

State of Mobile Networks: Peru (August 2018)

It's been six months since our last look at Peru, and while a quick glance at our awards table might suggest not much has changed, a deeper dive into the data shows notable growth in some metrics and conspicuous declines in others. Entel won our 4G availability category, as all four of Peru's operators neared or exceeded the 80% LTE reach milestone – but Entel had to settle for a draw with Movistar in 4G download speed. We analyzed more than 463 million data samples collected from 33,400 devices between April and June to examine the 3G and 4G experience provided by Peru's four main operators, both at a national level and in the capital Lima.

Report Facts



463,085,459 Measurements



33,489 Test Devices



Apr 1 - Jun 29, 2018 Sample Period



Peru Report Location

Highlights

Entel and Movistar see 4G download speeds drop

Entel and Movistar tied in our 4G download speed category but both saw their speeds fall by over 3 Mbps, allowing third-placed Claro to close the gap on the leaders.

4G availability approaches the 80% milestone

Entel held its place at the top of our 4G availability table as its reach passed 85%. All four of Peru's operators can now boast 4G availability scores of over or very close to 80% – and these scores were even higher in the capital Lima.

Movistar pulls ahead in 3G speeds but draws in overall

Movistar grabbed our 3G download speed award from key rival Entel with an impressive increase of nearly 1 Mbps. The two drew in our overall download speed metric, but both operators saw notable speed drops in our measurements.

Bitel behind in speed, but impressive in 4G reach

Bitel launched its 4G network at the end of 2016, and remains in a distant fourth place in all of our speed metrics. But the new entrant is holding its own in 4G availability, where it has passed 80% nationally, while it tied for the top availability spot in Lima with an impressive score of 87%

Awards Table

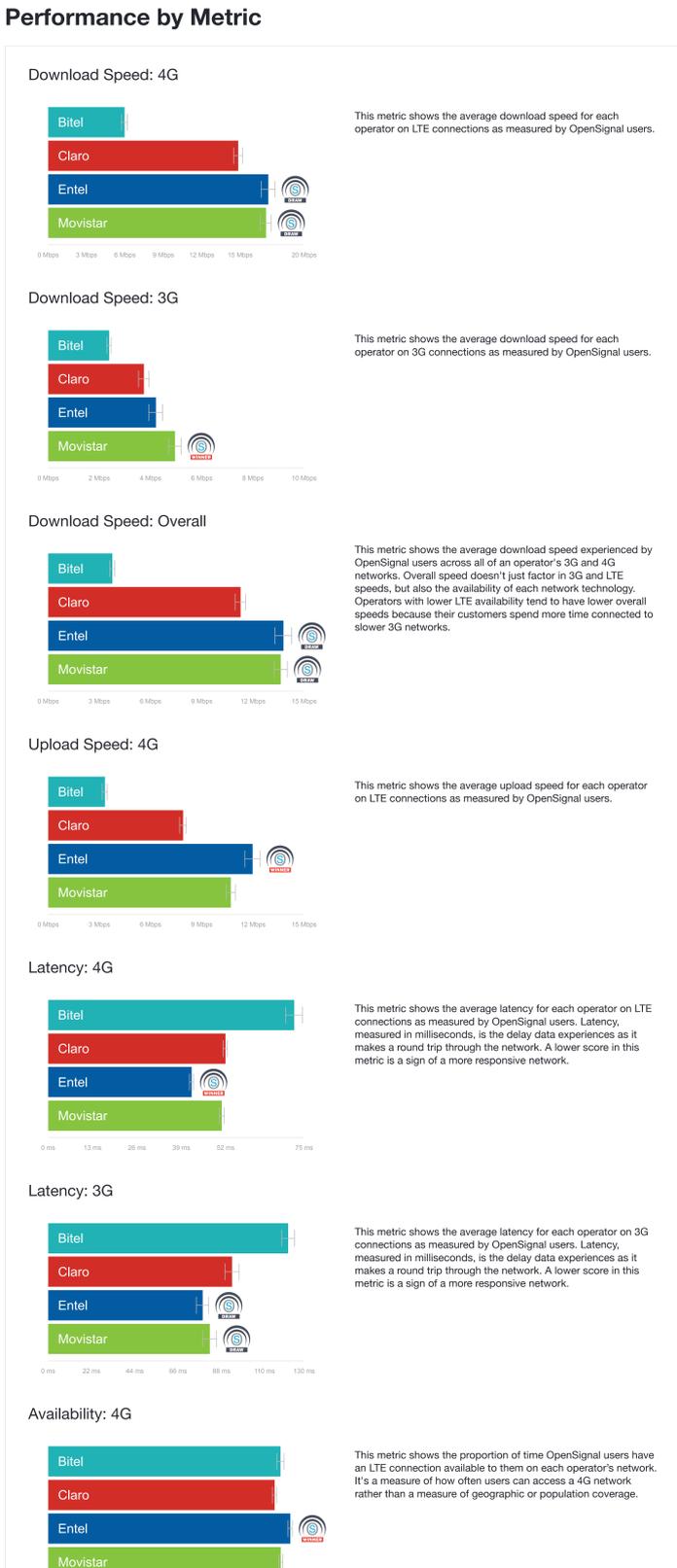
	Download Speed: 4G	Download Speed: 3G	Download Speed: Overall	Upload Speed: 4G	Latency: 4G	Latency: 3G	Availability: 4G
Bitel							
Claro							
Entel							
Movistar							

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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.

Legend: M Movistar C Claro B Bitel E Entel

Region	Download Speed: 4G	Download Speed: 3G	Download Speed: Overall	Upload Speed: 4G	Latency: 4G	Latency: 3G	Availability: 4G
Lima	C	M C	C E	E	E	M C E	B E

Analysis

We've seen some impressive developments in Peru's mobile networks. The country is one of the best in Latin America for 4G availability, although its 4G speeds have been modest – and growth in this metric now seems to have stalled. Entel and Movistar monopolized our awards table, with Entel taking our 4G availability crown while the two shared the spoils for 4G download speeds. Of the others, Claro is closing the gap on the leaders in most categories, and while relatively new entrant Bitel is some way behind in our speed metrics it has distinguished itself in LTE reach.

In our fourth report on Peru, we analyzed more than 463 million data points collected from 33,489 mobile users between April 1 and June 29, 2018. We have compared the 3G and 4G experience offered by Bitel, Claro, Entel and Movistar on the national level. We have also included an analysis of our seven key metrics on a regional level in the Peruvian capital Lima.

Let's start by looking at 4G download speed, the metric where we've seen some notable declines since our last report.

Entel and Movistar see 4G speeds slowing

Our 4G download speed metric has been a closely run race in Peru, as we recorded a draw between Entel and Movistar – the same two-operator draw we saw six months ago. However, more notable was the fall in average 4G speeds we recorded for the top two operators: Entel's download speed fell by over 3 Mbps to 17.2 Mbps, while Movistar's fell by over 4 Mbps to 17 Mbps. This has allowed Claro to close the gap on the leaders, as the third-placed operator's 4G download speed grew by some 0.5 Mbps to reach 14.8 Mbps in our measurements. New kid on the block Bitel remains some way behind the others with a score of 6 Mbps in our 4G download speed metric.

In the capital Lima, the 4G download speed story was quite different as Claro topped our table with average speeds of 17.9 Mbps. Entel and Movistar had to settle for second place with speeds of 16.5 Mbps and 15.8 Mbps in our measurements, while Bitel remained in fourth place by some distance.

The drop in Entel and Movistar's 4G download speeds could be related to a phenomenon we are seeing across many mobile markets as they mature. Operators are focusing investment on improving LTE reach to bring services to as many users as possible, rather than concentrating on boosting capacity. Big increases in the level of LTE access are often coupled with jumps in mobile bandwidth and data use, which can negatively impact download speeds as subscribers vie for limited capacity. And we are certainly seeing some impressive increases in 4G availability in Peru.

4G availability approaches the 80% milestone

Peru is on the verge of joining the global top tier in terms of LTE reach, as all four of its national operators have now passed or are about to pass the 80% mark in our 4G availability metric. Entel held its position at the top of our table, but the operator saw growth of less than 1 percentage point over the past six months to reach 85.1% in our 4G availability metric, allowing its rivals to catch up. Movistar saw its 4G availability jump by over 4 points to 81.8%. Claro's increased by nearly 4 percentage points to 79.6%, while Bitel's grew by over 2 points to hit 81.7%. The gap between all four of Peru's operators is now less than 6 percentage points.

Peru's LTE reach is impressive, especially when you consider the topographical challenges in the mountainous country. Our 4G availability scores were even more remarkable in Lima, where all four operators were well above the 80% mark, while the leaders Bitel and Entel passed the 85% milestone. This is a particularly impressive performance from Bitel, which only launched its LTE network in Peru in December of 2016. The table has shown it is one of the top countries in Latin America in our 4G availability metric, beating much larger rivals such as Mexico and Argentina.

Movistar held to a draw in overall speed but pulls ahead in 3G

As in our last [Mobile Networks Update](#) on Peru, we saw two operators score a draw in our overall download speed metric, which measures the combined speeds of operators' 3G and 4G networks and the level of access to each technology. Entel and Movistar were statistically tied with speeds of just under 14 Mbps in our measurements – but as with 4G speed, both operators saw notable drops in our measurements since our last report. This allowed Claro to close the gap, with our users on its network getting average overall speeds of 11.3 Mbps, while Bitel was way in the distance with a score of just 3.8 Mbps.

Movistar was able to pull ahead in our 3G download category, grabbing the title from Entel who won this award six months ago. But while Movistar showed an impressive increase of nearly 1 Mbps in our measurements, the other three operators' 3G speeds seem to have somewhat stalled. Fourth-placed Bitel's 3G speeds have fallen below 2.5 Mbps, placing it some distance behind its rivals.

Bitel was also a distant fourth in our 4G upload metric, averaging upstream LTE connections of just 3.3 Mbps. Entel won the 4G upload award with a score of 12 Mbps, followed by Movistar with 10.7 Mbps and Claro on 8 Mbps. While we would expect relatively new entrant Bitel to bring up the rear in most of our metrics, these low speeds could impact the operator's growth as more and more Peruvians turn on to mobile broadband. But Bitel has committed to some [serious investment in Peru](#) to implement its newly-acquired mobile spectrum, and we expect to see improvement in its network speeds over the next couple of years.

Competition is increasing in Peru, and accordingly the country's other operators are increasing network investment into new technologies such as LTE-Advanced. All four operators are now at or around the 80% 4G availability mark, and this score is even higher in the capital Lima. In terms of 4G download speeds, Peru's national score of 16.5 Mbps in our latest [State of LTE Report](#) was distinctly mid-table, but only a shade below the global average of 16.9 Mbps. We will continue to monitor the development of networks in this fast-maturing market, and expect to see improvements in the metrics in our next few reports.

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