

State of Mobile Networks: Chile (September 2017)

OpenSignal's second report on Chile finds an LTE market maturing well with healthy competition between its four main operators. Though we found clear winners in our 4G categories, there was very little separating all four operators when it came to the overall mobile data experience we measured on their networks. More than 248 million measurements, sampled over a 3-month period this summer, form the basis of our latest Chile report, which examines the changing 3G and 4G experience offered to consumers by Claro, Entel, Movistar and WOM.

Report Facts

248,633,377 Measurements

18,241 Test Devices

May 1 - Jul 31, 2017 Sample Period

Chile Report Location

Highlights

Chile's 4G reach improves for all operators

4G availability has increased for all operators since our last Chile report, showing steady progress in LTE expansion for the entire mobile industry. However, Telefónica's Movistar was the clear winner in our 4G availability metric. Its result was at least six percentage points ahead of each of its three rivals and more than a 10-percentage-point improvement on its score from a year ago.

Claro wins 4G-speed award

América Móvil's Claro had the fastest LTE speeds in our tests, delivering an average 4G download of 19.9 Mbps. Those speeds were above the current global average 4G download speed of 16.2 Mbps, but they were markedly lower than the 27 Mbps average we recorded for Claro a year ago.

LTE speeds trend downward as 4G usage increases

In fact, three of the four main operators in Chile saw their LTE speeds drop significantly in our metrics year over year, a sure sign of increased 4G subscriber growth and mobile data demand. Only one operator, WOM, saw an improved 4G speed result in our tests. According to Chilean regulator Subtel, total 4G subscriptions skyrocketed in 2016, increasing 162%. As those new 4G users compete for bandwidth on their respective networks, we're witnessing average LTE connection speeds drop in our results.

The competitive gap between all four operators narrows

While average 4G speeds fell in Chile over the last year, overall speeds actually increased in our tests, which is a direct result of 4G availability increasing. Consumers are able to tap into 4G services more often, improving their overall experience. Claro, Movistar and WOM were tied for our overall speed award, each averaging downloads under 10 Mbps across their data networks. Entel, however, was only a fraction away from making it a four-way draw.

Awards Table

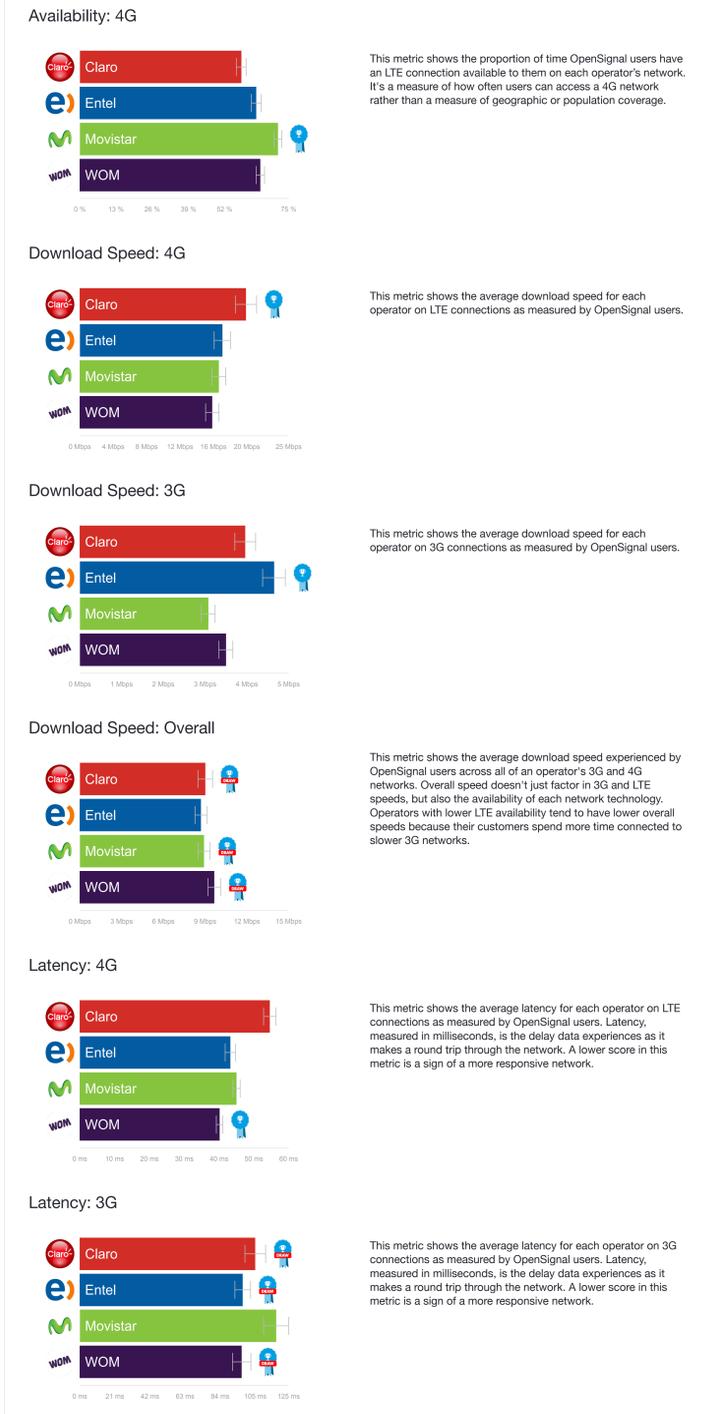
Operator	Download Speed: 4G	Download Speed: 3G	Download Speed: Overall	Latency: 4G	Latency: 3G	Availability: 4G
Claro	1st		1st	1st	1st	
Entel		1st		1st	1st	
Movistar		1st		1st		1st
WOM		1st	1st	1st	1st	

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Performance by Metric



Analysis

In our last look at Chile, we found a country in the early stages of its LTE evolution, offering fast speeds but relatively low access to 4G services. How things can change in a year. In this report, we found 4G speeds have slowed down considerably, but LTE's reach has increased dramatically. The end result is the overall mobile data experience has improved for Chilean consumers, while no one operator is dominant in what has become a very competitive market.

Our report this year draws on nearly 249 million measurements captured between May and July from more than 18,000 smart devices. Analyzing that data, we compared the consumer 3G and 4G experience on Chile's four nationwide operators: América Móvil's Claro, Telefónica's Movistar, Entel and WOM. In the 12 months since our last Chile report, we've seen a lot of change.

Looking for signal and speed

Our first metric for 4G availability shows that LTE reach has improved for all operators. Last year, there was a tie for first place between Movistar and WOM in our 4G availability metric. But this year we have a clear winner, Movistar, which provided its users with access to LTE signal over 71% of the time in our tests. This is at least six percentage points ahead of each of its three rivals. Claro and Entel, however, had the biggest individual increases in 4G availability, as their scores jumped by 20 and 16 percentage points, respectively, over the same period. The improvements highlighted by our data show that all four operators are making steady progress in expanding their LTE operations.

In our 4G-speed category, América Móvil's Claro was the clear winner in our tests, delivering the fastest LTE average download speed of 19.9 Mbps. That score exceeded the current global average 4G download speed of 16.2 Mbps, but they also represent a sizable drop from the 27 Mbps average we recorded for Claro's 4G speed a year ago. Indeed, three out of the four operators saw their 4G speeds decline since last year. Entel's average 4G test fell by around 5 Mbps, while Movistar's fell by some 6.5 Mbps in our results. WOM, on the other hand, was the only operator to see its average 4G speeds improve in our results, increasing by around 5 Mbps.

These LTE-speed fluctuations, while seemingly a negative trend, are a clear indication that 4G usage is increasing. It's a common theme we see in developing 4G markets: As competition increases between operators and more subscribers sign up for 4G subscriptions, those new subscribers compete for bandwidth, inevitably leading to slower data speeds until further network infrastructure and capacity improvements take place. And 4G usage is definitely on the increase. Chilean telecoms regulator Subtel reported a huge 162% growth in the number of 4G connections in 2016.

In our 3G-speed category, Entel was the clear winner, averaging far below speeds of 4 Mbps. Our data shows the other three operators were not far behind, all offering users average 3G speeds of between 3 and 4 Mbps.

When we looked at our 3G and 4G speed metrics in tandem, though, the results got interesting. Our overall speed metric tracks the average download speeds experienced by OpenSignal users across both an operator's 3G and 4G networks, factoring in the availability of each network technology. A lower LTE availability correlates with lower overall speeds because users will spend more time connected to slower 3G networks.

This year, our overall speed test data delivered a very narrow three-way tie between Claro, Movistar and WOM, all offering around 9 Mbps in our tests. Entel, however, was only a fraction away from making it a four-way draw. Worthy of particular note is WOM, it having made the greatest overall speed improvement in the last 12 months. WOM's overall speed increased by over 3 Mbps to 9.7 Mbps in our measurements. We found Claro's measured overall speed jumped by more than a megabit, while Entel's stayed level at 8.7 Mbps. Movistar was the only operator to experience a decline in overall speed in our tests, and that decline was small. These results show that while 4G speeds have, in the main, declined, the everyday speed available to consumers has actually increased. This reflects the increases in 4G availability we're seeing from all operators. By providing users with access to 4G signals more often, operators are delivering an improved overall user data experience. In addition, the results show that when it comes to the typical mobile data experience provided to consumers, all four operators were very closely matched.

Our final metric, latency, measures the delay in milliseconds that data experiences as it makes a round trip through the network. Our 4G latency award was won by WOM outperforming the competition with an LTE reaction time of 40.1ms. Entel and Movistar trailed by only a few milliseconds, while Claro was almost a full 15ms behind the leader in this category. In the 3G latency test, we found a three-way tie for first place between Claro, Entel and WOM.

A fast-growing market

Chile's mobile data market is growing at a fast pace, and clearly there is demand for more data services. Not only are 4G subscriptions rapidly rising, but Subtel recently announced that some 80% of internet sessions in Chile now come from mobile devices.

Comparing Chile to its global peers, we found three of the four Chilean operators exceeded the global average 4G download speed of 16.2 Mbps, as reported in OpenSignal's State of LTE report, while WOM was a fraction below that benchmark. In terms of global 4G availability, however, Chile currently sits in the bottom third of our global rankings out of 75 countries. It ranked below Latin American markets like Argentina and Colombia, though above Brazil and Ecuador.

In summary, our data indicates that Chile's mobile industry is on a level playing field with all operators providing a comparable mobile data experience. While LTE speeds may be on the decline, that's not a sign of a declining 4G market. LTE's reach is expanding, giving consumers access to mobile broadband services more often. Declining the typical mobile data experience is improving. That's not the sign of a declining market, rather a maturing one.

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Our Methodology

OpenSignal data is collected from consumer smartphones and recorded under conditions of normal usage. As opposed to drive-test data, which attempts to simulate what a user might experience by using the same devices to measure network performance in a small number of locations, we take our measurements from millions of smartphones owned by regular people who have downloaded OpenSignal's apps.

Those measurements are taken wherever users happen to be, whether indoors or out, in a city or in the countryside, representing a mobile data service the way users experience it. For more information on how we collect and analyze our data see our methodology page.

For this particular report, 248,633,377 datapoints were collected from 18,241 users during the period: May 1 - Jul 31, 2017.

All data has been collected from users of the OpenSignal mobile app for Android or iOS.

For every metric we've calculated statistical confidence intervals and plotted them on all of the graphs. When confidence intervals overlap for a certain metric, our measured results are too close to declare a winner in a particular category. In those cases, we show a statistical draw. For this reason, some metrics have multiple operator winners.

Recent Chile Reports

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