Network Performance & 5G Reality Report

National Coverage Gaps & Infrastructure Trends | Advanced Analytics Services| **December 2025**

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1. Executive Overview

“Technology Defines the Experience”

Device readiness is outpacing infrastructure. In **Lagos**, effective 5G coverage is only **~27%**, and in **Abuja**, it sits at **31%**, leaving the majority of capable devices on 4G.

Performance varies wildly by provider. While the market leader keeps the 5G gap around **50%**, other major operators show gaps as high as **83% to 99%** in key cities.

Your location dictates your speed. Urban centers like **Lagos** and **FCT** consistently outperform rural regions by **30-40%** across key performance metrics

2. National Performance Landscape

Market Benchmark: MTN leads nationally in throughput and latency stability, setting the standard for 5G rollout.

Competitive Challenger: Airtel maintains a balanced profile, trailing in real-time readiness (latency/jitter).

Localized Player: T2 demonstrates specific strengths in throughput but lacks the national consistency of the larger players.

Baseline Connectivity: Glo provides widespread access, trailing in stability.

Operator	Urban Speed	Rural Speed
MTN	24.9	15.8
T2	18.5	24.9
Airtel	15.9	10.6
Glo	9.5	9.5

Download Speed (Mbps) – *Higher is Better*

Operator	Urban Speed	Rural Speed
MTN	12.9	7.9
Airtel	7.5	4.6
Glo	4.2	4.3
T2	1	6.2

Upload Speed (Mbps) – *Higher is Better*

Operator	Urban Latency	Rural Latency
MTN	29.0 ms	38.0 ms
Airtel	30.0 ms	39.0 ms
Glo	33.0 ms	98.0 ms
T2	53.0 ms	85.5 ms

Latency (ms) – *Lower is Better* (Responsiveness)

3. The 5G Reality Check: Lagos

Lagos: Device Readiness vs. Network Reality.

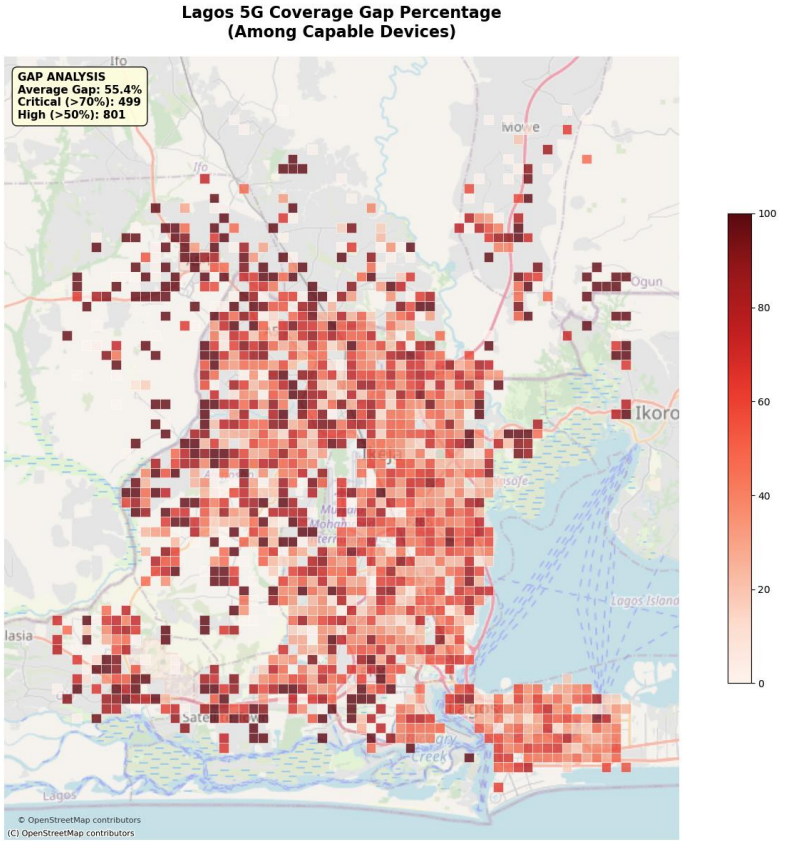
The "Phantom" Signal: The average 5G coverage gap in Lagos is 55.4%. This means more than half the time, a 5G phone in Lagos cannot connect to 5G.

Critical Zones: 499 areas in the city are flagged as "Critical" (Gap > 70%), mostly in high-density commercial zones.

Operator Breakdown:

MTN: ~50% gap.

Airtel: ~77% gap.



4. The 5G Reality Check: Abuja (FCT)

The Capital's Connectivity Status

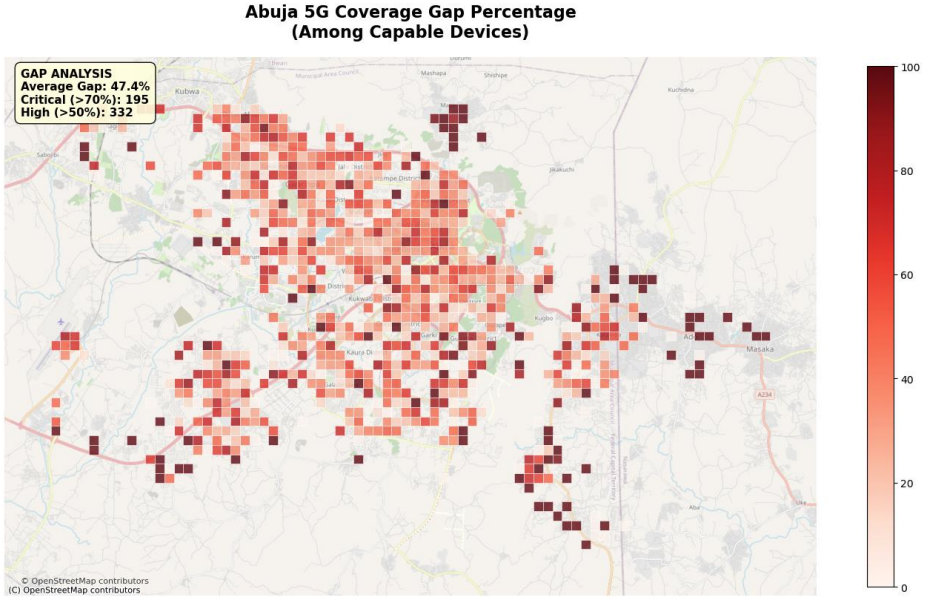
Abuja records an average 5G gap of 47.4%. Slightly better than Lagos, but nearly half of potential connections still fail.

Effective Coverage: Only 31% of 5G-capable devices in the capital are successfully connecting to 5G networks.

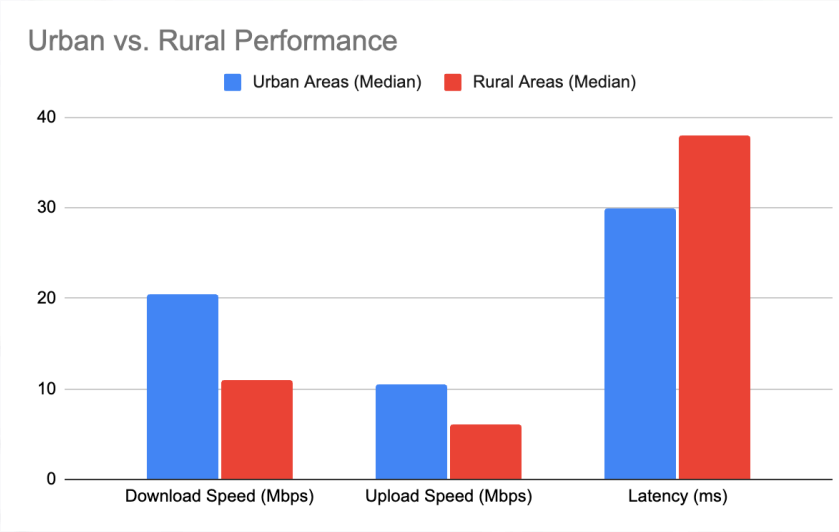
Deployment Imbalance:

MTN: ~49% gap.

Airtel: ~83% gap.



5. The Urban-Rural Divide



Performance Gap: Urban states (Lagos, FCT, Rivers) outperform rural Northern states by approximately 30-40% in download speeds and latency.

Legacy Anchor: Rural performance averages are materially depressed by the continued reliance on 2G and 3G, which drag down national statistics.

Investment Focus: Recent network upgrades have concentrated on high-density areas, with limited spillover to underserved regions.

6. The Road Ahead

For the Industry:

- **Optimize Urban 5G:** Focus on existing sites in Lagos/Abuja to lower the 55% gap. “Turning on" 5G isn't enough; it must be usable for the 50%+ of users currently blocked.

- **Prioritize for Improvements:** Targeted investment is critical in rural areas and states with vast rural communities to close the 40% regional performance divide.

For Regulators:

- **Retire Legacy Tech:** Accelerate the phase-out of 2G/3G to free up spectrum for 4G/5G, which dictates modern user experience.

- **Monitor Stability:** Shift regulatory focus to latency and jitter, as stability is now a stronger predictor of user satisfaction than peak speed.

Thank You