The Great Divide: Urban vs. Rural Speeds

Uncovering the Quality of Mobile Service Where Nigerians Live and Work

Agenda

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Beyond the Map: Classifying Your Connection Based on How You Use It

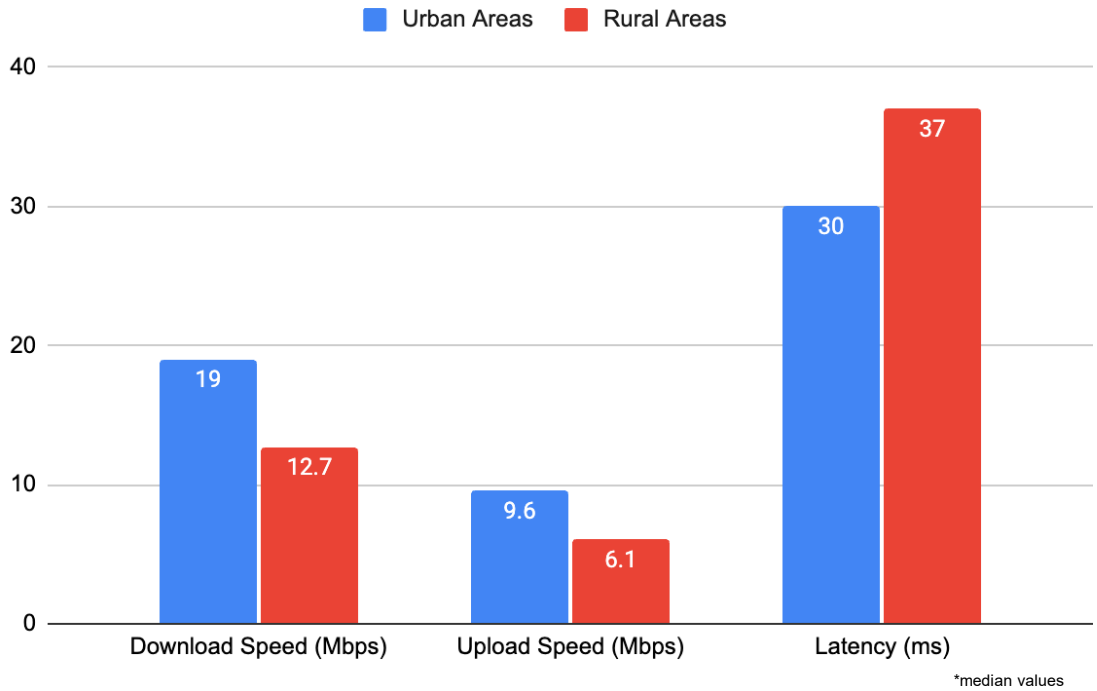
Start Big. The whole country is divided into large map regions. If a large region has low activity, it remains a **large tile**

Find the Hotspots. When we record high activity, the map automatically splits that region into four smaller squares. This process repeats several times to pinpoint dense usage areas.

Urban (High-Density). Small squares mean **many users** in a small space (like a neighbourhood)

Rural (Low-Density). Large squares mean **fewer users** spread over a wide area. This reflects villages and remote regions

The Connectivity Gap: Your Speed is Faster in the City



Urban speeds are solid for streaming, calls, and office tools

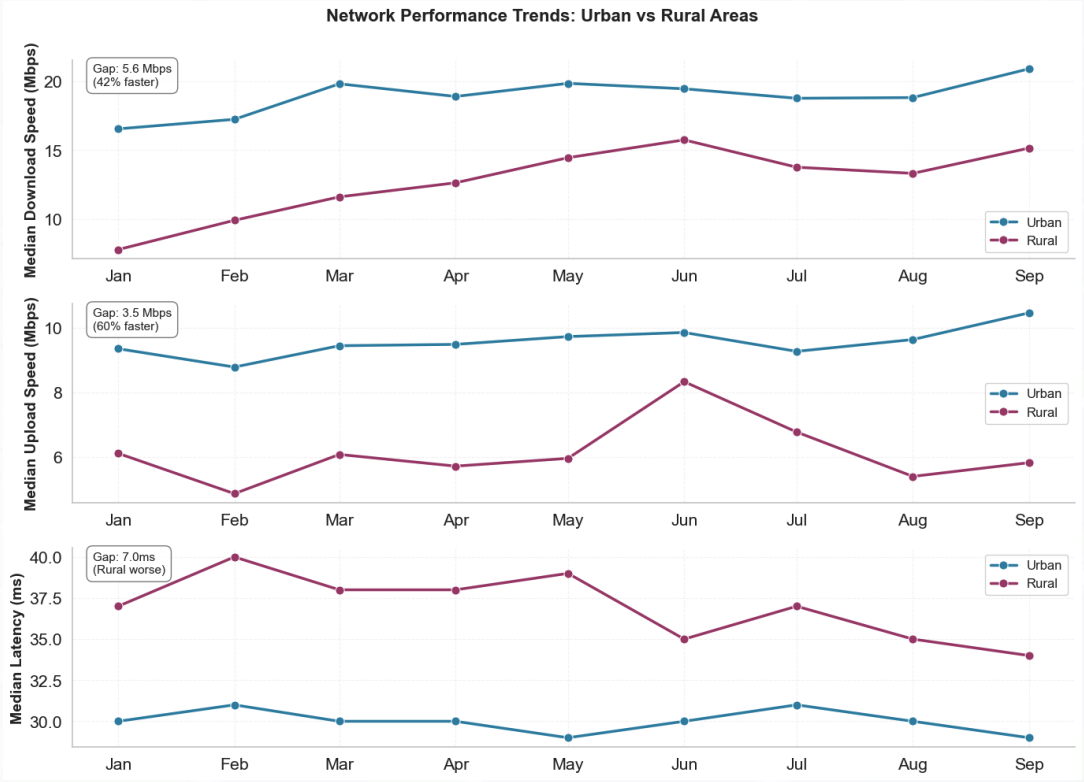
The 3.5 Mbps absolute upload gap in rural areas curbs deeper digital

Rural Performance is Improving, But The Urban Edge is Maintained

Progress Highlight: Rural median download speeds **improved significantly**, roughly doubling from 7.5 Mbps in January to **15.0 Mbps by September**.

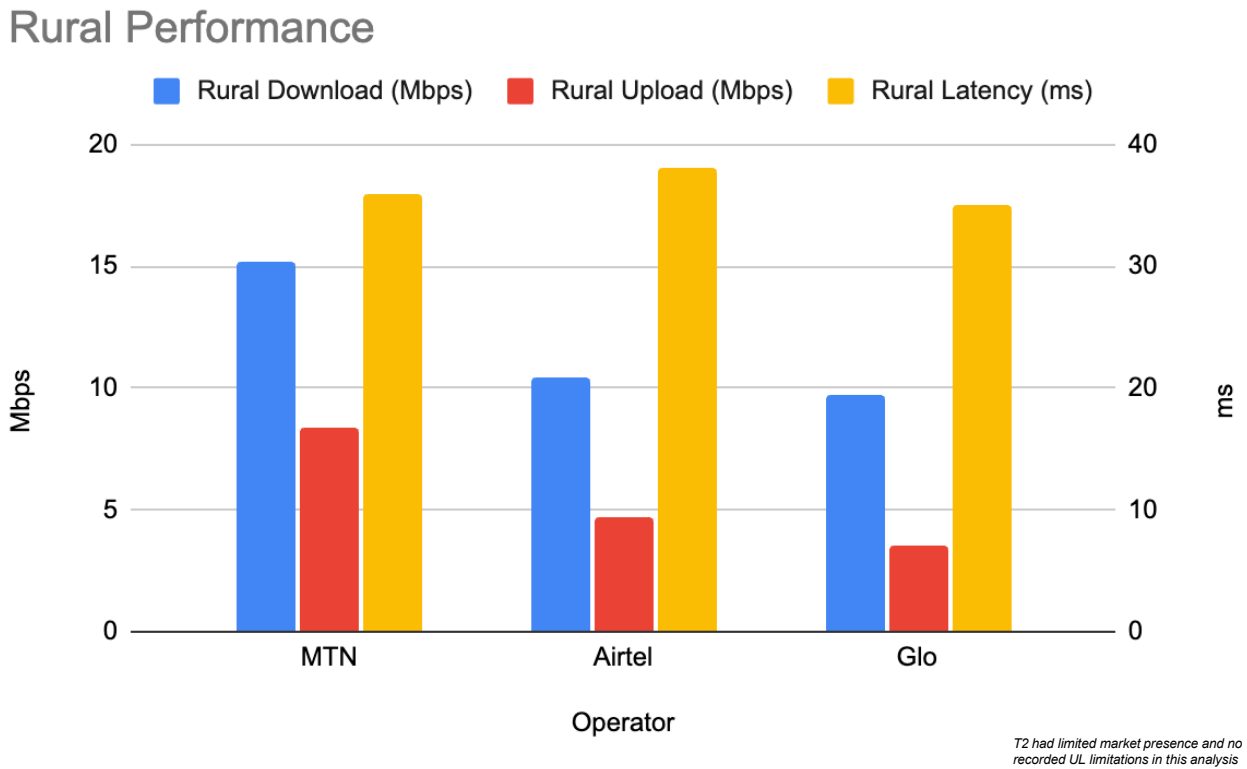
Reality Check: Despite this strong growth, the absolute speed gap between urban and rural networks maintained a consistent **5-6 Mbps difference**.

Interpretation: Urban infrastructure keeps pace with rural gains, locking in a tiered performance model.



T2 had limited market presence and no recorded DL limitations in this analysis

Operator Rural Performance



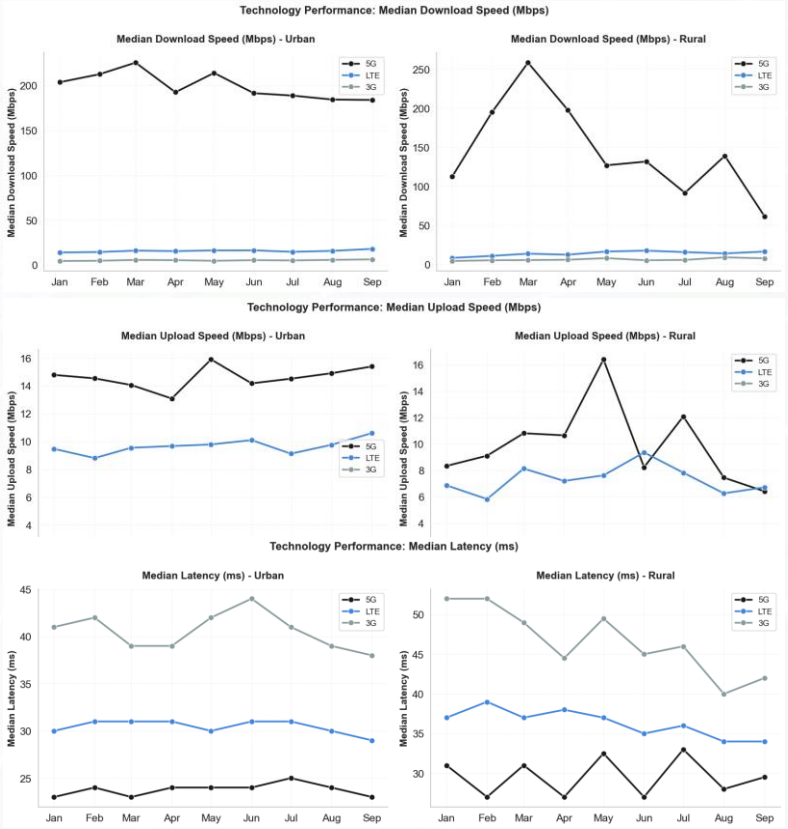
T2 had limited market presence and no recorded UL limitations in this analysis

Technology: LTE is The Backbone, 5G is Niche

LTE (4G) is The Core: LTE performance is consistently reliable, positioning it as the main mobile broadband option through at least 2028-2030. Rural LTE speeds are climbing, reaching up to **15 Mbps**.

5G is Niche: Urban 5G reaches impressive download speeds (**180-220 Mbps**), but it trends downward and lacks latency gains over LTE, keeping it niche for now.

3G is Winding Down: 3G speeds are flatlining, indicating operators are maintaining but not expanding these assets ahead of a phase-out



Key Takeaways and Investing in Equitable Connectivity

Usage Concentration: high percentage of mobile usage activity is concentrated in a dense area, creating an enduring performance gap.

Rural Quality Challenge: Rural access supports basic tasks, but the upload bottleneck hinders advanced digital use.

Strategy: Performance is a layered system: **LTE** is the core engine, **5G** is the urban premium option, and **3G** is winding down.

> ***NCC Commitment***
> The NCC is committed to addressing connectivity inequality by promoting targeted investment in rural areas and accelerating the national shift to 4G/5G networks to ensure equitable quality of experience (QoE) for all Nigerians

Thank You