



 SPEEDTEST

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Downdetector[®]

RootMetrics

Device Model Adoption & Performance Benchmarking Highlights

Advanced Analytics Services

Agenda

1. The Big Picture: A Market in Transition
2. The Device Landscape: Understanding Consumer Choices
3. The Performance Paradox: Where the Speed is found
4. The Digital Divide: A Persistent Challenge
5. Key Takeaways for Sector Improvement

The Big Picture: A Market in Transition

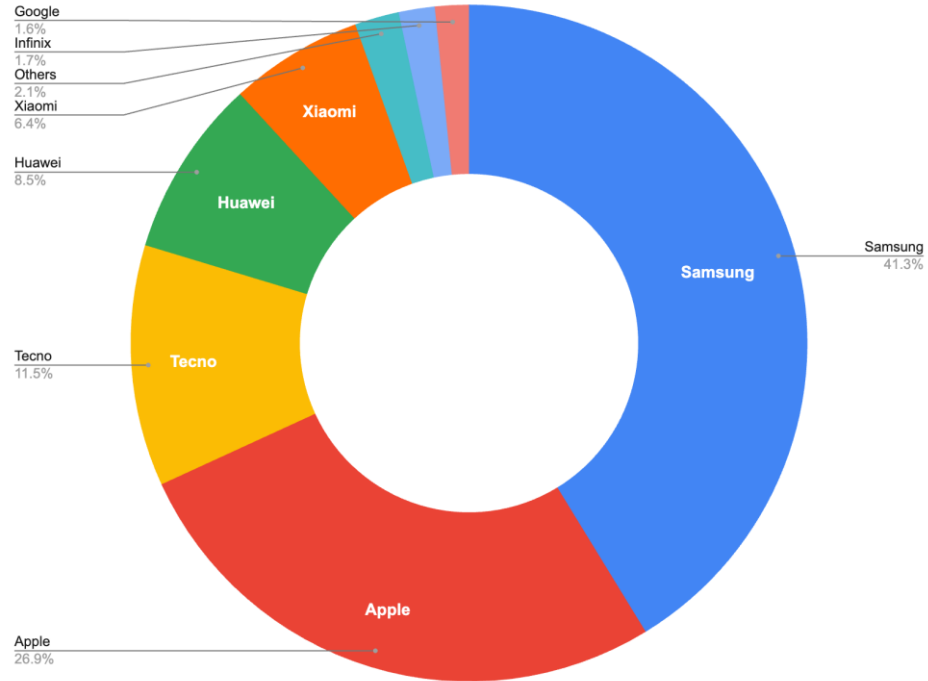
Our recent analysis of nearly one million speed tests reveals major shifts in how Nigerians connect, highlighting the powerful influence of new technology and device choices on mobile network performance:

- **5G is a Game Changer:** The rollout of 5G is delivering massive speed boosts. On the fastest networks, we observed an incredible **620% jump in performance** when moving from older 4G (LTE) technology to 5G. This shows 5G's massive potential to dramatically enhance user speed.
- **The Dominance of Giants:** Established players **Samsung and Apple** firmly control the market, accounting for **64%** of all user-initiated speed tests in Nigeria.
- **Mid-Range Phones Close the Gap:** You no longer need a premium flagship phone for top performance. Recent data shows that **mid-range devices** are now directly **challenging their premium counterparts** in terms of overall network speed and experience.

The Device Landscape: Understanding Consumer Choices

- **Samsung** dominates overall market share
- **Samsung** and **Apple** account for over two-thirds of all analyzed speed tests conducted, indicating their strong popularity among Nigerian consumers.
- **Tecno** represents significant consumer choice outside the top two brands.

Market Share based on user-initiated tests



The Performance Paradox: Where the speed is found

Data analysis reveals a crucial point about real-world network performance: it is not exclusively tied to the most expensive devices. Performance is determined also by the synergy between the device and the network



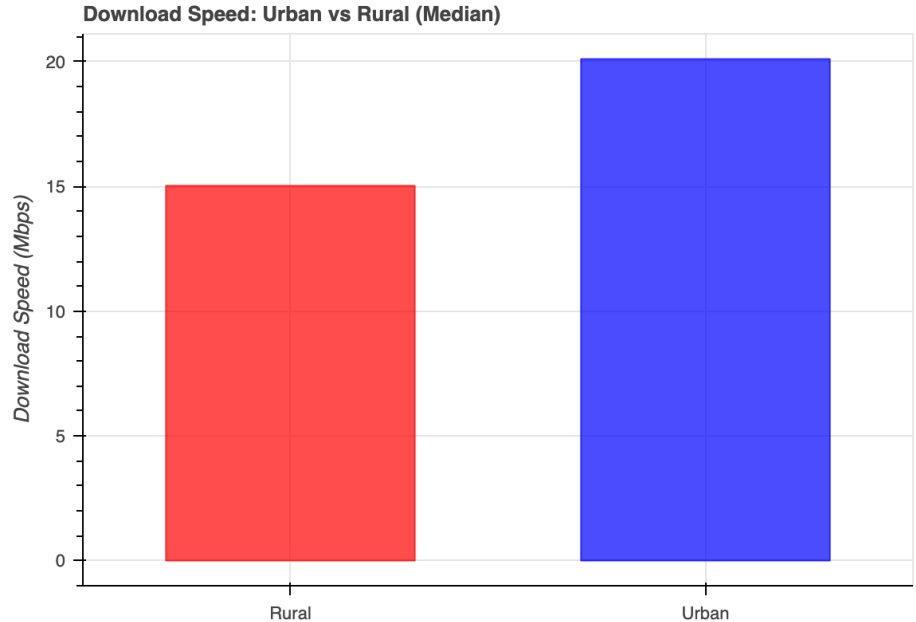
Surprising Top Performer: The **Samsung Galaxy A26**, a mid-range model, recorded the **highest median download speed** in our analysis at 244.3 Mbps. This challenges the assumption that only high-end flagship phones can deliver top performance.

Implication for Improvement: This finding underscores the importance of **network optimization for popular mid-range chipsets**. Operators must ensure their network configuration delivers excellent performance across the wide range of devices consumers actually use.

The Digital Divide: A Persistent Challenge

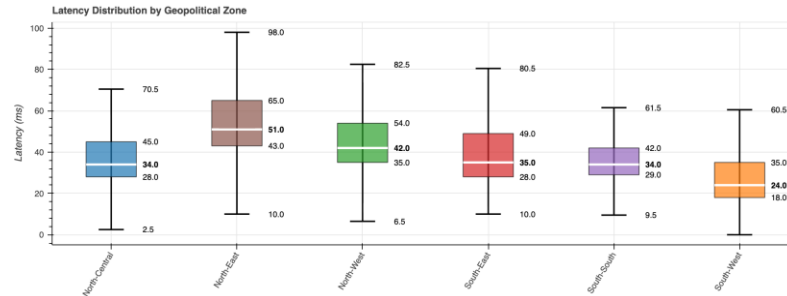
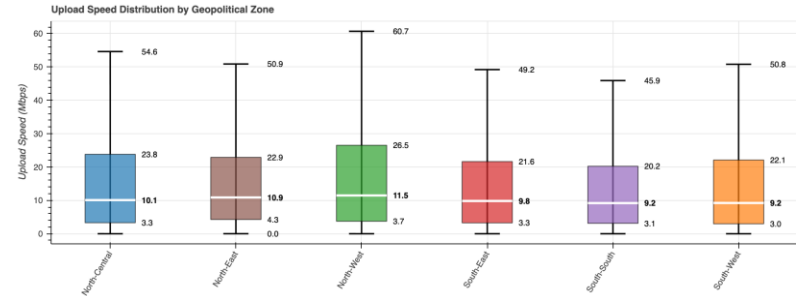
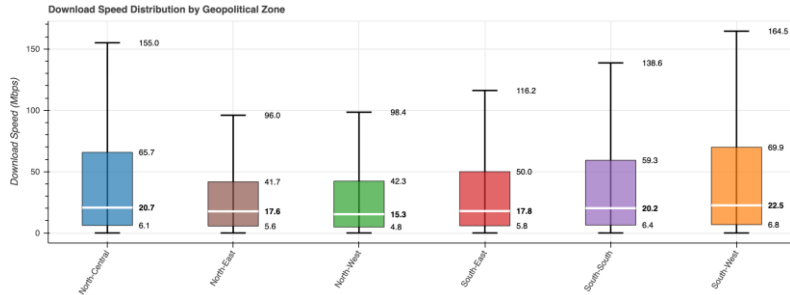
While performance has increased overall, a **significant gap persists** between urban and rural areas, which slows national progress toward digital equity.

- **Speed Disparity:** Urban areas currently offer service that is **1.3x faster than rural areas** (20.1 Mbps median download speed vs. 15.0 Mbps).
- **Responsiveness Gap (Latency):** Rural areas experience **4.0 ms higher latency**. This is critical because higher latency negatively impacts time-sensitive applications like video conferencing, online gaming, and financial transactions.



The Digital Divide: A Persistent Challenge

Regional Unevenness: Performance is not consistent across the country. This pattern points to the need for more uniform infrastructure investment to ensure all regions benefit equally.



Key Takeaways for Sector Improvement

Focusing on Rural Service Quality: A clear opportunity exists to raise the baseline quality of service in rural areas by establishing and meeting minimum performance standards for speed and responsiveness

Driving Investment in Lagging Regions: Encouraging network build-out in underserved regions is essential to close the regional performance gaps and ensure truly national digital coverage

Enhancing Performance Transparency: Standardized public performance reporting from all operators can empower consumers to make better choices and foster a competitive environment where operators are motivated to step up their performance

Thank You