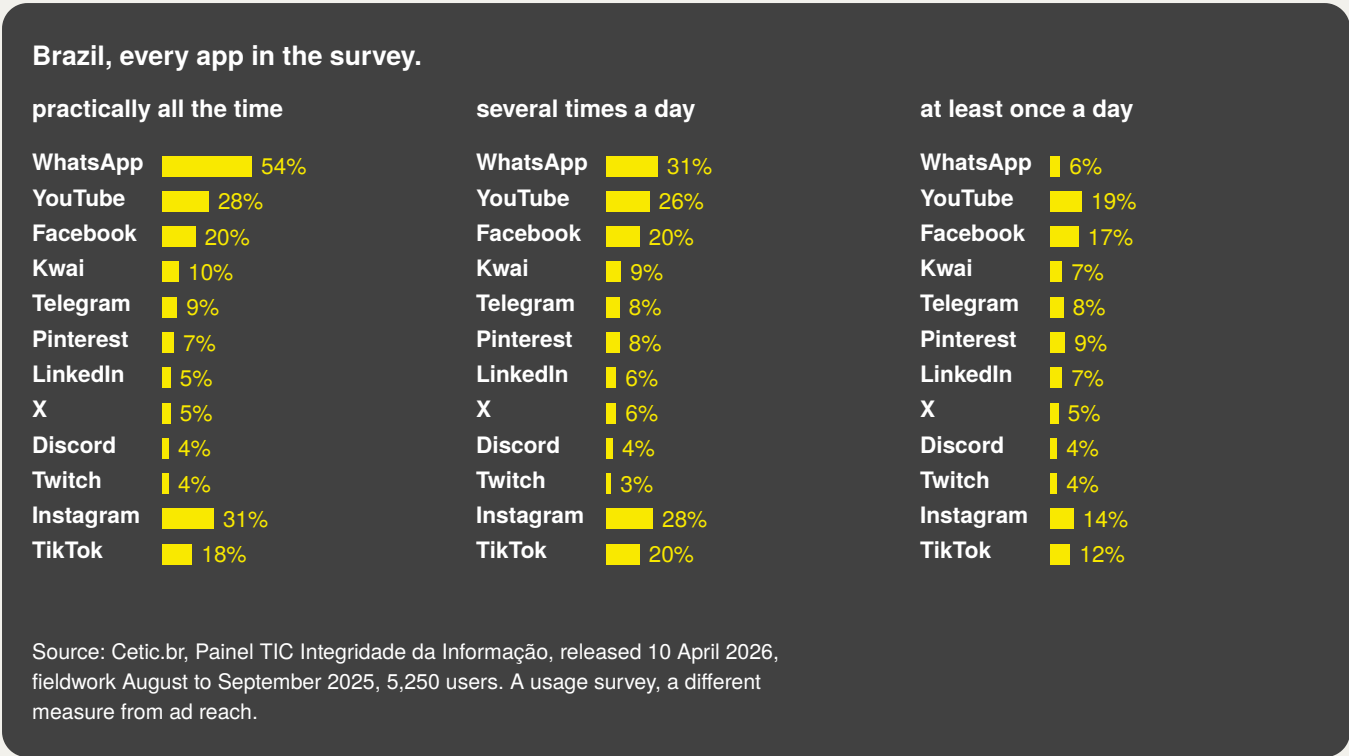
Six markets: the networks people use at all.

83% Argentina
82% Brazil
83% Chile
82% Colombia
83% Mexico
87% Peru

Brazil: three answers, never one total.

54% of Brazilian internet users aged 16+ say they use WhatsApp "practically all the time", 31% several times a day and 6% at least once a day. The three are separate answers and must not be added into one total.

Source: Cetic.br, Painel TIC Integridade da Informação, released 10 April 2026, fieldwork August to September 2025, 5,250 users. A usage survey, a different measure from ad reach.



Mexico: an active account.

91% of respondents to AIMX's 2026 internet habits study said they have an active WhatsApp account, against 85% for Facebook, 62% YouTube, 58% TikTok and 58% Instagram. An earlier national survey found that 91.2% of smartphone users used instant messaging apps such as WhatsApp.

Sources: AIMX, 21° Estudio Hábitos de los Usuarios de Internet 2026, public version, an online panel of 1,200 people aged 18+ in urban Mexico, not a representative sample of all Mexicans; it prints no fieldwork dates, margin of error or publication date (released by 18 May 2026, per DPL News) and measures having an active account, not daily use. INEGI, ENDUTIH 2023, published 13 June 2024, a share of smartphone users, not of all internet users.

Colombia: the messaging app.

99% of Colombians aged 15+ who use a messaging app on their own smartphone use WhatsApp; 36% use Facebook Messenger, 19% Instagram chat, 8% Telegram and 2% TikTok. 88% of people aged 15+ with a personal smartphone use a messaging app at all.

Source: CRC, the communications regulator, November 2025, 3,043 in person household interviews in 58 municipalities, fieldwork 9 August to 20 September 2025, maximum margin of error 2% at 95% confidence. More than one answer allowed; a share of smartphone messaging app users, not of all Colombians.

Argentina, Brazil and Mexico: older data, the same lead.

90% of adults in Brazil say they ever use WhatsApp, 88% in Argentina and 83% in Mexico; for Telegram the shares are 28% in Brazil, 27% in Mexico and 13% in Argentina.

Source: Pew Research Center, published 22 March 2024, face to face survey of 10,235 adults in eight countries, fieldwork in 2023. Older data and a different measure from the Cetic.br survey.

Panama: where people get information.

74.8% of the people asked in CIEPS's 2025 citizenship and rights survey said they get information through WhatsApp.

Source: CIEPS (Centro Internacional de Estudios Políticos y Sociales), article of 13 March 2026: a research centre's survey, not a national statistics office. The article does not print the sample size, fieldwork dates, age base or margin of error, and CIEPS says it did not ask what kind of information people get through WhatsApp.

Six markets: the networks people use at all.

Asked which networks they use for any purpose, the share of each market's online sample naming WhatsApp was 83% in Argentina, 82% in Brazil, 83% in Chile, 82% in Colombia, 83% in Mexico and 87% in Peru.

Source: Reuters Institute Digital News Report 2026, country pages of 16 June 2026 ("for all"; Peru: "for any purpose"). Shares of each market's online sample surveyed by YouGov, not of all people, and not user counts or reach; listed in alphabetical order, not ranked. The full method note is in chapter 07.

Brazil, every app in the survey. In Cetic.br's survey of internet users aged 16+ (Painel TIC Integridade da Informação, released 10 April 2026, fieldwork August to September 2025, 5,250 users), the shares who say they use each app "practically all the time", several times a day and at least once a day are: WhatsApp 54%, 31% and 6%; YouTube 28%, 26% and 19%; Facebook 20%, 20% and 17%; Kwai 10%, 9% and 7%; Telegram 9%, 8% and 8%; Pinterest 7%, 8% and 9%; LinkedIn 5%, 6% and 7%; X 5%, 6% and 5%; Discord 4%, 4% and 4%; Twitch 4%, 3% and 4%. The three parts are separate answers and must not be added into one total; this is a usage survey, a different measure from ad reach. Instagram's and TikTok's rows are in chapter 05.

Colombia, a year earlier and a second survey. In the CRC survey, 89% of people aged 15+ with a personal smartphone used a messaging app in 2024, and among those users the shares were WhatsApp 100%, Messenger 31%, Instagram chat 8% and Telegram 5%, with no TikTok value. In a separate survey, DANE found that 87.3% of internet users aged 5+ used the internet for video, calls or instant messaging (ENTIC Hogares 2024, 1 August 2025, 53,570 households; more than one answer allowed). The DANE and CRC figures come from different surveys with different bases and are not one series.

Panama, platform preferences. In the same CIEPS survey, Instagram (71.8%), TikTok (59.7%), YouTube (57.6%) and Facebook (56.8%) led social network preferences, with X last at 28.6%. We could not open the full report. The platform figures are "preferences" and the question is not printed, so they are not account ownership, use rates or user counts, and they cannot be compared with ad reach.

What this means for brands (TNS view, not data).

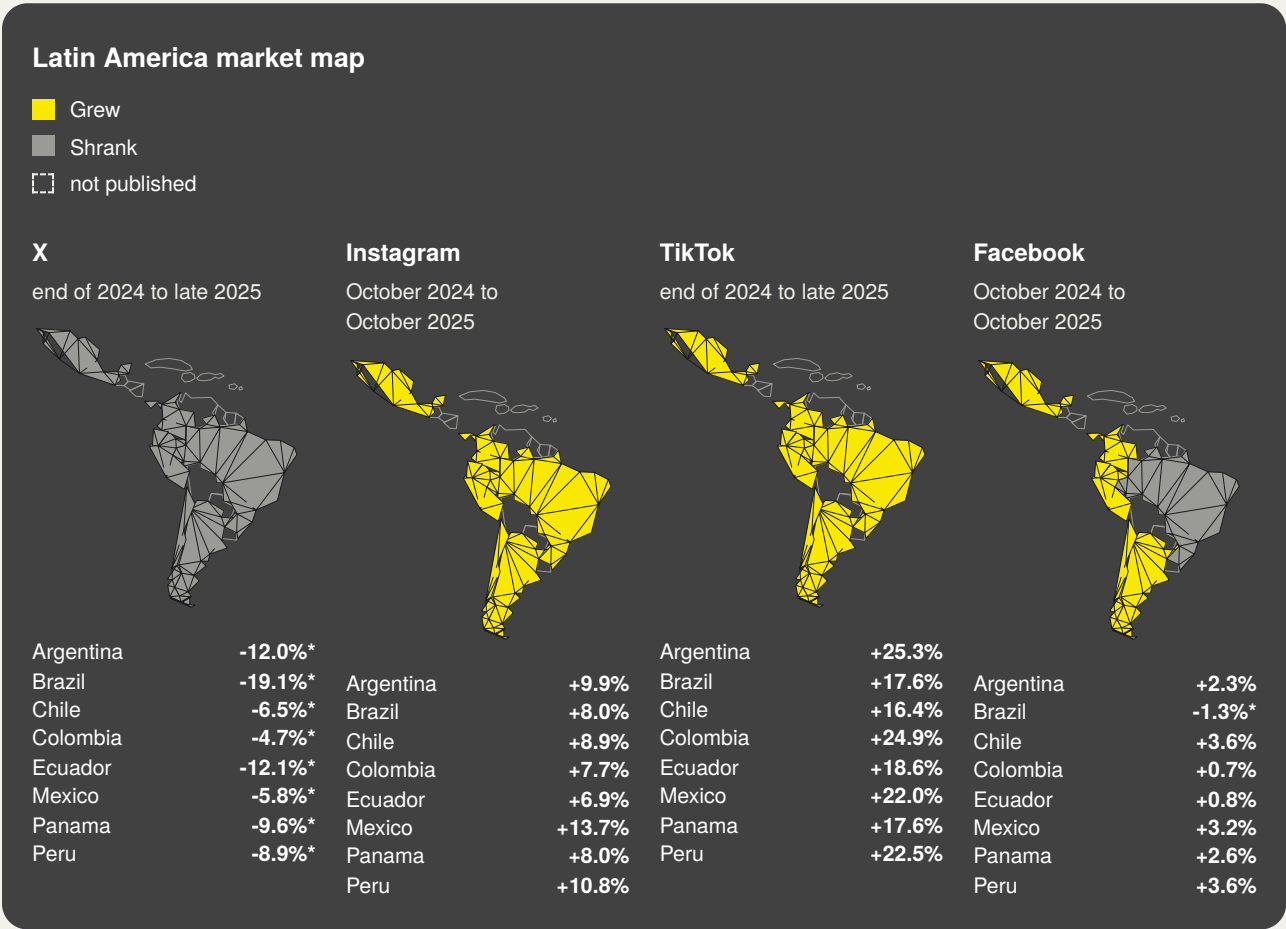
Size the opportunity in people and money as well as in ad reach: a market's population, age and income matter as much as its platform audience. Look beyond Instagram and TikTok too. YouTube and Facebook carry large ad audiences in every market, and WhatsApp leads the national usage surveys we

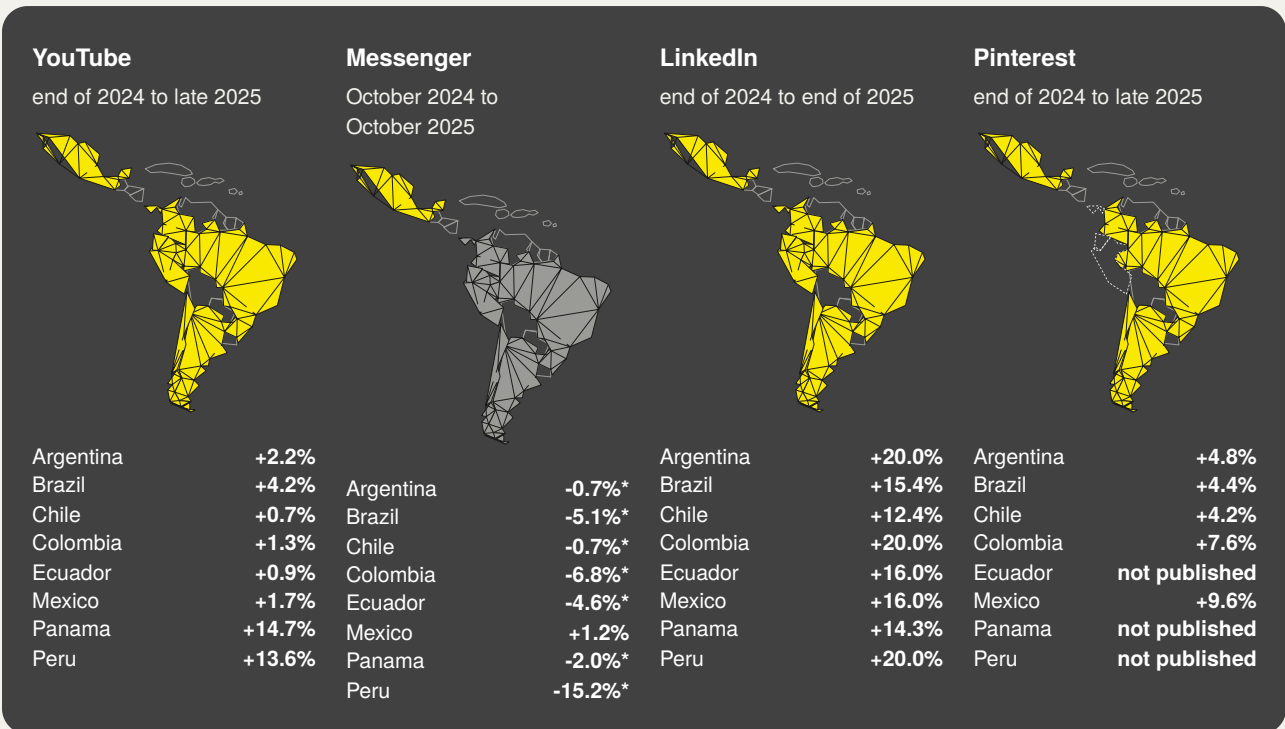
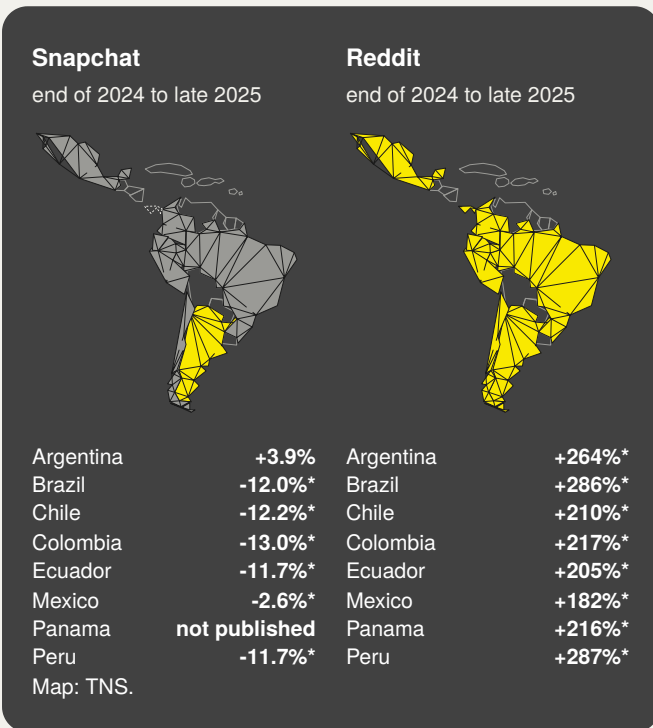
found for Brazil and Mexico and the messaging app answers for Colombia (national surveys, chapters 01 and 02), although in the Reuters Institute's question on networks used for news, Instagram leads in Brazil and Facebook in Mexico. A creator plan that ignores where people talk to each other is missing part of the picture.

The surveys we found point to WhatsApp for conversation. Next: which social platforms grew in the past year, and which shrank.

Which social platforms grew in Latin America in the past year, and which shrank?

Instagram, TikTok, YouTube and LinkedIn grew their ad reach in all eight markets, while X's shrank in all eight (DataReportal, Digital 2026 country reports; one year periods ending in October 2025, late 2025 or at the end of 2025). The source marks every decrease with an asterisk and advises caution: a fall in ad reach may not mean fewer people. Counts of markets are a TNS calculation.





X: down in all eight.

-19.1% in Brazil, where X's ad reach fell by 4.04 million. It also fell in Ecuador (-12.1%), Argentina (down 911 thousand, -12.0%), Panama (-9.6%), Peru (-8.9%), Chile (-6.5%), Mexico (down 1.01 million, -5.8%) and Colombia (-4.7%).

Source: DataReportal, end of 2024 to late 2025. The source flags X's figures as fluctuating and marks every decrease with an asterisk: a fall in ad reach may not mean fewer people.

Instagram, TikTok, YouTube and LinkedIn: up in all eight.

Each of them grew its ad reach in every market. LinkedIn counts registered members, not active users.

Source: DataReportal. Periods: Instagram October 2024 to October 2025; TikTok and YouTube end of 2024 to late 2025; LinkedIn end of 2024 to end of 2025.

Messenger and Snapchat: down in most markets. Facebook: down only in Brazil.

Messenger's ad reach shrank in seven of the eight markets (all except Mexico), with Peru's the largest fall, at -15.2%. Snapchat's shrank in six of the seven markets where it is published (Argentina grew; there is no Panama figure). Facebook's shrank only in Brazil (-1.3%).

Source: DataReportal. Periods: Messenger and Facebook October 2024 to October 2025; Snapchat end of 2024 to late 2025. The source marks every decrease with an asterisk and advises caution in reading falls in ad reach, and Meta warns that its figures are revised.

Reddit. Reddit's reported ad reach grew between +182% (Mexico) and +287% (Peru) from the end of 2024 to late 2025. The source flags these changes as unusually large, so we do not read much into them.

One year change in ad reach, by market and platform:

Market	Instagram change	TikTok change	Facebook change	YouTube change	Messenger change	LinkedIn change	Pinterest change	Snapchat change	X change	Reddit change
Argentina	+9.9%	+25.3%	+2.3%	+2.2%	-0.7%	+20.0%	+4.8%	+3.9%	-12.0%	+264%*
Brazil	+8.0%	+17.6%	-1.3%	+4.2%	-5.1%	+15.4%	+4.4%	-12.0%	-19.1%	+286%*
Chile	+8.9%	+16.4%	+3.6%	+0.7%	-0.7%	+12.4%	+4.2%	-12.2%	-6.5%	+210%*
Colombia	+7.7%	+24.9%	+0.7%	+1.3%	-6.8%	+20.0%	+7.6%	-13.0%	-4.7%	+217%*
Ecuador	+6.9%	+18.6%	+0.8%	+0.9%	-4.6%	+16.0%	not published	-11.7%	-12.1%	+205%*
Mexico	+13.7%	+22.0%	+3.2%	+1.7%	+1.2%	+16.0%	+9.6%	-2.6%	-5.8%	+182%*
Panama	+8.0%	+17.6%	+2.6%	+14.7%	-2.0%	+14.3%	not published	not published	-9.6%	+216%*
Peru	+10.8%	+22.5%	+3.6%	+13.6%	-15.2%	+20.0%	not published	-11.7%	-8.9%	+287%*

Source: DataReportal, Digital 2026 country reports (We Are Social & Meltwater; Ecuador and Panama: Kepios), retrieved 15 October 2026. Periods: Instagram, Facebook and Messenger October 2024 to October 2025; LinkedIn end of 2024 to end of 2025; TikTok, YouTube, Pinterest, Snapchat, X and Reddit end of 2024 to late 2025. Instagram counts ages 13+ and TikTok adults 18+. The source

puts an asterisk on every decrease in ad reach and advises caution in reading falls; in this table, * marks Reddit's changes, which the source flags as unusually large. "Not published" means the report gives no figure; we never fill it from another source. These are context only: never add them across platforms or use them to rank platforms.

Other platforms' ad audiences

For context, the same reports publish ad audiences for other platforms. Each platform counts in its own way: LinkedIn, for example, counts registered "members", not active users. These figures are context only. We do not add them up, and they are not a ranking of platforms.

Market	Facebook	YouTube	Messenger	LinkedIn (members)	Pinterest	Snapchat	X	Reddit	Threads
Argentina	29.3 million	32.9 million	13.5 million	18.0 million	11.9 million	1.99 million	6.70 million	4.55 million	3.35 million
Brazil	109 million	150 million	46.9 million	90.0 million	42.2 million	6.00 million	17.1 million	19.9 million	not published
Chile	13.1 million	14.9 million	7.45 million	10.0 million	5.36 million	645 thousand	3.25 million	2.80 million	1.60 million
Colombia	36.4 million	31.0 million	18.0 million	18.0 million	10.9 million	4.16 million	5.04 million	2.35 million	2.70 million
Ecuador	12.5 million	11.5 million	7.20 million	5.80 million	not published	1.91 million	1.69 million	708 thousand	839 thousand
Mexico	93.5 million	85.0 million	54.6 million	29.0 million	28.5 million	14.8 million	16.4 million	10.5 million	7.40 million
Panama	2.00 million	2.73 million	781 thousand	1.60 million	not published	not published	512 thousand	396 thousand	not published
Peru	24.7 million	21.7 million	10.9 million	12.0 million	not published	2.35 million	2.08 million	1.70 million	999 thousand

Source: DataReportal, Digital 2026 country reports, late 2025, retrieved 15 October 2026. Ad audiences are advertising reach estimates, not monthly active users or unique people. "Not published" means the report gives no figure; we never fill it from another source.

A side story: Bluesky and Brazil's X suspension

Bluesky and Brazil's X suspension

- Checked 15 October 2026.
- Brazil's Supreme Federal Court suspended X by a decision of 30 August 2024 and authorised its return on 8 October 2024. (STF decision in Pet 12.404.)
- In those first days, Bluesky said it had grown by more than 2.6 million users, over 85% of them Brazilian (Bluesky, 4 September 2024).
- A study of Bluesky's public activity data suggests that most of the users who joined in the surge after the X ban likely left Bluesky and returned to X once X was reinstated in Brazil on 8 October 2024 (Seckin and others, arXiv preprint, April 2025).

- Brazil: 2% of internet users aged 16+ say they use Bluesky practically all the time, 3% several times a day and 2% at least once a day (Cetic.br, Painel TIC Integridade da Informação, released 10 April 2026, fieldwork August to September 2025, 5,250 users; a share of internet users, not a user count).
- Apart from Brazil's 2024 sign up figures, we found no published Bluesky user count for any of the eight markets in this study, and the page text of DataReportal's Digital 2026 reports for these markets does not mention Bluesky. The only survey figure we found is a share of Brazilian internet users, not a count.
- Bluesky carried no advertising as of March 2025 (Search Engine Land), and in October 2026 TechCrunch reported that Bluesky plans to introduce payments as a first step toward making money without relying on advertising, so it has no advertising audience to compare with the platforms in this study.
- Sources: Brazil's Supreme Federal Court (STF); Bluesky; Seckin and others, arXiv preprint; Cetic.br; Search Engine Land; TechCrunch.

Instagram, TikTok, YouTube and LinkedIn grew in all eight markets, and the first two are the giants of this study. Next: how large Instagram's and TikTok's audiences are.

How large are Instagram's and TikTok's audiences in Latin America?

Instagram's ad audience across the eight markets adds up to about 288 million (ages 13+) and TikTok's to about 360 million (adults 18+): TNS sums of DataReportal's Digital 2026 figures, which count from different ages, so they are not a like for like comparison. DataReportal's country reports publish the audiences that Meta's and TikTok's ad tools report for each market; they describe late 2025. Ad audiences are reach estimates, not users.

288M**Instagram ad audience
(ages 13+)**

TNS sums of DataReportal's Digital
2026 figures

360M**TikTok ad audience
(adults 18+)**

TNS sums of DataReportal's Digital
2026 figures

51%**Brazil****Share of the eight market
Instagram total**

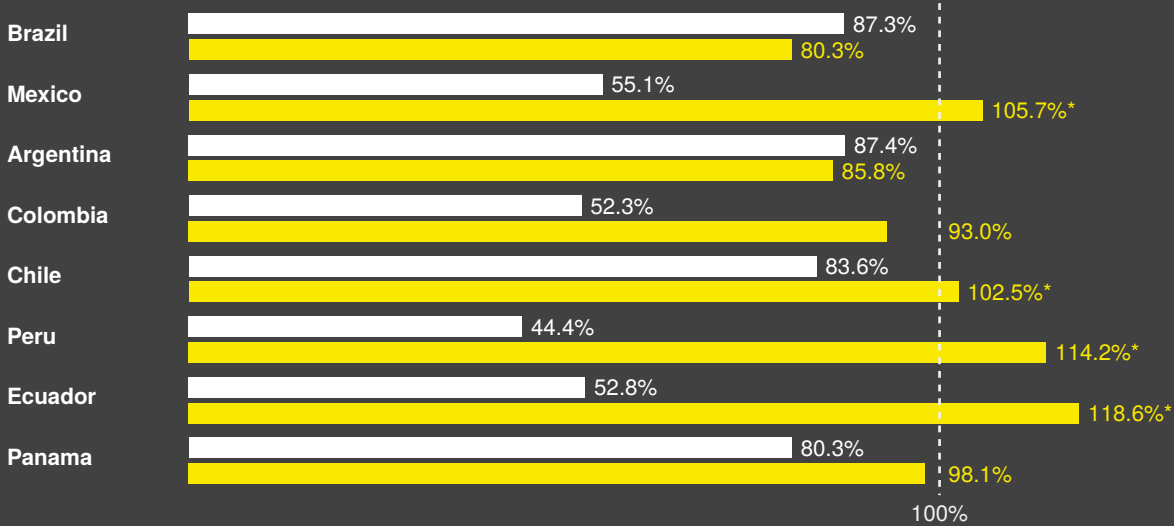
TNS calculation: each market's
audience divided by the sum of
the eight.

Brazil: half of Instagram's audience.

51.1% of the eight market Instagram total is in Brazil, where the Instagram ad audience is 147 million (ages 13+) and the TikTok ad audience 131 million (adults 18+). Mexico comes second on both platforms, with 53.6 million on Instagram and 99.0 million on TikTok. Panama, the smallest market, has 2.70 million and 3.18 million.

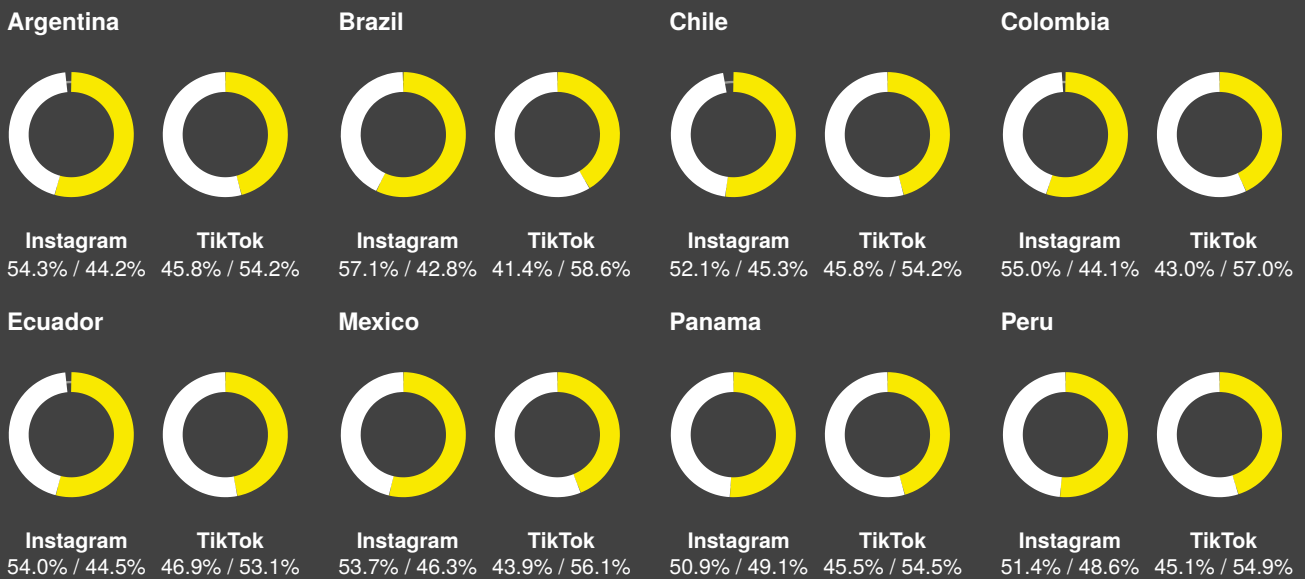
Instagram and TikTok audiences and market context

- Instagram ad reach, share of adults 18+
- TikTok ad reach, share of adults 18+



Who is in the audience: the gender split

- female
- male



Brazil also holds 36.4% of the TikTok total, and Mexico holds 18.6% of Instagram's and 27.5% of TikTok's. These shares are a TNS calculation: each market's audience divided by the sum of the eight.

Market	Instagram ad audience (ages 13+)	Share of the eight market Instagram total	TikTok ad audience (adults 18+)	Share of the eight market TikTok total
Brazil	147 million	51.1%	131 million	36.4%
Mexico	53.6 million	18.6%	99.0 million	27.5%
Argentina	31.1 million	10.8%	29.2 million	8.1%
Colombia	21.6 million	7.5%	37.7 million	10.5%
Chile	13.5 million	4.7%	16.2 million	4.5%
Peru	11.3 million	3.9%	28.3 million	7.9%
Ecuador	7.00 million	2.4%	15.4 million	4.3%
Panama	2.70 million	0.9%	3.18 million	0.9%

Source: DataReportal, Digital 2026 country reports (We Are Social & Meltwater; Ecuador and Panama: Kepios), retrieved 15 October 2026. Shares: TNS calculation from the same reports; shown to one decimal place, so they may not add up to exactly 100. Ad audiences are advertising reach estimates, not monthly active users or unique people.

The like for like comparison: reach among adults

The fairest way to compare the two platforms is the share of adults (18+) each one's ads can reach, because DataReportal publishes both figures on that same base. By that measure, TikTok ads reach a larger share of adults than Instagram ads in six of the eight markets: Chile, Colombia, Ecuador, Mexico, Panama and Peru. In Argentina and Brazil, Instagram's ad reach among adults is higher.

Market	Instagram ad reach, share of adults 18+	TikTok ad reach, share of adults 18+
Brazil	87.3%	80.3%
Mexico	55.1%	105.7%*
Argentina	87.4%	85.8%
Colombia	52.3%	93.0%
Chile	83.6%	102.5%*
Peru	44.4%	114.2%*
Ecuador	52.8%	118.6%*
Panama	80.3%	98.1%

Source: DataReportal, Digital 2026 country reports (We Are Social & Meltwater; Ecuador and Panama: Kepios), end of 2025, retrieved 15 October 2026. * The source flags values above 100% of adults; we show them as published, never capped or corrected. Ad reach estimates are not counts of unique people.

The gap can be wide.

114.2% of adults is TikTok's ad reach in Peru, a value the source flags, against 44.4% for Instagram; in Colombia, 93.0% against 52.3% (DataReportal, end of 2025, adults 18+).

A second view: the size of the two audiences

Comparing the raw audience counts gives a similar picture, with one caveat that matters: TikTok's count includes adults 18+ only, while Instagram's includes everyone aged 13+. Dividing TikTok's ad audience by Instagram's gives a ratio above 1 in the same six markets, from 1.18 in Panama to 2.50 in Peru. In Argentina the ratio is 0.94 and in Brazil 0.89. These ratios are a TNS calculation from DataReportal figures, and they compare counts with different age floors (TikTok 18+, Instagram 13+), so the adult reach table above is the better guide.

Who is in the audience: the gender split

Instagram's adult ad audience leans female in all eight markets, and TikTok's leans male in all eight (DataReportal, late 2025). In Brazil, 57.1% of Instagram's adult ad audience is female, while 58.6% of TikTok's is male. Panama is the most even on Instagram, at 50.9% female and 49.1% male.

Market	Instagram: female / male	TikTok: female / male
Argentina	54.3% / 44.2%	45.8% / 54.2%
Brazil	57.1% / 42.8%	41.4% / 58.6%
Chile	52.1% / 45.3%	45.8% / 54.2%
Colombia	55.0% / 44.1%	43.0% / 57.0%
Ecuador	54.0% / 44.5%	46.9% / 53.1%
Mexico	53.7% / 46.3%	43.9% / 56.1%
Panama	50.9% / 49.1%	45.5% / 54.5%
Peru	51.4% / 48.6%	45.1% / 54.9%

Source, for all eight markets: DataReportal, Digital 2026 country reports, late 2025. The source publishes female and male shares only; it does not report other genders. These are shares of each platform's adult (18+) ad audience in each market. They say nothing about who

creates content or who buys. In Argentina, Brazil, Chile, Colombia and Ecuador, Instagram's female and male shares do not add up to exactly 100 in the source; the gap is the part the source does not assign, and we show the figures as published.

What this means for brands (TNS view, not data).
Do not pick one platform on audience size alone. In six markets TikTok's ads reach a larger share of adults (DataReportal); in Argentina and Brazil Instagram's do; and in Brazil more internet users say

they use Instagram often than say so of TikTok (Cetic.br survey). These are two different measures. We suggest planning for both and deciding each platform's role market by market.

Size is one measure; speed is another. Next: whether TikTok is growing faster than Instagram, and how the region came online over ten years.

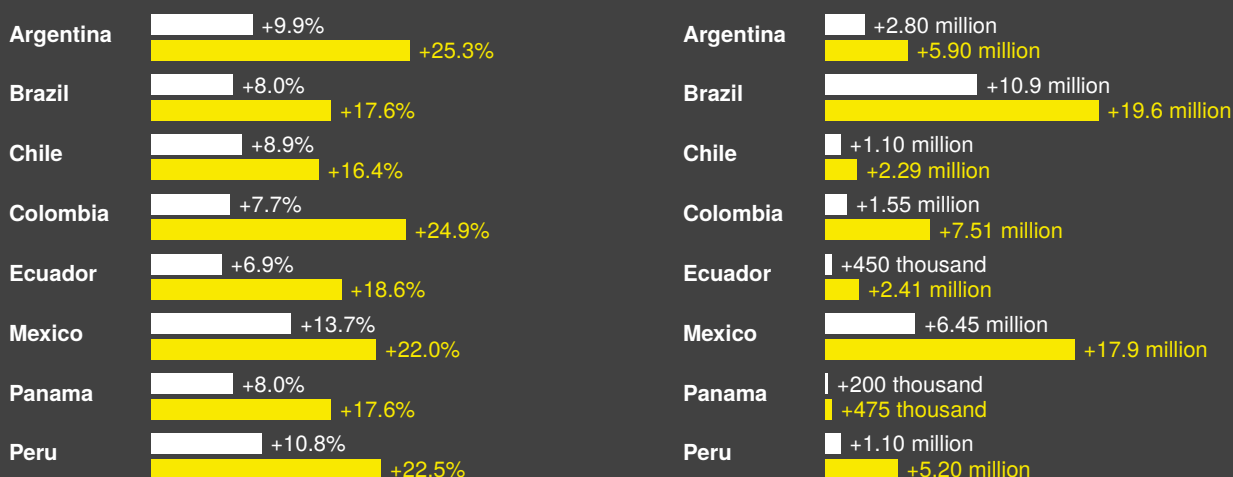
Is TikTok growing faster than Instagram in Latin America?

In ad reach, yes: TikTok's grew faster than Instagram's in all eight markets over one year, adding about 61.3 million against about 24.6 million for Instagram (TNS sums of DataReportal figures). The two platforms report different periods and age bases, so read the totals as a direction, not a precise comparison.

Growth in ad reach by market

Instagram ad reach change, October 2024 to October 2025 (ages 13+)

TikTok ad reach change, end of 2024 to late 2025 (adults 18+)



Colombia: about 3.2 times as fast.

+24.9% was TikTok's ad reach growth in Colombia, against +7.7% for Instagram; in Argentina, +25.3% against +9.9%. "Times as fast" is a TNS calculation from DataReportal figures.

Market	Instagram ad reach change, October 2024 to October 2025 (ages 13+)	TikTok ad reach change, end of 2024 to late 2025 (adults 18+)
Argentina	+2.80 million (+9.9%)	+5.90 million (+25.3%)
Brazil	+10.9 million (+8.0%)	+19.6 million (+17.6%)
Chile	+1.10 million (+8.9%)	+2.29 million (+16.4%)
Colombia	+1.55 million (+7.7%)	+7.51 million (+24.9%)
Ecuador	+450 thousand (+6.9%)	+2.41 million (+18.6%)
Mexico	+6.45 million (+13.7%)	+17.9 million (+22.0%)
Panama	+200 thousand (+8.0%)	+475 thousand (+17.6%)
Peru	+1.10 million (+10.8%)	+5.20 million (+22.5%)

Source: DataReportal, Digital 2026 country reports (We Are Social & Meltwater; Ecuador and Panama: Kepios), retrieved 15 October 2026. Each platform reports its own period (Instagram: October 2024 to October 2025; TikTok: end of 2024 to late 2025). A change in ad reach can reflect changes to the platforms' audience tools, not only people joining.

Reach is not the same as habit

31% of Brazilian internet users aged 16+ say they use Instagram "practically all the time", against 18% for TikTok (Cetic.br survey). How often people say they use an app is a different measure from ad reach, and in Brazil it points the other way. In the same survey, 28% say they use Instagram several times a day and 14% at least once a day; for TikTok the figures are 20% and 12%. Instagram is ahead of TikTok in all three frequency bands.

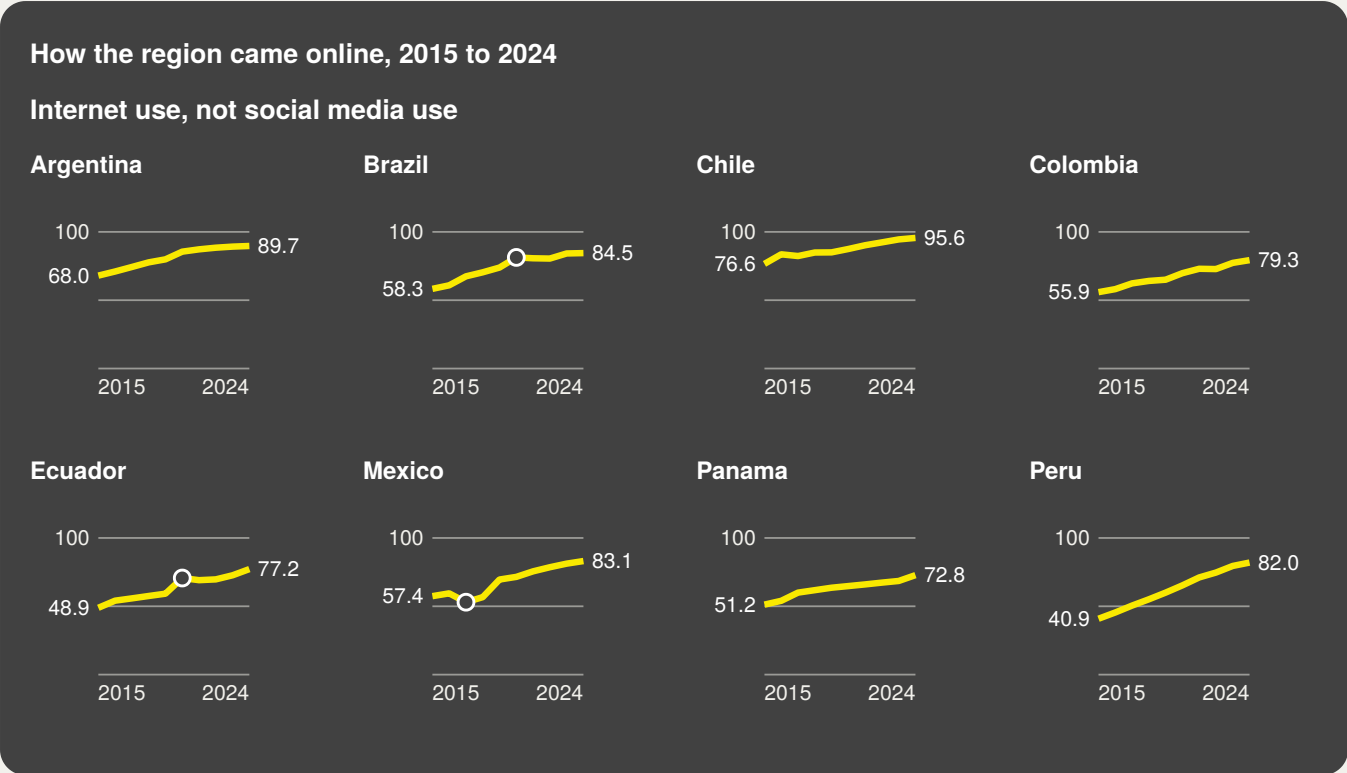
Read together: DataReportal's figures show TikTok's ad reach growing faster than Instagram's in all eight markets,

while more Brazilian internet users say they use Instagram often than say so of TikTok. This is a TNS reading of two different measures. One is growth in platform ad reach across eight markets (Instagram 13+, TikTok 18+, different periods; DataReportal). The other is how often people say they use each app, in Brazil only, among internet users aged 16+, with fieldwork in August to September 2025 (Cetic.br, Painel TIC Integridade da Informação, released 10 April 2026, 5,250 users). Ad reach is not a count of users, and the three frequency bands should not be added into one total.

How the region came online, 2015 to 2024

In ITU figures, internet use rose in all eight markets over ten years, and in most of them it rose fastest up to about 2020. The share of people using the internet went from 68.0% in 2015 to 89.7% in 2024 in Argentina, from 58.3% to 84.5% in Brazil, 76.6% to 95.6% in Chile, 55.9% to 79.3% in Colombia, 48.9% to 77.2% in Ecuador, 57.4% to 83.1% in Mexico, 51.2% to 72.8% in Panama and 40.9%

to 82.0% in Peru. In seven of the eight markets the average yearly rise was larger from 2015 to 2020 than from 2020 to 2024; Mexico is the exception (TNS calculation in percentage points, with 2020 as the dividing year; Brazil's and Ecuador's 2020 values carry a break, so read the split as approximate).



Share of people using the internet (% of population), ITU:

Market	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Argentina	68.0	71.0	74.3	77.7	79.9	85.5	87.2	88.4	89.2	89.7
Brazil	58.3	60.9	67.5	70.4	73.9	81.3	80.7	80.5	84.2	84.5
Chile	76.6	83.6	82.3	84.9	85.0	87.5	90.2	92.3	94.5	95.6
Colombia	55.9	58.1	62.3	64.1	65.0	69.8	73.0	72.8	77.3	79.3
Ecuador	48.9	54.1	55.8	57.5	59.2	70.7	69.1	69.7	72.7	77.2
Mexico	57.4	59.5	53.0	56.7	69.6	71.5	75.6	78.6	81.2	83.1
Panama	51.2	54.0	60.0	61.8	63.6	64.8	66.0	67.3	68.5	72.8
Peru	40.9	45.5	50.5	55.1	60.0	65.3	71.1	74.7	79.5	82.0

Source: ITU, individuals using the Internet (% of population), from the ITU World Telecommunication/ICT Indicators Database as published by the World Bank (indicator IT.NET.USER.ZS; database updated 8 October 2026), retrieved 21 October 2026. Rounded to one decimal place by TNS; markets in alphabetical order, not ranked; the database has no 2025 values yet. This is internet use, not social media use. ITU draws on national surveys and its own estimates, so

these figures are not a separate check on the national figures in chapter 01. The series has breaks: Mexico's value falls in 2017 (to 53.0%, while INEGI's own survey printed 63.9% of people aged 6+ for that year), and Brazil's and Ecuador's jump in 2020, the first year of the pandemic, when Cetic.br's household survey for Brazil was run by telephone.

Brazil: a level share on social networks.

81% of Brazilian internet users aged 10+ used social networks in 2024, and the share has stayed between 75% and 81% in every year since 2016 except 2020, when it was 72%.

Year by year: 78% in 2016, 77% in 2017, 75% in 2018, 76% in 2019, 72% in 2020, 81% in 2021, 80% in 2022 and 80% in 2023.

Source: Cetic.br, TIC Domicílios 2016 to 2024, table C5 ("Usou redes sociais"), a share of internet users aged 10+, not of all Brazilians. The 2020 edition used an adapted method during the pandemic, with telephone interviews, so read that year with care. A different survey and question from the Cetic.br panel earlier in this chapter.

Instagram and TikTok, edition by edition.

Each yearly edition of DataReportal's reports states its own one year change in Instagram's and TikTok's ad reach. In Digital 2023, Instagram's fell in all eight markets; in Digital 2024 it grew in all eight; in Digital 2025 it grew in six and fell in Chile and Ecuador (-0.8% in each, both marked with the source's asterisk). TikTok's grew in every

market with a stated change in Digital 2023 (six markets) and Digital 2024 (seven), and in Digital 2025 in every market but Brazil, where it fell 6.9%, also with an asterisk. The Digital 2026 changes are the ones at the top of this chapter.

Market	Instagram, Digital 2023	Instagram, Digital 2024	Instagram, Digital 2025	TikTok, Digital 2023	TikTok, Digital 2024	TikTok, Digital 2025
Argentina	-5.3%	+19.0%	+3.8%	+43.1%	+31.1%	+14.7%
Brazil	-5.0%	+18.6%	+4.5%	+11.0%	+19.9%	-6.9%*
Chile	-6.0%	+18.3%	-0.8%*	+31.6%	+22.2%	+5.9%
Colombia	-3.0%	+13.0%	+1.7%	+47.4%	+35.8%	+17.1%
Ecuador	-5.7%	+13.0%	-0.8%*	not stated	+31.1%	+6.5%
Mexico	-3.0%	+22.2%	+8.7%	+25.0%	+28.9%	+15.1%
Panama	-8.3%	+15.9%	+2.0%	not on the page	not stated	+11.0%
Peru	-4.5%	+17.6%	+4.5%	+38.6%	+29.9%	+11.4%

Source: DataReportal (Kepios), Digital 2023 (12 and 13 February 2023), Digital 2024 (23 February 2024) and Digital 2025 (3 March 2025) country reports for the eight markets, retrieved 21 October 2026. Each edition states its own period: for Instagram, 2022 to 2023, January 2023 to January 2024 and January 2024 to January 2025; for TikTok (adults 18+), the start of 2022 to early 2023, the start of 2023 to early 2024 and the beginning of 2024 to early 2025. Each change is that edition's own statement. We never chain them,

add them or draw them as one line, because DataReportal asks readers to "avoid calculating values for change over time by referencing data published in our previous reports and articles" (Digital 2026). An asterisk is the source's mark on a fall that may reflect changes to the platforms' data. "Not stated" and "not on the page" mean the edition gives no figure; we never fill it from another source. Counts of markets are a TNS calculation; ad reach is not a count of users.

● 05 THE GROWTH RACE

Read together: in most markets, people came online fast up to about 2020. Since 2021, in Brazil, where Cetic.br asks the same question every year, the share of people online who use social networks has held level, while a platform's ad reach can grow or shrink within a single year (chapter 03). This is a TNS reading of different measures (ITU internet use, Cetic.br's survey and DataReportal's ad reach), which cannot be compared with each other.

What this means for brands (TNS view, not data).

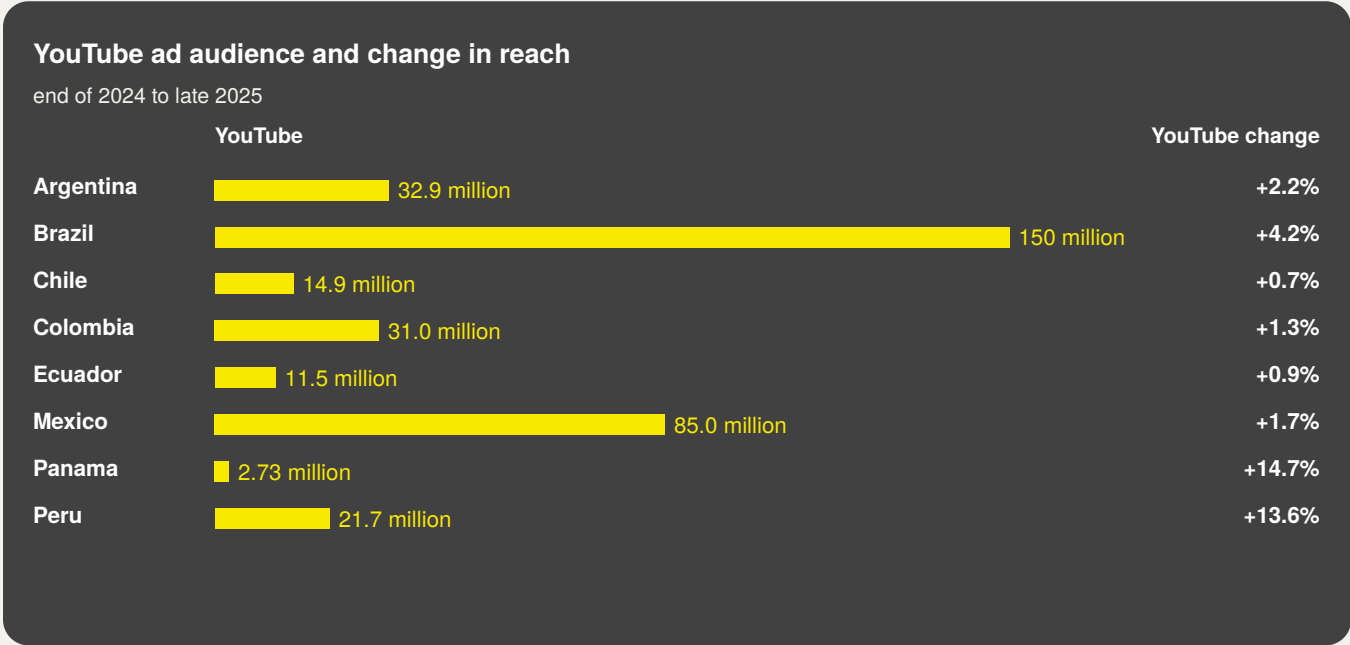
Treat these numbers as the ceiling of what paid distribution can reach, not as a head count. In every market, Instagram's adult ad audience leans female and TikTok's leans male, so check the split for your

own market before you set a platform mix. And because TikTok's ad reach grew faster everywhere in the year measured, a platform mix set a year ago deserves a fresh look.

Video is not only TikTok. Next: how big YouTube is in Latin America, and which other video apps matter.

How big is YouTube in Latin America, and which other video apps matter?

YouTube's ad audience is 150 million in Brazil and 85.0 million in Mexico, and its ad reach grew in all eight markets in a year, by 4.2% in Brazil and 14.7% in Panama, for example (DataReportal, Digital 2026 country reports; audiences late 2025, change from the end of 2024 to late 2025). Ad audiences are reach estimates, not users, and other platforms' audiences are context only, not a ranking.



Brazil: Shorts and daily habit.

55% of 1,000 online respondents aged 16+ in Brazil said they have accessed or access YouTube Shorts. In the Cetic.br survey, 28% of internet users aged 16+ say they use YouTube "practically all the time", 26% several times a day and 19% at least once a day.

Sources: Opinion Box, Pesquisa YouTube no Brasil, August 2026, interviews June to July 2026, margin of error 3 points, an online panel, not all Brazilians. Cetic.br, fieldwork August to September 2025; three separate answers, never one total.

Colombia: the most accessed video platform.

29% of people aged 15+ in Colombia access YouTube for audiovisual content, ahead of Netflix at 26%, while 54% access none of the listed platforms.

Source: CRC, November 2025, the same household survey as in chapter 02. The question is about platforms for TV and video content, not social media use, and more than one answer was allowed.

YouTube's own estimate for Brazil.

More than R\$6 billion and more than 150,000 full time equivalent jobs: what YouTube says its creative ecosystem contributed to Brazil's GDP in 2025.

Source: YouTube, Relatório de Impacto do YouTube 2025, blog post of 1 August 2026; YouTube's report page credits both figures to Oxford Economics. A company claim: self reported by the platform, an economic model estimate, not a count, and the method is not printed on the pages we opened.

Kwai: company figures.

9.3% was the year on year growth in Kwai's daily active users in Brazil in the last quarter of 2024, with average daily time spent per daily user of more than 75 minutes, according to Kuaishou Technology's results. Kwai itself says it has about 60 million monthly active users in Brazil,

half of them daily. In the Cetic.br survey, 10% of Brazilian internet users aged 16+ say they use Kwai "practically all the time", 9% several times a day and 7% at least once a day.

Sources: Kuaishou Technology results, 25 March 2025, company reported. Kwai's own claim, made by Vitor Yu, general manager of Kwai for Business in Latin America, in an interview published on 29 September 2026, with no method given. Cetic.br, fieldwork August to September 2025.

Kick: a global signal.

+131%: Kick's hours watched grew to 4.5 billion in 2025.

Source: Stream Hatchet, 2025 yearly report on live streaming. A global figure, not Latin American data.

The YouTube blog post calls the jobs "diretos e indiretos", the report page "equivalentes a tempo integral".

Watching is one habit; following the news is another. Next: which social networks Latin Americans use for news.

Which social networks do Latin Americans use for news?

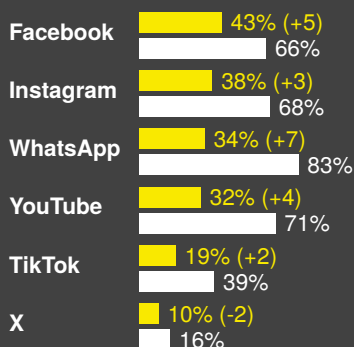
Facebook leads in five of the six markets of this study that the Reuters Institute's survey covers: it is the network named by the largest share of the online sample as one they use for news, and in Brazil it is Instagram (Reuters Institute Digital News Report 2026, country pages of 16 June 2026). These are shares of each market's online sample, not of all people.

Networks in printed order

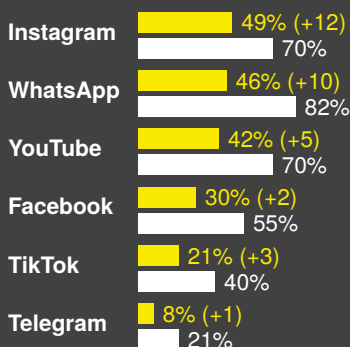
■ for news (Change in points)

■ for all

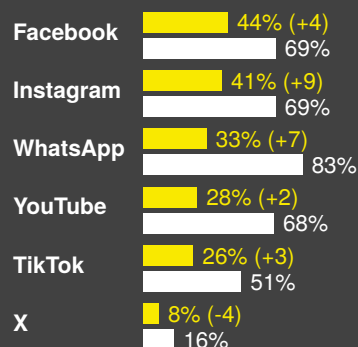
Argentina



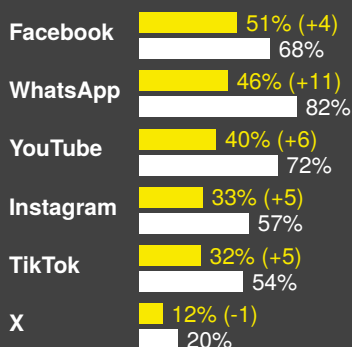
Brazil



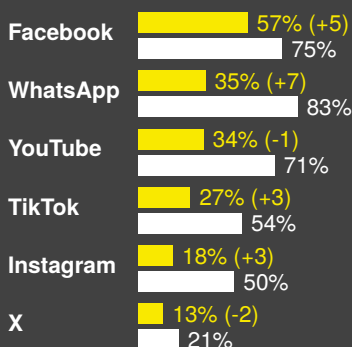
Chile



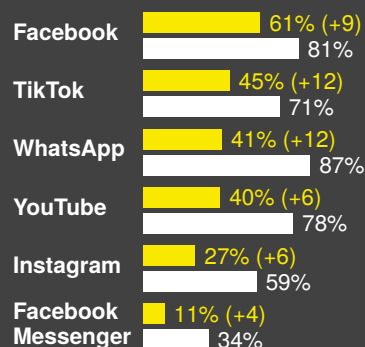
Colombia



Mexico



Peru



Reuters Institute Digital News Report 2026, country pages of 16 June 2026

The network named most for news, market by market.

Argentina: Facebook, 43%. Brazil: Instagram, 49%. Chile: Facebook, 44%. Colombia: Facebook, 51%. Mexico: Facebook, 57%. Peru: Facebook, 61%.

Each is a share of that market's own online sample, listed in alphabetical order: do not rank the markets on them.

Brazil: Instagram up 12 points.

49% of Brazil's online sample named Instagram as a network they use for news, up 12 points on a year earlier; WhatsApp follows at 46% (up 10) and YouTube at 42% (up 5).

Peru: TikTok second.

45% of Peru's online sample named TikTok for news, up 12 points, second only to Facebook at 61%.

How to read these figures. The survey is run online by YouGov, with quotas for age, gender and region (no education quota in Peru), and online samples tend to under-represent the news habits of older and less affluent people. "For news" and "for any purpose" are different measures. The institute asked its network questions again in all markets in the second half of March 2026 after a display problem in the original fieldwork, and we did not find the age base or the question wording for these tables. They are not user counts or reach and cannot be compared with DataReportal's ad reach or with the Cetic.br survey.

Each market's table, in the order printed, as "for news" (change from the previous year in brackets) / "for all" (Peru: "for any purpose"):

- **Argentina:** Facebook 43% (+5) / 66%; Instagram 38% (+3) / 68%; WhatsApp 34% (+7) / 83%; YouTube 32%

Source: Reuters Institute Digital News Report 2026, country pages of 16 June 2026, table "Top social, messaging, and video networks". Main fieldwork ran from mid January to the end of February 2026, but the institute's methodology page says the questions on social media and video networks, both "for any purpose" and "for news", were asked again in all markets in the second half of March 2026, with 1,000 respondents and the same quotas, after a problem in how

(+4) / 71%; TikTok 19% (+2) / 39%; X 10% (-2) / 16%.

- **Brazil:** Instagram 49% (+12) / 70%; WhatsApp 46% (+10) / 82%; YouTube 42% (+5) / 70%; Facebook 30% (+2) / 55%; TikTok 21% (+3) / 40%; Telegram 8% (+1) / 21%.
- **Chile:** Facebook 44% (+4) / 69%; Instagram 41% (+9) / 69%; WhatsApp 33% (+7) / 83%; YouTube 28% (+2) / 68%; TikTok 26% (+3) / 51%; X 8% (-4) / 16%.
- **Colombia:** Facebook 51% (+4) / 68%; WhatsApp 46% (+11) / 82%; YouTube 40% (+6) / 72%; Instagram 33% (+5) / 57%; TikTok 32% (+5) / 54%; X 12% (-1) / 20%.
- **Mexico:** Facebook 57% (+5) / 75%; WhatsApp 35% (+7) / 83%; YouTube 34% (-1) / 71%; TikTok 27% (+3) / 54%; Instagram 18% (+3) / 50%; X 13% (-2) / 21%.
- **Peru:** Facebook 61% (+9) / 81%; TikTok 45% (+12) / 71%; WhatsApp 41% (+12) / 87%; YouTube 40% (+6) / 78%; Instagram 27% (+6) / 59%; Facebook Messenger 11% (+4) / 34%.

the brands were shown in the original fieldwork; the page does not say outright that these tables use that repoll. We did not find the age base or the question wording for this table, and the full report PDF could not be opened. X is not in the Brazil or Peru tables. These figures cannot be compared with DataReportal's ad reach or with the Cetic.br survey.

News is one reason people follow accounts; creators are another. Next: how many influencers there are in Latin America, and whether people trust them.

How many influencers are there in Latin America, and do people trust them?

Each market has its own best figure, and each counts something different. Chile's, below, is the tax office's count of 31,595 taxpayers monitored as influencers or content creators (SII, 29 September 2025), which its release of 13 October 2025 rounds to more than 31,000. It is not a census of creators and not a count of people who filed or paid tax, and the SII's other influencer counts measure different things.

TNS publishes no creator counts of its own. Other organisations have published estimates and surveys, and we list here the ones we could check at their original publisher or, where marked, in the press. **These figures come from different methods, years, samples and** Separate counts and estimates

coverage. They cannot be added up or compared with each other, or with the ad audience figures in chapters 01 to 06, and markets must not be ranked on them.

Argentina: vendor database.

1,748,417

Brazil: platform.

More than 100,000

Chile: official.

31,595

Colombia: platform, in an interview.

250

Ecuador: official, as reported.

1,455

Mexico: vendor database.

670,969

Panama: official, as reported, a bill.

13 July 2026

Peru: platform, as reported.

20,000

The SII's two other counts, each a different measure: in the 2024 income tax process (tax year 2024, income of 2023), 68% of the 1,023 influencers the SII said were required to file a return did so, and 4,679 influencers filed in total, voluntary and required (SII, 1 July 2024); the SII warned that non-filers face interest and fines of up to 30% of the undeclared amount, which is the legal maximum, not fines imposed. In the 2026 income tax season (Operación Renta 2026), 13,855 influencers filed tax returns; 3,699 of them paid tax totalling \$8,298,161,056

(Chilean pesos, as printed), and 10,089 were due refunds (SII, 1 September 2026); that page does not define "influencers" for its count. "Influencers" means as classed by the SII in each case. The three counts (identified in 2025, filers in 2024, filers in 2026) are different measures: never add them or compute growth between them.

One figure per market, in alphabetical order. Each label says what kind of figure it is: official, platform or vendor database.

Argentina: vendor database.

1,748,417 Instagram accounts in Argentina are ones Influencity classes as influencers.

Source: Influencity, study of influencers in Latin America, 2023 edition (undated page). One vendor's database of public Instagram accounts of people over 18 with more than 1,000 followers, not a census.

Brazil: platform.

More than 100,000 YouTube channels in Brazil have more than 100,000 subscribers, YouTube says.

Source: YouTube Official Blog Brasil, Relatório de Impacto do YouTube 2025 post, 1 August 2026. Self reported by YouTube; channels, not people.

Chile: official.

31,595 taxpayers were monitored by the tax office (SII) as influencers or content creators in the 2025 income tax season.

Source: SII, 29 September 2025. A tax monitoring count, not a census of creators; the 13,855 influencers who filed returns in the 2026 season are a different measure.

Colombia: platform, in an interview.

250 YouTube channels in Colombia had more than 1 million subscribers in June 2022, according to YouTube's vice president for the Americas.

Source: interview in Portafolio, 21 June 2022. A platform figure from 2022; channels, not people.

Ecuador: official, as reported.

1,455 influencers were brought into compliance by the tax office (SRI) in 2023.

Source: the SRI's annual report on 2023, as reported by DPL News on 13 March 2024. It counts influencers the SRI formalised through its control work in 2023, not all creators in Ecuador; we did not open the SRI's own report.

Mexico: vendor database.

670,969 Instagram accounts in Mexico are ones Influencity classes as influencers.

Source: Influencity, study of influencers in Latin America, 2023 edition (undated page). One vendor's database of public Instagram accounts of people over 18 with more than 1,000 followers, not a census.

Panama: official, as reported, a bill.

On **13 July 2026** a draft bill was presented to the plenary of the National Assembly that would require commercial posts on digital platforms to carry a visible label, whatever the creator's number of followers or income.

Source: La Estrella de Panamá and TVN, 14 July 2026; Tico Times, 19 July 2026. A draft bill, not law, and a rule rather than a count. No source prints its number, so we cannot say whether it is Bill 654 in chapter 10.

Peru: platform, as reported.

20,000 Peruvian YouTube channels had more than 10,000 subscribers, according to platform data reported by Mercado Negro.

Source: Mercado Negro, 24 April 2025. YouTube's own release was not found; channels, not people.

Other published estimates, each with its own method:



Brazil: a vendor estimate.

About 4.4 million Instagram accounts in Brazil are ones HypeAuditor classes as influencers, the second highest number worldwide.

Source: HypeAuditor, State of Influencer Marketing report, whose cover shows both 2024 and 2026. A vendor estimate, not a census; coverage Brazil only.

Latin America: an unofficial estimate.

About 20 million content creators in Latin America: the unofficial estimate that UNESCO cites.

Source: UNESCO, Influencers in Latin America, Discussion Papers No. 33, 2026. UNESCO does not name the source of the estimate. Coverage: Latin America as a whole, not only the eight markets in this study.

Argentina: most creators are small.

82.3% of the Argentine Instagram influencers in HypeAuditor's model are nano influencers, with 1K to 10K followers.

Source: HypeAuditor with IAB Argentina, 2025 Estado del Marketing de Influencers, Argentina, on 2024 data, page 16. A vendor's model from public social data, not a census: it counts only accounts of 1,000 followers or more that the vendor classes as influencers, and the report does not print how it places accounts in Argentina or the month of the data.

- **Argentina (vendor estimates):** HypeAuditor's 2025 Estado del Marketing de Influencers report for Argentina, made with IAB Argentina on 2024 data, classifies the creators its model places in Argentina by follower tier. These are HypeAuditor estimates, a vendor's model from public social data, not a census: they count only accounts of 1,000 followers or more that the vendor classes as influencers, and the report does not print how it places accounts in Argentina or the month of the data.
- Instagram: 82.3% of Argentine Instagram influencers are nano influencers (1K to 10K followers), 14.2% micro (10K to 50K), 3.2% mid tier (50K to 500K), 0.2% macro (500K to 1M) and 0.1% mega influencers and celebrities (more than 1M) (page 16).
- TikTok: 84.8% of Argentine TikTok influencers are nano influencers (page 3).
- YouTube: of Argentine YouTube channels by subscribers, nano (1K to 10K) were 71.6% of creators, micro (10K to 50K) 18.5%, mid tier (50K to 500K) 8.4%, macro (500K to 1M) 0.8% and mega (more than 1M) 0.8%; HypeAuditor writes that nano and micro influencers "representan el 90% de los creadores", its own printed figure (page 29).
- Engagement, each platform on its own formula: on TikTok (likes, comments and shares divided by views), the average engagement rate by tier was nano 8.5, micro 8.2, mid tier 7.6, macro 8.2 and mega 8.5, with

8.4 overall, so nano and mega tie at 8.5 (page 24). On Instagram (likes plus comments divided by followers), it was nano 1.0, micro 0.5, mid tier 0.4, macro 0.7 and mega 0.9, with 1.0 on average, against 0.2% for brand accounts, whose geography is not stated (page 19). The two formulas differ, so the platforms' rates must never be compared.

- Reels: in HypeAuditor's analysis of 1.4 billion Instagram posts by influencers in 2024 (accounts with more than 1,000 followers), Reels were 51% of posts, 68% of likes, 70% of comments and 87% of estimated reach (page 17). The page does not say the posts are Argentine only, so these shares may be global, and reach is HypeAuditor's estimate.
- Accounts mentioned by the most influencers in 2024 (HypeAuditor's Instagram list mixes a national team, football clubs, a TV channel, news media, a venue and a ticket seller with one sportswear brand): on Instagram, @afaseleccion (Argentina's national football team), with 11,721 mentions by 5,666 influencers; @riverplate, 6,675 by 2,750; and @adidasar (Adidas Argentina), 5,090 by 1,643 (page 20). On TikTok, @telefe, 3,946 mentions by 1,103 influencers; @lorealparis, 1,883 by 924; @mercadolibre.arg, 1,568 by 869; @larocheposay, 1,054 by 469; and @primevideolat, 1,135 by 441 (page 25). The lists are ordered by the number of influencers, not by mentions, and the report does not print how mentions are counted.

Creators as a profession: **Chile's tax rules**

These are tax rules, not advertising or labelling rules. Since 11 October 2025, when its extract was published in the Diario Oficial, a resolution of the SII, Chile's tax office (Resolución Exenta No. 128 of 1 October 2025), requires digital content creators, meaning people who make and share content personally and independently, to document money that users pay them through social media platforms with an electronic fee receipt (Boleta de

Honorarios Electrónica). Not issuing one is sanctioned under the Tax Code (Article 97 No. 10); the resolution prints no fine amount. It covers payments from users through platforms, not brand deals, and creators who mainly rely on audiovisual equipment rather than personal work fall under business tax rules instead.

A second resolution (Resolución Exenta No. 113 of 31 August 2026) requires platforms based in Chile that

handle payments from users or subscribers to creators to report the amounts creators received in a new annual sworn statement (Declaración Jurada No. 1965), due by 29 March each year from tax year 2027 (information for 2026). The SII's news headline reads as if creators file, but the resolution puts the duty on the platforms, and only

on those with domicile or residence in Chile, so not on global social networks based abroad. The SII named Sponsor, Onfayer, UGC and Arsmate among the platforms operating in Chile (SII news, 1 September 2026; names as printed by the SII; we did not open the Diario Oficial extract).

Spend and brand plans

Brazil: what brands say.

82% of brands in Brazil consider influencer marketing important, and for 52% of advertisers it is a central part of strategy (YouPix and Nielsen, ROI & Influência 2025, August 2025). In YouPix and Nielsen research reported by Propmark on 19 August 2025, 57% of advertisers planned to raise influencer spend in 2025, and 12% already spend over R\$5 million a year.

Colombia: an investment figure.

227,360 million pesos was influencer marketing investment in Colombia in 2025, up 23.1% on 2024 (IAB Colombia, Reporte de Inversión en Publicidad Digital, announced on 11 March 2026). The figure is built from data reported by agencies, publishers and ad networks affiliated with IAB Colombia, plus estimates for companies that do not report; IAB Colombia's page links only an executive summary.

Mexico: not yet measured.

The 2025 advertising spend study by AVE, CIM and IAB Mexico does not yet measure influencer marketing; it names it as an area needing future measurement, as reported by Insider Latam on 14 October 2026.

Trust

Brazil: bought on a recommendation.

65% of Brazilian internet users surveyed have bought something after an influencer recommended it. People they know are the most trusted source (74%), with influencers second (Opinion Box and Influency.me, Influenciadores Digitais 2025, 2,000 online interviews, August 2025).

Mexico: a World Cup study.

52% of 300 participants in an Ipsos study about the 2026 World Cup did not trust influencers who take part in advertising campaigns ("No confían en los influencers que participan en las campañas publicitarias") (Ipsos Mexico, La otra cara del Mundial, Parte 2, slide 24, 24 April 2026). It is not a figure for all Mexicans: the base is 300 participants, and ages, recruitment, survey mode, fieldwork dates and margin of error are not printed.

Peru: following, as reported.

55% of Peruvian internet users actively followed a video blogger, influencer or celebrity in the last month, and 64% of Generation Z, in a Kantar IBOPE Media study as reported by Andina, the state news agency (31 December 2025). We did not find Kantar's own publication, and the data year is not known. These are internet users, not all Peruvians.

- **Mexico, the question:** the Ipsos question asks yes or no and then, openly, who and why or why not. This is a World Cup study, not an influencer study, and the slide does not say whether the 52% is the share answering no or a coding of the open answers.
- **Peru, the method:** the Kantar IBOPE Media study was reported earlier by Forbes Perú (5 December 2025); the sample, ages, fieldwork dates and

method are not printed, and no age range is given for Generation Z.

- **Colombia:** 43% of Colombians surveyed say influencers' recommendations influence their purchase decisions; 23% of Generation Z respondents (the release writes "el 23% de los encuestados" under Generation Z) and about 18% of millennials say they bought online following an influencer's recommendation (EY Colombia press release, 17 September 2024, EY Future Consumer Index). EY's release prints no sample size, ages or fieldwork dates and does not say which edition of the index it uses.

Many people say they have bought on a creator's word. Next: whether people can buy inside social apps in Latin America.

Can people buy inside social apps in Latin America?

Yes, and the launches we checked are in Brazil and Mexico: TikTok Shop launched in Brazil on 8 May 2025 (TikTok Newsroom Brasil) and arrived in Mexico in early February 2025, according to a press report (Expansión, 6 February 2025), and YouTube's Shopping Affiliate Program opened in Brazil on 4 November 2025 (YouTube Official Blog Brasil).

Launches and company claims

early February 2025

Mexico: a press report.

8 May 2025

TikTok Shop launched in Brazil

4 November 2025

YouTube's Shopping Affiliate Program

102 times

A company claim: growth multiples with no absolute base.

Brazil: TikTok's own figures.

102 times: TikTok says the shop's average daily sales in Brazil grew 102 times, and its live sales 161 times, between May 2025 and May 2026.

Source: TikTok, 4 June 2026. A company claim: growth multiples with no absolute base.

Brazil: YouTube's affiliate programme.

YouTube's Shopping Affiliate Program works with Mercado Livre and Shopee, for channels with more than 5,000 subscribers (YouTube Official Blog Brasil).

Mexico: a press report.

We found no TikTok newsroom post confirming the Mexican launch; the date comes from Expansión's report of 6 February 2025.

Do people buy **what creators recommend?**

Brazil: 81% say they have.

81% said they have bought a product an influencer recommended, and 58% buy within seven days (YouPix and Nielsen, Consumo e Influência 2026, 1,000 online respondents, May 2026, as reported by Meio & Mensagem on 31 July 2026). This survey and the Opinion Box survey in chapter 08 ask different questions of different samples, so their figures cannot be compared.

Chile: buying on a creator's word.

33% of adults in Chile have bought a product or service an influencer recommended or promoted, rising to 46% among people who follow influencers (Cadem, Estudio 5C N.121, online panel of 700 adults, fieldwork 10 August 2026, margin of error 3.4 points).

How many people buy **online at all?**

Chile: when people last bought online.

60.0% of people aged 16+ made their last online purchase or order for personal use in the last 3 months, 8.5% longer ago, and 31.5% have never bought or ordered online; in the last 3 months, men 64.6% against women 55.6% (Subtel household survey, fieldwork ending 7 September 2025). This covers all online purchases for personal use, not only purchases through social media, and the base is not printed on the slide.

Colombia: buying online.

24.1% of internet users aged 5+ used the internet to buy or order products or services in 2024 (DANE, ENTIC Hogares 2024, 1 August 2025, 53,570 households; more than one answer allowed).

Mexico: buying is a stated use.

34% of respondents to AIMX's 2026 internet habits study said they use social networks to buy items ("Comprar artículos"), against 70% who use them to keep in touch with friends and family. This is a stated use of social networks, not a measured purchase, from an online panel of 1,200 people aged 18+ in urban Mexico that is not representative of all Mexicans and prints no fieldwork dates or margin of error.

Each of these surveys has its own base, period and question; they cannot be compared with each other, and markets must not be ranked on them.

Selling inside the feed brings the rules into play. Next: how paid creator posts must be labelled in Latin America, and what changed in 2026.

How must paid creator posts be labelled in Latin America, and what **changed in 2026?**

Six of the eight markets have a rule or guide written for influencer advertising, Panama has only a bill and for Ecuador we found none; and in September 2026 Brazil added a government order on disclosing paid relationships and a ban on all advertising for fixed odds betting, paid creator posts included (TNS reading of the official and issuer texts, checked on 15 and 16 October 2026).

This chapter summarises public rules; it is not legal advice.

Rules as checked on 15 October 2026, and on 16 October 2026 for Brazil's September 2026 changes, Argentina's betting rule and Panama's bill. Rules change,

Two **layers of rules**

Each market can have two layers. The first is a rule written for influencer advertising: either **self regulation** (an industry code, not law) or **official guidance** (a government agency's guide explaining how existing law applies). The second is a **general binding law**, usually consumer or fair competition law, that applies to all advertising. Since September 2026, Brazil also has a third kind: a **binding government rule** on disclosing paid relationships (a ministerial order with legal force, not a law passed by Congress). Separate sector rules cover betting ads in Argentina and Brazil; we did not research betting ad rules in the other six markets, though we note betting enforcement in Colombia and Peru below. This chapter reports what exists; it does not rank one market's rules above another's.

In one line per market:

- **Argentina:** industry guide (CONARP 2020) plus consumer and fair trade laws that ban misleading ads; a government rule requires a health warning on all betting ads, kept on screen in influencer posts

so we recheck each one in the week of publication. We read each rule at its official source where we could find one. Where we quote a label, we copy it word for word from the official text or, for Argentina, from the issuing body's own page, in its original language.

and live streams (2025, amended 2026); influencer bills not passed.

- **Brazil:** industry code (CONAR 2026) and a government disclosure order (Ministry of Justice 2026, applies from late October 2026) plus a consumer law saying ads must be recognisable as ads; betting ads banned by a provisional measure (a temporary order by the President with the force of law) since 25 September 2026, not yet voted by Congress.
- **Chile:** agency guidance (SERNAC 2022) and an industry code (CONAR Chile 2025), plus a consumer law that bans misleading ads.
- **Colombia:** agency guidance (SIC 2020) plus a consumer law that bans misleading ads.
- **Ecuador:** no influencer rule found; a consumer law bans misleading and abusive ads.
- **Mexico:** agency guidance (PROFECO 2023) plus a consumer law requiring ads to be truthful and clear.
- **Panama:** no influencer rule in force (bill in committee by September 2026); a consumer law requires truthful ads.

10 THE RULES TIGHTEN

- **Peru:** agency guidance (INDECOPI 2024) plus a fair competition law saying ads must be recognisable as ads.

"Recognisable as an ad" and "not misleading" are different tests. Among the general consumer and fair

competition laws we checked, only Brazil's and Peru's say in words that advertising must be identifiable as advertising; the other six ban misleading advertising. Radio, TV and media laws were not checked.

Rules by market



Rules as checked on 16 October 2026. Map: TNS.

Market by market

Argentina

- **Influencer rule:** "Influencers: Guía para la comunicación con fines comerciales", issued in 2020 by CONARP (Consejo de Autorregulación Publicitaria), the advertising self regulation council hosted by the Cámara Argentina de Anunciantes. Self regulation.
- **Label wording (issuer page):** "Contenido en colaboración con ... (marca)" placed visibly next to the name, and the hashtag "#ContenidoPatrocinado" or similar.
- **General law:** Decreto 274/2019 (Lealtad Comercial), Art. 11, bans advertising that may mislead through inaccuracies or omissions; the consumer protection law, Ley 24.240, also applies. Neither says in words that ads must be identifiable as ads.
- **Who enforces, and fines:** the Secretaría de Comercio Interior is the national enforcement authority under both texts, with the City of Buenos Aires and the provinces acting locally (whether that office has since been renamed or merged is not confirmed). Fines

● 10 THE RULES TIGHTEN

under Decreto 274/2019, Art. 57, run from 1 to 10,000,000 Unidades Móviles, an index unit updated each year (current peso value not confirmed); under Ley 24.240, Art. 47 (as replaced by Ley 27.701 in 2022), from 0.5 to 2,100 basic food baskets. CONARP's sanctions are not stated on the page we read.

- *Not passed:* two 2024 bills in the Chamber of Deputies (1225-D-2024 and 4060-D-2024) and a 2024 Senate bill would require ad labels; we found no sign that any has passed.
- *Betting ads (official text):* Resolución 446/2025 of the Secretaría de Industria y Comercio (Ministry of Economy), signed 29 October 2025 and published in the Boletín Oficial on 3 November 2025, requires every gambling and betting ad, online or in any other format (Article 5 and Annex point 1), to carry the warning "EL JUGAR COMPULSIVAMENTE ES PERJUDICIAL PARA LA SALUD" and a "+18" label. Its Article 6

opens a channel to report "personas o influencers" who promote online gambling sites without that warning; that is a reporting channel, not a labelling rule for paid posts. Resolución 271/2026 (Boletín Oficial, 6 August 2026) replaced the Annex: it keeps the warning and the "+18" label, and its point 3 now names influencer content and live streams, where the warning and the label must stay on screen for as long as the content refers to taking part in or reaching betting sites. The 2025 Annex already set this on screen rule for any person who mentions online gambling; the 2026 text names influencers, it does not create the duty. Breaches are sanctioned under Decreto 274/2019 and Ley 24.240 (Article 8). This is a health warning and an age label for betting ads, not a paid post label. We read Articles 5, 6 and 10 on the Boletín Oficial page (from a browser copy), and Article 8 and the Annex on InfoLEG, the government's legal database, in its original and updated text, on 16 October 2026; we did not open the Boletín Oficial page for Resolución 271/2026.

Brazil

- *Influencer rule:* CONAR's "Guia de Marketing e Publicidade por Influenciadores Digitais" (2026), which updates the guide CONAR launched in December 2020. Self regulation. Published 12 May 2026, with effect from 1 June 2026.
- *Government disclosure order (binding; applies from late October 2026):* a joint order of three Ministry of Justice secretariats, Portaria Conjunta SENACON/SEDIGI/SPDIGI No. 3 of 22 September 2026, requires anyone who distributes content because of a "relação material" (a payment or any other benefit, in cash or in kind) to tell the public, in a prominent and easy to understand way, for as long as the content stays up, live streams included (Article 9). Article 9 applies only from late October 2026: 30 days after publication, which was on 23 September 2026 as reported by Atlas Público (a law firm says 22 September; either way, from 22 or 23 October). Platforms that sell ads or boosting must give creators a tool to disclose (Article 3), from 90 days after publication. The order sets no label word, so CONAR's guide stays the source of label words for Brazil. It is a government order under the Consumer Code, not a law passed by Congress, and it does not use the word "influencer". We read the order's official PDF on the ministry's site, not on the gazette's own site.
- *Label wording (official text):* use the platform's paid content feature (for example "parceria paga") or expressions such as "#publicidade", "#publi" or an equivalent the audience understands. The guide's table lists "#publi" and "#publicidade" for identifying advertising. It says to use "#ad", "#adv", "#advertisement" and "#embaixador ou ambassador" with caution, because foreign terms may not be understood. The label should be immediate and visible, preferably on the first screen; in stories it stays visible throughout, and in lives it is kept or repeated. A collab feature or a brand hashtag alone may not be enough.
- *General law:* the Consumer Defence Code (Código de Defesa do Consumidor, Lei 8.078/1990), Art. 36, says advertising must be shown so the consumer recognises it as advertising "fácil e imediatamente".
- *Who enforces, and fines:* CONAR's Ethics Council judges complaints under the guide; CONAR issues no fines, but can warn, recommend a change or suspension, and publish its position. Under the Consumer Defence Code, the national consumer secretariat (Secretaria Nacional do Consumidor) coordinates enforcement and state and municipal Procons decide cases in their areas; fines run from 200 to 3 million Ufir, or the index that replaces it (Art.

57; no amount in reais confirmed). Senacon, the national consumer secretariat, enforces the disclosure order with Consumer Code sanctions (Article 12); the order sets no new fine amounts.

- *Children*: where advertising involves children and adolescents, the guide asks for stronger identification so they can recognise its commercial nature.
- *2026 rules and rulings*:
- **Betting ban**: Provisional Measure (Medida Provisória) 1.394 of 25 September 2026 bans all communication, advertising, marketing and sponsorship of fixed odds betting in any physical or digital medium, including any content aimed at the Brazilian public that promotes or eases access to betting "independentemente do formato ou da forma de remuneração" (Article 16), which covers paid creator posts. A breach counts as abusive advertising under the Consumer Code (Article 18). It took effect on publication and gave ten days to remove existing ads and sponsorship signs. It is a provisional measure with the force of law, not yet voted by Congress, which must convert it within 60 days, extendable once by 60 days, or it lapses (first period 25 September to 23 November 2026, per the Congress page). It has been challenged at the Supreme Court, with no suspension as of 15 October 2026 (as reported by Agência Brasil, Exame and iGaming Brazil). The text does not use the word "influencer", and the fine of up to 10% of turnover in Article 22 is for platforms' duties, not for advertisers or creators.
- **Status checked 16 October 2026; rechecked before publication.**
- **Betting, on hold**: CONAR's betting rules (approved 27 August, published 28 August 2026: betting ads may only feature people who are and appear to be over 21, and an accreditation for those who make them) are on hold while the ban lasts, CONAR says, as reported by Meio & Mensagem on 28 September 2026; we did not open CONAR's own note. The source does not say when they would apply again; in our reading, that would turn on the ban lapsing, being suspended by a court or being changed by Congress.
- **Betting, historical**: from 17 July 2026, warnings in betting ads had to take up at least 10% of the ad under

a Finance Ministry order (SPA/MF 1.964/2026, as reported by Congresso em Foco; not a CONAR rule). Since the ban of 25 September 2026 that rule has nothing to apply to while the ban lasts; whether the order was formally revoked was not checked, and in our reading it could matter again if the ban lapses, is suspended by a court or is changed by Congress.

- **Elections**: TSE Resolution 23.755 (2 March 2026) treats paying people or companies to post political content on their social profiles as paid electoral propaganda, which is banned on the internet. The resolution does not use the word "influencer".
- **Deepfakes**: on 1 September 2026 the electoral court (TSE) ruled 5 to 2 that the 2026 election ban on deepfakes applies when the content counts as electoral propaganda; the thesis guides electoral judges in similar cases.
- *Enforcement examples (no names)*:
- In May 2026, CONAR unanimously recommended suspension plus a warning in two influencer cases (self regulation: recommendations, no fines): TikTok posts promoting a prescription only medicine, including products banned in Brazil by Anvisa, the health regulator (Representation 059/26); and supplement ads with categorical therapeutic and weight loss claims (Representation 020/26). CONAR had suspended the ads by interim order when each case opened. In 020/26, CONAR's case summary also notes that the influencers' posts carried no advertising identification, but the published vote rests on the therapeutic and weight loss claims and does not rule on that point, so it is not a disclosure ruling. Judged in May 2026, day not printed; the advertisers and the influencers are not named here.
- On 23 January 2024, São Paulo's state court (TJSP, 30th Private Law Chamber) unanimously held an influencer and a consultancy liable for misleading ads for an online digital marketing course that suggested a guaranteed daily income, and ordered R\$5,000 in moral damages (appeal 1052135-63.2023.8.26.0002; TJSP news of 31 January 2024). This was a civil case between private parties, not a regulator's action; we read the judgment date on a copy of the ruling hosted by a legal news site, not on the court's own site, and did not check whether the ruling is final. The parties are not named here.

Chile

- *Influencer rules:* SERNAC's interpretive circular "Publicidad nativa e influencers" (Resolución Exenta N° 534, 16 June 2022), which is official guidance on the consumer protection law; and CONAR Chile's Código Chileno de Ética Publicitaria, 7th edition, in force from 1 January 2025, which is self regulation.
- *Label wording (official text):* there is no fixed label word. CONAR Chile's code (Art. 36) says influencer advertising "deberá señalizarse de manera que no quepa duda de que se trata de un contenido publicitario, pagado, patrocinado o en colaboración con una marca o empresa determinada." SERNAC's circular says the identification must be "en idioma castellano, ser expreso (no basta con etiquetar o hacer referencia al proveedor anunciante)", at least the same type size as the rest, not hidden behind "ver más" or a link, not mixed into a group of hashtags, written and spoken in videos, and repeated in lives.
- *General law:* the consumer protection law, Ley 19.496, requires advertising to be truthful and not misleading (Arts. 28 and 33); none of the articles we checked says in words that ads must be identifiable as ads. SERNAC's circular reads that duty into the law; that is the agency's interpretation, not words in the law.
- *Who enforces, and fines:* SERNAC oversees compliance and takes cases to court; fines are set by a judge. Under Ley 19.496, Art. 24, as amended by Ley 21.081 (2018), fines reach up to 1,500 UTM for false or misleading advertising in the media (amounts from the law firm Carey and a consolidated text; the official text did not load). CONAR Chile issues no fines.
- *Children:* CONAR Chile's code requires parental consent before a minor is paid or their social media is used for advertising, and SERNAC treats children as hypervulnerable consumers.

Colombia

- *Influencer rule:* the SIC's "Guía de buenas prácticas en la publicidad a través de influenciadores" (2020). Official guidance, described as non binding.
- *Label wording (official text):* "La mejor manera para declarar la relación comercial es a través del uso de etiquetas." Examples include "#publicidad @(marca del anunciante)" and "#Patrocinadopor @(marca del anunciante)". The guide says not to use "#" followed only by "patrocinio", "en asociación con" or "gracias a [nombre de la marca]", and not only to say one is an ambassador.
- *General law:* the Consumer Statute (Ley 1480 de 2011), Art. 30: "Está prohibida la publicidad engañosa". None of the articles we read says in words that ads must be identifiable as ads.
- *Who enforces, and fines:* the SIC. Under Ley 1480, Art. 61, it can fine up to 2,000 monthly minimum wages and order temporary closure of up to 180 days. In one case, the SIC fined an influencer 813 million pesos for misleading advertising of a course (as reported by Asuntos Legales, 29 April 2024; the report does not say whether the decision was final, and its appeal status is not known to us).
- *2026:* on 10 August 2026, in ruling T-241 of 2026, the Constitutional Court urged the IT ministry (MinTIC) and Congress to regulate the rights and duties of content creators and influencers. This is an exhortation, not an order. A Senate bill to regulate influencers was filed in March 2025; we could not confirm whether it has advanced.
- *Betting enforcement:* on 10 December 2024, Coljuegos, the gambling regulator, asked the national police cyber centre to block 289 Facebook and Instagram profiles over illegal raffles and promotion of illegal betting, and said it had 35 administrative sanctioning proceedings open against influencers and companies for the alleged illegal operation of games of chance (Coljuegos, Boletín No. 110). These are a blocking request and open proceedings, not sanctions; the proceedings are about operating games of chance, not about advertising or disclosure; and we did not check their outcome.

Ecuador

- *Influencer rule:* none found. Our searches for an Ecuadorian influencer guide, bill or agency rule from 2025 to 2026 returned nothing.
- *Label wording:* no label rule found, so we quote none.
- *General law:* the Ley Orgánica de Defensa del Consumidor, Art. 6, bans all forms of misleading or abusive advertising. It does not say in words that ads

must be identifiable as ads. The communications law (Ley Orgánica de Comunicación) was not checked.

- *Who enforces, and fines:* the Defensoría del Pueblo receives complaints, and contravention courts decide cases at first instance. Misleading or abusive advertising is fined US\$1,000 to US\$4,000 (Art. 72, in the text as amended to January 2015; later reforms not checked).

Mexico

- *Influencer rule:* PROFECO's "Guía de publicidad para influencers" (2023), published through an Acuerdo in the Diario Oficial de la Federación on 21 August 2023. Official guidance, which the Acuerdo calls "un instrumento de consulta".
- *Label wording (official text):* "SIEMPRE INCLUYE LAS SIGUIENTES ETIQUETAS: #PublicidadPagada #Publicidad #OpinionesPersonales #PatrocinadoPor". Labels must be visible at all times and not buried among hashtags or links; in audio, say expressly that it is advertising. The guide says to avoid ambiguous references such as using only "¡Gracias empresa X!", "Embajador", "Socio", "Empresa X", "#Publi" or

"#Ad". Invited events, trips and gifted products count as advertising too.

- *General law:* the Federal Consumer Protection Law (LFPC), Art. 32, requires advertising to be truthful, verifiable and clear. It does not say in words that ads must be identifiable as ads.
- *Who enforces, and fines:* PROFECO, which can order advertising suspended or corrected (LFPC Art. 35). Fines fall under Arts. 127 and 128 Bis according to the law firm ECIIJA; the peso amounts are updated each year, and we did not confirm them in the official text.
- *Children:* the guide says its advertising rules also apply to child and adolescent influencers.

Panama

- *Influencer rule:* none in force. Bill 654, which would regulate commercial advertising and require content creators and influencers to identify any sponsored message or recommendation clearly, expressly and in advance, was sent by the National Assembly's Commerce and Economic Affairs Committee to a three member subcommittee with 20 days to report, by 8 September 2026 at the latest (the Assembly's news note is stamped 9/8/2026, which can mean 9 August or 8 September). We found nothing on its stage after that referral; it is a bill, not law. In July 2026 a draft bill to regulate influencer advertising had been presented to the Assembly's plenary by a deputy (as reported by Telemetro, 14 July 2026, which gives no bill number); that it became Bill 654 is likely but not printed in either

source. We read the Assembly page from a browser copy on 16 October 2026.

- *Label wording:* no label rule in force (bill only), so we quote none.
- *General law:* Ley 45 de 2007 (consumer protection and competition), Art. 58, says advertising must be truthful. It does not say in words that ads must be identifiable as ads.
- *Who enforces, and fines:* ACODECO, the consumer protection and competition authority. Fines reach up to B/.25,000 for commercial practices that breach consumer rules (Art. 104, 2007 text; later amendments not checked).

Peru

- *Influencer rule:* INDECOPI's "Guía de Publicidad para Influencers", second digital edition, August 2024, from its unfair competition commission. Official guidance.

● 10 THE RULES TIGHTEN

- *Label wording (official text):* "el influencer debe colocar o mencionar expresamente en su publicación la palabra publicidad o anuncio contratado. Una opción para realizar esta divulgación es mediante el uso de etiquetas o hashtags como #publicidad o #anunciocontratado." The label must be visible, understandable and "en idioma castellano", not hidden after "ver más", not left to the end of a video, and, among many hashtags, the first one read should reveal the advertising. The guide lists "Embajador", "Socio", "Empresa X", "#Publi" or "#Ad" among references to avoid.
- *General law:* the unfair competition law (Decreto Legislativo 1044), Art. 16, bans acts that stop the audience recognising advertising "claramente como tal", such as ads disguised as news or opinion.
- *Who enforces, and fines:* INDECOPI's unfair competition commission, which has exclusive national competence. Fines reach up to 700 UIT for very serious cases, each capped at 10% of the previous year's gross income (DL 1044, Art. 52).
- *Enforcement in practice:* in a press note of 31 March 2025, Indecopi said that since 2019 it had opened 13 sanctioning procedures against influencers, content creators and companies over advertising on social networks (procedures opened, not 13 fines). In one case, a first instance decision of 4 March 2025 fined an influencer 47 UIT (251,450 soles), 1 UIT for each of 47 Instagram stories that promoted an online game as hidden advertising; the fine was open to appeal at the time (Resolución N.º 013-2025/CCD-INDECOPI). Indecopi tells influencers to tag sponsored content "Publicidad" or "#Publicidad".
- *2026:* between March and June 2026, Indecopi opened 13 preliminary investigations into advertising by betting platforms, with maximum fines of 700 UIT, as reported by El Peruano, the state gazette, on 19 June 2026 (we could not load Indecopi's own page). These are not the same 13 as the procedures above.

This chapter summarises public rules; it is not legal advice.

What this means for brands (TNS view, not data).

Write the label into the brief and the contract, in the local language, before a creator posts. In every market with a written influencer rule, the guide asks creators to disclose the commercial relationship, and several official guides warn against relying on English tags such as "#ad". Where the rule is self regulation or guidance, the general consumer or competition law

still applies, and regulators in Colombia and Peru have fined influencers (in Peru at first instance; for Colombia, the press report does not say whether the decision was final). In Brazil, betting advertising, paid creator posts included, is off the table while the ban lasts, and from late October 2026 a government order adds its own disclosure duty. Check the rules again in the week your campaign goes live.

The rules close the journey. Next: what brands entering Latin America should do with these findings, and how to get the full study.

What should brands entering Latin America do **with these findings?**

Plan market by market and platform by platform: TikTok's ads reach a larger share of adults in six of the eight markets and Instagram's in Argentina and Brazil (DataReportal, end of 2025, adults 18+), WhatsApp leads the usage surveys we found for Brazil and Mexico (chapter 02), and the rules differ in every market (chapter 10).

This chapter is TNS's view, drawn from the findings above. It is guidance, not data, and not legal advice.

1. Plan for Instagram and TikTok together, and decide each one's role market by market. Among adults, TikTok's ads reach the larger share in six markets and Instagram's in Argentina and Brazil (DataReportal ad reach), while in Brazil more internet users say they use Instagram often than say so of TikTok (Cetic.br usage survey, a different measure; chapters 04 and 05). No single platform choice fits all eight markets.

2. Do not treat Latin America as one market. Brazil alone holds about half of Instagram's ad audience across the eight markets, and Brazil and Mexico together hold more than half of each platform's eight market total (TNS calculation from DataReportal figures; shares in chapter 04). But the eight markets differ in size, age, income and rules (chapters 01, 04 and 10). Plan per market, not per region.

3. Read audience numbers as a ceiling, not a head count. Ad audiences are advertising reach estimates, not users or unique people, and some figures exceed the adult population. Use them to size and compare opportunities, and measure results with your own campaign data.

4. Put the disclosure label in the brief and the contract, in the local language. The influencer guides in Brazil (CONAR, an industry body), Mexico and Peru (government agencies) list Portuguese or Spanish labels and advise caution with, or against, English tags such as "#ad"; the Mexican and Peruvian guides also advise against "#Publi". Chile's consumer agency asks for disclosure in Spanish, and Peru's guide says the same. Agree the exact label and where it sits before a creator posts (chapter 10).

5. Check the rules in the week you launch. In 2026 alone, Brazil's influencer guide took effect, a Brazilian government order on disclosing paid relationships was issued (applying from late October 2026), Brazil banned betting advertising by a provisional measure that Congress has not yet voted on, Brazil's electoral authorities set rules for paid political posts and deepfakes, Argentina's betting warning rule was amended to name influencer content and live streams, Peru's regulator opened investigations into betting ads, Colombia's Constitutional Court asked for creator regulation, and a Panamanian bill reached committee (chapter 10). What we checked on 15 and 16 October 2026 may have moved by the time you read this.

6. Take extra care with betting, political and children's content. Betting and political content are where we found the newest specific rules: in Brazil, betting advertising is banned while the provisional measure lasts, and in Argentina every betting ad needs a health warning and a "+18" label, kept on screen in influencer content and live streams. The Brazilian and Chilean texts also ask for extra care and clearer disclosure where children are involved (chapter 10).

7. Look beyond the two platforms. WhatsApp leads the usage surveys we found for Brazil and Mexico and the messaging app answers for Colombia (chapter 02); YouTube and Facebook carry large ad audiences in every market, and YouTube's ad reach grew in all eight (chapters 03 and 06); the networks people use for news differ by market in the Reuters Institute's survey (chapter 07); and shopping is moving inside the platforms, with TikTok Shop in Brazil and Mexico and YouTube's affiliate programme in Brazil (chapter 09). A creator plan can connect with all of these.

8. Use third party creator counts with care. The estimates in chapter 08 come from different methods and years, and even Chile's official tax office counts measure different things. They are useful context, not a census, and they cannot be added up or compared with each other.

Get the full study

The full study PDF holds every table, every survey with its sample and date, and every rule text we read, free and with no form to fill in. <https://tnsagency.com/wp-content/uploads/2026/10/TNS-LATAM-Social-Media-Study-2026-EN.pdf>

How we built this study

Markets. Exactly eight: Argentina, Brazil, Chile, Colombia, Ecuador, Mexico, Panama and Peru, the markets TNS works in.

Audience data. All audience, population and age figures come from one series for all eight markets: DataReportal's Digital 2026 country reports, retrieved on 15 October 2026. The one exception is the history section

Talk to TNS. TNS works with brands across Argentina, Brazil, Chile, Colombia, Ecuador, Mexico, Panama and Peru. To plan a creator or communications programme in these markets, <https://tnsagency.com/en/#contact>.

of chapter 05, which names its own sources. Each figure carries the date its page gives: late 2025 for ad audiences and gender splits, the end of 2025 for reach shares and median age, and October 2025 for population and social media user identities. Population is United Nations data as published by DataReportal. We show every audience value as published and never cap, correct or re-round it.

What each figure is divided by. Every percentage names its base:

- Instagram ad reach is shown both as a share of the total population (ages 13+ counted) and as a share of adults 18+. TikTok ad reach is shown as a share of adults 18+. Only the two adult figures are compared with each other.
- Shares of the eight market total divide one market's audience by the sum of the eight (TNS calculation).
- The TikTok to Instagram ratio divides TikTok's ad audience (adults 18+) by Instagram's (ages 13+) (TNS calculation); it compares counts with different age floors and is a secondary view.
- Gender splits are shares of each platform's adult (18+) ad audience in one market. They are never pooled across markets.
- One year changes are divided by the platform's ad reach at the start of its own period, and each platform's period is printed with its figure.
- Social media user identities are shown as a count and as a share of the total population.

Flags. Where the source flags a value (TikTok reach above 100% of adults in Chile, Ecuador, Mexico and Peru; every decrease in ad reach; Reddit's unusually large changes; Ecuador's social media count), we keep the flag and say so.

What ad audiences are. Advertising reach estimates from the platforms' ad tools, as published by DataReportal: not monthly active users or unique people. A change in ad reach can reflect platform revisions, not people joining or leaving. Other platforms' audiences are context only and are never added up.

Income. GDP per capita in current US dollars for 2025, from the World Bank (indicator NY.GDP.PCAP.CD), retrieved on 15 October 2026 and rounded to the nearest dollar by TNS.

Calculations. Every sum, share and ratio marked "TNS calculation" was computed by script from our data files, every table value was checked by script against those

files, and every other number was traced to those files or to our checked fact list. With only eight markets, we make no statistical claims: no correlations and no tests of significance. We describe and compare; we do not claim causes.

Rules. We read each market's influencer rule and general advertising law at its official source on 15 October 2026, and Brazil's September 2026 changes, Argentina's betting rule and Panama's bill on 16 October 2026, or, where we found no official source, at the secondary copy we name. Where an official site blocks automated reading, we read it from a browser copy and say so. Label wording is copied word for word from the official text or, for Argentina, from the issuing body's page. We recheck every rule in the week of publication.

Surveys and other figures. Every survey, spend and platform figure in chapters 01, 02 and 04 to 09 was re-opened at its source by a separate reviewer before use. Some survey values were read from charts in the source documents: the Cetic.br chart on page 10 of its presentation, CRC's slide 44, Subtel's chart on page 69 and DANE's Gráfico 23. The internet column of INEC Panama's census table (Cuadro 20) was read on screen on 21 October 2026, because an automated reader cannot line up its columns. Where a source blocks automated reading, values were read from browser screenshots or captures: the Reuters Institute's country tables (16 October 2026), Ipsos Mexico's slide 24 (16 October 2026) and the HypeAuditor and IAB Argentina report, read from captures of 26 of its pages because no reviewer could open the report's own file (its cover was not seen, and the page number for its Instagram tier table comes from the capture's file name). Figures known only through the press are marked "as reported by" with the outlet and date.

What we did not use. No creator database run by TNS, and no creator counts of our own. No figure appears here that we could not trace to a published source.

Questions and answers

Which social platforms grew in Latin America in the past year?

Instagram, TikTok, YouTube and LinkedIn grew their ad reach in all eight markets, and X's shrank in all eight (DataReportal, Digital 2026 country reports; one year periods ending in October 2025, late 2025 or at the end of 2025). The source flags X's figures as fluctuating, and a change in ad reach can reflect platform revisions, not people joining or leaving (chapter 03).

Which social network do Latin Americans use for news?

In the Reuters Institute's 2026 survey, Facebook is the network named by the largest share of the online sample for news in Argentina, Chile, Colombia, Mexico and Peru, and Instagram is in Brazil. These are shares of online samples, not of all people, and markets must not be ranked on them (chapter 07).

Why does this study not count creators?

TNS chose to use public sources only and not to publish creator totals of its own. The public creator figures in chapter 08 use different methods, years and coverage, so they cannot be added up or compared across markets. Instead, the study measures what a brand can check: the audience each platform's ads can reach, and the rules for labelling paid posts. Chapter 08 lists other organisations' creator estimates, with credit and their limits.

Why are some TikTok figures above 100%?

In Chile, Ecuador, Mexico and Peru, DataReportal publishes TikTok ad reach above 100% of adults 18+ and flags those values itself. Ad reach estimates are not counts of unique people. We show the figures as published.

Why do Instagram and TikTok figures start at different ages?

The ad tools count differently: Instagram's figures include people aged 13 and over, while TikTok's include adults 18 and over. For a like for like comparison, use the adult reach figures in chapter 04.

Can I compare the survey figures across countries?

No. Each national survey has its own age base, period and question. We report them market by market and do not rank markets on them.

Is the rules chapter legal advice?

No. Chapter 10 summarises public rules; it is not legal advice. Check with a qualified lawyer in each market before a campaign goes live.

Can I download the study?

Yes. A free PDF of the full study is available with no form to fill in. <https://tnsagency.com/wp-content/uploads/2026/10/TNS-LATAM-Social-Media-Study-2026-EN.pdf>

How do I cite this study?

TNS (2026), "Social Media and Influencer Marketing in Latin America 2026: A TNS Study", tnsagency.com, <https://tnsagency.com/en/latam-social-media-influencer-study-2026/>. When you use a DataReportal figure, please also credit DataReportal and the report it comes from, as listed below.

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● 11 WHAT IT MEANS FOR BRANDS, AND THE FULL STUDY

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