



Connectivity Report: Geospatial Urban-Rural Performance

Agenda

1. Executive Summary
2. The Airwaves: Frequency Band Utilization
3. Regional Spectrum Performance
4. Human Impact – What it Means for You
5. The Spectrum Evolution – Clearing the High-Speed Lanes

Executive Summary

Q2 2024 SPEEDTEST

- A Growing Network: Total network **tests surged from 266,970 to 543,123** over six months.
- Narrowing the Divide: The performance gap is closing; **rural median download speeds grew from 15.0 Mbps to 16.4 Mbps.**
- Infrastructure Impact: Operator investment is the primary driver of quality; **top rural speeds now exceed some competitors' urban speeds.**
- Urban Activity: **Metropolitan zones account for 63.4% of all tests despite being only 42.1% of classified tiles**

National Performance Trends (Urban vs. Rural)

Measuring Progress Across the Digital Divide

- The Velocity Delta: While urban speeds remain stable, rural regions saw a significant +47.5% increase in median upload speeds (from 6.1 to 9.0 Mbps).
- Latency Improvement: Rural latency improved by ~8%, dropping from 37ms to 34ms, reducing lag for video calls and payments

Metric (Median)	Sept 2025	Mar 2026	Delta (%)
Rural Download	15.0 Mbps	16.4 Mbps	+9.3%
Rural Upload	6.1 Mbps	9.0 Mbps	+47.5%
Rural Latency	37 ms	34 ms	-8.1%

Carrier Benchmarking

How Infrastructure Choices Overcome Geography

- Consistency: MTN maintains rural speeds (23.3 Mbps) that are faster than several urban competitors.
- Mid-Tier Stability: Airtel provides reliable service with median urban speeds of 18.4 Mbps

Carrier	Sept 2025 Rural (Mbps)	Mar 2026 Rural (Mbps)	Growth (Mbps)
MTN	15.2	23.3	+8.1
Airtel	10.4	13.7	+3.3
T2	-	16.4	
Glo	8.8	8.8	Stable

Technology Roles

The Roles of 5G & LTE

- LTE (4G) Standard: Continues to anchor connectivity with speeds of 10–16 Mbps in rural areas.
- 5G Growth: Delivers high peak speeds of ~200 Mbps in urban clusters.

Technology	Urban Download	Rural Download	Unit
5G	200	~150.0	Mbps
LTE (4G)	14.0 - 18.0	10.0 - 16.0	Mbps
3G	Single-Digit	Single-Digit	Mbps

Human Impact: Real-World Connectivity

Benefits of Narrowing the Divide

- **Empowering Rural Businesses:** The surge in rural upload speeds (+47.5%) allows farmers and small traders to use high-quality video for "social commerce" and real-time inventory management.
- **Education Without Borders:** With rural download speeds now reaching 16.4 Mbps, students in previously underserved areas can stream educational content with the same reliability as those in major cities.
- **Responsive Financial Inclusion:** The narrowing latency gap (now just 5ms between urban and rural) makes mobile money transactions faster and more reliable, reducing "failed payments" in agricultural interior regions in rural towns as in cities

Service Capability	3G Era (Legacy)	Current Rural (LTE 2026)	User Impact
Video Calls	Frequent Buffering	Smooth / HD	Remote Work & Learning
Mobile Payments	10+ Sec Wait	Instant Response	Faster Commerce
Large File Uploads	Failures Common	Successful / Fast	Content Creation
E-Government	Desktop Only	Mobile Optimized	Better Civic Access

Thank You