

State of Mobile Networks: Mexico (October 2017)

Upstart AT&T and Telcel are still locked in a fierce battle as both have shown network improvements since OpenSignal's last report for Mexico. Movistar's metrics have also improved but not enough to challenge the top two operators. In this report, we examined more than 1.4 billion datapoints captured from 111,584 devices this summer to better understand the maturing mobile broadband market in Mexico.

Report Facts

1,419,440,371
Measurements

111,584
Test Devices

Jun 1 -
Aug 31,
2017
Sample Period

Mexico
Report
Location

Highlights

AT&T continues to challenge Telcel in a close race

In the relatively short time since it entered the market, AT&T has pulled into a tie for 4G download speeds with Telcel, according to OpenSignal data. Don't count incumbent Telcel out just yet though. Telcel has regained the lead for 4G availability in Mexico since our March report, with OpenSignal users having access to its LTE connections 76.4% of the time – a jump from the 69.4% availability six months ago.

Movistar's network improves but falls further behind the big two

While Movistar didn't lead in any of the six OpenSignal metrics tested between June and August, the operator either made gains against or kept par with its results in our last report. However, in this three-horse race, it's really down to two thoroughbreds, as either AT&T or Telcel won or shared all of our awards.

Mexico's urban regions generally mirror national results

In our March report, we highlighted regional network results in Mexico City. This time, we're expanding those results to both Guadalajara and Monterrey, OpenSignal winners from all three cities were largely similar to the winners of our national results, however, there were some larger gaps between the operators at the regional level worth noting.

Mexico's 4G network speeds are among the fastest in Latin America

Mexico had some of the fastest 4G speeds in the Americas, according to our global data. It beat out Brazil, Argentina and Chile in LTE speeds, and – in what might be a surprise to Mexico's northern neighbors – Mexico provided faster 4G downloads than the U.S., based on our last State of LTE global report.

Awards Table

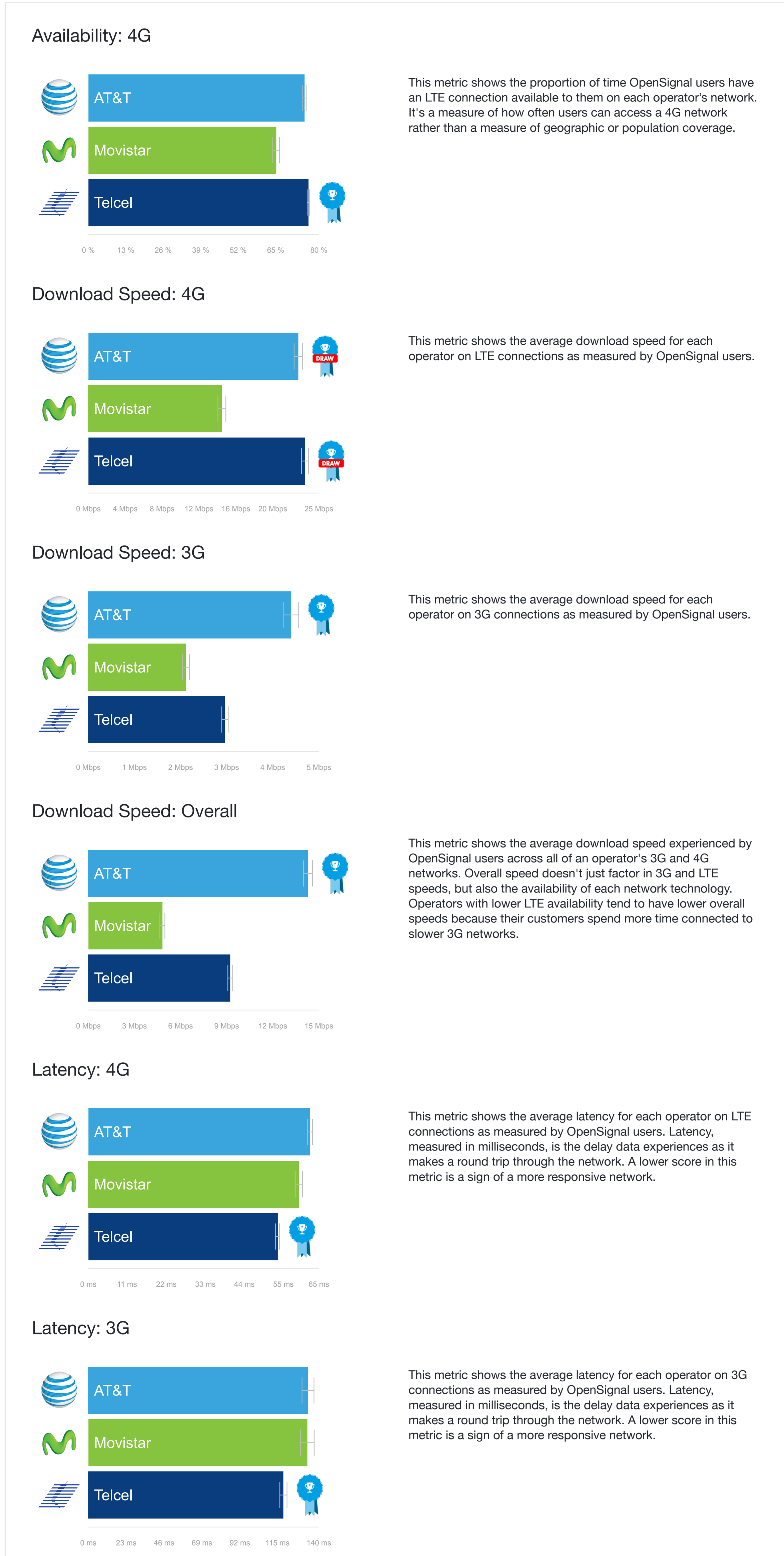
Operator	Download Speed: 4G	Download Speed: 3G	Download Speed: Overall	Latency: 4G	Latency: 3G	Availability: 4G
AT&T	🏆	🏆	🏆			
Movistar						
Telcel	🏆			🏆	🏆	🏆

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Performance by Metric



Regional Performance

This chart shows the regional winners in each category OpenSignal measures. Click on the icons to see a more detailed graph showing each operator's metrics in a particular region.

Region	Download Speed: Overall	Availability: 4G	Download Speed: 4G	Download Speed: 3G
Mexico City	🏆	🏆	🏆	🏆
Guadalajara	🏆	🏆	🏆	🏆
Monterrey	🏆	🏆	🏆	🏆

Analysis

Consumers in Mexico have a trio of major operators to choose from for mobile broadband service, but while all three provided solid mobile data experiences in our latest tests, two stood out. In fact, AT&T Mexico and Telcel were in a neck-and-neck race for supremacy in many of our key metrics. A deeper dive into the more than 1.4 billion data points collected from OpenSignal users from June to August of 2017 shows just how intense the battle between AT&T and Telcel has become, especially when compared to prior reports.

AT&T continues to improve in speed but Telcel remains strong

In two short years, AT&T has emerged as a true challenger to Telcel across several of OpenSignal's metrics. AT&T is now tied with Telcel for fastest 4G speeds in our measurements, and it was the outright winner in our overall download speed and 3G speed categories. Telcel balanced the scales with three category wins of its own. It had the lowest 3G and 4G latency in our tests and our users were able to access its LTE service the most often: 76.4% of the time.

AT&T showed the most improvement in our speed metrics. In our March report, 4G download speeds on Telcel led the pack at 24.1 Mbps, compared to AT&T's average 4G download of 21.6 Mbps. Movistar was well behind in that test period, as our testers measured 14 Mbps average download speed on the operator's LTE network. In this reporting period, however, our AT&T users saw 22.8 Mbps LTE download speeds, producing a statistical tie with Telcel, which averaged 23.5 Mbps LTE speeds in our measurements. Meanwhile OpenSignal users on Movistar experienced 14.5 Mbps LTE downloads, a slight improvement from six months ago.

AT&T's tie with Telcel in 4G speed, combined with its outright win in 3G speed, earned it the OpenSignal award for overall download speed, which is the average connection speed experienced by OpenSignal users across all of an operator's 3G and 4G networks. AT&T customers saw everyday download speeds of 14.3 Mbps, which is noticeably faster than Telcel's average of 9.2 Mbps or the Movistar average of 4.8 Mbps. According to our data, it's worth noting that for the overall speed metric, AT&T saw an increase in overall speed over the last six months, while Telcel's overall speed declined.

4G availability is improving for all but especially for Telcel

While all operators saw 4G availability improvements, Telcel had by far the largest increase in our metrics. AT&T won our 4G availability metric in March, but in our latest results Telcel leaptfrogged over AT&T with a 4G availability of 76.4%. AT&T was close behind in our rankings with an availability score of 75%. The two leaders were in stark contrast to Movistar, whose users were able to connect to 4G signals only 65.4% of the time in our measurements. That's still a respectable figure but less time on Movistar's 4G network, combined with slower 4G download speeds in our user tests are the likely contributor to the operator providing less than a third of the overall speeds OpenSignal users found on AT&T's network.

Widespread network availability is only part of the customer experience equation though. Network latency is another key element as customers expect fast response times when using mobile broadband. Based on OpenSignal data, Telcel led in 4G latency, just as it did six months ago, and it took the 3G latency award away from Movistar.

In large cities, AT&T leads in speeds but not availability

For this report, we've examined 4G availability and 3G, 4G and overall speeds in Mexico's three largest metro areas: Mexico City, Guadalajara and Monterrey. (Note: our June-August test period was before the earthquake that devastated Mexico City Sept. 19, 2017, which will have impacted these results in the near term.) We recorded the fastest overall speeds on AT&T in all four regions, often by a larger margin than in its national results. In Monterrey, for example, OpenSignal data showed AT&T's overall download speeds clocked in at 17.5 Mbps compared to 9.7Mbps on Telcel and 6.7Mbps on Movistar.

In LTE availability, Telcel won our award in Mexico City and Monterrey, mirroring its national results, but in Guadalajara all three operators were tied. In each of the three cities though, the operators had noticeably higher availability scores than their national results. For instance in Monterrey, Telcel was able to provide our users a 4G signal 90% of the time, while our Movistar and AT&T users were able to find a 4G signal 82.7% and 79.8% of the time respectively.

Regardless of the region, it's clear that in Mexico, AT&T has made excellent progress with its mobile broadband rollout in a short time and that neither of the two incumbents can rest easy on their laurels. By winning OpenSignal's 4G availability and tying with AT&T in our 4G speeds tests, Telcel continues to make this a two-operator 4G race. However, all Mexico's LTE operators will have to continue investing in network infrastructure and advanced cellular technologies to truly stand out from the crowd.

Mexico's metrics lead the way in Latin America

At the national level, Mexico's mobile broadband networks do stand out when compared to other countries in Latin America. Data from the [OpenSignal State of LTE report](#) indicates that Mexico had high 4G availability among its peers. Mexican consumers were able to find an LTE signal 69% of the time, compared to 67.4% availability in Peru, 62.1% availability in Argentina and 50.5% availability in Colombia.

Mexico's national average LTE download speed of 22.4 Mbps was also faster than every other country we examined in Latin America, save one. Ecuador averaged 4G download speeds of 24.3 Mbps. Mexico didn't just beat out most of its Latin American peers. The 15 Mbps typical LTE download connection experienced by our U.S. consumers was far slower than the speeds OpenSignal users experienced south of the border.

Our Methodology

OpenSignal data is collected from consumer smartphones and recorded under conditions of normal usage. As opposed to driver-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. We continually adapt our methodology to best represent the changing experience of consumers on mobile networks and therefore comparisons of the results to past reports should be considered indicative only. For more information on how we collect and analyze our data see our [methodology page](#).

For this particular report, 1,419,440,371 datapoints were collected from 111,584 users during the period: Jun 1 - Aug 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.

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