



Network Performance

Agenda

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Executive Summary

- **Technology-Driven Outcomes:** Real-world user experience in early 2026 is determined primarily by access to 4G and 5G, rather than operator branding.
- **Persistent Benchmarks:** While MTN continues to set the national performance standard, no single operator provides uniform quality across all states.
- **Regional Fragmentation:** Improvements remain concentrated in high-density urban zones like Lagos and FCT, with limited spillover into rural or northern regions.
- **The 5G Utilization Gap:** A significant gap persists between "device readiness" and "effective utilization," meaning many 5G-capable devices are still falling back to older technologies

National QoS Comparison

QoE TEST

Stability and Throughput Evolution (Aug 2025 vs. Feb 2026)

- **Urban Dominance:** High-density states (Lagos, FCT, Rivers) consistently outperform the national average by 30–40%.
- **QoE Bottleneck:** Reliance on legacy 2G and 3G continues to depress national averages, highlighting the urgency of spectrum refarming toward 4G/5G

Operator	Performance Trend (vs. Aug 2025)	Key Characteristic
MTN	Sustained Growth	Consistent throughput & latency stability.
Airtel	Steady	Competitive in streaming; lagging in latency.
T2	Localized Peaks	High speeds in selected areas; lacks scale.
Glo	Persistent Bottlenecks	High latency, jitter, and limited 5G.

User Sentiment & Satisfaction

Connecting Availability to Consumer Recommendation

- **Coverage over Speed:** User dissatisfaction is more closely linked to network availability and technology access (e.g., lack of 5G) than to peak download speeds.
- **NPS Rankings:** Despite performance leads, all major operators currently hold negative NPS scores, reflecting high consumer expectations for network consistency

Carrier	NPS (Feb 2026)	NPS (Aug 2025)	Satisfaction Trend
Glo	-0.22	-0.38	Improved
T2	-0.22	-0.33	Improved
MTN	-0.26	-0.31	Improved
Airtel	-0.36	-0.34	Declined

5G Coverage Gap (Lagos & Abuja)

The Utilization Gap in Nigeria's Biggest Hubs

- **The Challenge:** Device readiness far exceeds network availability. Most 5G-capable devices are still falling back to older networks.
- **Effective Usage:** Only 27% to 31% of capable devices are actually utilizing 5G services in major commercial centers.
- **Strategic Opportunity:** Priority areas include cultural centers, hospitals, and transport hubs where demand is proven but service is limited
- **Growing Demand vs. Static Supply:** Although the effective utilization percentages for Lagos and Abuja remain identical to the previous report , it is critical to highlight that the absolute volume of 5G-capable devices has increased significantly.

Market	Usage Feb 2026 (%)	Usage Aug 2025 (%)	Gap to Full Readiness (%)
Abuja (FCT)	31.4%	31.4%	68.6%
Lagos	27.5%	27.5%	72.5%

Human Impact: Beyond Speed

From Connectivity to Quality: Delivering a Reliable Digital Future

- **The Latency Dividend:** Improving stability (jitter and latency) is now more critical for user satisfaction than increasing peak speeds. Reliable latency ensures that real-time services like VoIP calls, online gaming, and live fintech transactions function without interruption.
- **Targeting "Critical Clusters":** The identification of 27 critical priority clusters in Lagos and Abuja represents a direct opportunity for operators to capture high-value demand by fixing 5G gaps in cultural and institutional centers.
- **Phasing Out the Past:** Accelerating the retirement of 2G and 3G networks is essential to liberate spectrum for high-capacity 4G and 5G services. This transition is the primary path to closing the 30-40% urban-rural performance gap.
- **Infrastructure Sharing:** To ensure digital equity, the industry must promote coordinated deployment and tower sharing, particularly in underserved northern regions where solo investment is economically challenging

Thank You