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2024 Report

# India's Best 5G Smartphone Brand<sup>e</sup>

**Consumers want uncompromised experiences on their new 5G smartphone devices.**





## Key Takeaway

Consumers in India have graduated from just wanting to own a 5G smartphone. They want 5G as a hygiene capability without compromising experiences powered and defined by other specifications. At the same time they want enough choices to select most suited 5G smartphone for themselves.



**Faisal Kawoosa, Chief Analyst, Techarc**

Consumers are increasingly demanding 'no compromise' 5G smartphones that have a wide range of choice to offer as well.



# India 5G Snapshot



**176 MN subscribers**

India had 176 MN 5G subscribers as of June end 2024. In 2024, 46 MN 5G subscribers were added in 1H (Jan-June) 2024.

With 5G smartphones becoming available across price points, India is expected to have 240 MN 5G subscribers by the end of 2024.



**4,46,000 5G BTS**

As of 31st May 2024, India has 4,46,000 5G BTS deployed across the different states and UTs.

By states, UP led with 50,212 followed by Maharashtra with 45,739 5G BTS installed. Tamil Nadu stood 3rd, with 34,233 such deployments.

Source - DOT

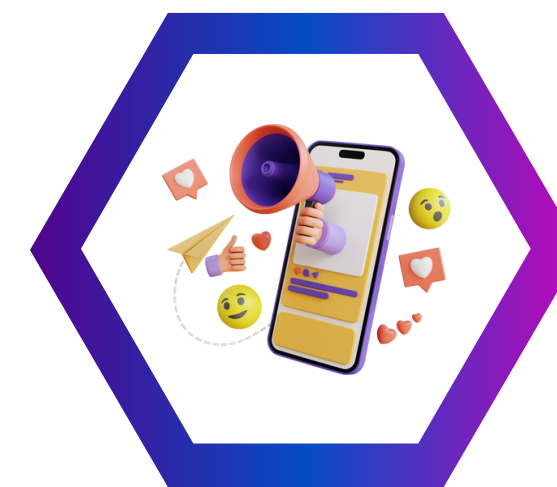


**14.8% 5G Data**

14.8% of the total mobile broadband traffic was 5G in 2023.

5G users consume 3.6X more data than the previous generation users.

Source - NOKIA MBIT



**240 MN 5G smartphones**

The country has 240 MN active 5G smartphone devices. Presently, 73% of this base is using 5G services.

With two leading operators making 5G the default choice, more 5G enabled users are expected to switch to 5G services in the remaining of 2024.

# The expectations shift!



**Consumers want 5G connectivity on smartphones**



**Consumers want experiential smartphones with 5G**

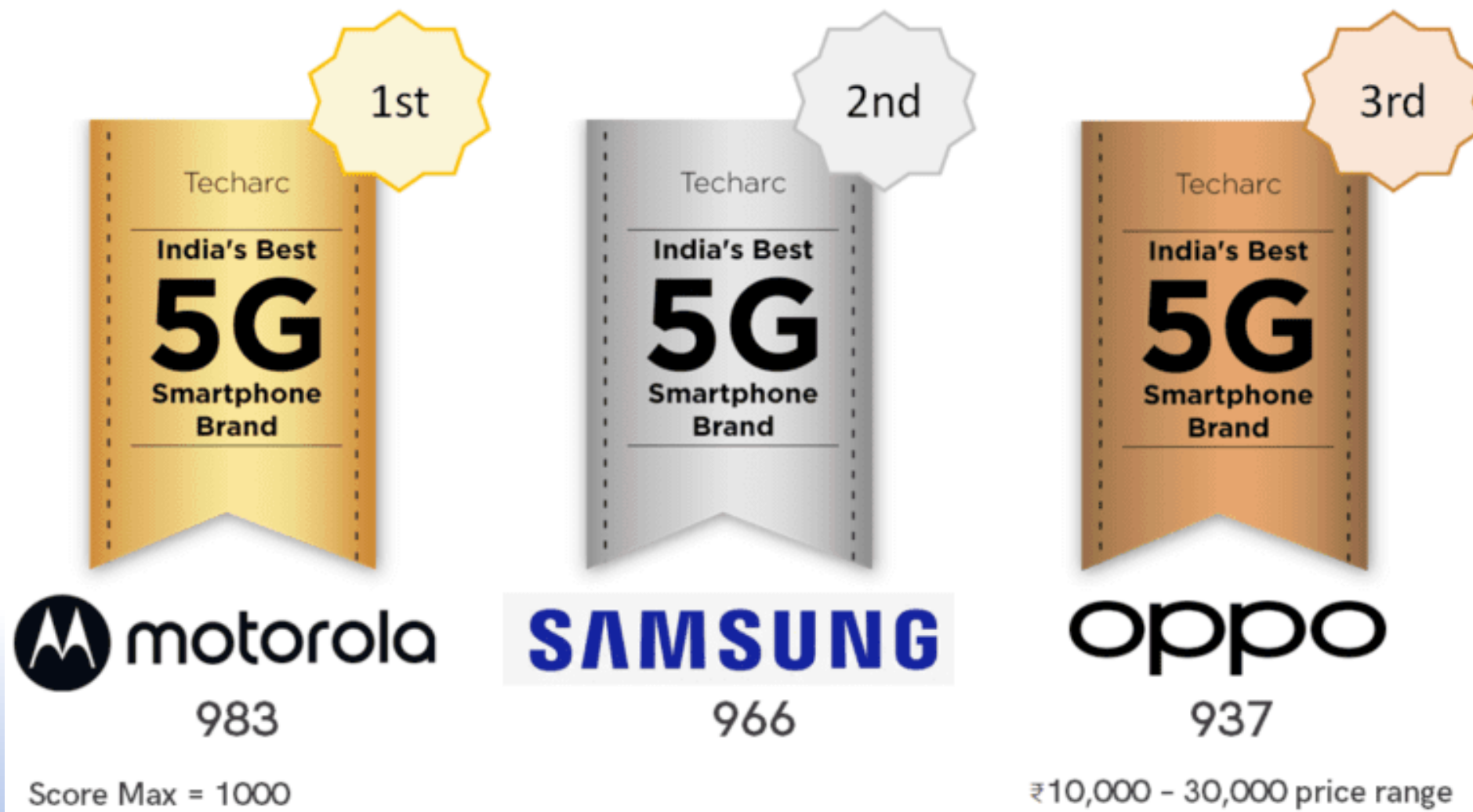
2023 was the 1st year of commercial availability of 5G services in India which kept the operators - Jio and Airtel busy with network rollouts and expansions. Consumers were still exploring 5G and had fundamental questions like which all bands will the devices support, will the smartphone work on both the operators as they are using different technology architectures, will the phone work in a roaming network, etc. Essentially, will the 5G smartphone offer omni **connectivity**? This added to the customer confusions making it difficult for them to make a decision. So they gave preference to brands offering maximum bands so that they can secure a seamless connectivity across locations, operators and bands.

We will be completing 2 years of 5G service in October 2024. By now all these questions have become irrelevant. Now consumers prefer brands that do not compromise on the capability of the smartphones in delivering the experiences they are looking for. Also, they want several options to choose from. So **capability** and **choice** become paramount and take the centre stage for consumers to decide about their preferred 5G smartphone.



# Best Smartphone Brand 2023

## INDIA'S BEST 5G SMARTPHONE BRAND



In 2023, we used 3C framework that focused on three factors as prioritised by consumers through a survey. These included **Connectivity**, **Coverage** and **Capability**. However, capability was not a big ask last year and its traces were found only in upper segments having little impact on the overall scores.

In 2023, there were several questions that consumers had around 5G which were on the fundamentals like connectivity and coverage. This was primarily for the reason that many 5G smartphones were not having all bands in them and also because of the two different architectures (SA & NSA) used by the two operators, consumers were apprehensive if the devices they buy would connect effortlessly and work in every scenario.

Basis, a weighted score we had top 3 smartphone brands adjudged using the 3C framework populated through a consumer survey capturing opinion of 1,500 smartphone users.

# What has changed in 2024?

Attribute	2023	2024
Sweet Spot	₹10,000 - ₹30,000	₹10,000 - ₹40,000
5G Specific Factors	<b>Connectivity</b> <b>Coverage</b> Capability	Connectivity Coverage <b>Capability</b> <b>Choice</b>

The good news for the industry is that consumers are ready to spend more on buying 5G smartphones. This is primarily due to their stepping up on the experience ladder. Hence a mass base of existing smartphone users are ready to buy new 5G smartphones in higher price segments. In our survey **67%** of the respondents said that they will be buying a 5G smartphone in this price range. Last year it was **72%**. Out of remaining **33%**, **24%** are looking for smartphones priced above **₹40,000**, while the remaining **9%** want a 5G smartphone in less than **₹10,000**.

The other key change to register is that **Choice** has become another important factor while looking for a 5G smartphone. At the same time the significance of **Capability** has risen this year attracting higher weightage compared to 2023. These two factor are seen by consumers determining their experience of using a 5G smartphone. The other two factors of **Connectivity** and **Coverage** have lost significance since consumers aren't anymore confused about the coverage and network connectivity of 5G with SA and NSA and bands supported clear before them.

# 4C Framework of Best 5G Smartphone Brand <sup>techarc</sup>

To reflect the changes in customer preferences and the resultant market preferences, we modified our existing 3C framework by adding Choice as another factor and adjusted weights as per the importance attached to each of these factors in decision making of customers. The weights were determined by the survey results capturing customer opinion about these.

Factors	Elements	Details	Weightage
Connectivity	5G bands supported	The bands that are supported by each 5G model were checked for. In this Motorola still includes all 13 bands compared to others supporting 8-9 bands. This has however ceased to be a significant differentiators as the smartphone OEMs are carrying all relevant 5G bands that the operators are offering 5G on.	5
Coverage	Technologies supported (SA/NSA)	The 5G smartphones available in market are supporting both SA and NSA architectures. This makes them compatible to all the operators offering 5G services in the country. This has also lost its significance compared over last year.	5
<b>Capability</b>	5G critical Specifications	The critical specifications impacting 5G experience like display size, type and quality. Performance factors like RAM, Processor, Storage and operational efficiency like battery capacity and charging speed.	<b>50</b>
<b>Choice</b>	Models, Variants & Colours	The models, variants and colours defined the breadth of the choice palette from which consumers could chose their 5G smartphone.	<b>40</b>

# Best 5G Smartphone Brand 2024 - Overall



Brand	Rank	Score
Motorola	1	892
Samsung	2	877
Realme	3	825



# Best 5G Smartphone Brand by Choice - ₹30k to ₹40k <sup>techarc</sup>

	Motorola	Redmi	Realme	Samsung
Models	1	1	2	3
Variants	2	3	3	5
Colors	4	4	5	10
<b>Total</b>	8	12	7	18

# Best 5G Smartphone Brand by Choice - ₹20k to ₹30k <sup>techarc</sup>

	Motorola	Redmi	Realme	Samsung
Models	2	1	4	4
Variants	4	3	8	9
Colors	7	4	9	12
<b>Total</b>	14	12	18	27

# Best 5G Smartphone Brand by Choice - ₹10k to ₹20k <sup>techarc</sup>

	Motorola	Redmi	Realme	Samsung
Models	4	3	6	4
Variants	7	8	15	10
Colors	12	10	16	11
<b>Total</b>	21	27	34	28



# Best 5G Smartphone Brand by Capability - ₹30k to ₹40k

	Moto Edge 50 Pro	Redmi Note 13 Pro+	Realme GT 6T	Samsung S23 FE
Display	6.7 inch 1.5K pOLED	6.67 inch 1.5K AMOLED	6.72 AMOLED	6.4 inch AMOLED
Refresh Rate (Hz)	144	120	120	120
Processor	SD 7 Gen 3	Dimensity 7200 Ultra 5G	SD 7+ Gen 3	Exynos 2200
Battery Capacity	4500 mAh	5000 mAh	5500 mAh	4500 mAh
RAM	12 GB	12 GB	12 GB	8 GB
Storage	256 GB	512 GB	512 GB	256 GB

# Best 5G Smartphone Brand by Capability - ₹20k to ₹30k

	Moto Edge 50 Fusion	Redmi Note 13 Pro	Realme 12 Pro+	Samsung F55
Display	6.7 inch FHD pOLED	6.67 inch 1.5K AMOLED	6.7 inch FHD+ OLED	6.7 inch AMOLED
Refresh Rate (Hz)	144	120	120	120
Processor	SD 7s Gen 2	SD 7s Gen 2	SD 7s Gen 2	SD 7 Gen 1
Battery Capacity	5000 mAh	5100 mAh	5000 mAh	5000 mAh
RAM	12 GB	12 GB	12 GB	12 GB
Storage	256 GB	256 GB	256 GB	256 GB

# Best 5G Smartphone Brand by Capability - ₹10k to ₹20k <sup>techarc</sup>

	Moto G85	Redmi Note 13	Realme P1 Pro	Samsung F55
Display	6.67 inch pOLED	6.67 inch AMOLED	6.7 inch FHD+ OLED	6.5 inch sAMOLED
Refresh Rate (Hz)	120	120	120	120
Processor	SD 6s Gen 3	Dimensity 6080	SD 6 Gen 1	Dimensity 6100+
Battery Capacity	5000 mAh	5000 mAh	5000 mAh	5000 mAh
RAM	12 GB	12 GB	8 GB	8 GB
Storage	256 GB	256 GB	256 GB	128 GB



# Best 5G Smartphone Models - Top 20 (₹10k - ₹40k)

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**Top 20 5G Smartphone Models in India (₹10,000-40,000)**

Brand	Model	4C Framework Score	Rank
Redmi	Note 13 Pro+	925	1
Realme	GT 6	906	2
Poco	X6 Pro	897	3
Motorola	Edge 30 Ultra	894	4
iQOO	Neo9 Pro	884	5
Motorola	Edge 40 Neo	870	6
OnePlus	Nord 3	862	7
Motorola	Edge 50 Pro	859	8
Motorola	Edge 50 Fusion	855	9
OnePlus	11R	852	10
Tecno	CAMON 30	850	11
Infinix	GT20 Pro	848	12
Motorola	Edge 40	830	13
Vivo	V30	824	14
Redmi	Note 13 Pro	823	15
OnePlus	Nord CE3	810	16
Realme	12 Pro+	809	17
OPPO	Reno 12 Pro	804	18
Redmi	Note 13	804	18
Tecno	POVA 6 Pro	802	19
Motorola	G64 5G	792	20

# About the Report

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A robust methodology was adopted so that the findings are statistically significant as well as give maximum weightage to the opinion and experience of consumers. Accordingly, all data modelling was done basis the feedback of consumers, captured through a survey.



## Consumer Interpretation

The consumers opinion was sought about their 5G smartphone purchase plans, factors that are essential to them, hindrances they have and the sweet spot in terms of pricing.

The consumers were also asked about their top expectations from a 5G smartphone and factors contributing in defining that.

This was done through a survey conducted among 2,000 respondents spread across metro / non-metro cities, with equal distribution from these regions.



## Industry Benchmarking

Basis the inputs from the consumer survey, the benchmarking exercise was done to compare the 5G portfolio of key smartphone brands operating in the market capturing over 90% of the market share. Also, the price range was defined as ₹10,000 - ₹40,000 in line with the sweet spot of consumers.

These models were compared using Techarc's Unboxing Score framework where factors defining Connectivity, Coverage, Capability and Choice were evaluated.



## Statistical Modelling

Finally, using the 4C framework that includes the factors of Connectivity, Coverage, Capability & Choice were computed on a weighted score matrix to ascertain the scores of each model, then segment and finally of the brand.

This way the best 5G smartphone brand was ascertained for 2024.

The weights were assigned as per the importance attached to the factors by consumers.

# Research Notes

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- The only purpose of this research was to independently ascertain the best 5G smartphone brands basis the user perception and understand their preferences about the same.
- The brands included in this study cover more than 90% of the market share of India smartphone market. The brands included were Samsung, Redmi, OPPO, Vivo, Realme, Motorola, OnePlus, POCO, iQOO, Infinix and Tecno.
- Over 50 5G smartphone models were considered in this benchmarking. These are popularly available / sold models launched in 2023 and up to July 15th 2024.
- The 4C framework is an intellectual property of Techarc and is used to ascertain the best 5G smartphone brand.
- Techarc is not liable for any legal obligation, including paying any compensation, etc., due to any kind of loss or damage caused by relying on the research findings of this report.
- The primary research was carried between July 1st to 12th, 2024.



# Thank You



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