



Malaysia: consumer survey



Jiachen Zhang

About this report

This report provides key findings from consumer survey data from Malaysia and gives an analysis at the operator level. It covers fixed broadband, mobile and pay-TV services.

The survey was conducted in association with Dynata between July and August 2022. The survey group was chosen to be representative of the mobile-internet-using population in Malaysia. We set quotas on age, gender and geographical spread to that effect. There were 1000 respondents.



GEOGRAPHICAL COVERAGE

- Malaysia

KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the most significant factors that affect Net Promoter Scores (NPSs) for fixed broadband and mobile operators? Which operators score highly and why?
- What are the most significant drivers of fixed broadband and mobile churn and how can operators approach customer retention?
- What are the mobile and fixed broadband data usage patterns among respondents?
- What are the most popular pay-TV and video streaming services? Which services lead to high satisfaction scores and why?



WHO SHOULD READ THIS REPORT

- Strategy teams and managers who are interested in improving the customer experience within telecoms operators and understanding the drivers of customer satisfaction and churn.
- Market intelligence and regional research teams of equipment/device manufacturers that are responsible for understanding end-user trends and supporting business units in identifying and addressing new opportunities.
- Product managers and strategy teams working for telecoms operators or pay-TV providers that are interested in using streaming video services as a value-added service (VAS) to support their core services.

Executive summary

TIME dotcom has the highest Net Promoter Score (NPS) and customer satisfaction ratings in the fixed broadband market, while Digi is the leader in the mobile market.

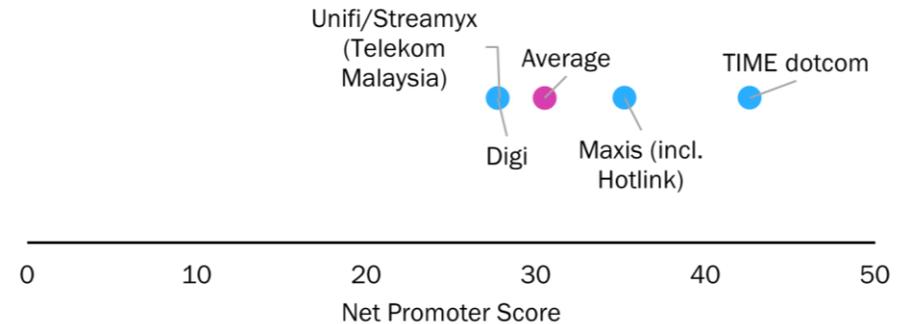
Faster speeds and lower prices often lead to higher customer satisfaction and willingness to recommend. Customers' satisfaction with prices and speeds also has a strong influence on intention to churn in both the mobile and fixed markets. As such, all operators should improve their network capacity in order to increase their speeds. They could also offer various bundled services to create new opportunities for revenue growth.



KEY FINDINGS

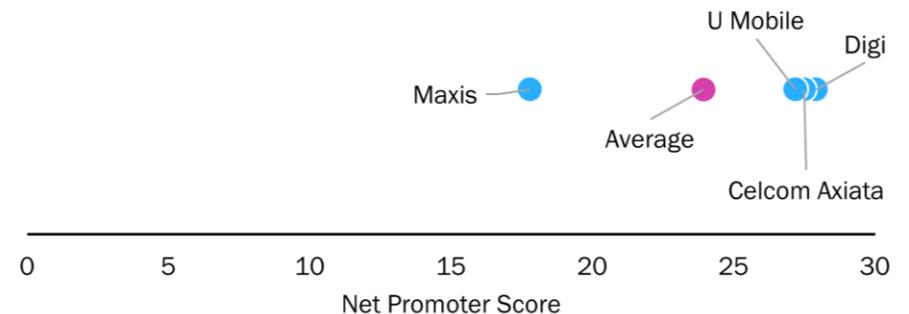
- Fixed operators have the potential to upgrade their customers to faster broadband packages. Bundling additional services may lead to further revenue growth.
- Competition between mobile operators is likely to be based on network coverage. Operators should consider upgrading their customers to unlimited data allowances.
- Streaming video services significantly outperform traditional pay-TV services in terms of customer satisfaction and popularity.

Figure 1: Net Promoter Scores for fixed broadband operators, Malaysia, 2022¹



Source: Analysys Mason

Figure 2: Net Promoter Scores for mobile operators, Malaysia, 2022¹



Source: Analysys Mason

¹ Net Promoter Score (NPS) is calculated by subtracting the percentage of subscribers that rated the operator 6 or below from the percentage that rated it 9 or 10. Please refer to the methodology and panel information section for the sample size and relevant survey questions.



Contents



Executive summary

Analysis and key findings

Appendix

Methodology and panel information

About the author and Analysys Mason

About the author



Jiachen Zhang (Research Analyst) is based in the London office. Prior to joining Analysys Mason, she worked at an accountancy and business advisory firm, where she was part of the complex data team responsible for transforming raw data and creating analytical data scripts. Jiachen holds an MSc in computing from Cardiff University.

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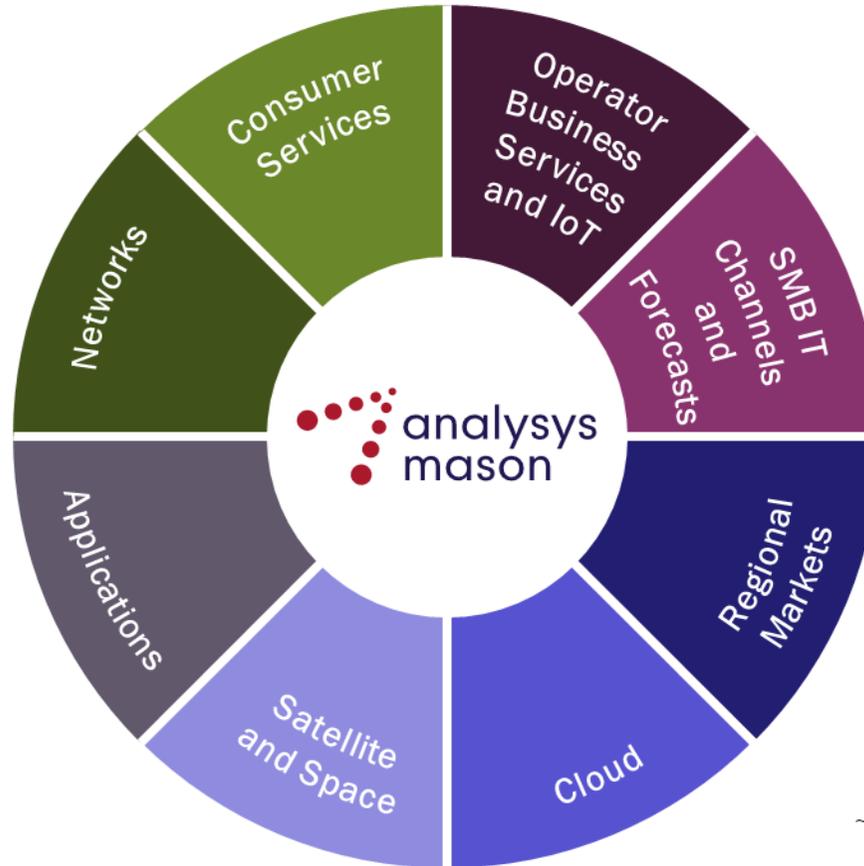
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 - Regional results and worldwide totals
 - Operator historical data

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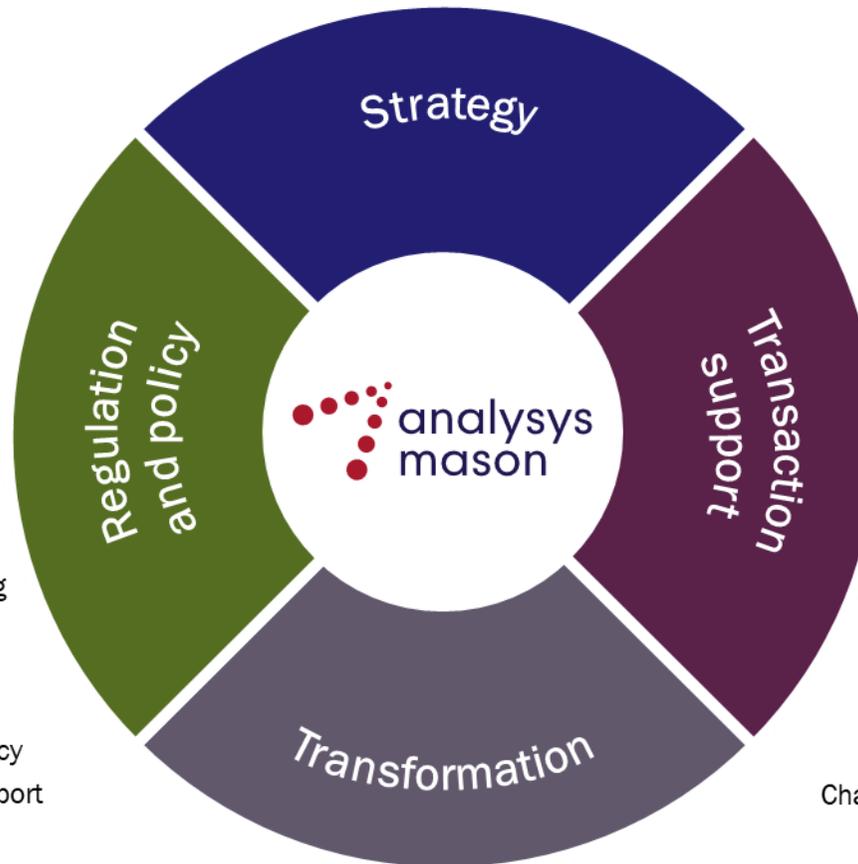
Strategy

- Corporate growth strategy
- Business unit strategy
- Infrastructure strategy



Regulation and policy

- Network and platform
- Public sector broadband intervention
- Accelerating digital transformation of society
- Price controls and cost modelling
- Regulatory accounting
- Regulatory benchmarking and analysis
- Spectrum management and policy
- Expert witness and litigation support
- Postal regulation and policy



Transaction support

- Commercial due diligence and market review
- Technical due diligence
- Post-merger integration
- Periodical business monitoring and loan technical advisory
- Opportunity scouting and pre-deal support



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- Operational excellence
- Data, BI, steering and insights
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- Sustainability



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