Consumer Insights & Industry Trends

Connecting Nigeria: National Mobile Network Performance Report | Advanced Analytics Services | **December 2025**

Agenda

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2. Performance at a Glance: Key Indicators
3. Meet Your Providers: Service Highlights
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1. Executive Overview: The State of Connectivity

Nigeria's digital landscape is characterized by a transition toward high-speed infrastructure. While newer technologies like 5G are expanding, the current experience is largely defined by the consistency of 4G networks and the ongoing presence of 2G and 3G in rural regions.

- **Technology-Driven Outcomes**: Digital experiences are heavily influenced by the specific technology available (4G/5G vs. 2G/3G) in a given area. 5G offers the best experience with page load times of **2-3 seconds** (vs. >10s for 2G/3G)
- **Geographic Trends**: Urban centers like Lagos and Abuja outperform rural regions by approximately **22%** in download speeds (35.52 Mbps Urban vs. 27.67 Mbps Rural).
- **Stability Metrics**: For modern applications like video calls and gaming, network stability (latency and jitter) is as vital as headline download speeds

2. Performance at a Glance: Key Indicators

We analyzed several technical metrics to see how they support your daily digital activities.

Metric	Operator Focus	Impact on Daily Life
Download Speed	**MTN** averages **28.6 Mbps**; **Airtel** and **T2** average **~20 Mbps**	Supports how quickly you can download large files or apps.
Responsiveness	**MTN** shows a loaded latency of **787 ms**; **Airtel** and **T2** are under **1,000 ms**	Lower latency reduces the delay when you click a link or send a message.
Stability	**MTN** and **T2** maintain jitter levels between **11.2 and 11.6 ms**	Helps prevent "freezing" during live video calls or streaming.

3. Meet Your Providers: Service Highlights

Each operator contributes differently to the national ecosystem, offering unique regional strengths.

MTN: Operates as a benchmark for infrastructure depth, maintaining high availability and consistent speeds in urban economic hubs like Lagos and the FCT. Leader in 5G and Video Streaming Score (63.98).

Airtel: Offers a balanced profile, frequently serving as a competitive alternative for browsing and streaming in southern and metropolitan states. Strong uplink (8.6 Mbps)

T2: Focuses on localized capacity, delivering high download peaks in specific markets such as Anambra and Oyo. Shows very high download peaks in specific states like Anambra (82.3 Mbps) and Oyo (80.0 Mbps).

Glo: Continues to provide essential baseline connectivity for a wide user base, with specific regional successes in video streaming in areas like Sokoto South

4. The User Experience: Daily Digital Tasks

Technical metrics translate into how you use the internet every day.

Web Browsing:

- MTN is the fastest for browsing (Score: 65.9), making e-commerce and news reading smoother.
- T2 follows (Score: 50.0), showing strong local performance.

Video Streaming: Competition is more even here; while MTN and T2 lead on start times, Airtel and Glo provide stable urban streaming experiences. The gap between urban and rural video streaming quality is only 2% (65.7 vs 64.39), suggesting fairly even basic video access

The Urban-Rural Divide: Urban users currently access speeds roughly 22% faster (35.52 Mbps) than those in rural Local Government Areas (27.67 Mbps).

5. The Road Ahead: National Focus Areas

To improve the digital experience for all Nigerians, several recommendations/goals are in place:

For Consumers (What this means for you):

- **Upgrade to 4G/5G:** Moving away from 3G devices is the single biggest step to improve your experience (2-3s load times vs 10s+).

For the Industry (Actionable Steps):

- **Targeted Investment:** The disparity is more evident in parts of the country with historically lower network density and higher infrastructure deployment challenges, underscoring the need to close the 40% performance gap for more balanced national connectivity

- **Focus on Latency:** Operators must optimize for stability (jitter/latency), not just speed, to support the growing demand for video calls and gaming.

- **Symmetrical Capacity:** Improve upload speeds (currently lagging at ~11-12 Mbps) to support the creator economy and remote work.

Thank You