



# OpenNet Fibre Index 2012

Summary of Market Study on optical-fibre for household segment



Prepared For



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# Research Methodology



- **N=500 sizing survey**
  - **Mix of door-knocks and telephone interviews**
  - **Market representative of population ages 15 and up – quotas for...**
    - ◆ **Housing Type**
    - ◆ **Age**
    - ◆ **Locality (North / South / East / West / Central)**
    - ◆ **Race**
    - ◆ **Gender**
  - **All decision makers or influencers of internet at home**
- **N=210 segment survey - Phone interviews among...**
  - **N=70 Newly installed TP residents (Less than 1 year TP installation)**
  - **N=70 New fibre broadband customers (Less than 1 year on Fibre Broadband)**
  - **N=70 Older fibre broadband users**
- **Interviews conducted from 24 Aug - 28 September 2012**



# Internet Usage

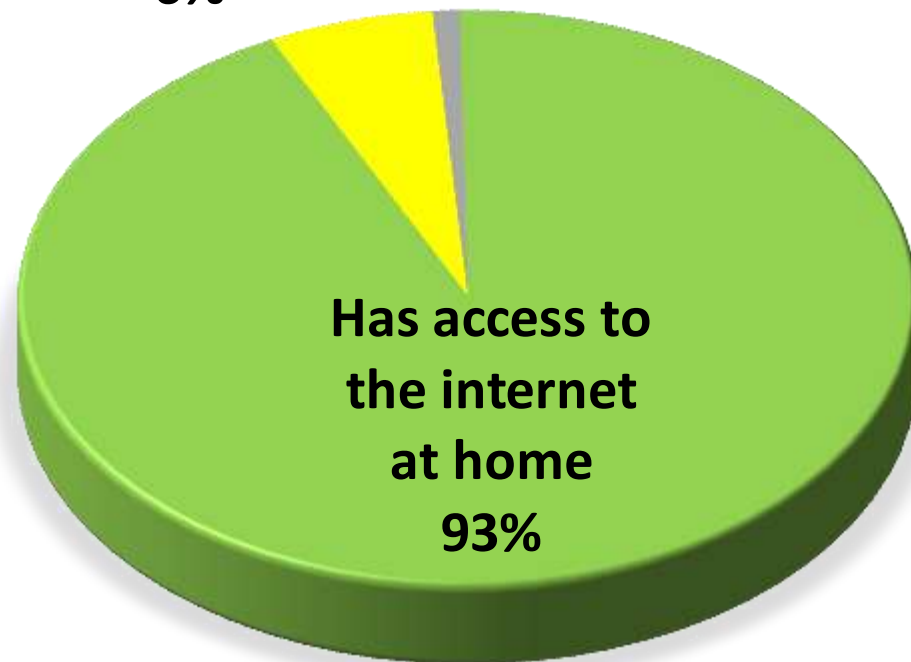


# Ownership of home internet plans

## 2011 internet accessibility

Access internet through other means 6%

Do not access the internet at home 1%

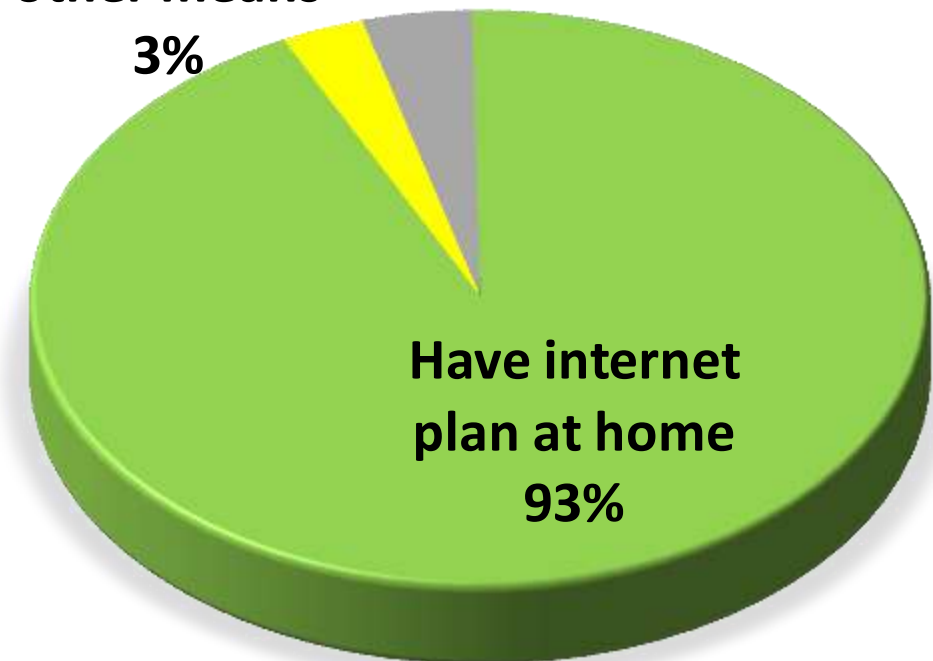


Base: Main Study 2011 n=504

## 2012 internet accessibility

Access internet through other means 3%

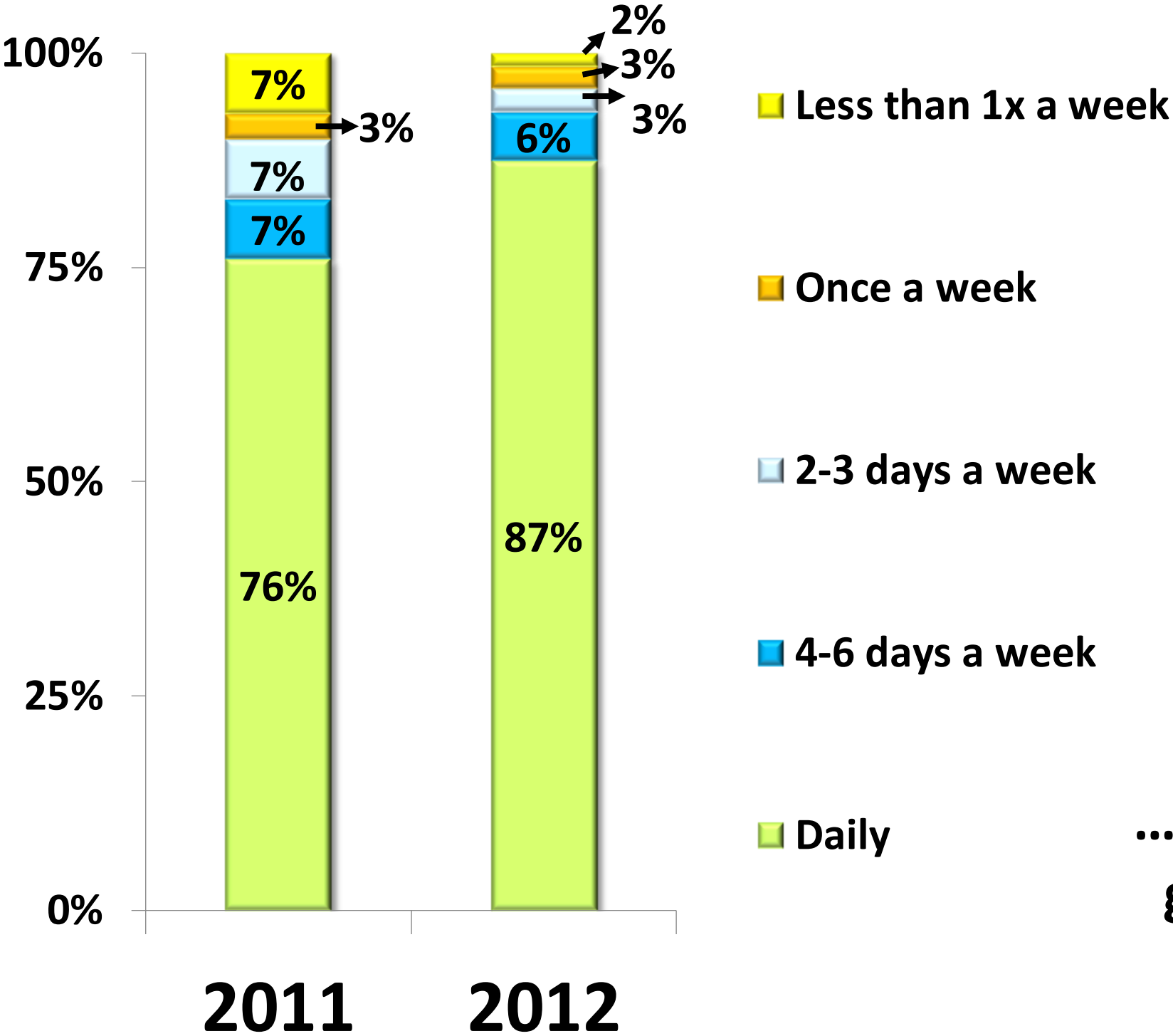
Do not access the internet at home 4%



Base: Main Study 2012 n=535

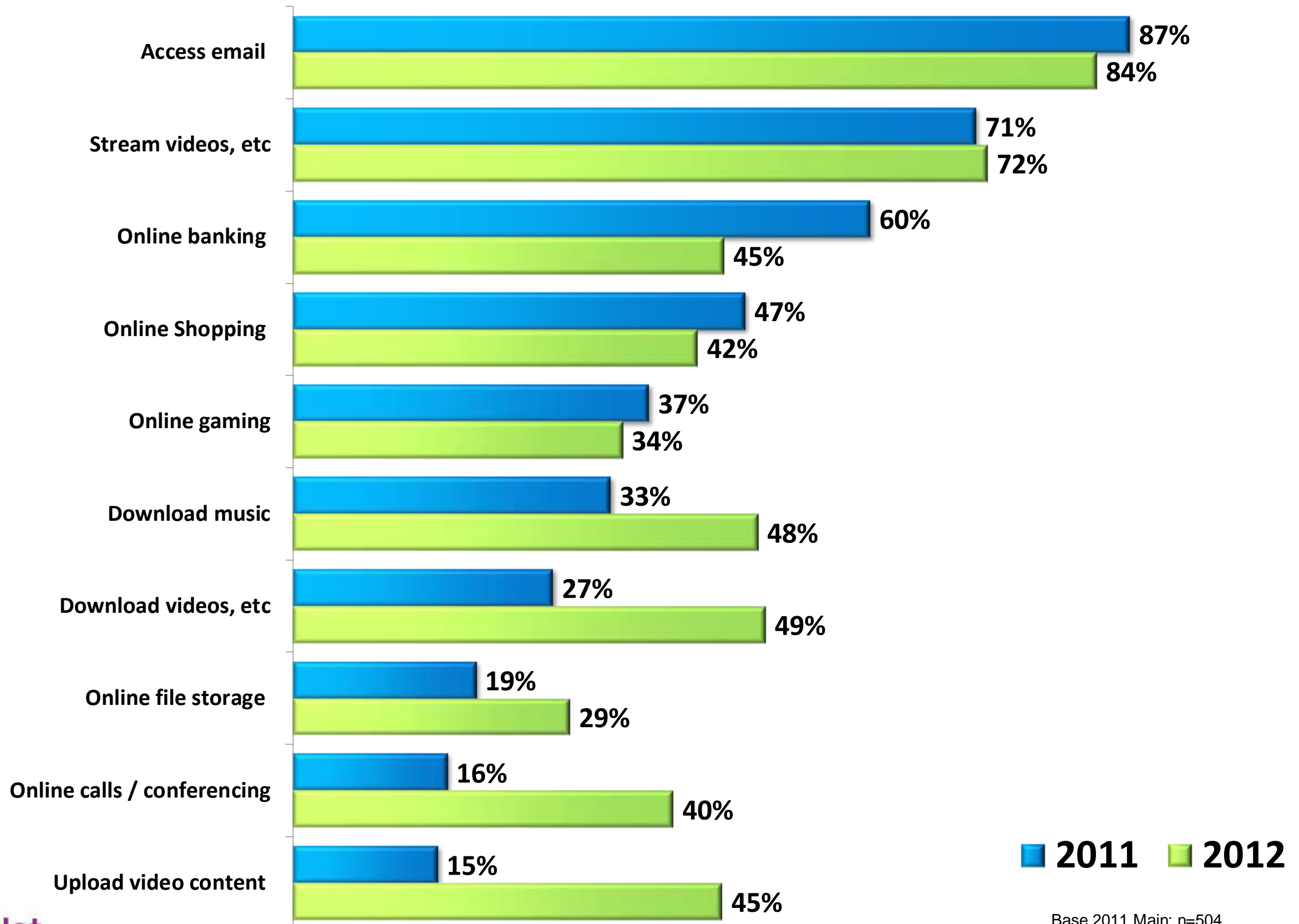
**Penetration of home internet plans remains stable at 93%**

# Usage of internet at home - Frequency



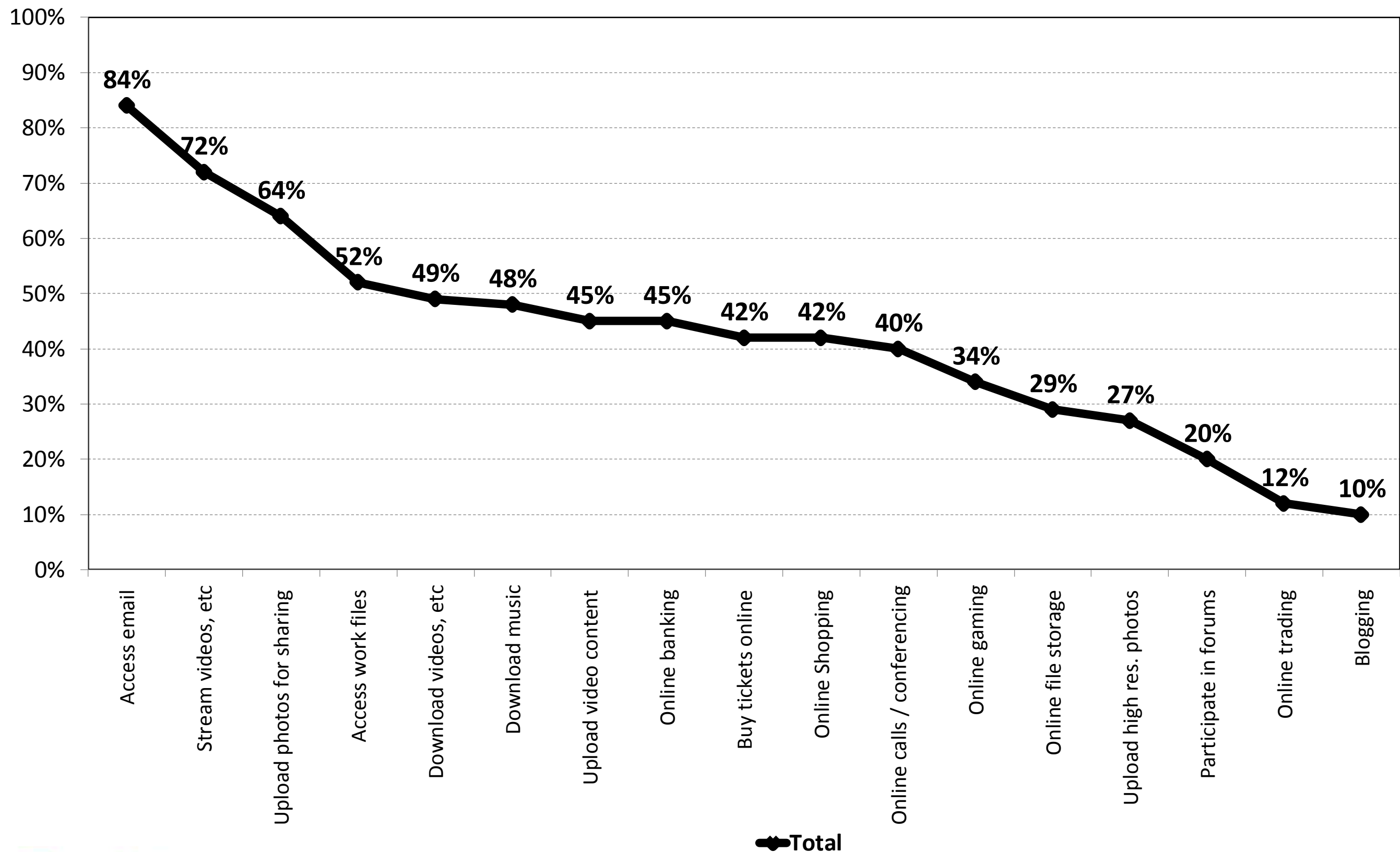
**...but frequency of use has gone up - 87% use daily.**

# What are they using the internet for



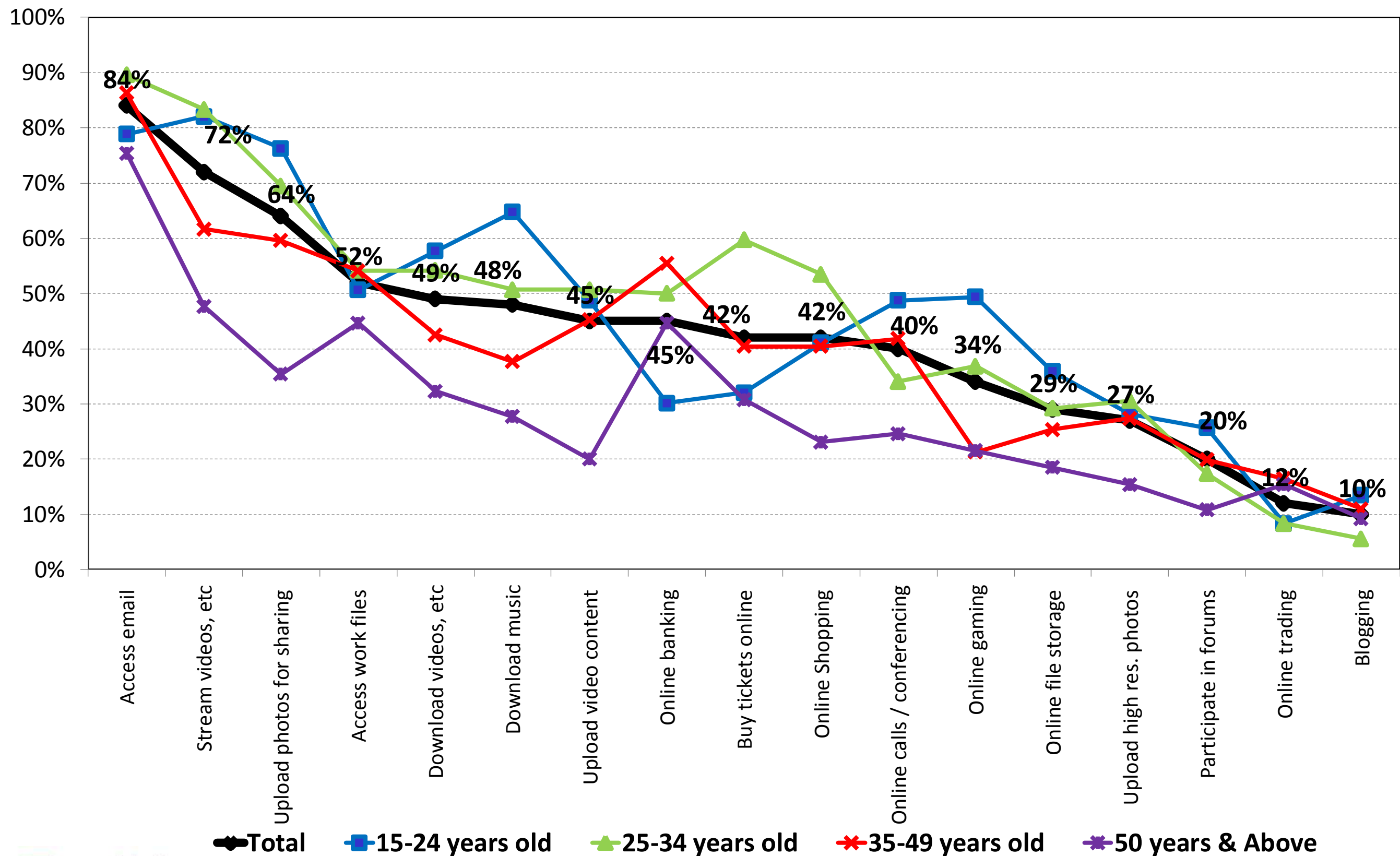
Base 2011 Main: n=504  
Base: Home Internet Users n=511

# What are they using the internet for





# What are they using the internet for

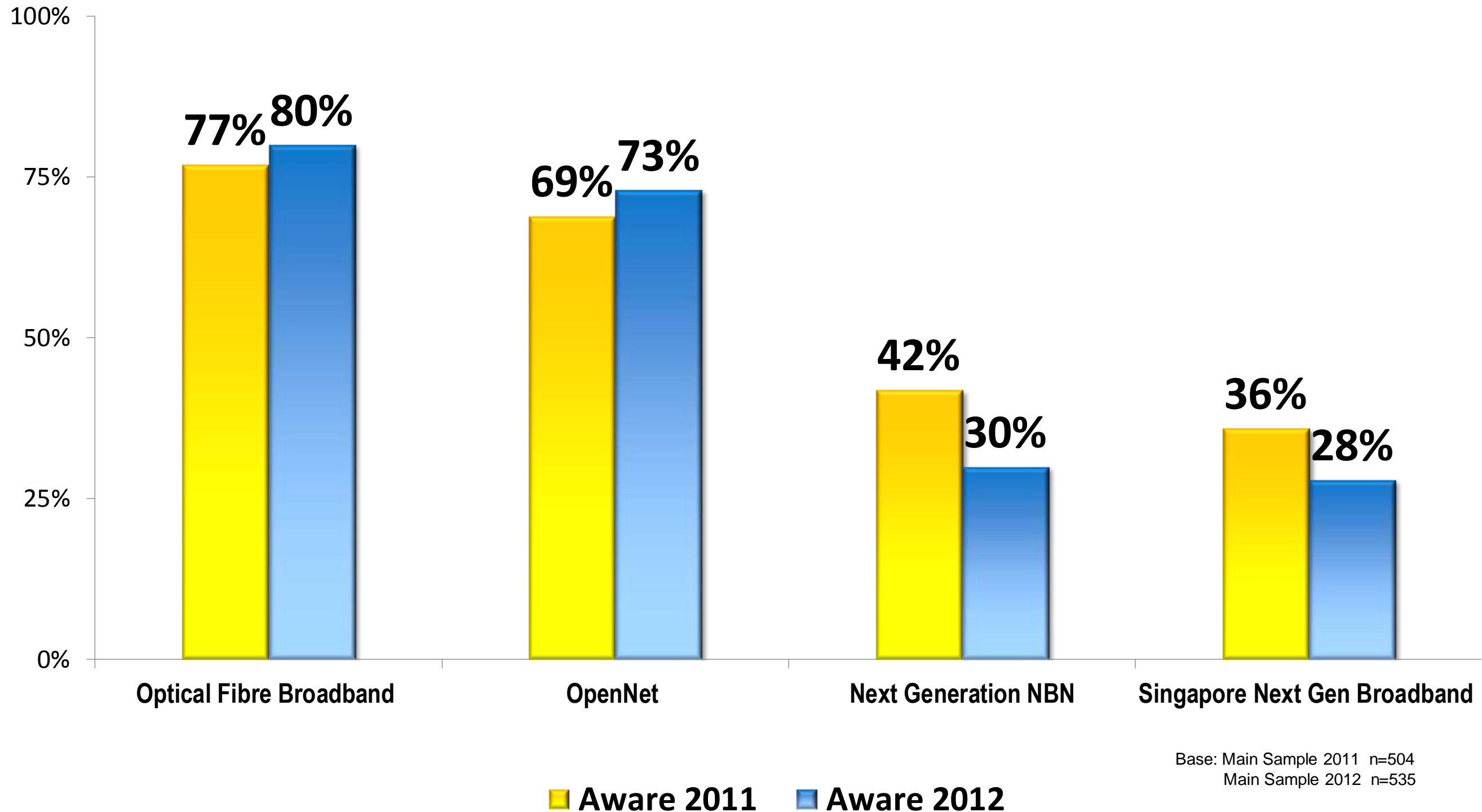




# Awareness of Fibre Initiatives



# Awareness of Fibre Initiative Names

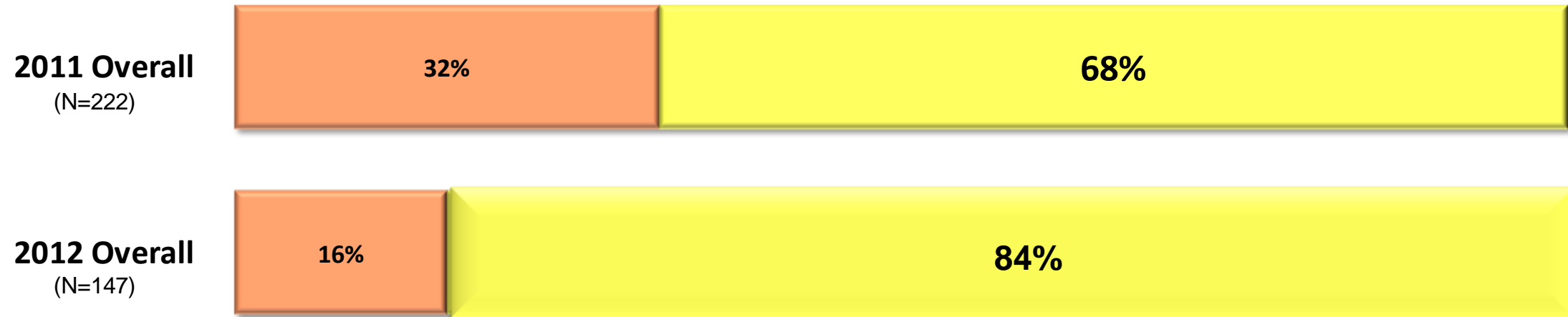




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# Satisfaction

# Satisfaction with TP Installation



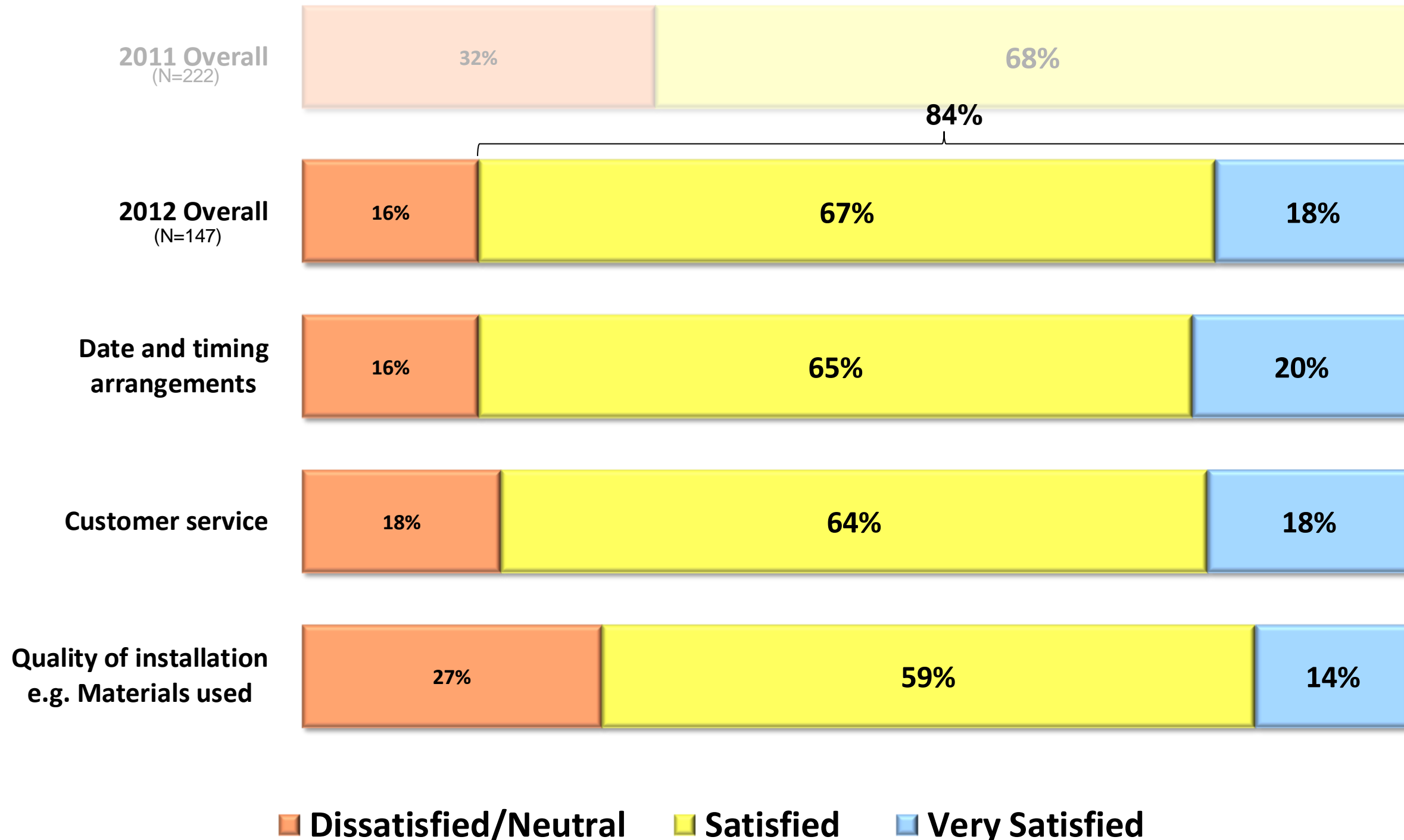
**Satisfaction with TP installation has gone up**

■ Dissatisfied/Neutral    ■ Satisfied

# Drill down on Satisfaction with TP Installation

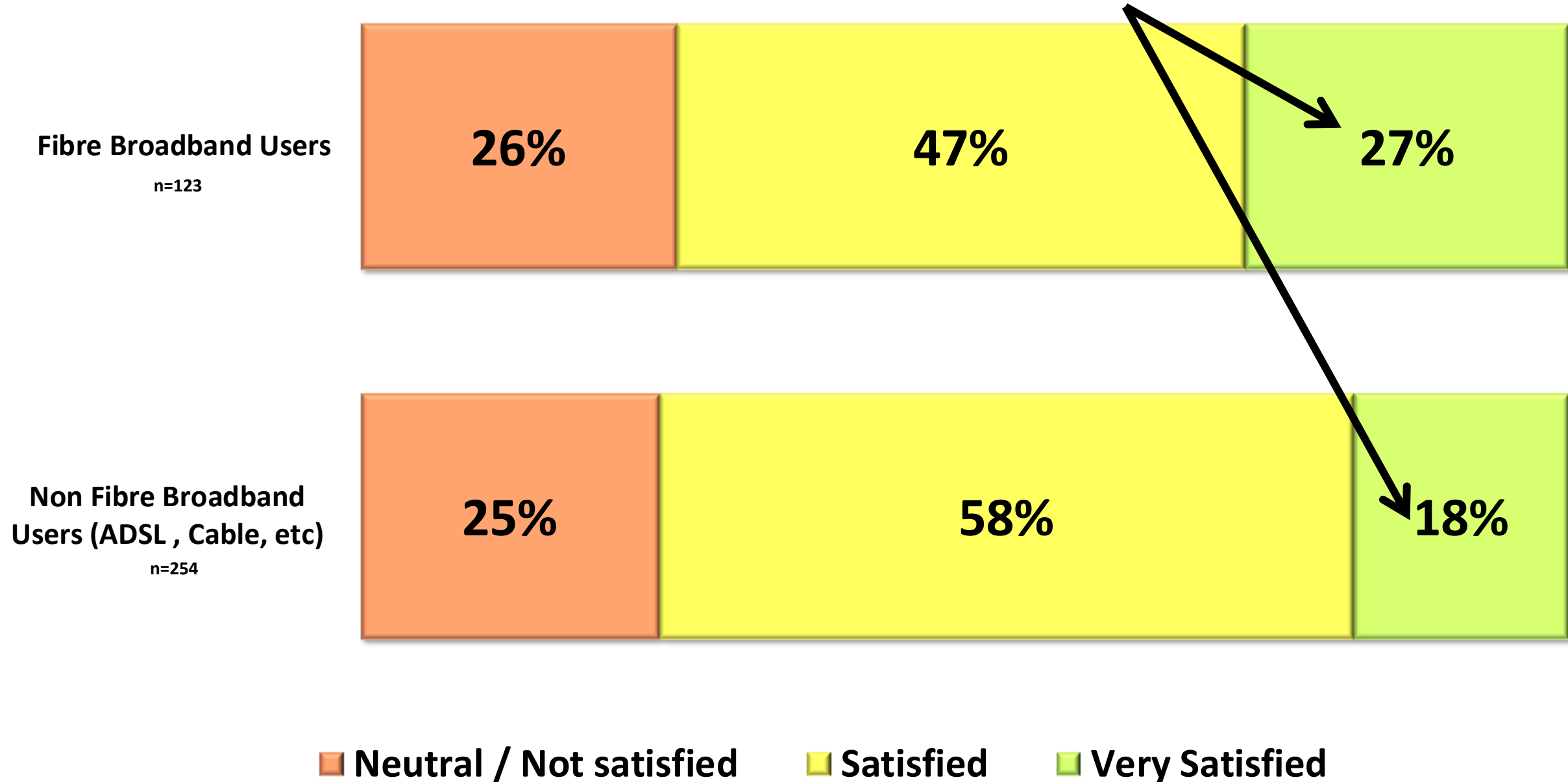


...specifically more satisfied with logistics and service.



# Satisfaction of current internet

**Overall satisfaction not very different, but 50% more fibre broadband users are very satisfied.**

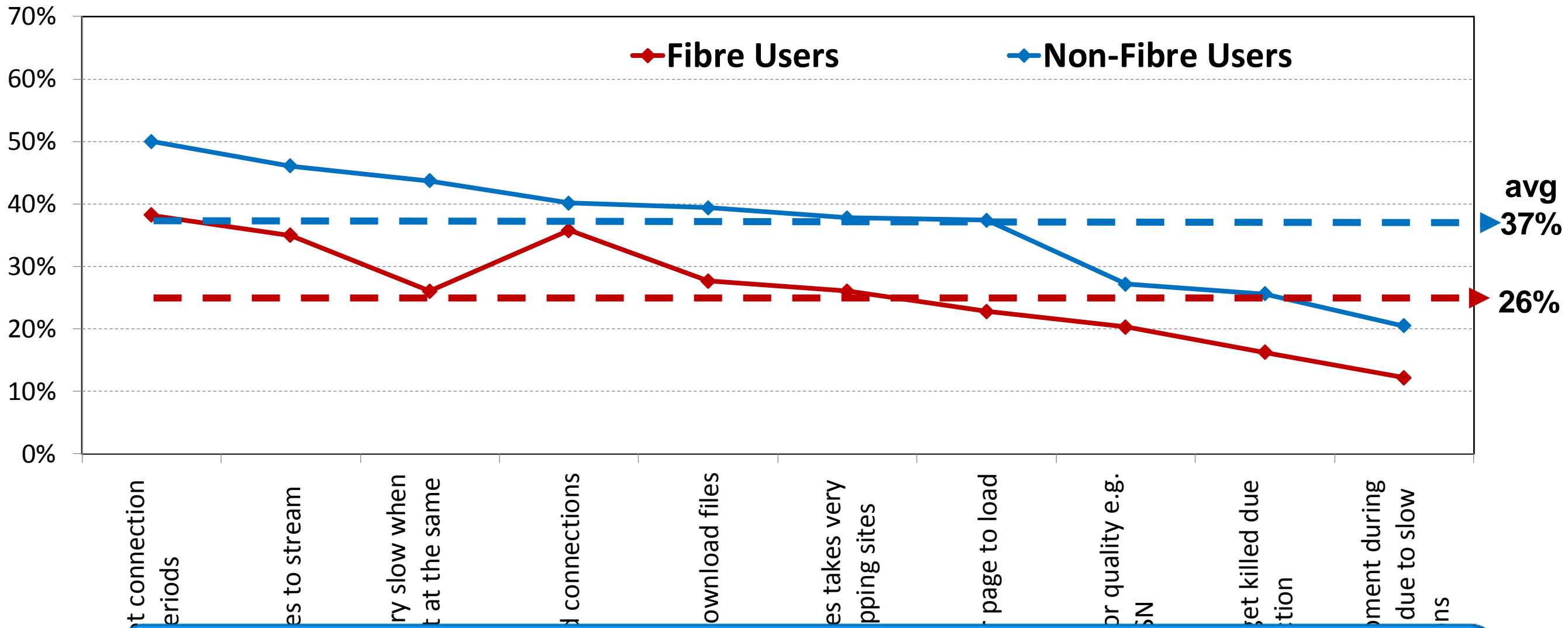


**The following issues were tested among respondents....**

- 1. Dropped connections**
- 2. Much slower internet connection during peak periods e.g weekends, 10pm-11pm on weekdays**
- 3. Takes very long for movies to stream**
- 4. Takes very long to download files**
- 5. Takes very long for page to load**
- 6. Internet calls have poor quality e.g. Skype / MSN**
- 7. Internet connection is very slow when there are a few people in the house using it at the same time**
- 8. Pages with many images takes very long to load e.g. Shopping sites**
- 9. During online gaming, get killed due to slow connection**
- 10. Missing a critical moment during online transactions due to slow connections E.g. Booking tickets, online auction, online trading**



# “Problems I regularly face with my connection”

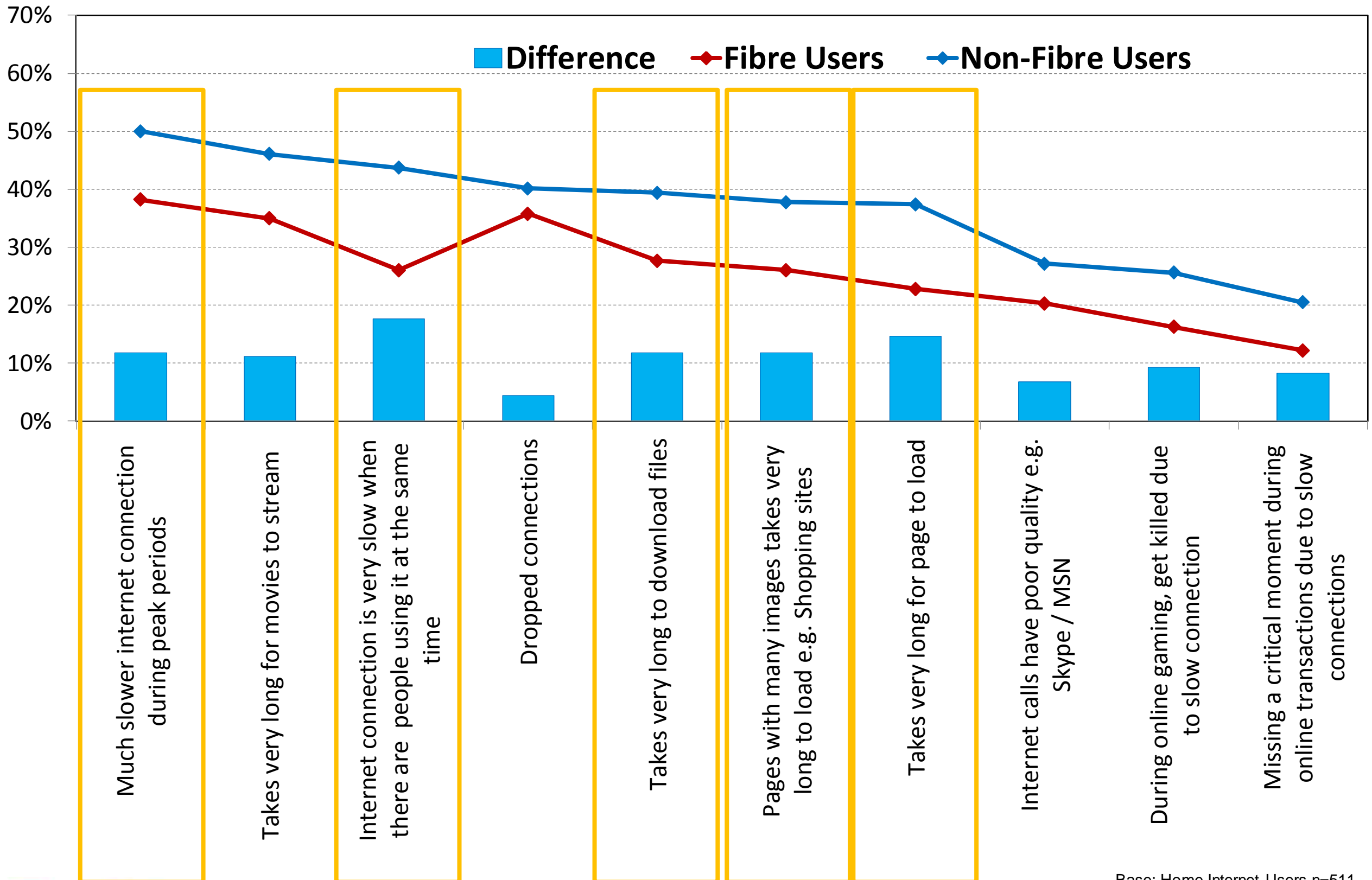


**On average, fibre users are 10% less likely to face regular problems with their connection than non-fibre users**

Much slower than normal  
Takes very long to load  
Internet connection drops out for periods  
Takes very long to load  
Pages take a long time to load  
Pages take very long to load  
Pages take very long to load  
Takes very long to load  
Internet connection drops out for periods  
During online activities  
Missing online

Base: Home Internet Users n=511  
Base: Home Fibre Users n=123  
Base: Home Non-Fibre Users n=254

# “Non-fibre users more likely to have problems with...”



Base: Home Internet Users n=511  
 Base: Home Fibre Users n=123  
 Base: Home Non-Fibre Users n=254



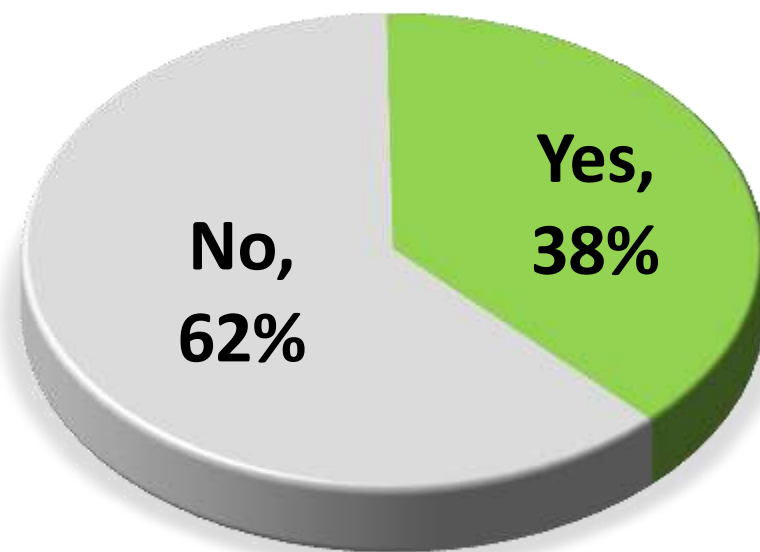
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# Interest in Fibre

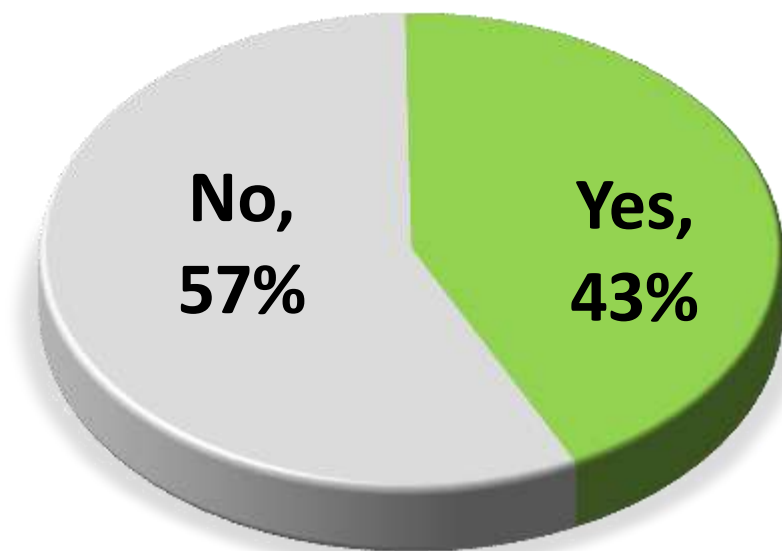
# Interest to sign up for Fibre Broadband

% of respondents having received a Fibre Broadband advertisement / promotion

**2011**  
Base: n=172



**2012**  
Base: n=251



**Interest to sign up for fibre has increased**

# “What will interest you to sign up for fibre NOW?”

