



Vodus Insights Report

# **TELECOMMUNICATION USAGE**

of Malaysians

May 2020 Market Report





## Content

1. Telco market share among Malaysians
2. Who are the subscribers of each mobile network? (Gender, Age, Race, Location)
3. Who are the prepaid and post-paid users?
4. Who have access to home broadband?
5. What do Malaysians regularly do on the Internet?
6. How satisfied are Malaysians with their Telco?

## Methodology

This report is based on a sample of 3,000 Malaysian adults stratified to represent the Malaysian adult population profile. The data collection was gathered via Vodus Media Network partners websites and portals consisting of Media Prima, Astro, Star Media Group and Sin Chew.

This is an online methodology which uses low disruption survey method pioneered by Vodus..

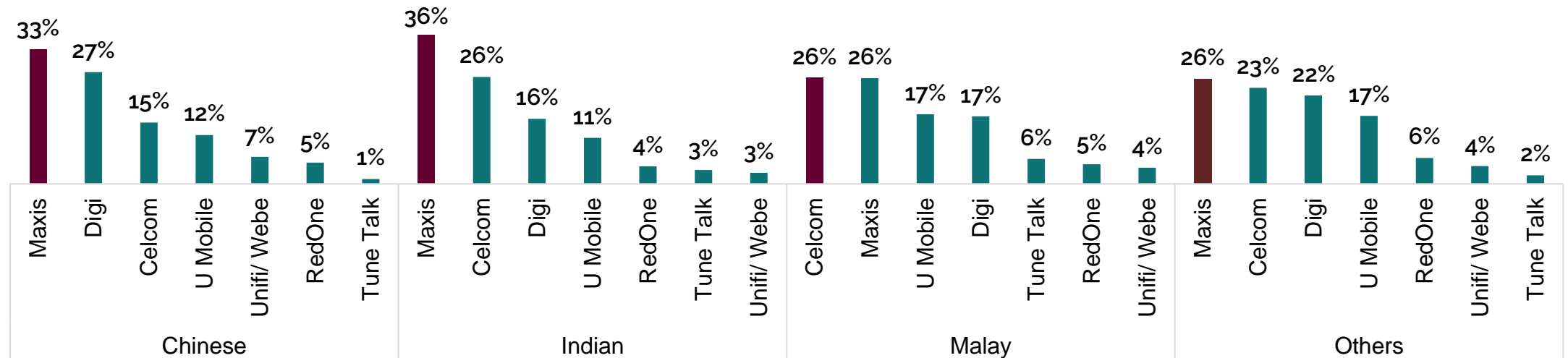
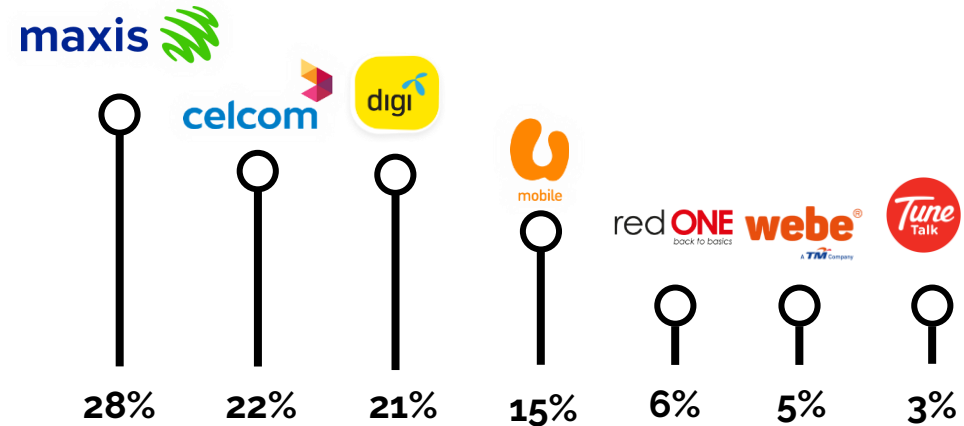
The fieldwork is done from 22 to 26 May 2020.



## Which Telco are you using as your main network provider? N = 2,000

Maxis and Celcom are the most popular network operator among Malaysians, with 27% and 24% usage share respectively.

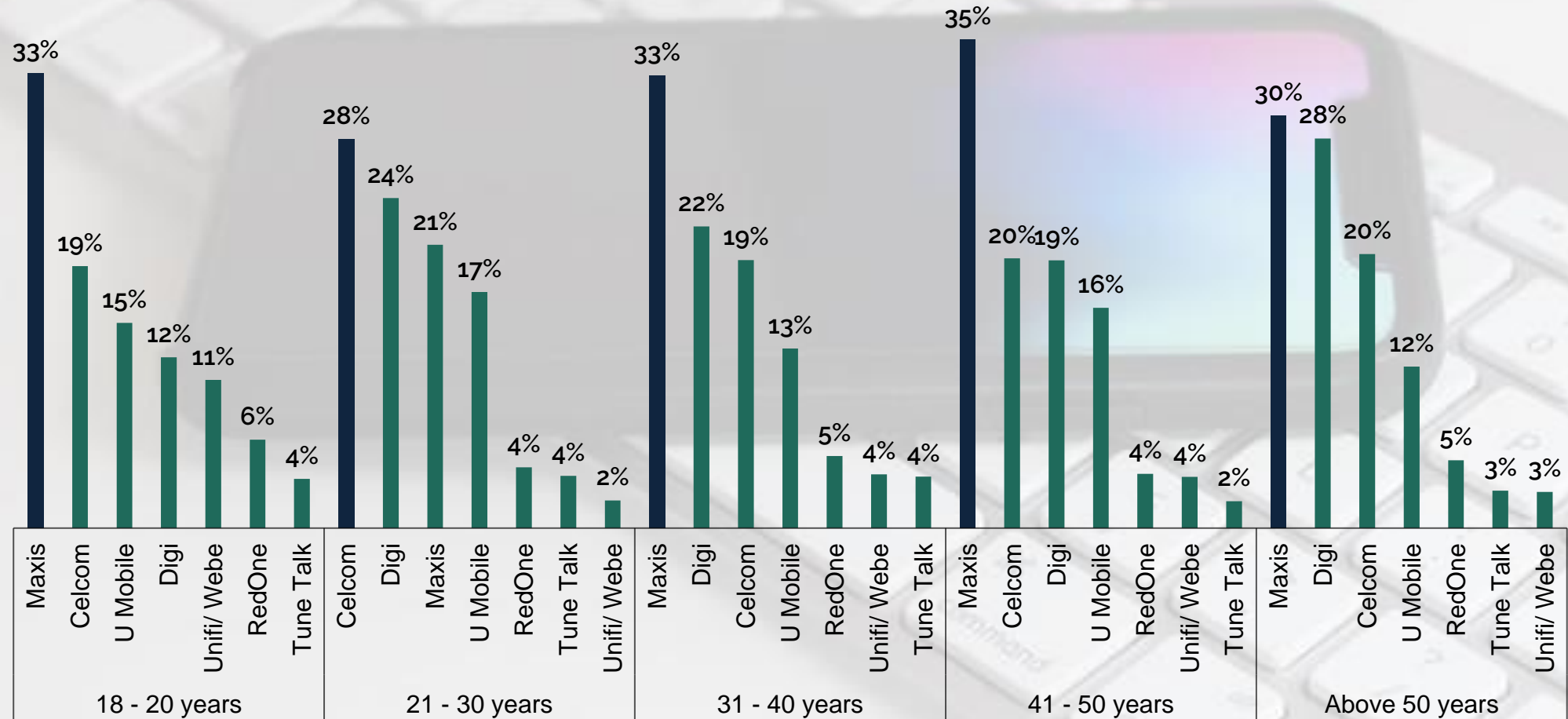
Maxis is the most popular network amongst the 3 major races. Digi is the 2<sup>nd</sup> most popular network among the Chinese, whereas Celcom is a close 2<sup>nd</sup> among the Malays and Indians.





## Which Telco is leading among Malaysians of various age groups? N = 2,000

Celcom is the most popular network amongst the young adults aged 21 – 30 years old, whereas Maxis is the strongest network among Malaysians aged 18 – 20 years old and 31 years old and above.

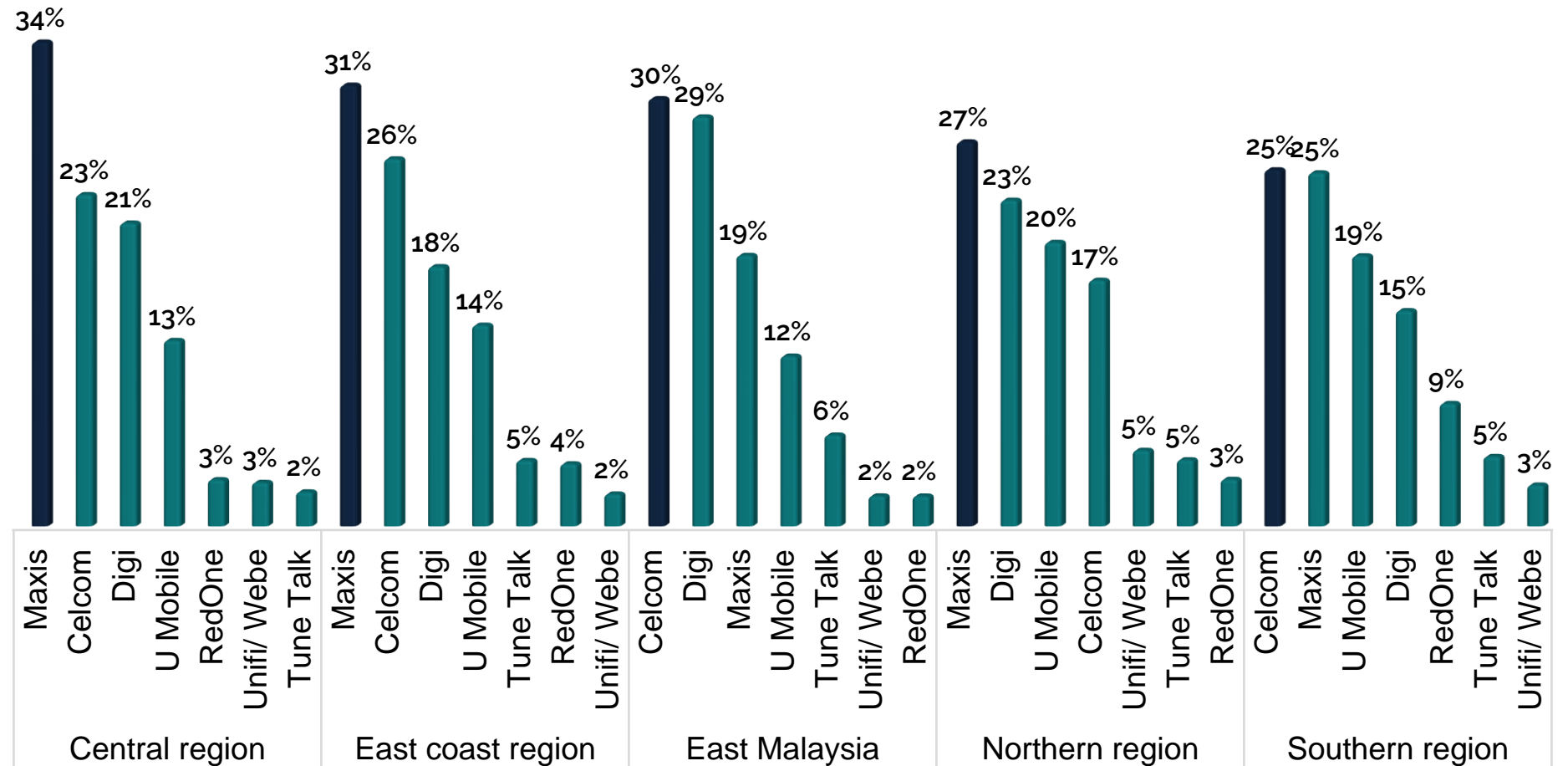






## How well are Telco's doing in each region? N = 2,000

Maxis has the largest market share across all regions in Malaysia except East Malaysia and Southern region, where it is neck to neck with Celcom at 25%.



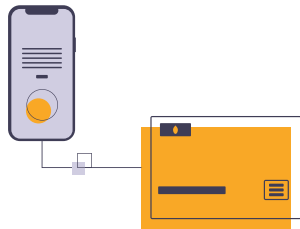


## Which mobile network is leading in prepaid and post paid market share? N = 2,000

Malaysians are still predominantly using Prepaid over Postpaid.

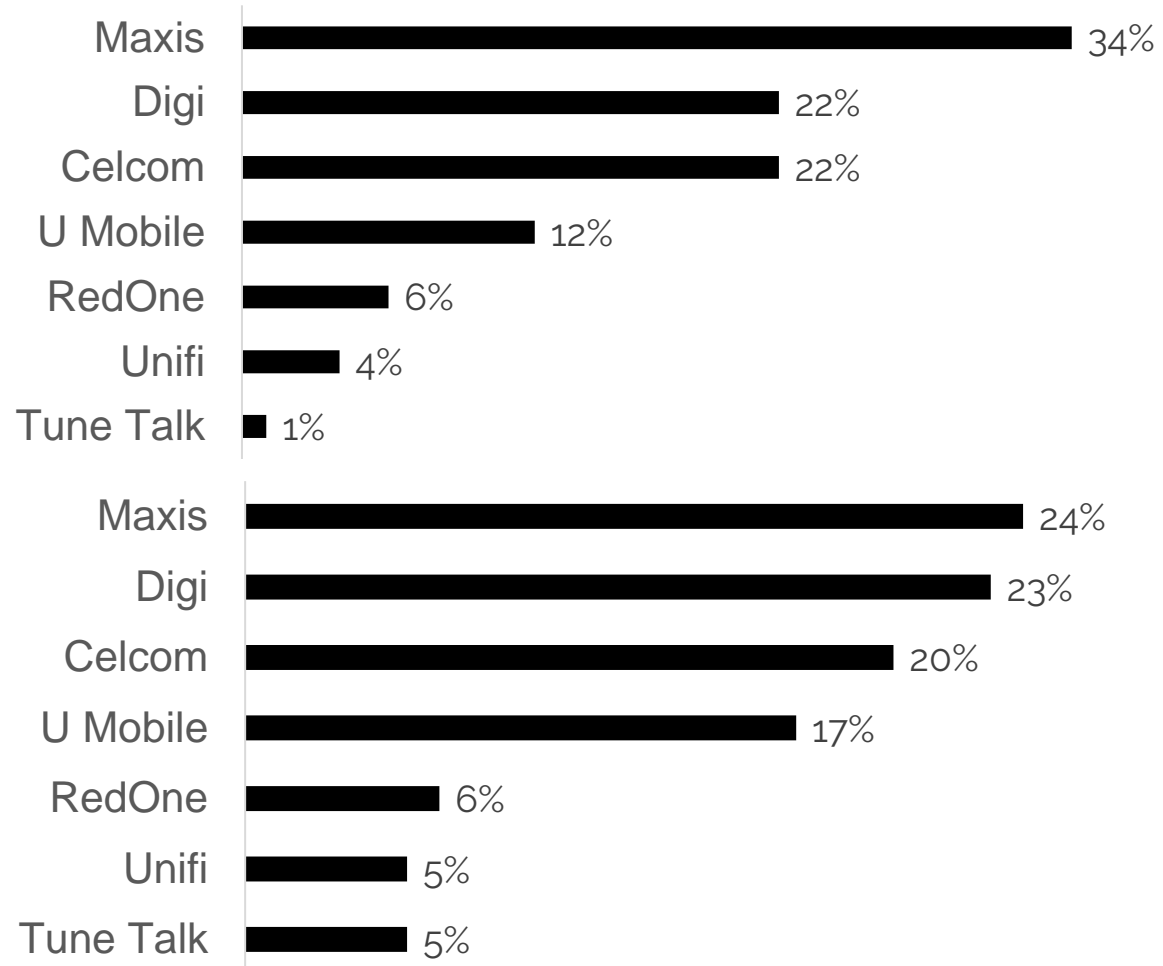


**Postpaid Users,  
38%**



**Prepaid Users,  
62%**

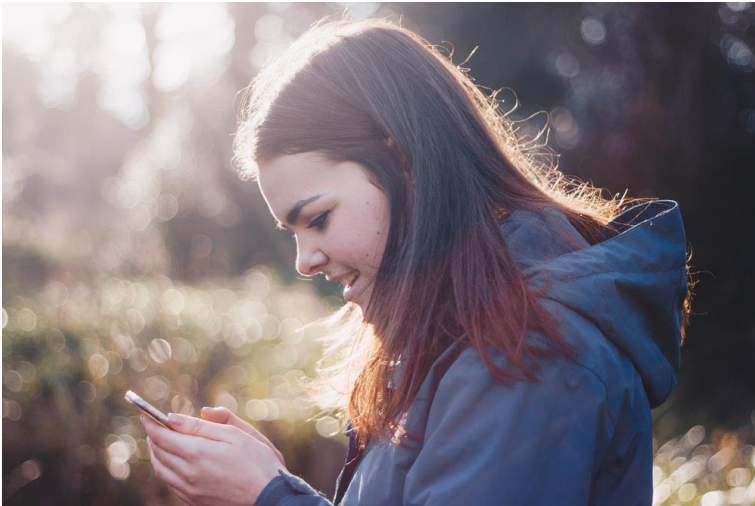
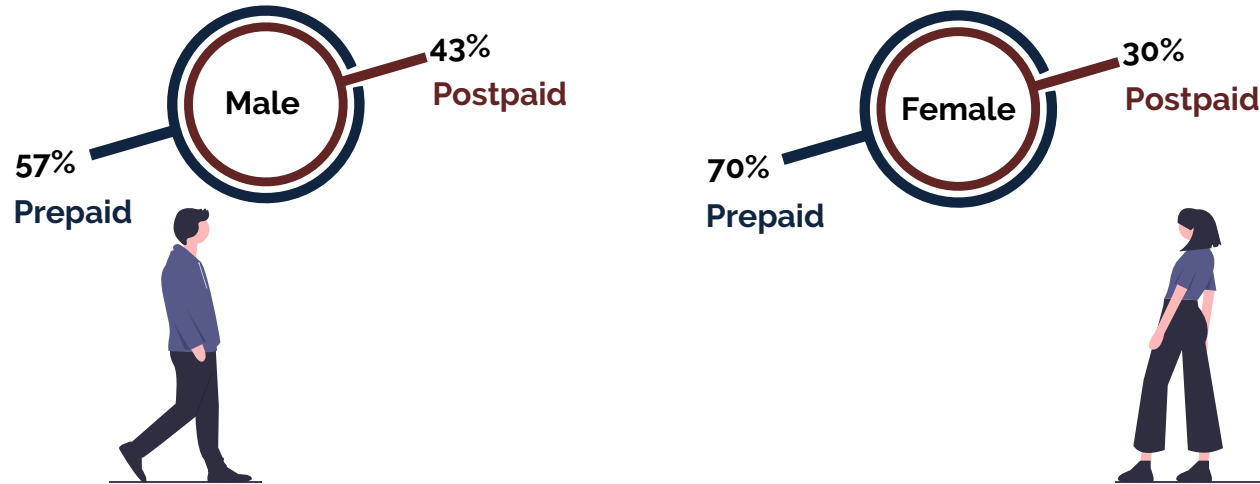
Maxis is the market leader for both prepaid and postpaid market among Malaysians.





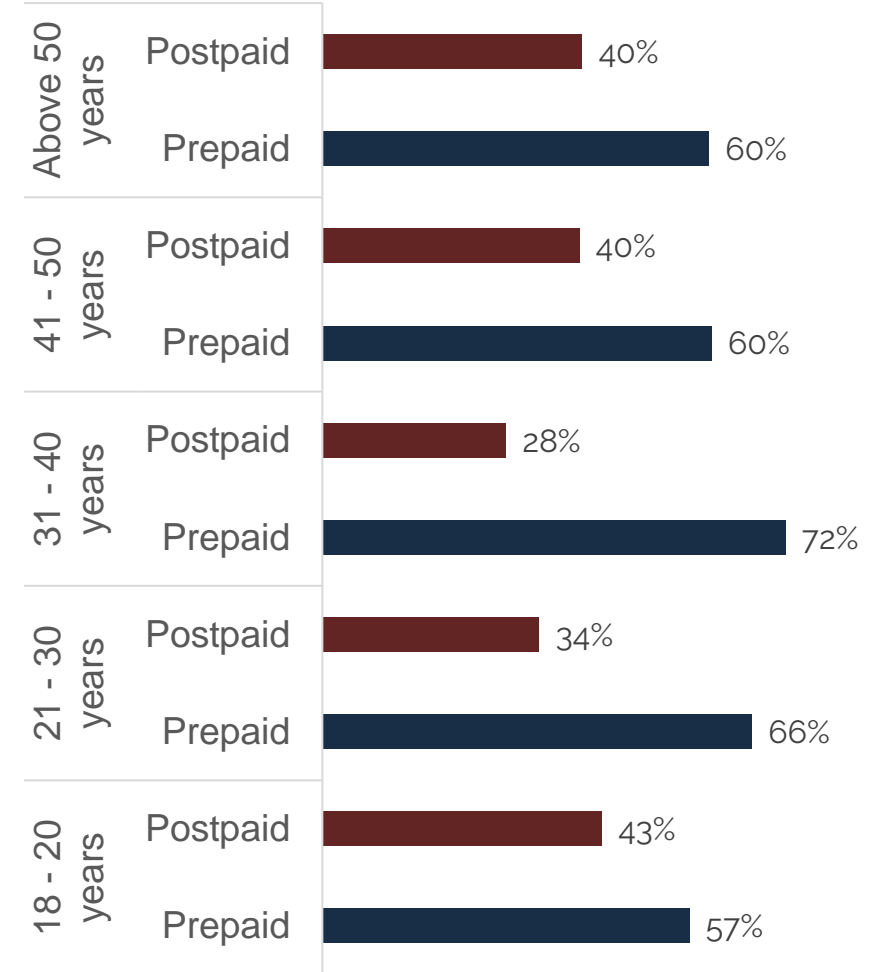
## Who are the prepaid and post-paid users? N = 2,000

Males are twice as likely to subscribe to post-paid than females.



Older Malaysians are more likely to be postpaid subscribers than younger Malaysians.

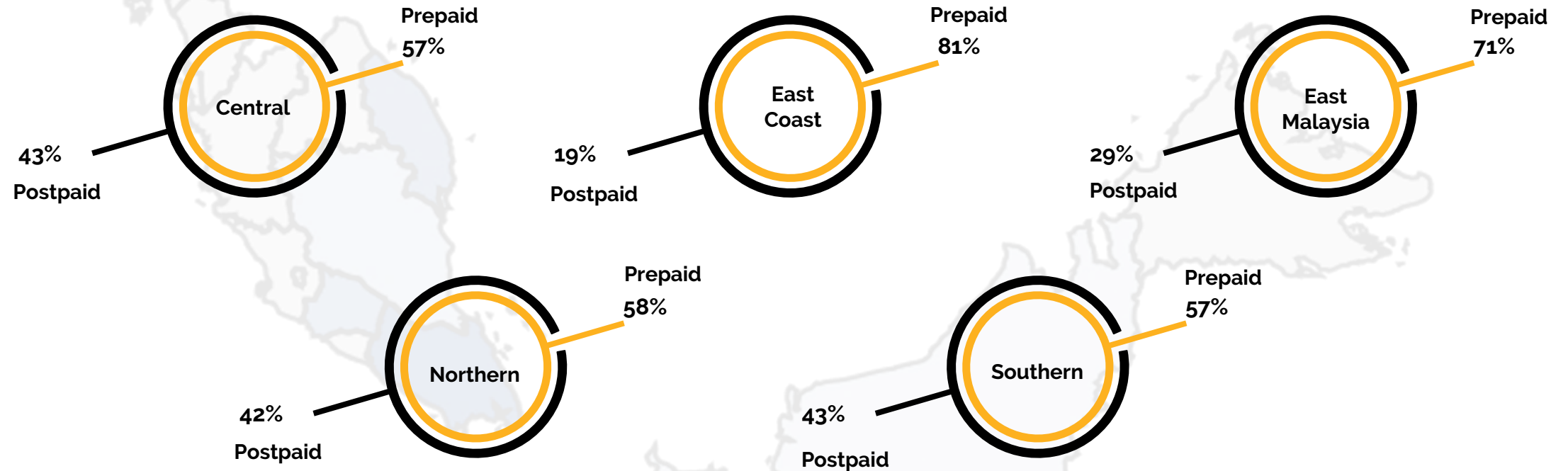
The only exception to this is the 18-20 years old where they may still be dependent on their family and are using their family's plan.





## Who are the prepaid and post-paid users? N = 2,000

Malaysians living along the west coast of Peninsular are most likely to be post-paid subscribers.

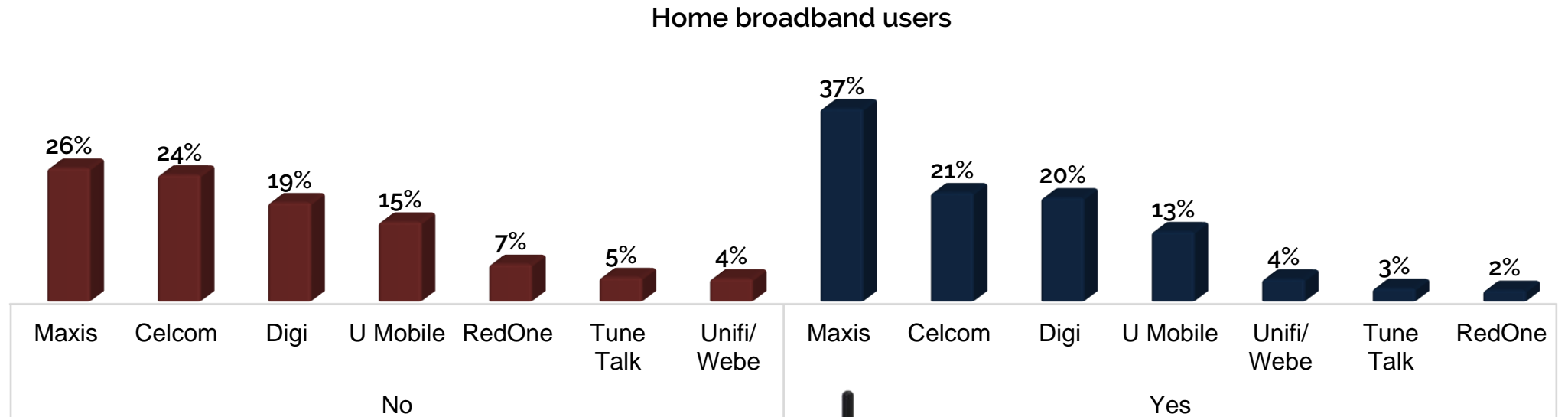






## How many Malaysians have access to home broadband? N = 1,164

More than half of Malaysians have access to home broadband.



Maxis is the clear leader among those with access to home broadband.

**NO ACCESS**  
TO HOME  
BROADBAND

44%

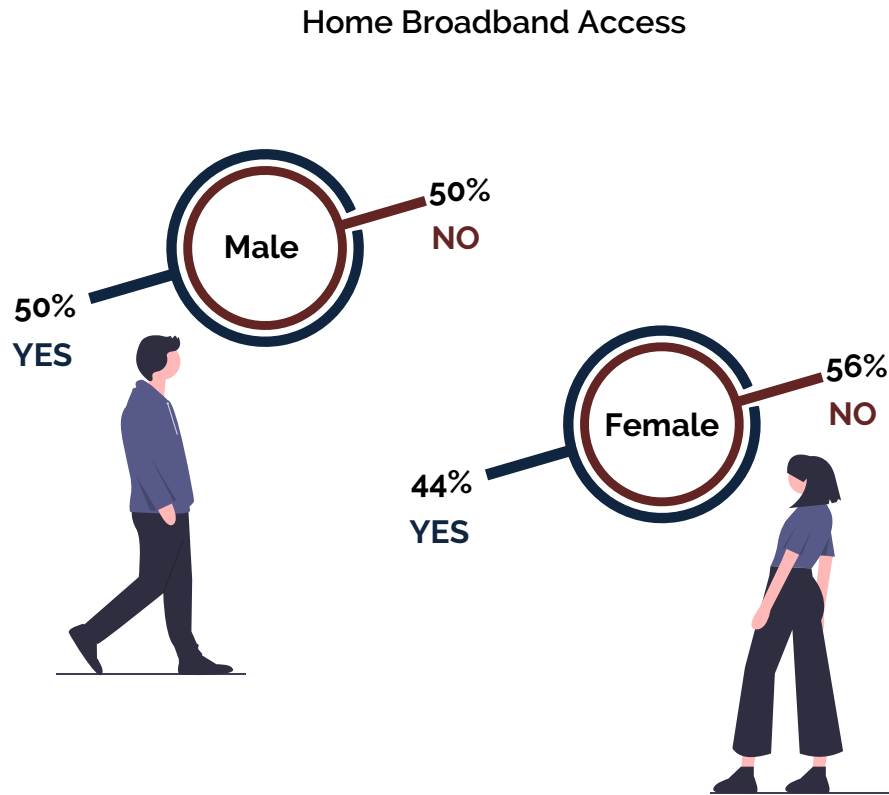


56%

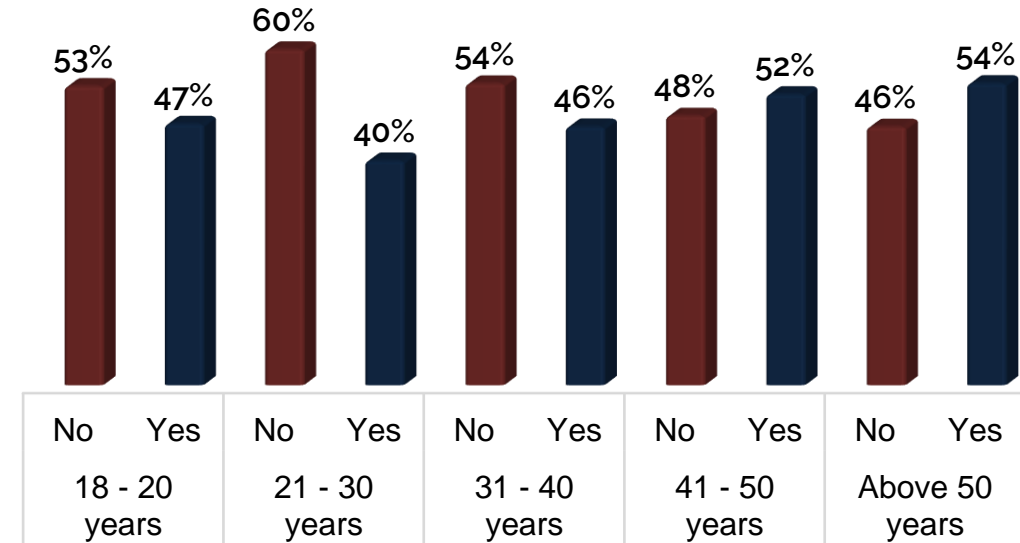
**HAVE ACCESS**  
TO HOME  
BROADBAND

# Who has access to home broadband? N = 1,164

Males are more likely to have access to home broadband than females.



## Home Broadband Access



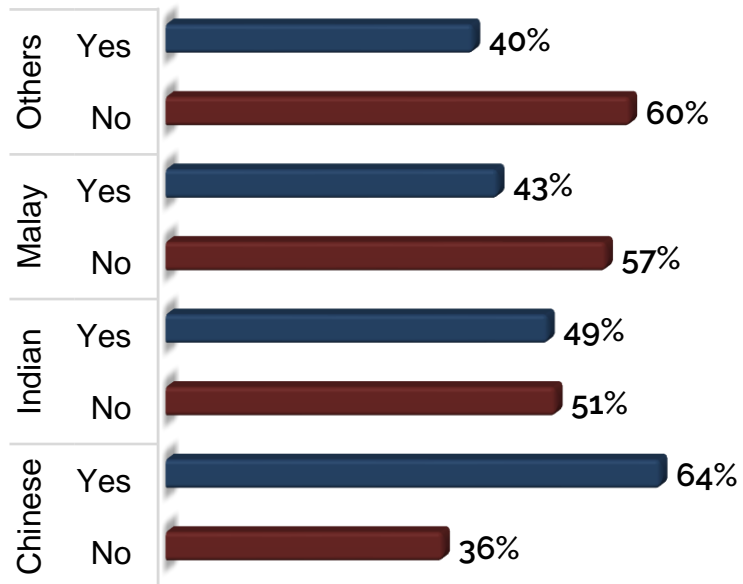
Older Malaysians are more likely to have access to home broadband than younger Malaysians, except those who are 18 – 20 years old.



## Who has access to home broadband? N = 1,164

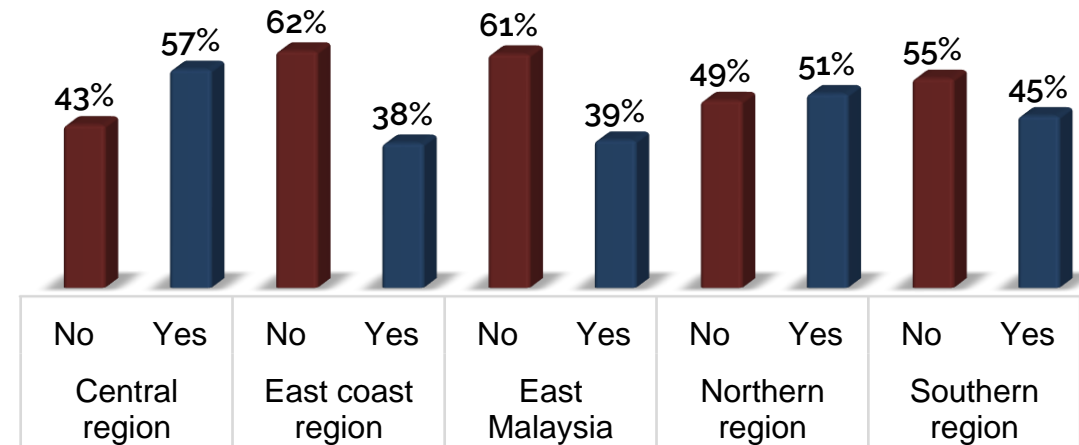
Almost two-thirds of Chinese have access to home broadband, followed by Indians, Malays and Other races.

### Home Broadband Access



Less developed regions such as East Coast region and East Malaysia are least likely to have access to home broadband.

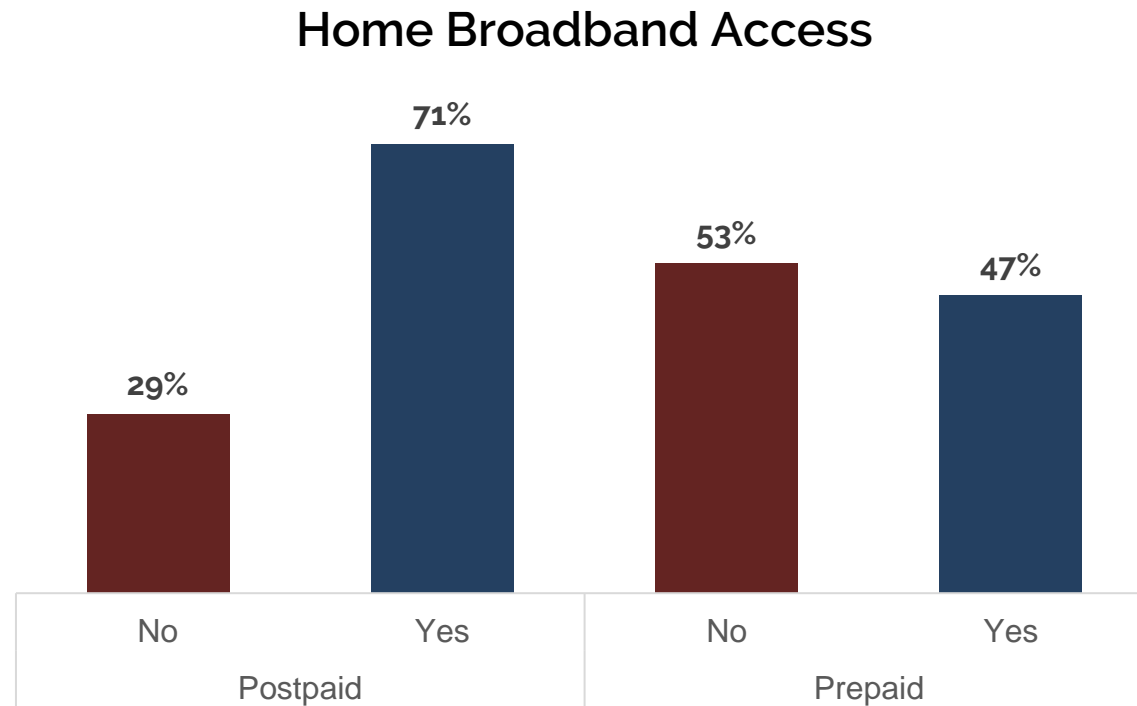
### Home Broadband Access





## What is the correlation between home broadband and postpaid subscription? N = 1,164

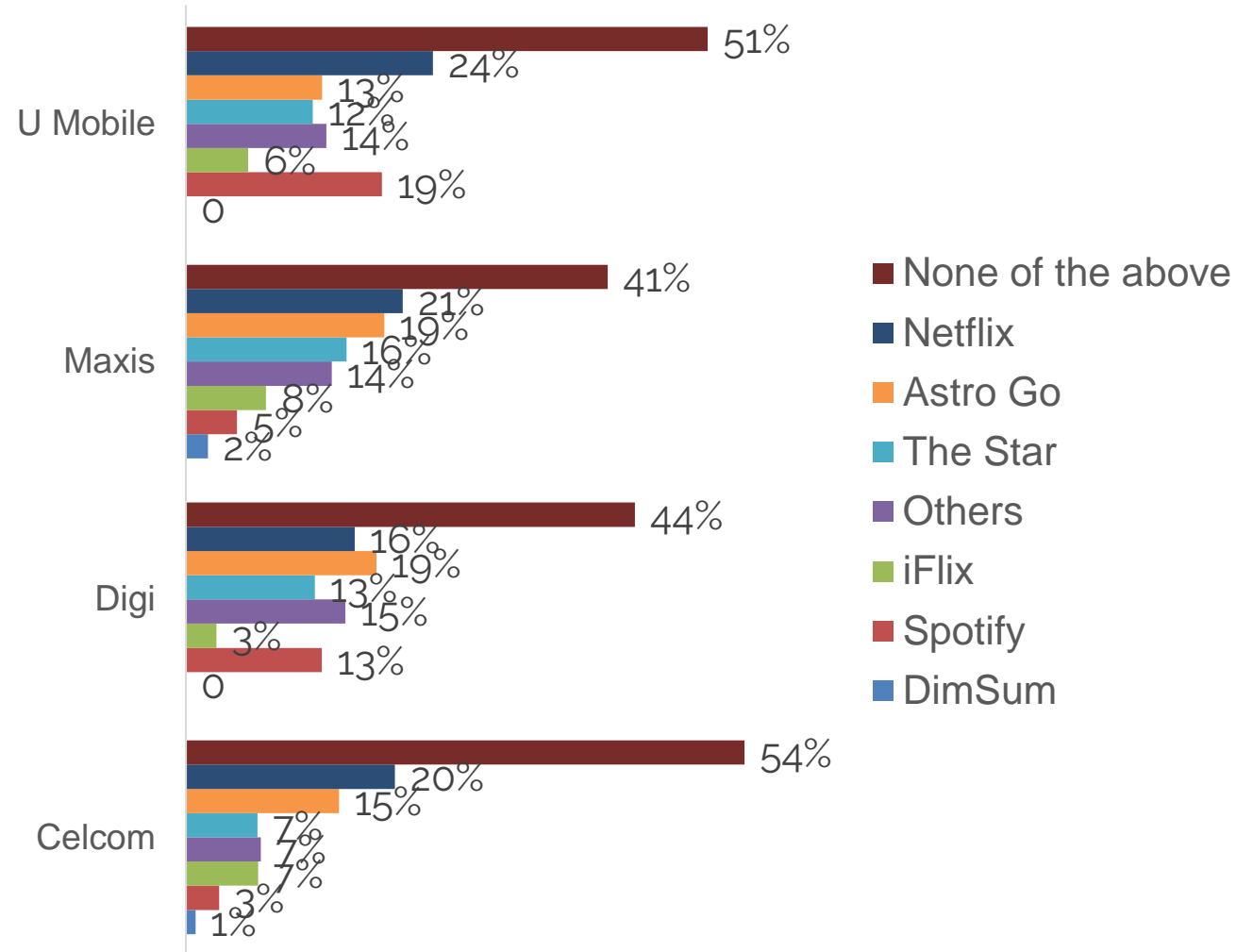
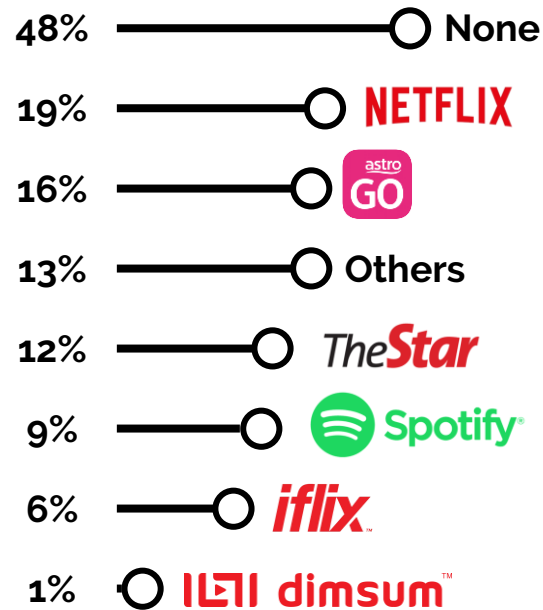
Postpaid subscribers are more likely to have access to home broadband than prepaid subscribers.





## Which online content platforms are Malaysians subscribed to? N = 438

Majority of Malaysians are now subscribed to at least one of the paid online content platforms. Netflix is the most popular paid content platform, follow by Astro Go.





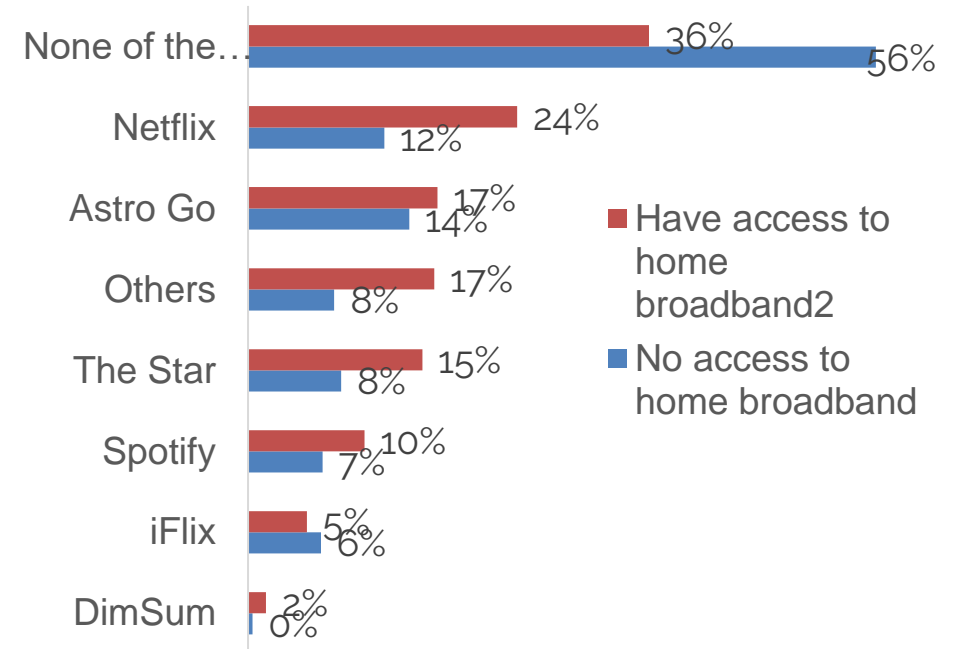
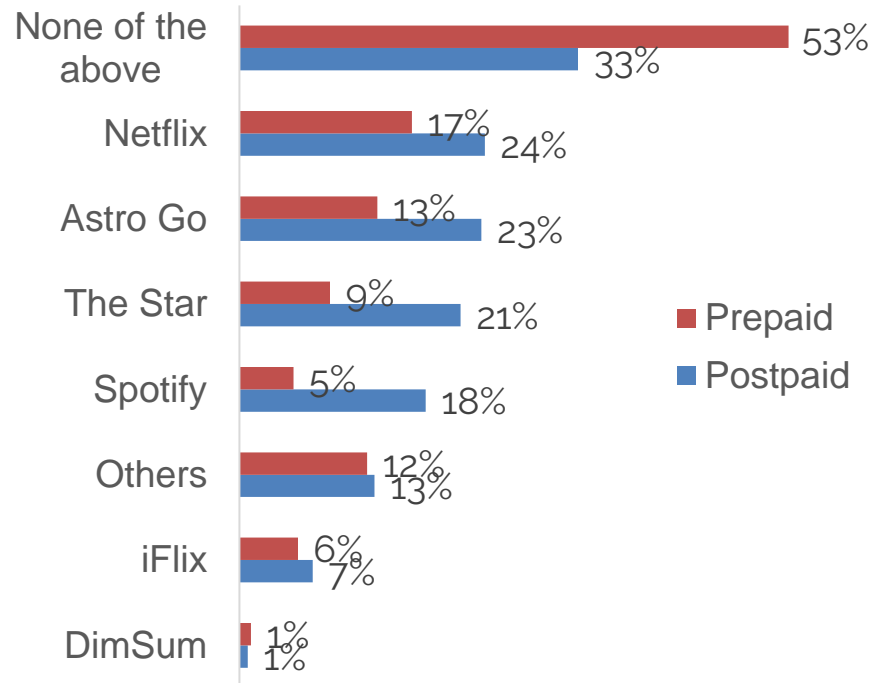


## Which online content platforms are Malaysians subscribed to? N = 438

53% of prepaid subscribers are not subscribed to any online content platforms, as compared to 33% of postpaid users.

Malaysians who have access to home broadband are nearly twice as likely to subscribe to an online content platform than those who don't.

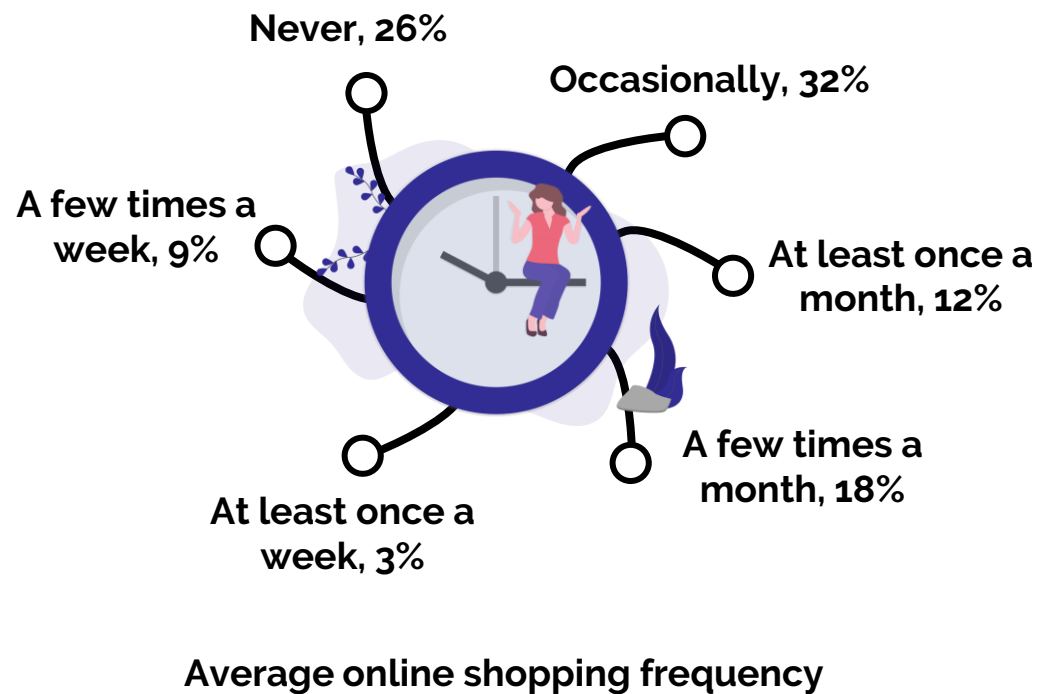
Interestingly, there is relatively small difference in the subscription rate of local VOD platforms like Astro Go and iFlix among those who have and don't have access to home broadband as compared to the other platforms.



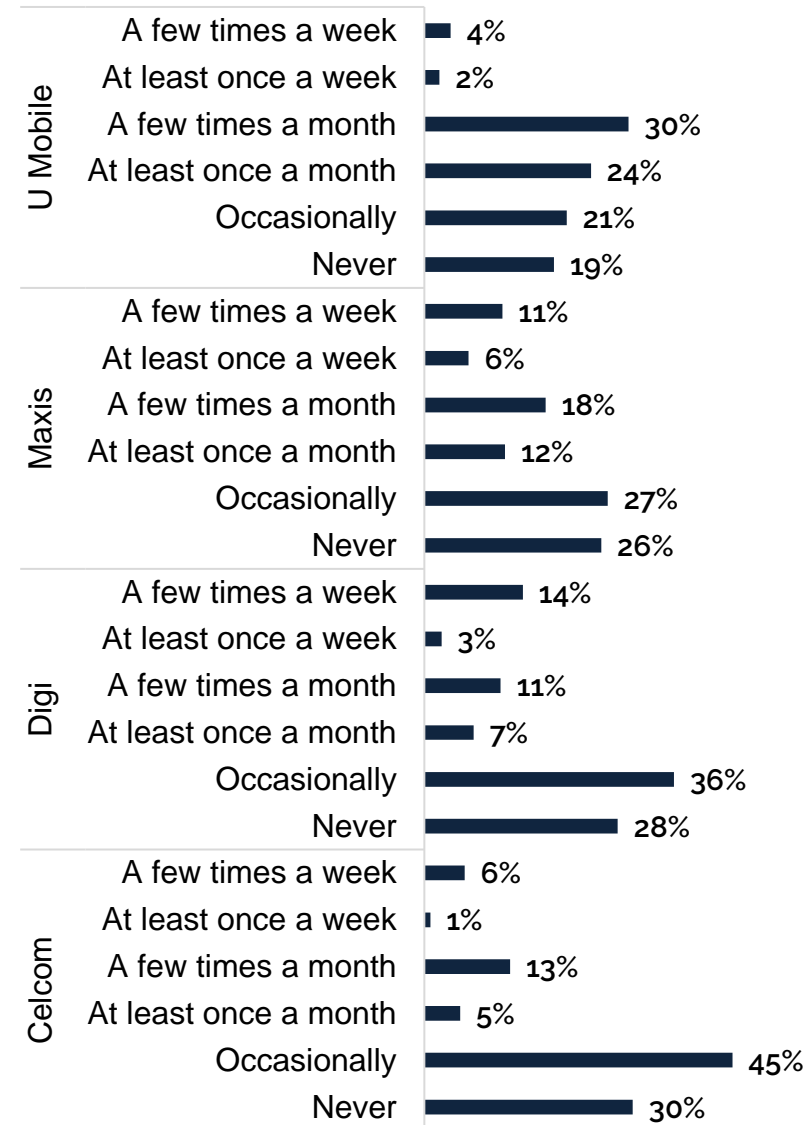


## Which mobile network have the most online shoppers? N = 425

Celcom subscribers are least likely to shop online, followed by Digi, Maxis and U Mobile subscribers.



## Online shopping frequency

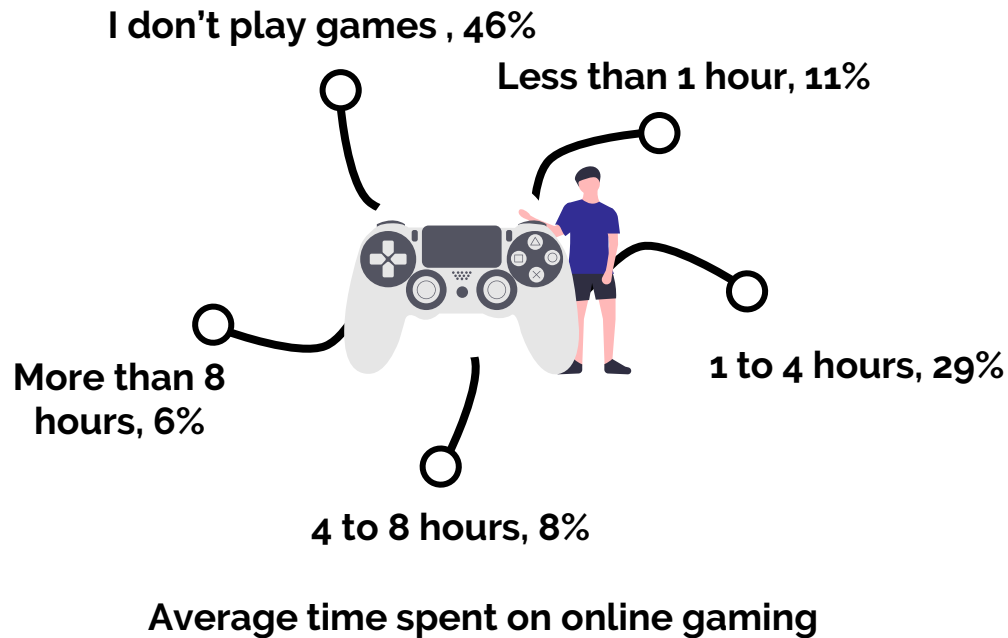




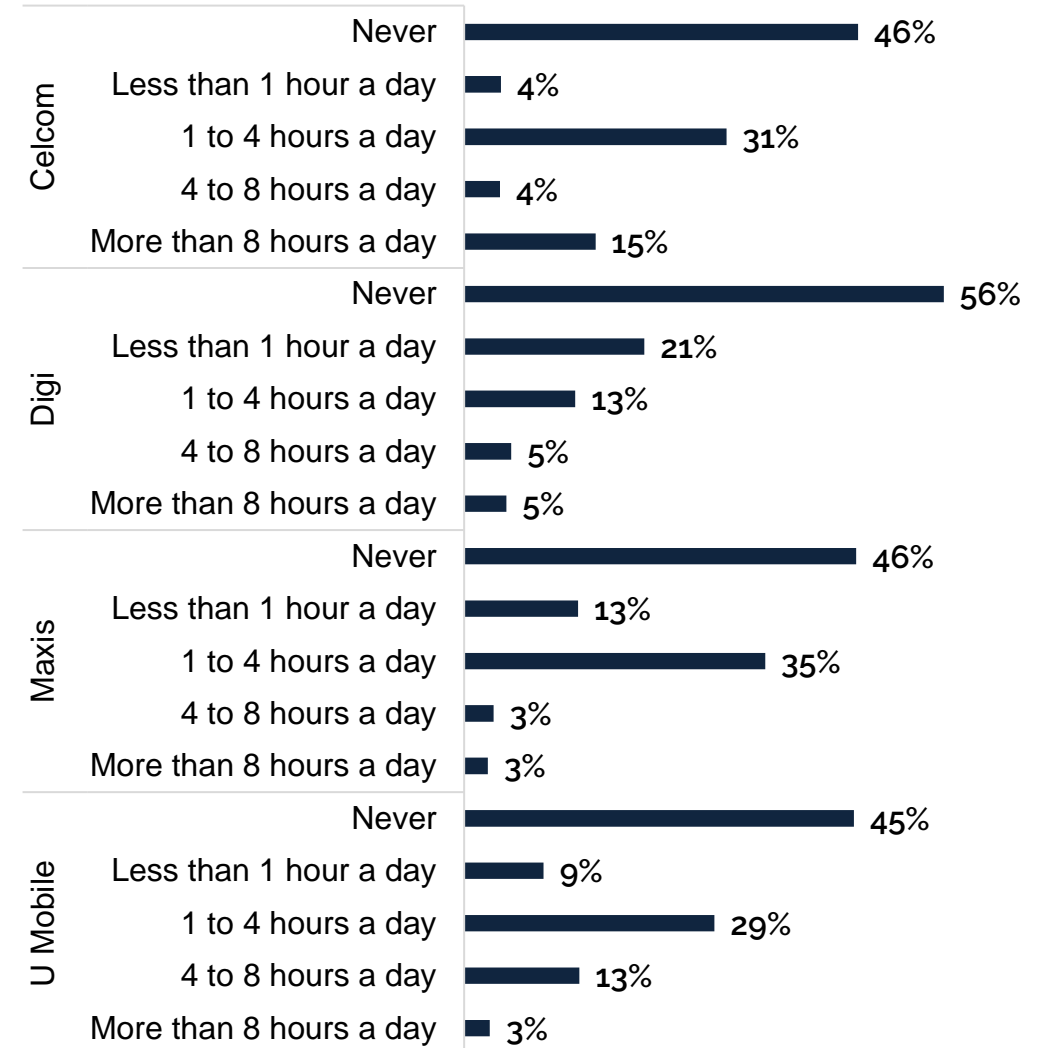
## Which mobile network have the most online gamers? N = 433

Celcom subscribers spend the most time playing online games, followed by U-mobile and Maxis subscribers.

Digi users are least likely to play online games.

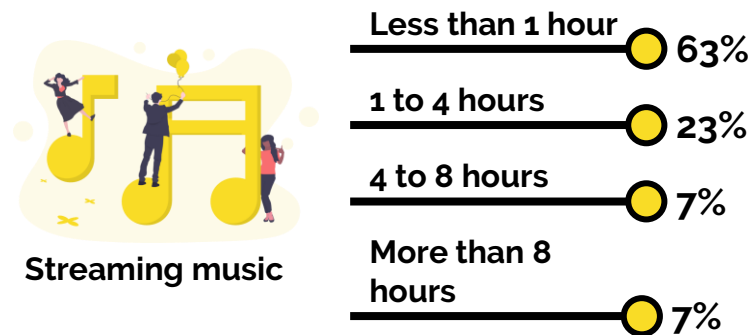
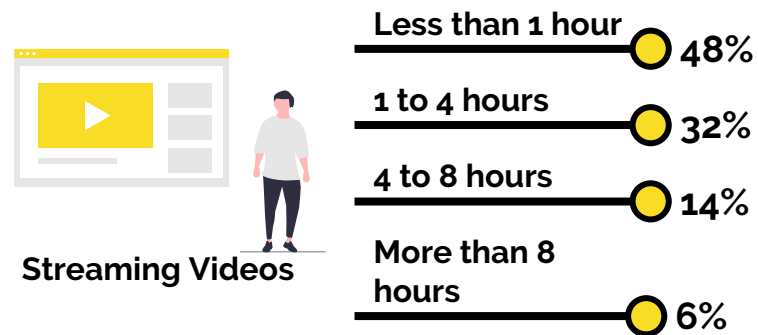
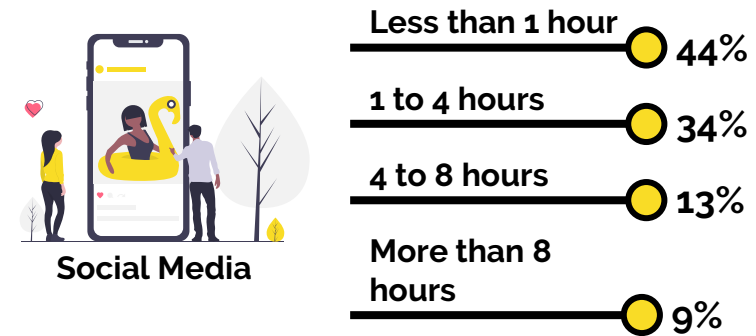
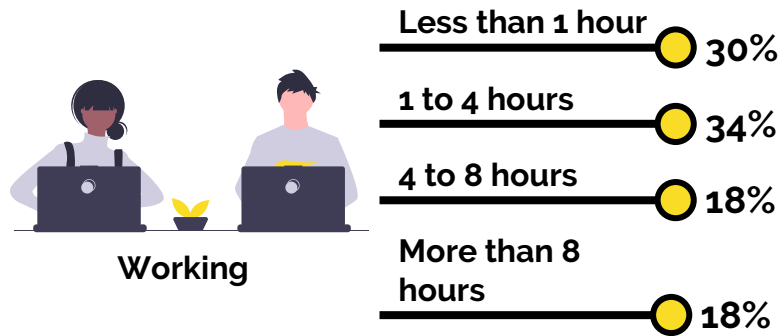


## Time spent playing online games by Telco subscribers
















## How much time do Malaysians spend on the Internet? N = 791





## How satisfied are Malaysians with their mobile network providers? N = 3,243

Satisfaction Score						
	21.6 %	23.9 %	20.8 %	15.2 %	15.7 %	16.1 %
	47.8 %	44.8 %	49.3 %	46.4 %	33.4 %	33.5 %
	11.3 %	11.5 %	12.8 %	13.8 %	21.7 %	16.2 %
	15.0 %	15.9 %	14.4 %	17.7 %	19.3 %	21.3 %
	4.3 %	3.9 %	2.7 %	6.9 %	9.8 %	12.9 %
Would Consider Switching Telco	22.7 %	26.7 %	20.6 %	24.7 %	28.0 %	36.9 %

From our customer satisfaction survey, Digi led by 70.1% of satisfied customers, followed by Celcom (69.4%) and Maxis (68.7%).

Digi also has the least unsatisfied customers at 17.1% whereas Celcom has 19.3% while Maxis has 19.8%.

There are room for improvement in customer satisfaction for U-Mobile (61.6%), RedOne (49.1%) and Unifi (49.6%).





## Want to learn more about us ?

Vodus pioneers the “answer one-question at a time” survey methodology that enables **17 million Malaysians** to be surveyed across the online media network of the largest media conglomerates in Malaysia (Astro, Media Prima, Sin Chew, The Star, Kwong Wah) to obtain market insights that are faster, more representative, accurate and cost effective.

For more information please visit:

<https://vodus.com>

### OUR SOLUTIONS

By having vast amount of market data on Malaysian consumers, we are in prime position to help businesses grow and gain market share through our [solutions](#):

#### Insights Solutions:

1. Instant Insights (*Consumer U&A, market validation*)
2. Brand Health Tracker

#### Insights Driven Marketing Solutions:

1. Construct audience persona of your target market
2. Ad Creative Impact Test
3. Brand lift survey

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