

# **Pre-Study Dragon Survey**

*(Pilot and Non-Pilot City)*

Advanced Analytic And Growth Marketing

# Background Study and objectives



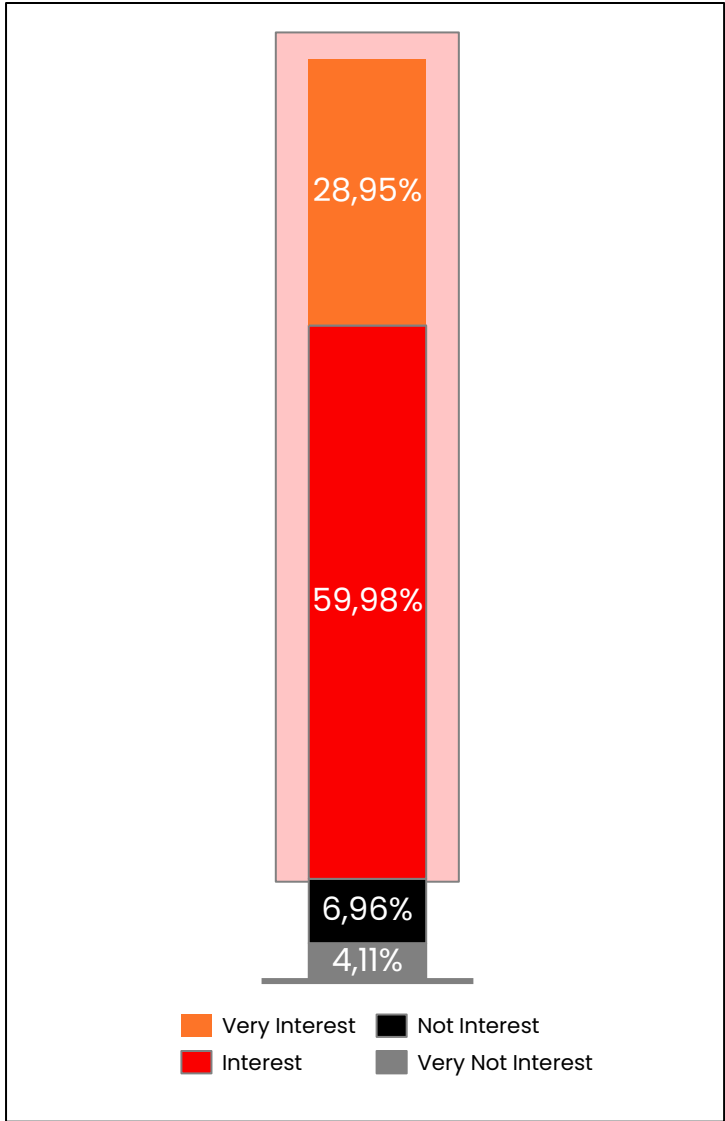
Background	<ul style="list-style-type: none"><li>Continuing Telkomsel’s FMC Journey vision, our goal is to leading in convergence.</li><li>Dynamic market conditions that threatening to erode our market share</li><li>The dragon project is being developed with aim of expanding our convergent customer base</li></ul>																								
Objectives	<ul style="list-style-type: none"><li>Market Responses toward Dragon project</li><li>Key opportunities for Telkomsel to strengthen its position in convergence</li><li>Asses the effectiveness of awareness and identified potential barrier.</li><li>Examine customer perceived toward the dragon project</li></ul>																								
Hypothesis	<ul style="list-style-type: none"><li>No hypothesis full exploration</li></ul>																								
Methodology	<ul style="list-style-type: none"><li>In-house online survey conducted using Survey Monkey</li><li>Quantitative</li><li>Sampling method : Purposive defined sampling with descriptive analysis</li><li>Survey period : 23-24 June 2024</li></ul>																								
	<table><tr><th>Study</th><th>Segment</th><th>Criteria</th><th>Whitelist</th><th>Takers</th><th>TUR</th></tr><tr><td>Dragon Survey Pilot City</td><td>Segment Q3</td><td><ul style="list-style-type: none"><li>Tsel Mobile, Non IndiHome User</li><li>Sukabumi and Kab Sukabumi</li></ul></td><td>112,164</td><td>1693</td><td>1.51%</td></tr><tr><td>Dragon Survey Non-Pilot City</td><td>Segment Q3</td><td><ul style="list-style-type: none"><li>Tsel Mobile, Non IndiHome User</li><li>12 City Control</li></ul></td><td>120,000</td><td>369</td><td>0.3%</td></tr><tr><td></td><td colspan="2">Total</td><td>232,164</td><td>2062</td><td>0.89%</td></tr></table>	Study	Segment	Criteria	Whitelist	Takers	TUR	Dragon Survey Pilot City	Segment Q3	<ul style="list-style-type: none"><li>Tsel Mobile, Non IndiHome User</li><li>Sukabumi and Kab Sukabumi</li></ul>	112,164	1693	1.51%	Dragon Survey Non-Pilot City	Segment Q3	<ul style="list-style-type: none"><li>Tsel Mobile, Non IndiHome User</li><li>12 City Control</li></ul>	120,000	369	0.3%		Total		232,164	2062	0.89%
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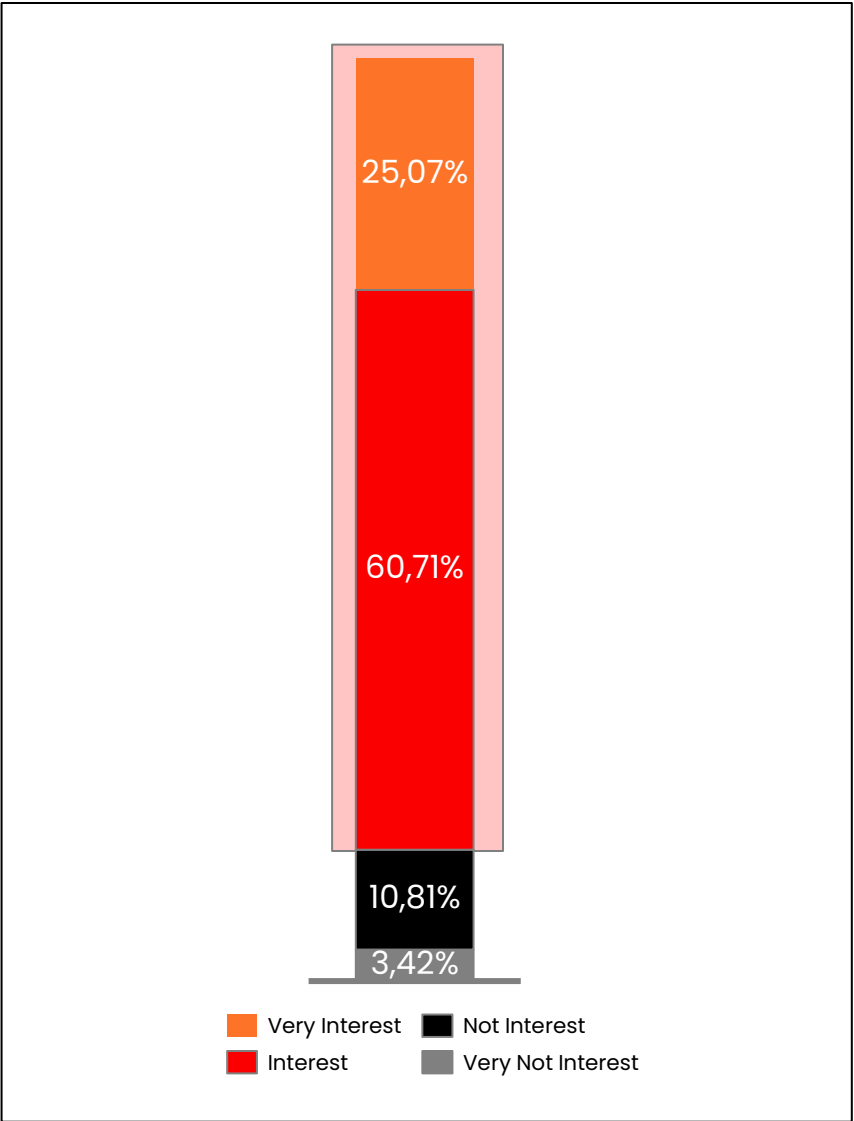
# **Pilot City**

***(Kota Sukabumi & Kab Sukabumi)***

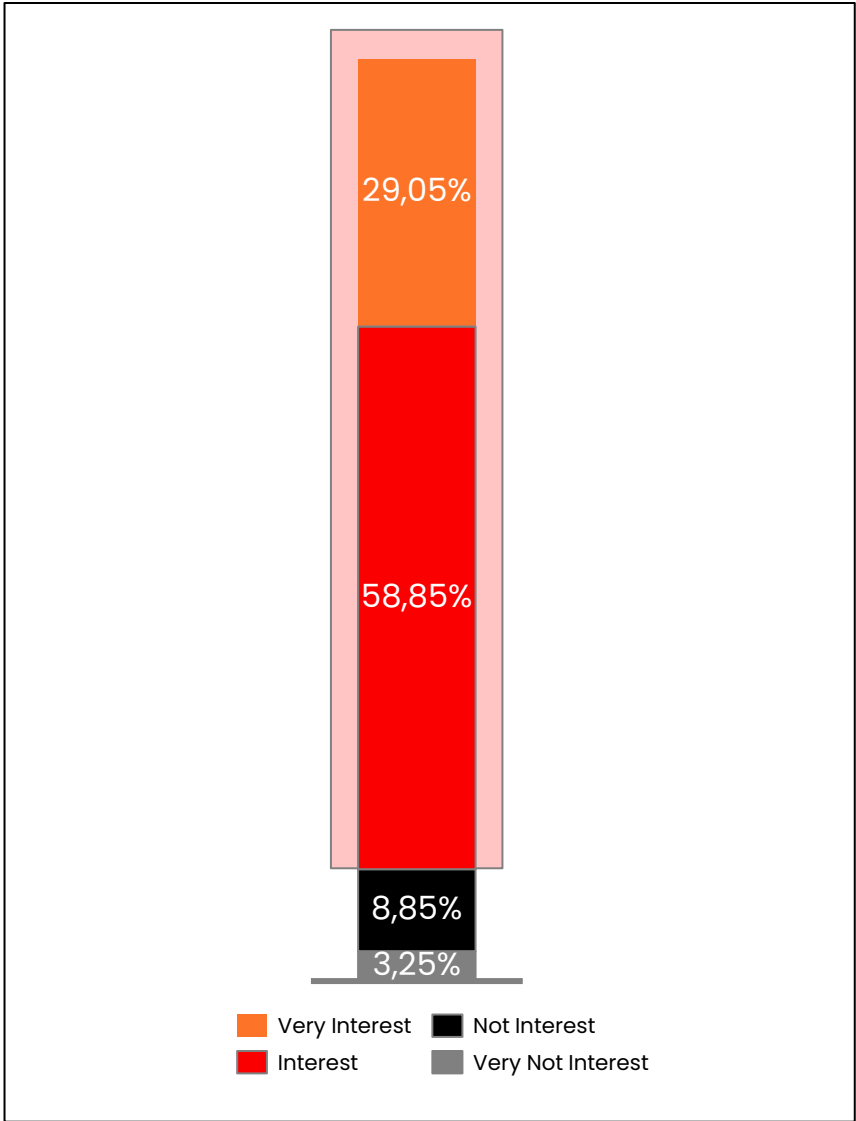
Most of respondent are interested with the concept of project dragon (88,93%), which offers a bundle of cellular and internet Wi-Fi, featuring a single bill and Cellular and Internet Wi-Fi within one brand provider.



Q1 : Menurut Anda, Apakah produk yang memberikan layanan bundle Kartu Selular dan layanan Internet WiFi menarik?



Q2 : Seberapa menarik penawaran produk yang memberikan layanan selular (Pembelian Paket data) dan tagihan internet rumah dalam satu tagihan (One Bill)?



Q3 : Seberapa menarik penawaran Produk Kartu Selular dan Internet Wi-Fi Rumah dari Satu Merek (Brand) (Contoh: Telkomsel dan Indihome, XL dan XL home,dsb)?

However, 53,18% is still not familiar with Telkomsel One, only 46,83% knows about Telkomsel one (34,40% have heard, 12,43% have received information about Telkomsel one)



Yes, I Know and have heard about Telkomsel One



Yes, I Know and have received offer from Telkomsel One

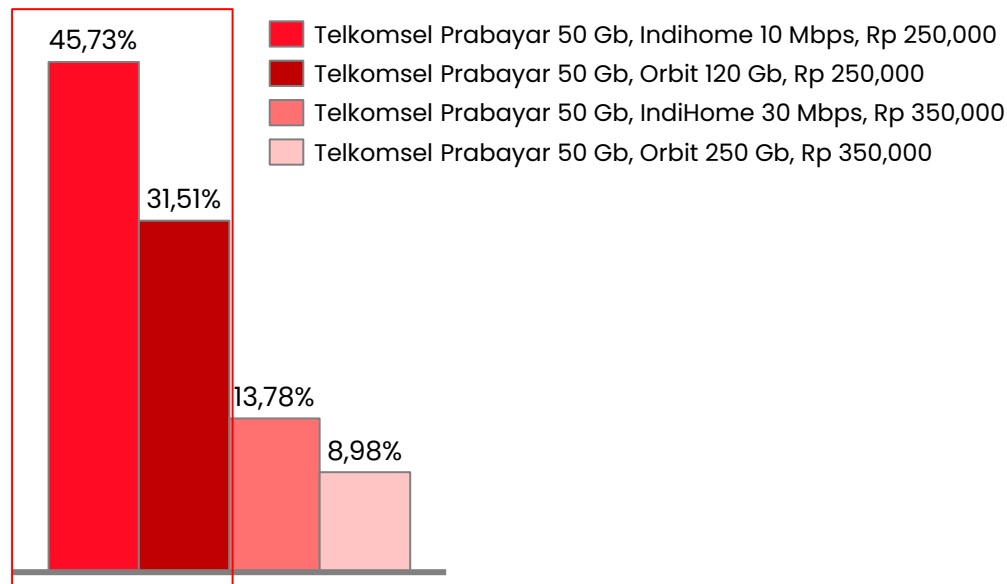


No, I don't Know

53,18%

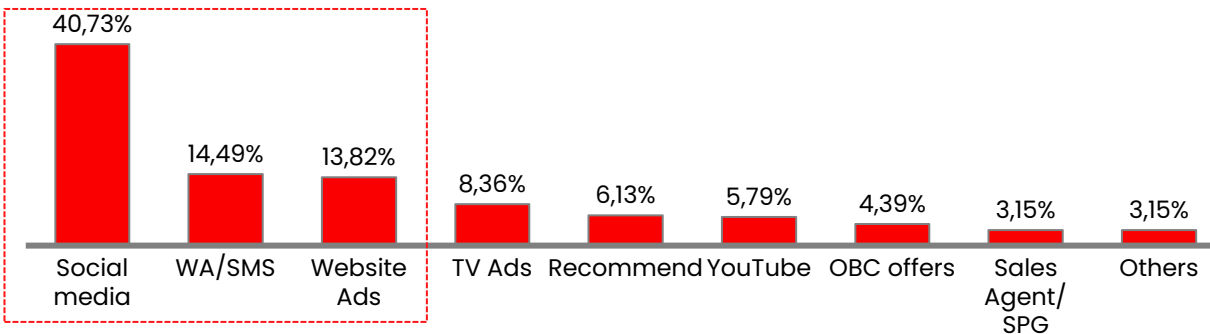
Q4 : Apakah anda mengetahui Layanan Telkomsel One ?

45,73% interest with combination product Telkomsel Prabayar 50Gb, IndiHome 10Mbps, Rp 250,000.



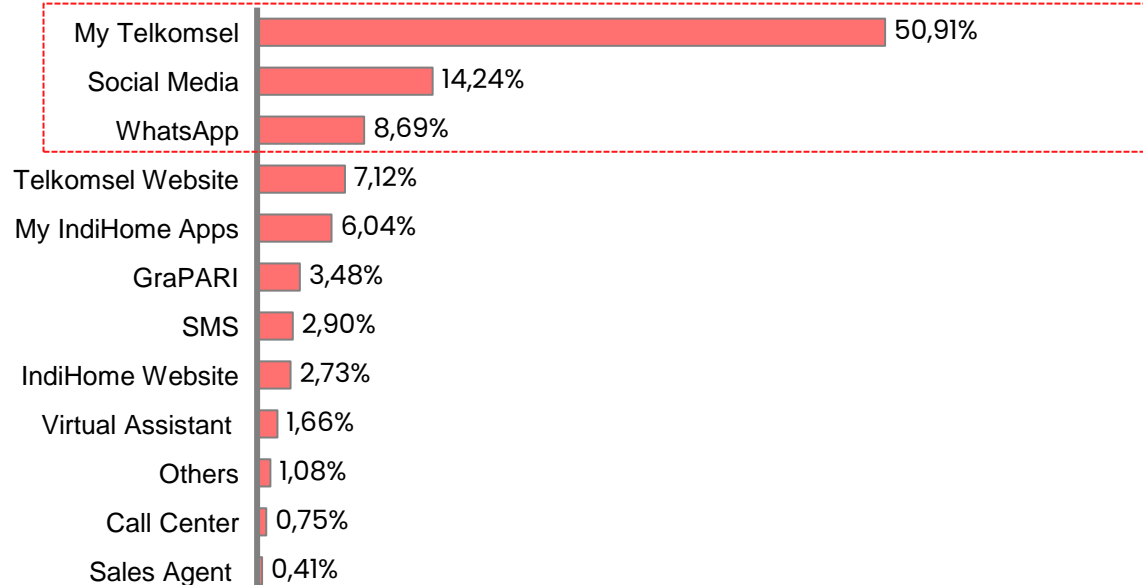
Q7: Jika Anda mendapatkan penawaran produk dari Telkomsel One berupa Telkomsel Prabayar Kuota Keluarga dan Layanan Internet Wi-Fi, Manakah dari pilihan berikut yang paling menarik menurut Anda ?

Social media, WA/SMS, Website ads are the effective channel to get awareness of Telkomsel One from audiences



Q5 : Dimana Anda pernah mendengar/mengetahui mengenai Telkomsel One?

My Telkomsel, Social Media and WhatsApp become preferences channel to find information about Telkomsel One

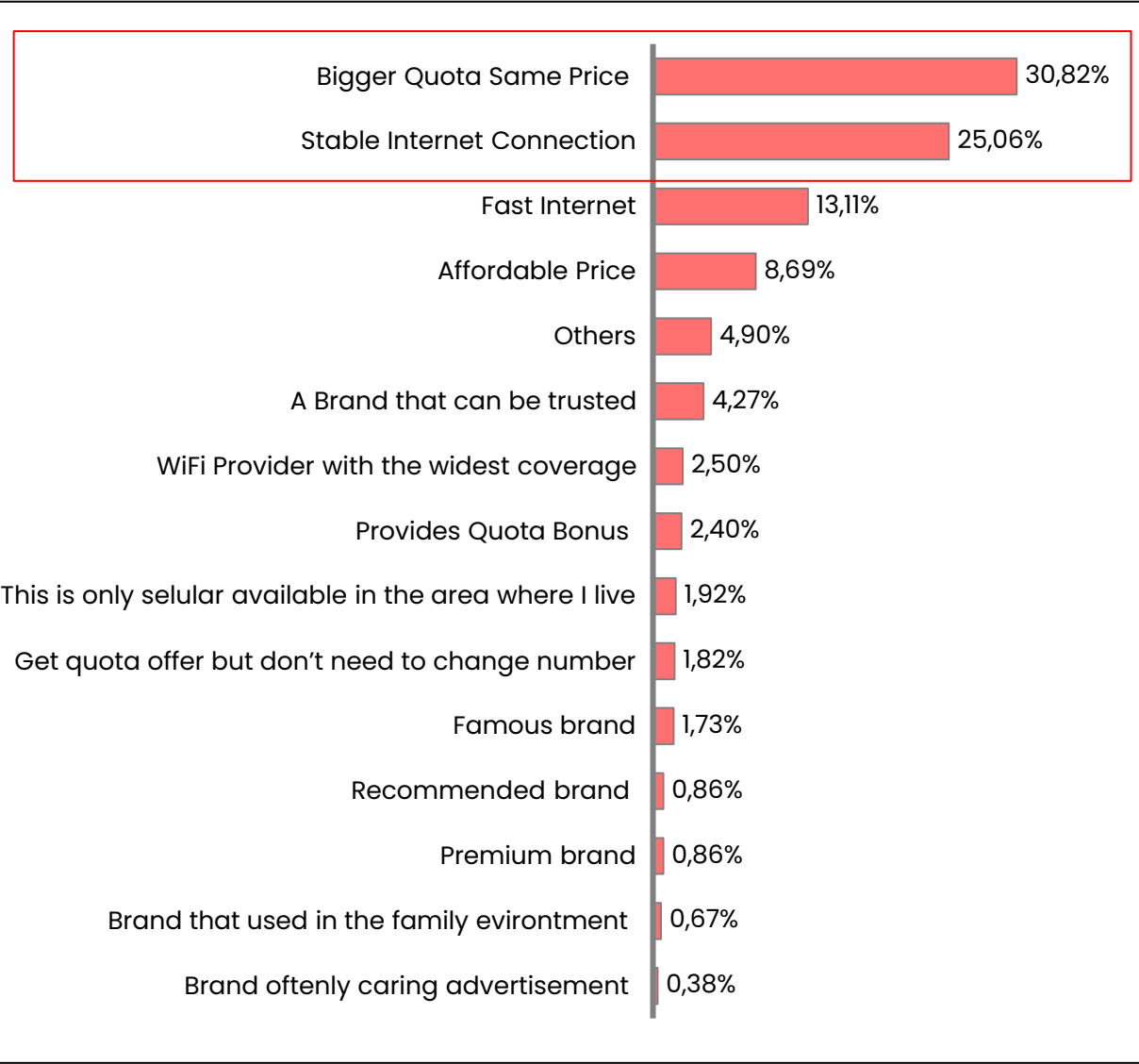


Q6 : Media/Saluran (Channel) Apa yang menjadi preferensi Anda untuk mencari Tahu Mengenai Telkomsel One ?

# Bigger Quota with Same Price and Internet Stable become main factors for users when choosing the services

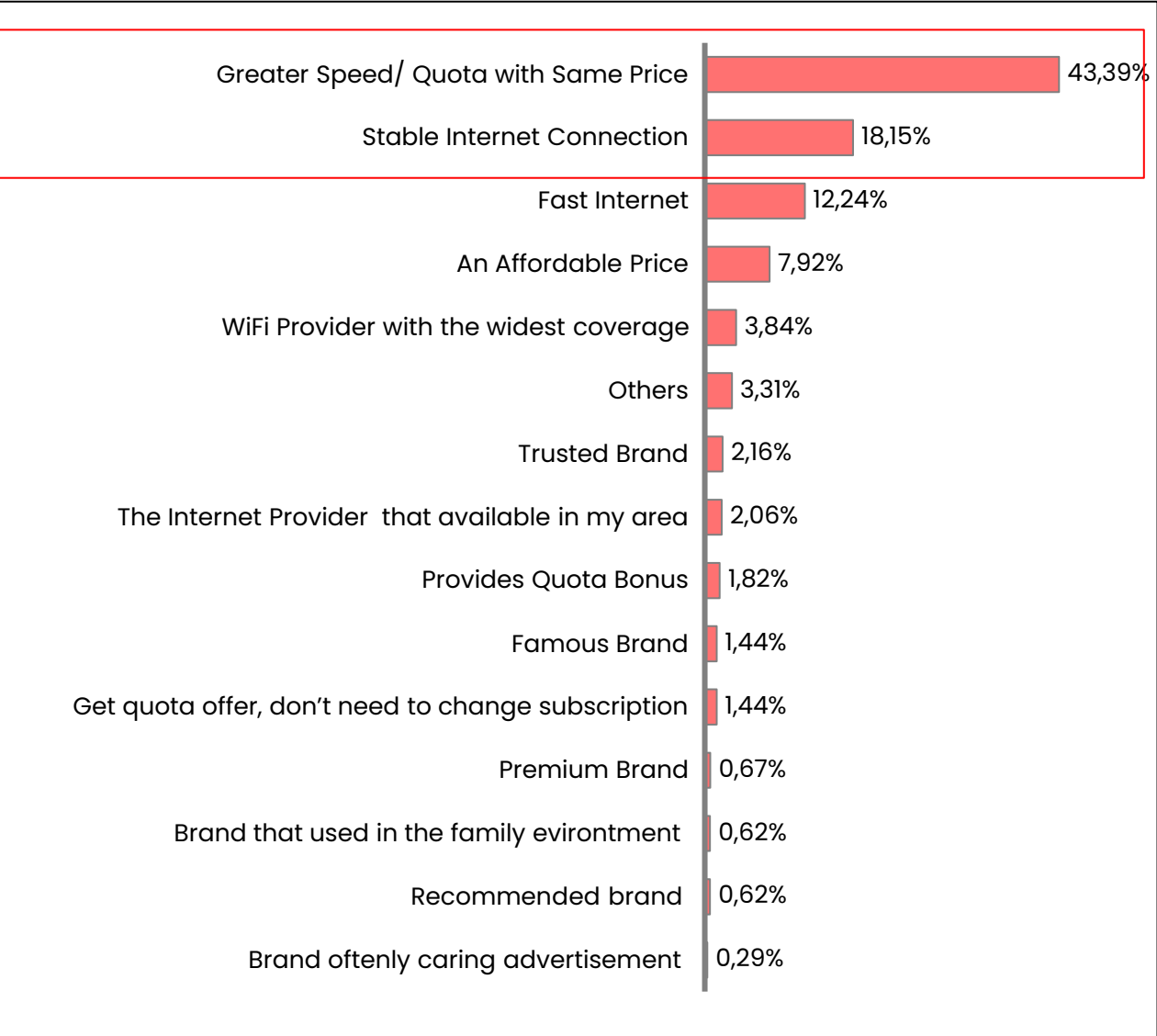


## Importance Factor using Cellular Services



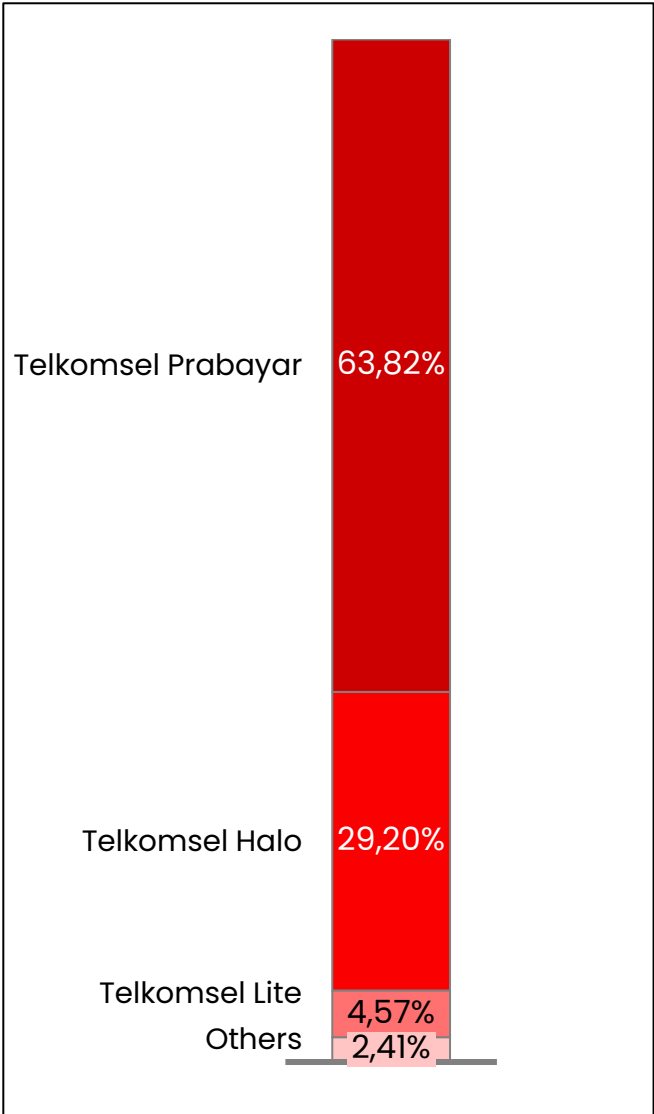
Q8 : Faktor apa yang menjadi penting untuk dalam pemilihan Kartu Selular ?

## Importance Factor using Internet Wi-Fi

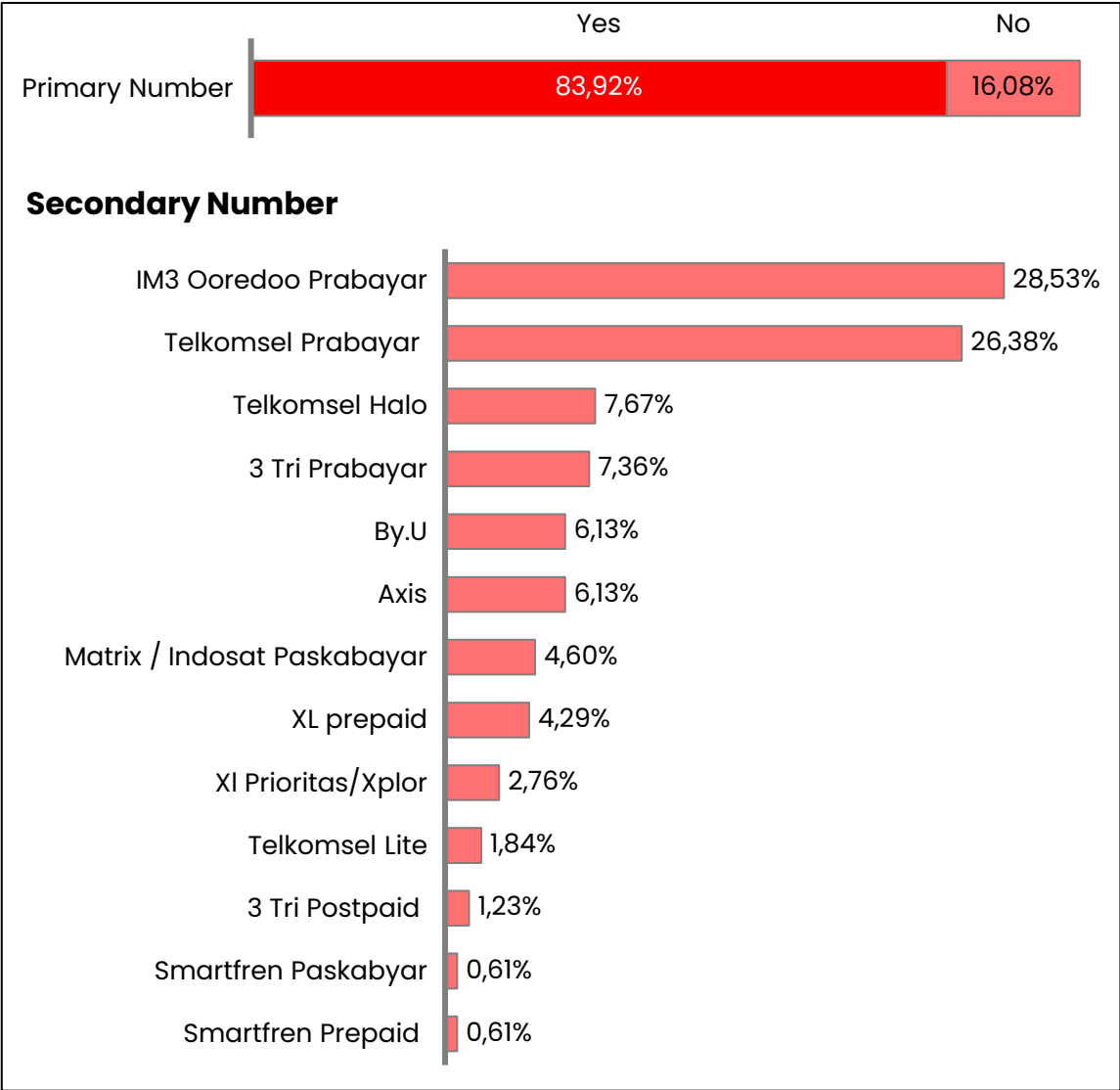


Q9: Faktor apa yang paling penting dan menjadi pertimbangan memilih layanan Internet Wi-Fi ?

63,82% of respondents use Telkomsel Prepaid. IM3 Prabayar and Telkomsel Prabayar become brand commonly used as their secondary number

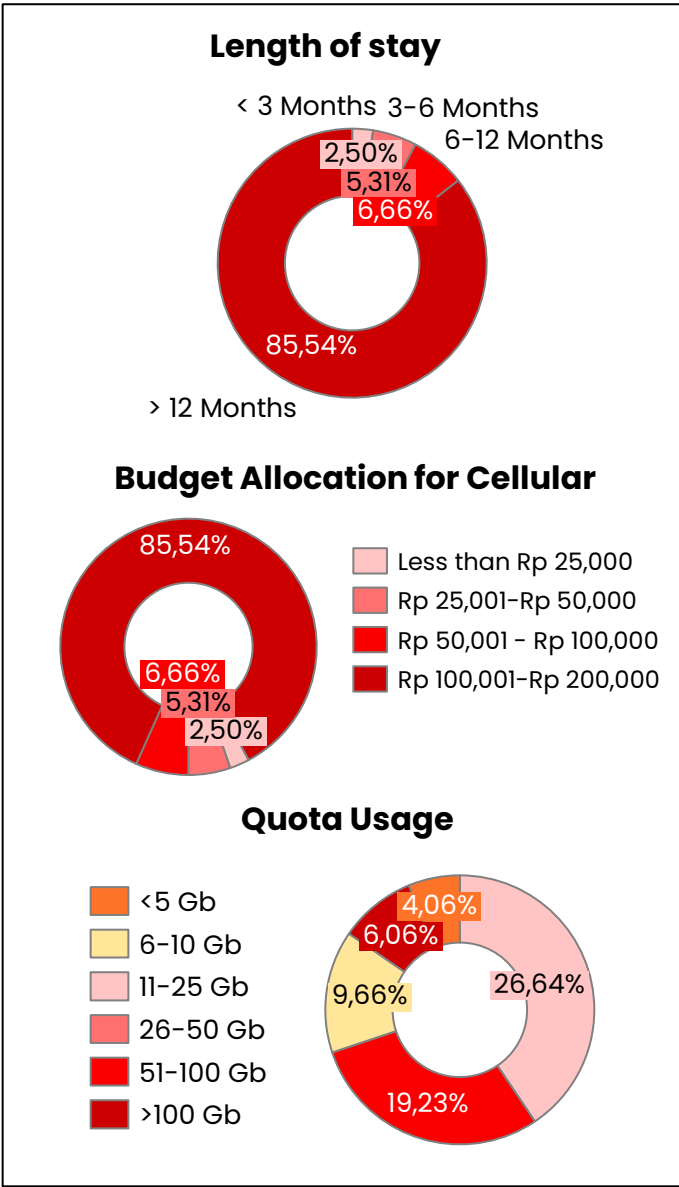


Q10: Merek (Brand) Kartu Selular Anda gunakan saat ini ?



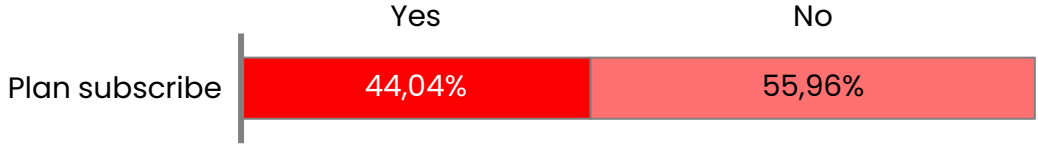
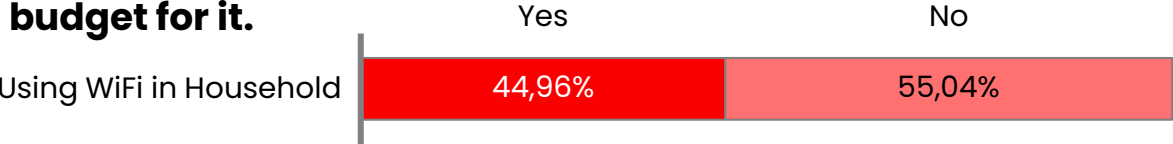
Q11 : Apakah nomor ini adalah nomor satu-satunya yang aktif digunakan ?

Q12: Brand Kartu Selular Apa yang Anda Gunakan selain {{ Q10 }}?

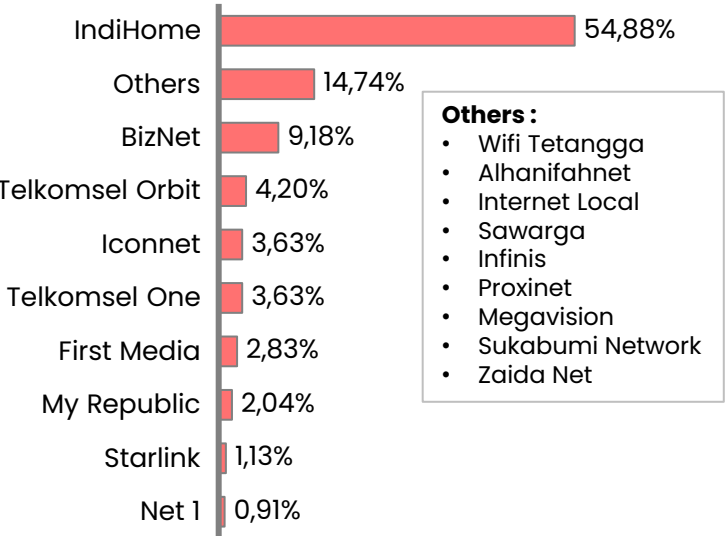




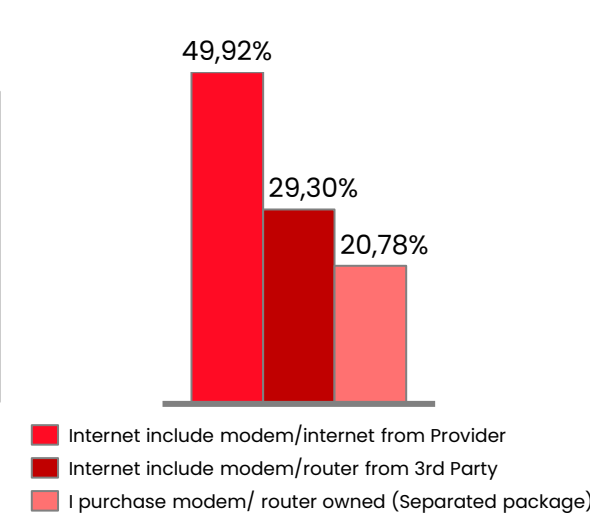
**55.04% of respondents claim they don't use Wi-Fi, 44.04% and intend to subscribe in the future . Meanwhile for the respondent who does not need Wi-Fi ,their main reason is just they feel sufficient with cellular and no additional allocation budget for it.**



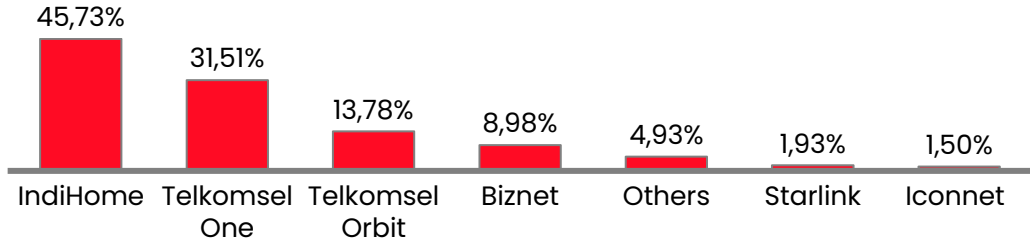
**Top 10 Brand used in Household**



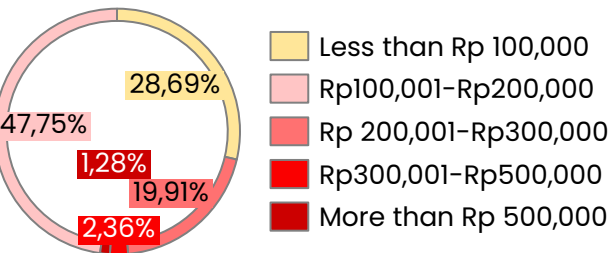
**Preferences Modem/Router Option**



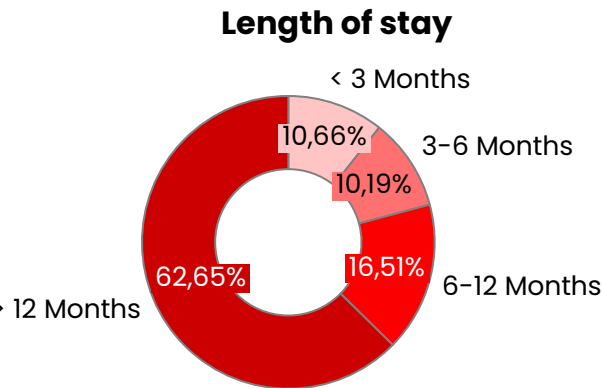
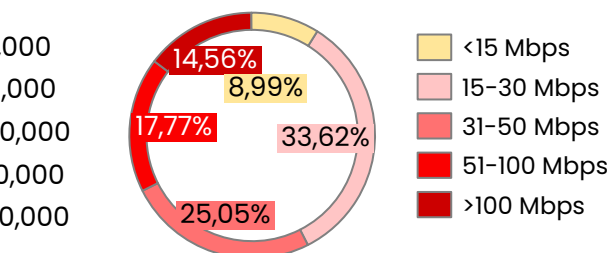
**Future Internet Provider Consideration**



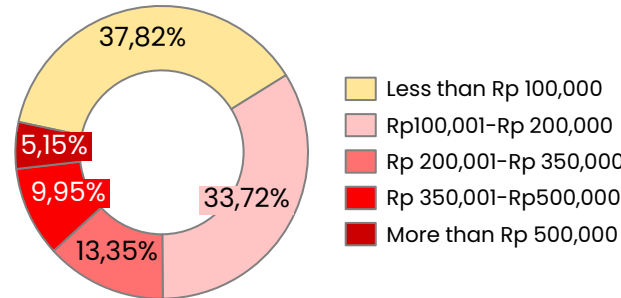
**Budget Allocation**



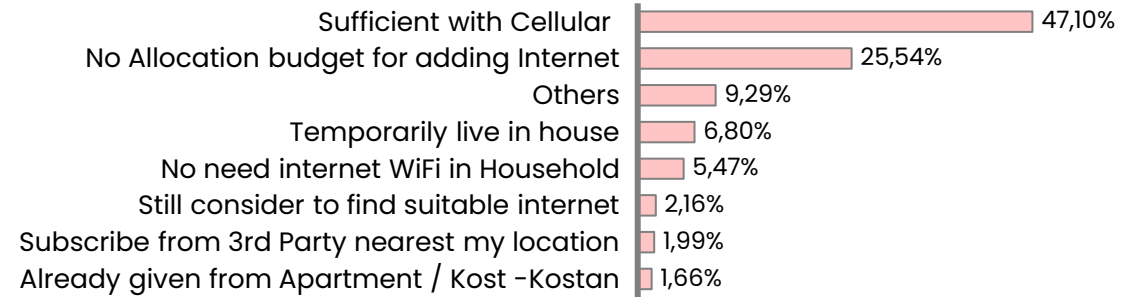
**Internet Speed Needs in Households**



**Budget Allocation for Internet Wi-Fi**



**Reason no need to subscribe Home Internet**

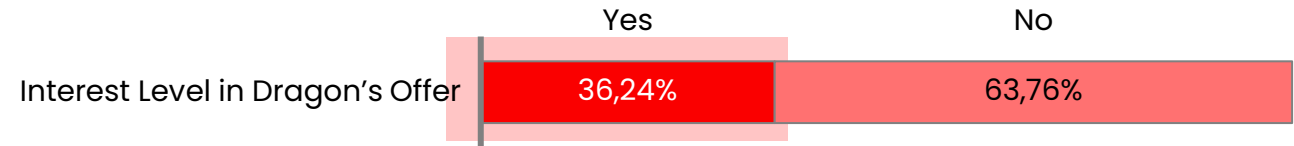


Q16: Apakah Anda menggunakan Internet Wi-Fi di Hunian Anda?

Q17 : Dalam waktu dekat, Apakah Anda memiliki rencana untuk menambah / membeli Internet Wi-Fi di hunian Anda ?

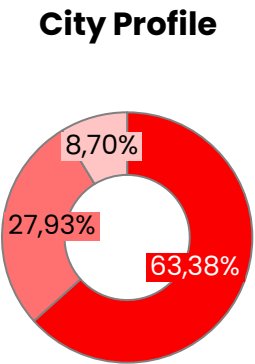


36,24% interest in Dragon offer with 63,38% those who interest skewness location in Kab. Sukabumi.

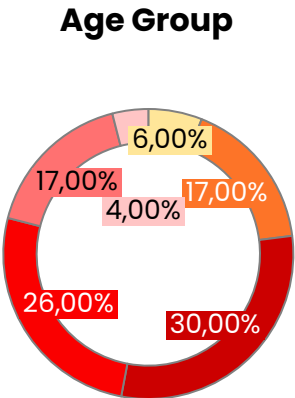


Product Option	Interest	Not Interest
Telkomsel Prabayar Kuota Keluarga 50 GB (Bebas Telepon dan SMS, untuk 2-3 Anggota Keluarga) dan IndiHome Kecepatan 10 Mbps, Harga Rp 250,000	34%	66%
Telkomsel Prabayar Kuota Keluarga 50 GB (Bebas Telepon dan SMS, untuk 2-3 Anggota Keluarga) dan IndiHome Kecepatan 30 Mbps, Harga Rp 350,000	44%	56%
Telkomsel Prabayar Kuota Keluarga 50 GB (Bebas Telepon dan SMS, untuk 2-3 Anggota Keluarga) dan Kuota Orbit 120 Gb, Harga Rp 250,000	34%	66%
Telkomsel Prabayar Kuota Keluarga 50 GB (Bebas Telepon dan SMS, untuk 2-3 Anggota Keluarga) dan Kuota Orbit 120 Gb, Harga Rp 350,000	39%	61%

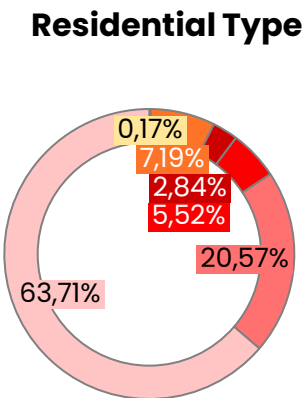
Segment Interest Profile



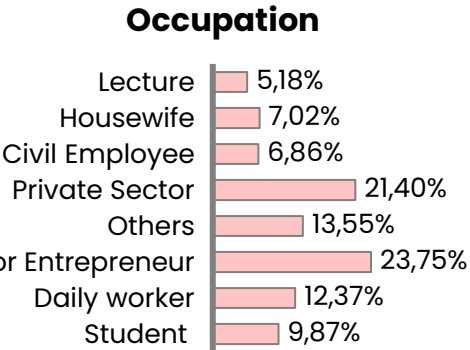
Kab. Sukabumi  
Kota Sukabumi  
Others



< 18 y.o  
18-24 y.o  
25-35 y.o  
36-45 y.o  
46-55 y.o  
> 55 y.o

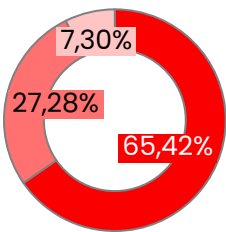


Apartement  
Rent House  
Kost- Kostan  
Others  
House in Residence  
House



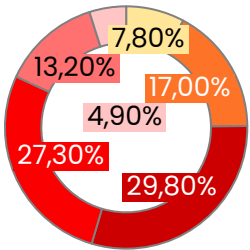
Segment Not Interest Profile

City Group



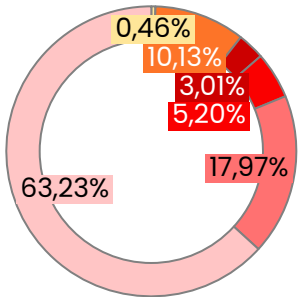
Kab. Sukabumi  
Kota Sukabumi  
Others

Age Group



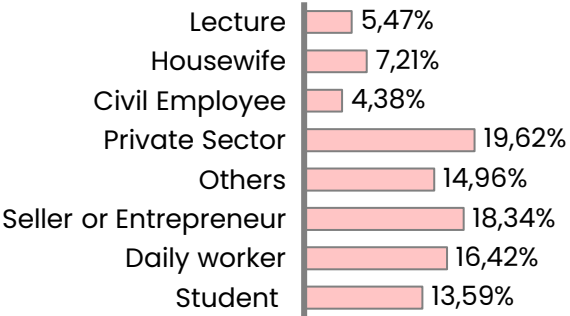
< 18 y.o  
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Residential Type



Apartement  
Rent House  
Kost- Kostan  
Others  
House in Residence  
House

Occupation





# **Non-Pilot City**

*(12 control cities)*

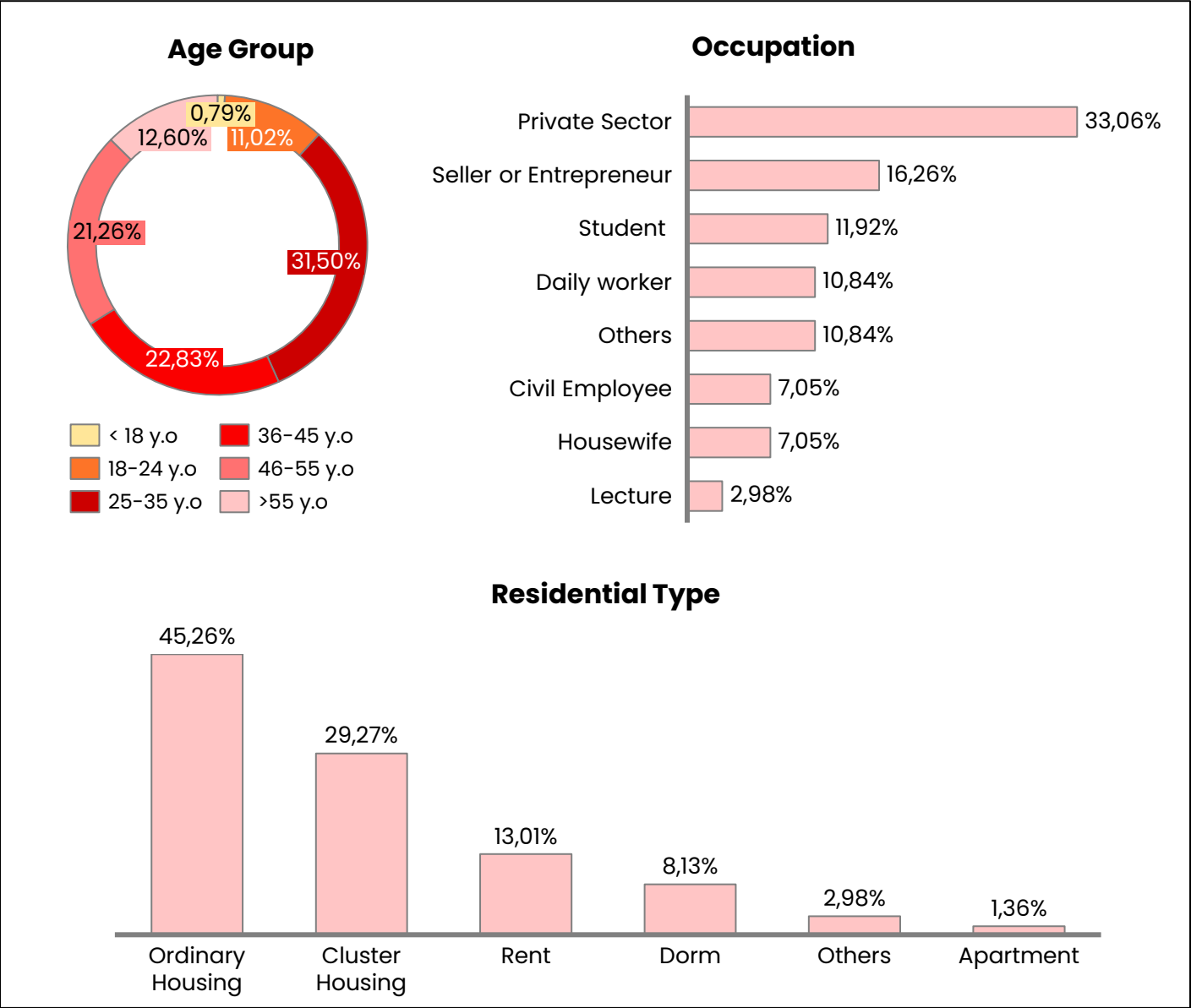
# Profile Non-Pilot Cities



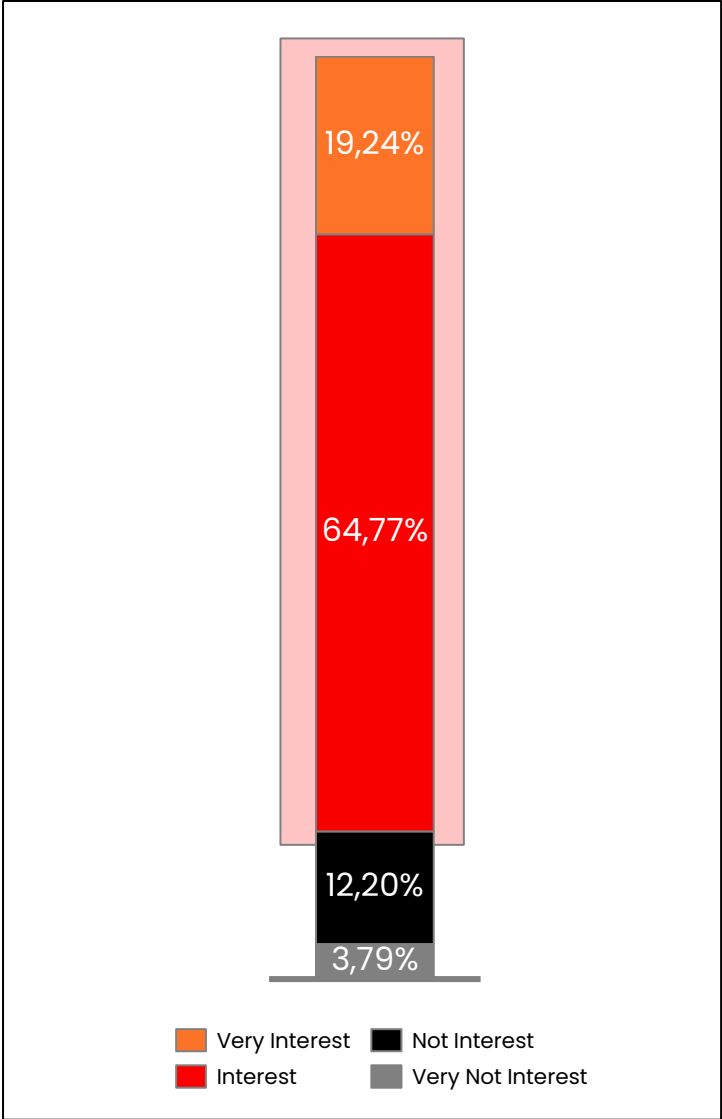
## 12 Control City

Region	Convergent City	N
WESTERN JABOTABEK	KOTA TANGERANG SELATAN	38
CENTRAL JABOTABEK	KOTA JAKARTA SELATAN	29
CENTRAL JABOTABEK	KOTA JAKARTA TIMUR	30
CENTRAL JABOTABEK	KOTA JAKARTA UTARA	19
EASTERN JABOTABEK	KOTA BEKASI	31
BALI NUSRA	BULELENG	12
BALI NUSRA	KOTA MATARAM	22
JATENG DIY	KOTA YOGYAKARTA	43
JATIM	JEMBER	24
JATIM	KOTA MALANG	31
JATIM	KOTA SURABAYA	30
JATIM	SIDOARJO	27

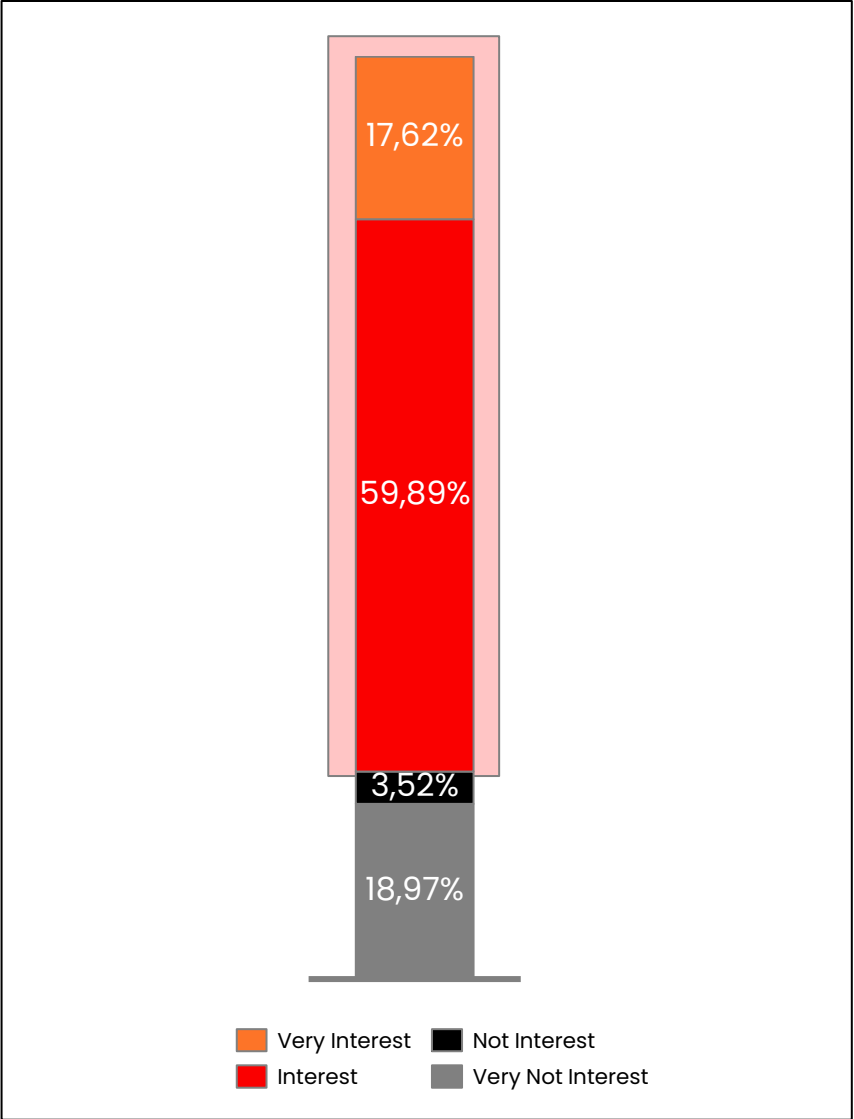
Threshold Mobile Share : <60% | Wi-Fi penetration : >80%



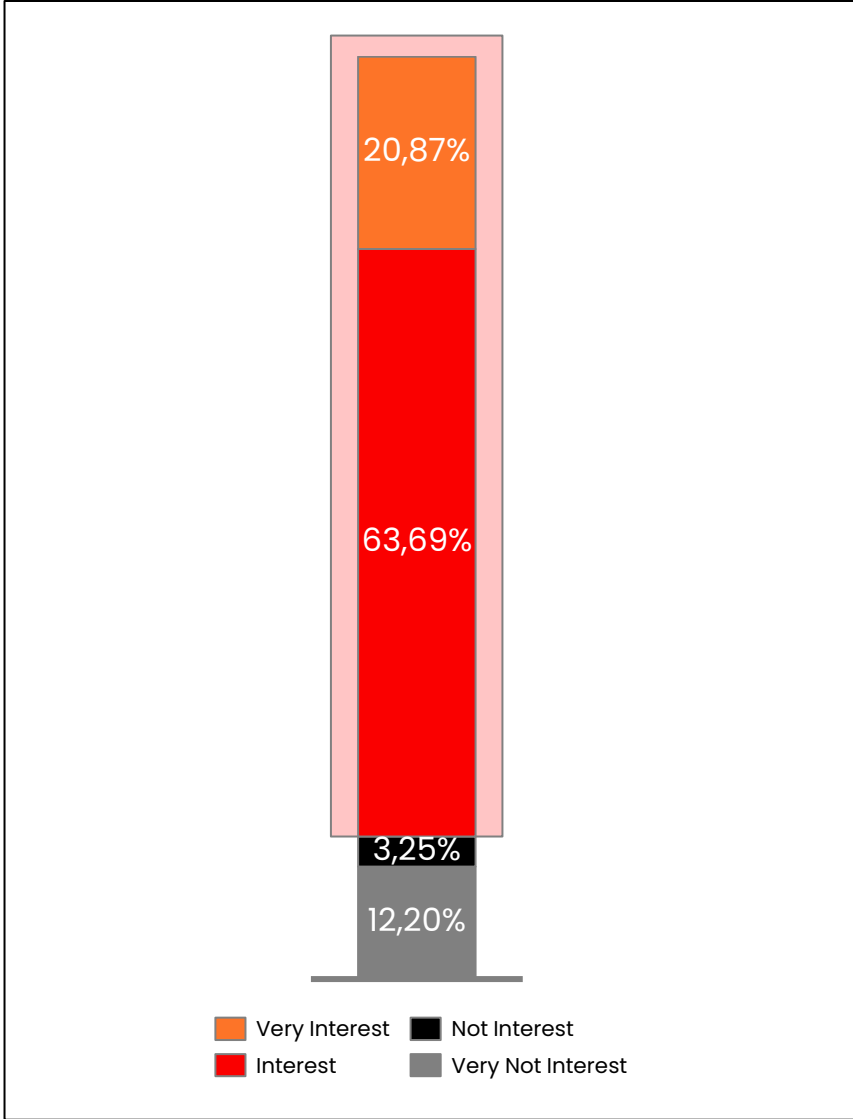
Most of respondent are interested with the concept of project dragon (84.01%), which offers a bundle of cellular and internet Wi-Fi, featuring a single bill and Cellular and Internet Wi-Fi within one brand provider.



Q1 : Menurut Anda, Apakah produk yang memberikan layanan bundle Kartu Selular dan layanan Internet WiFi menarik?

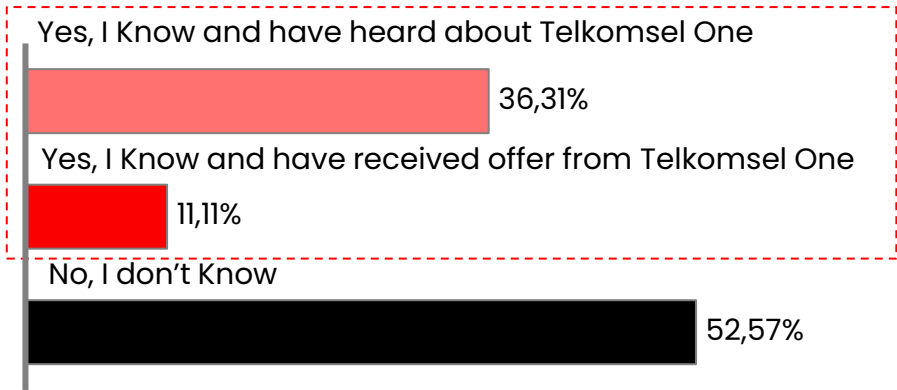


Q2 : Seberapa menarik penawaran produk yang memberikan layanan selular (Pembelian Paket data) dan tagihan internet rumah dalam satu tagihan (One Bill)?



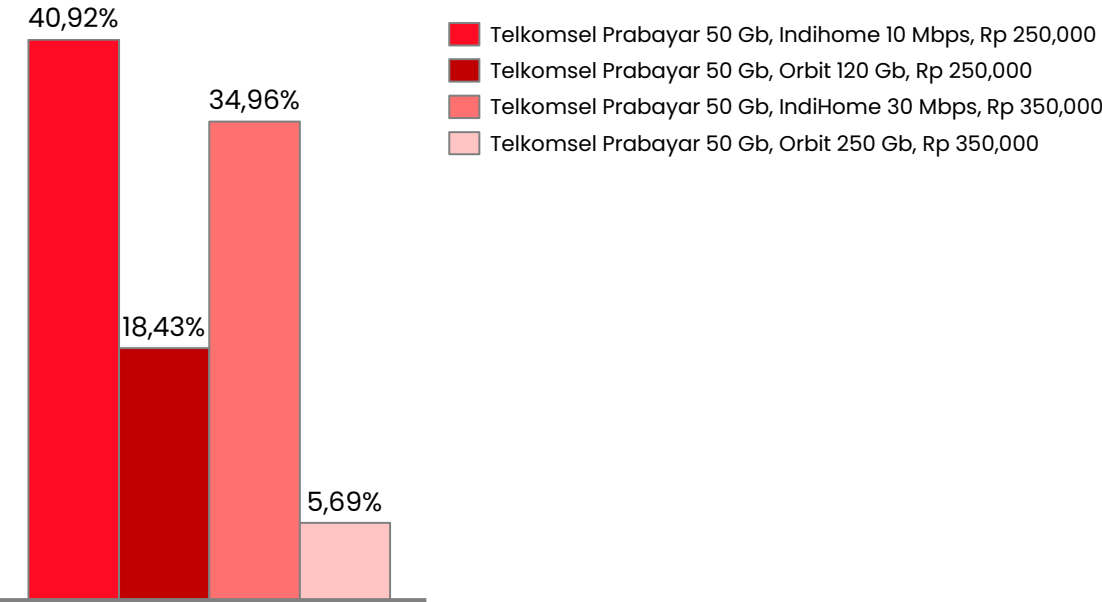
Q3 : Seberapa menarik penawaran Produk Kartu Selular dan Internet Wi-Fi Rumah dari Satu Merek (Brand) (Contoh: Telkomsel dan Indihome, XL dan XL home,dsb)?

52.57% respondent aren't familiar with Telkomsel One, while 47,43% respondents are familiar with Telkomsel one (36,31% have heard, while 11,11% have received information about Telkomsel one)



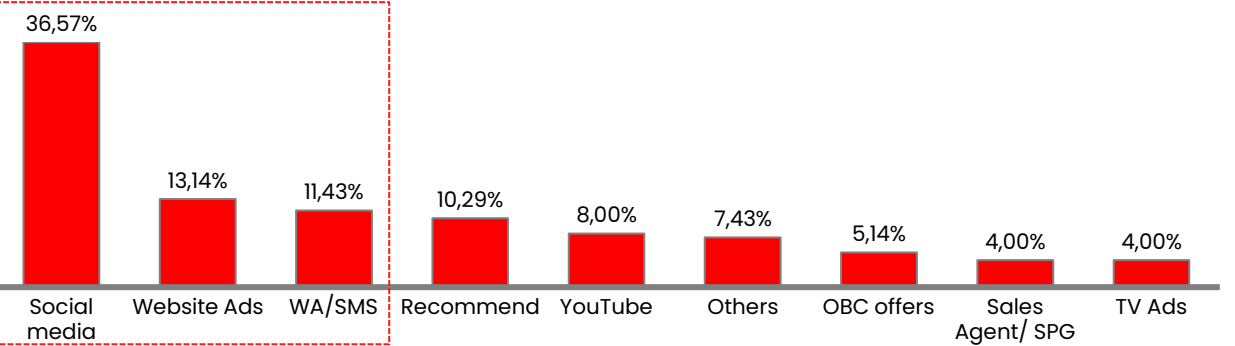
Q4 : Apakah anda mengetahui Layanan Telkomsel One ?

40,92% interest with combination product Telkomsel Prabayar 50Gb, IndiHome 10Mbps, Rp 250,000.



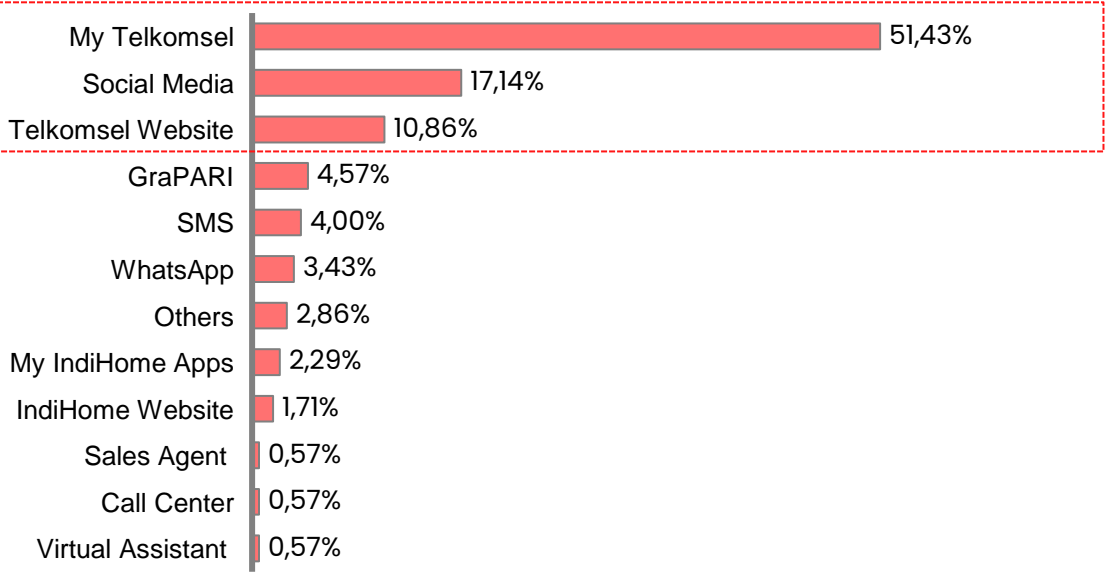
Q7: Jika Anda mendapatkan penawaran produk dari Telkomsel One berupa Telkomsel Prabayar Kuota Keluarga dan Layanan Internet Wi-Fi, Manakah dari pilihan berikut yang paling menarik menurut Anda ?

Social media, Website ads, and WA/SMS are effective channel for spread awareness of Telkomsel One



Q5 : Dimana Anda pernah mendengar/mengetahui mengenai Telkomsel One?

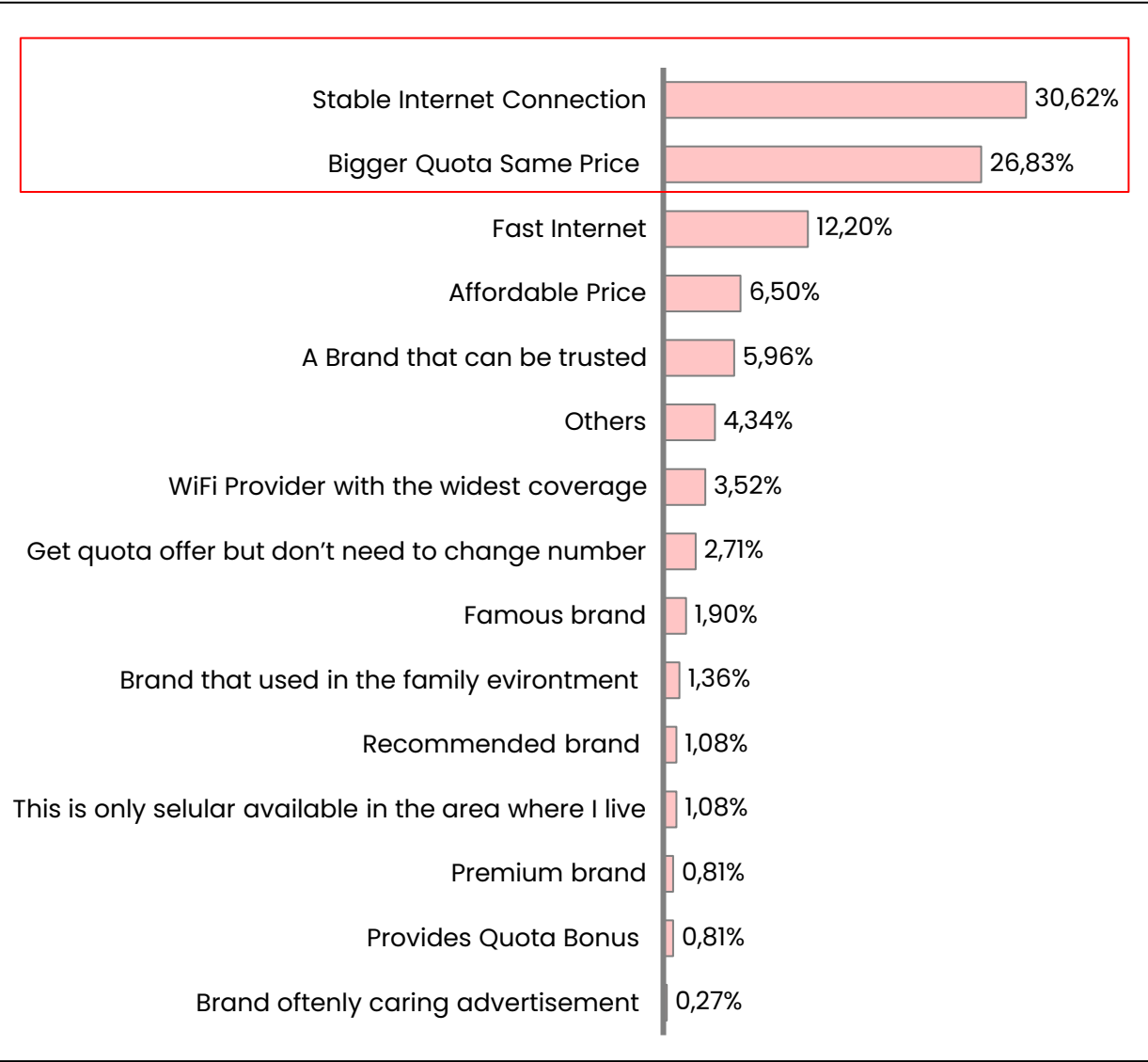
But respondents prefer to get information about Telkomsel One through My Telkomsel, Social media, and Telkomsel Website



Q6 : Media/Saluran (Channel) Apa yang menjadi preferensi Anda untuk mencari Tahu Mengenai Telkomsel One ?

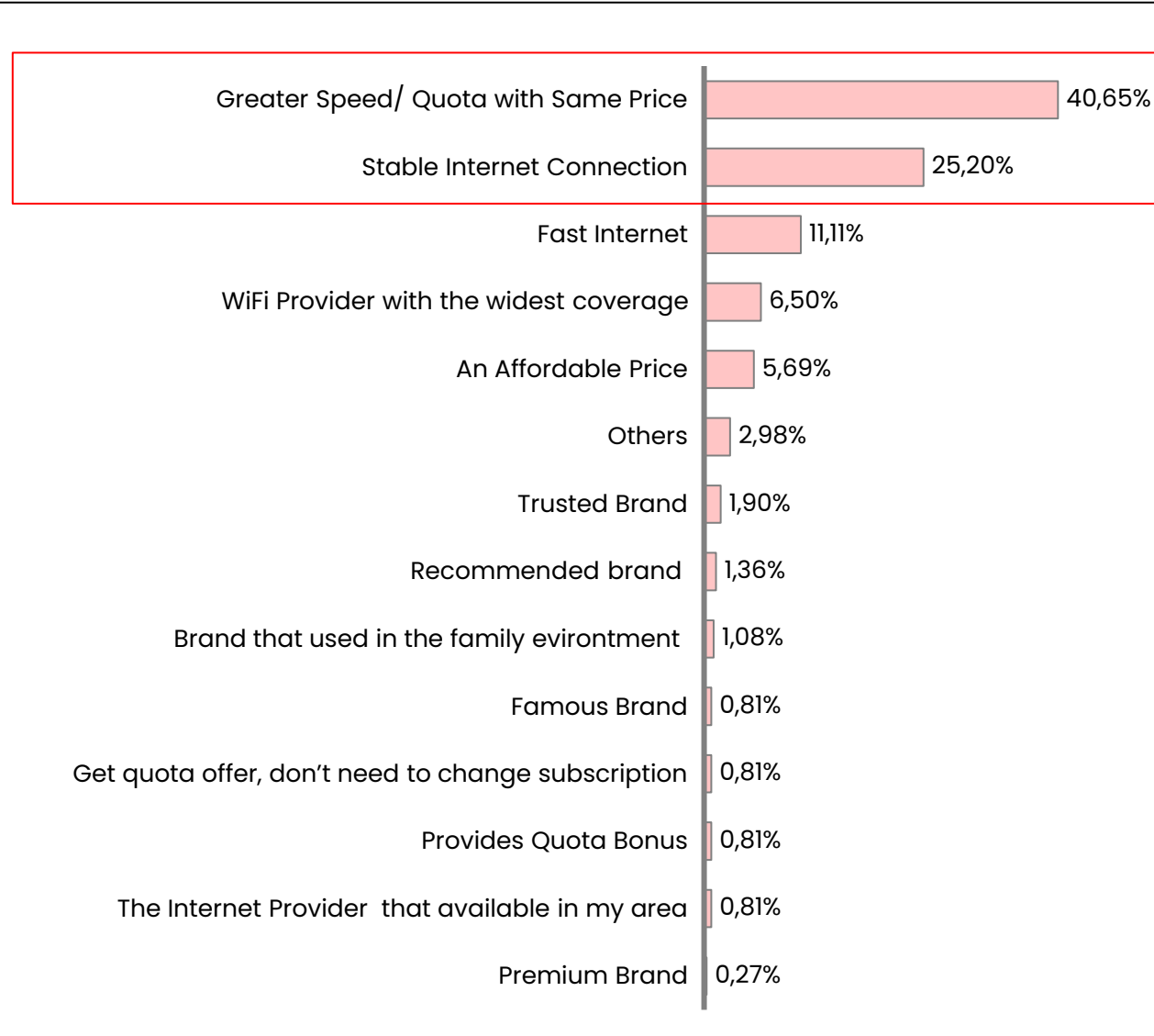
# Non-pilot respondents claimed that Stable Internet Connection is the most important factors for user when choosing the services

Importance Factor using Cellular Services



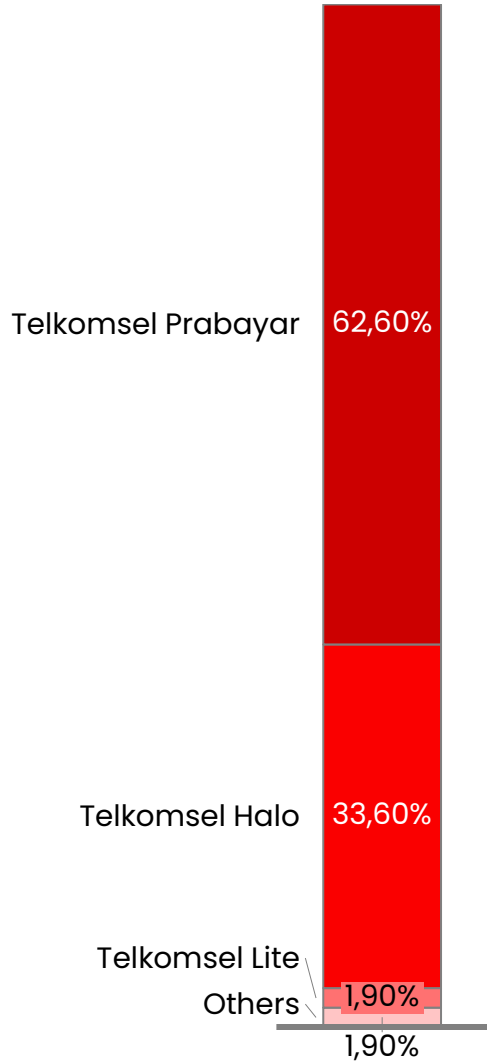
Q8 : Faktor apa yang menjadi penting untuk dalam pemilihan Kartu Selular ?

Importance Factor using Internet Wi-Fi

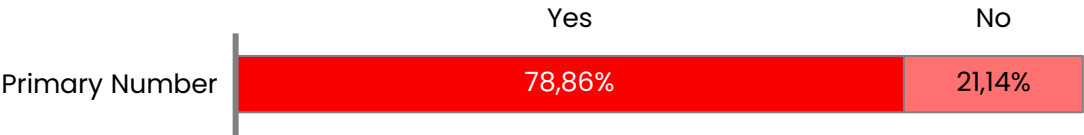


Q9: Faktor apa yang paling penting dan menjadi pertimbangan memilih layanan Internet Wi-Fi ?

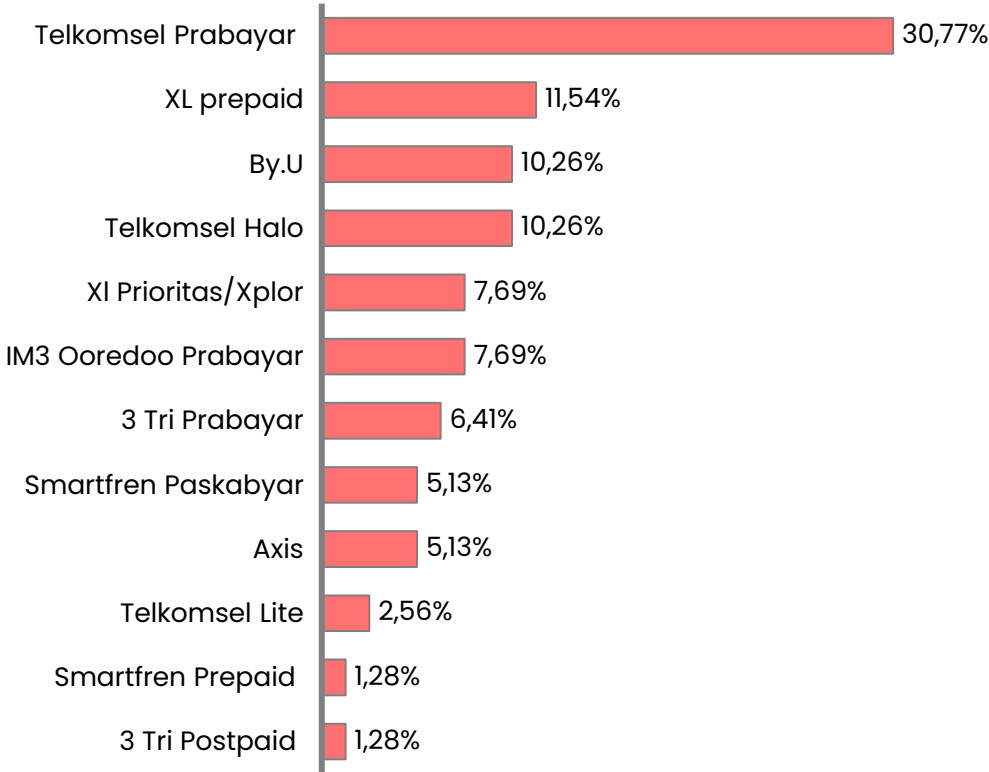
62,60% of respondents use Telkomsel Prepaid. Telkomsel Prabayar and XL Prepaid become brand commonly used as their secondary number



Q10: Merek (Brand) Kartu Selular Anda gunakan saat ini ?



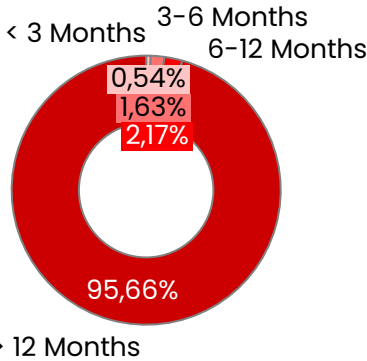
Secondary Number



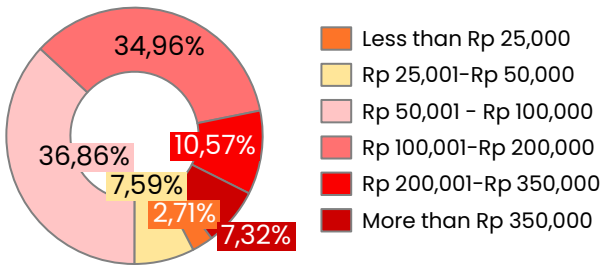
Q11 : Apakah nomor ini adalah nomor satu-satunya yang aktif digunakan ?

Q12: Brand Kartu Selular Apa yang Anda Gunakan selain {{ Q10 }}?

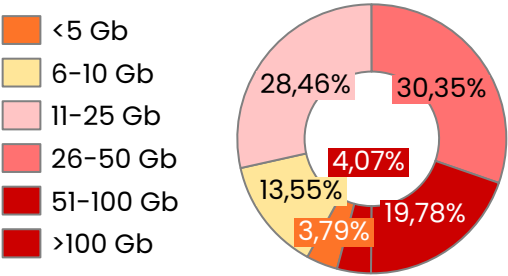
Length of stay



Budget Allocation for Cellular



Quota Usage



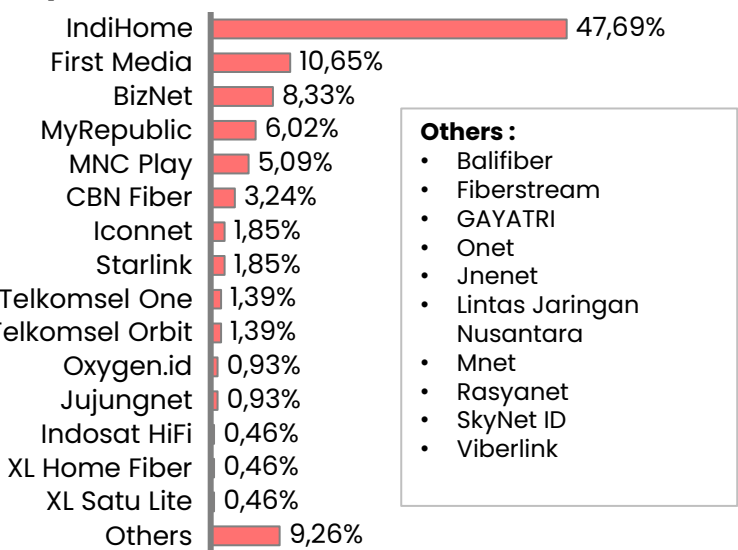


58.27% respondents are already WiFi subscribers and their top brand is IndiHome then First Media. While 41.73% haven't used WiFi and most of them doesn't plan to subscribe (58.44%) and their main reason is because they are already sufficient with cellular (48.89%).

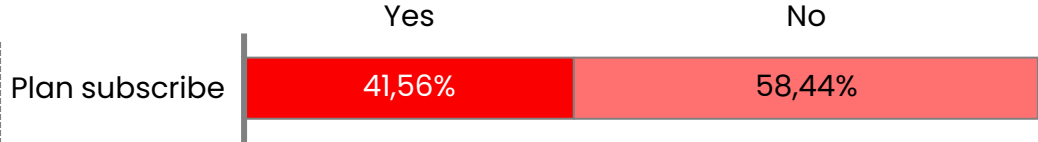
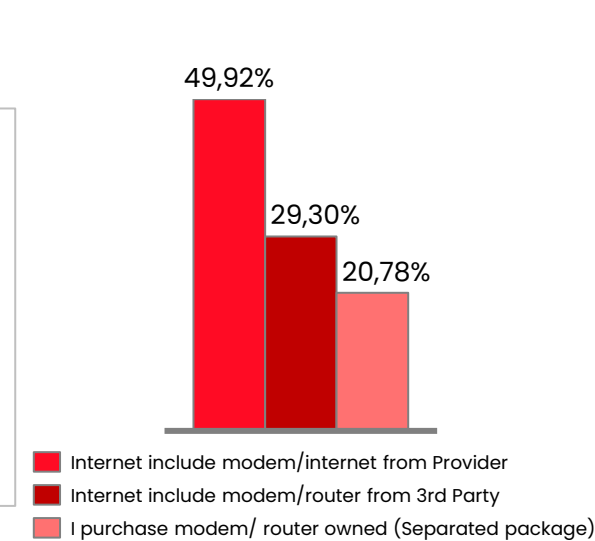




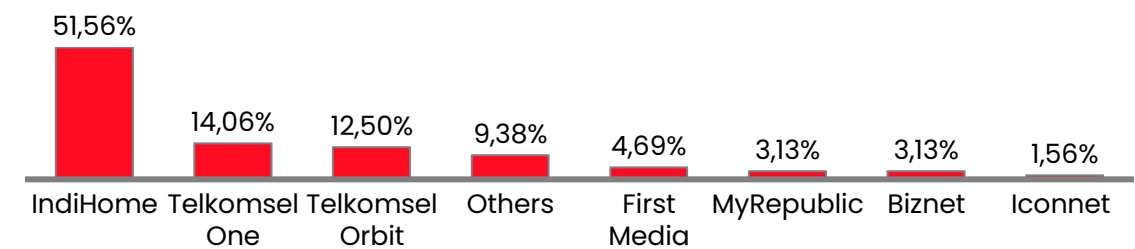
Top 10 Brand used in Household



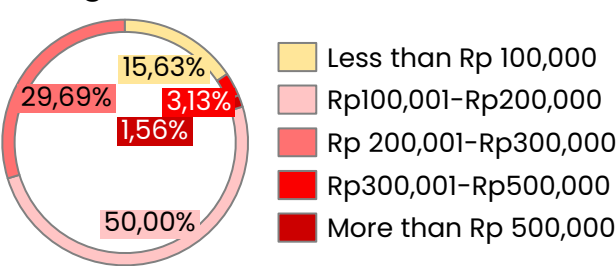
Preferences Modem/Router Option



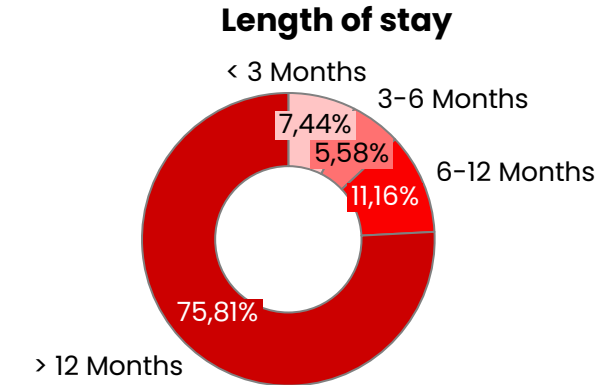
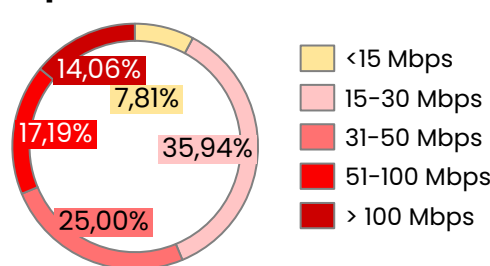
Future Internet Provider Consideration



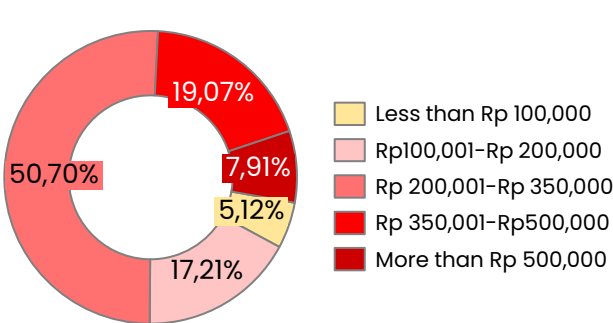
Budget Allocation



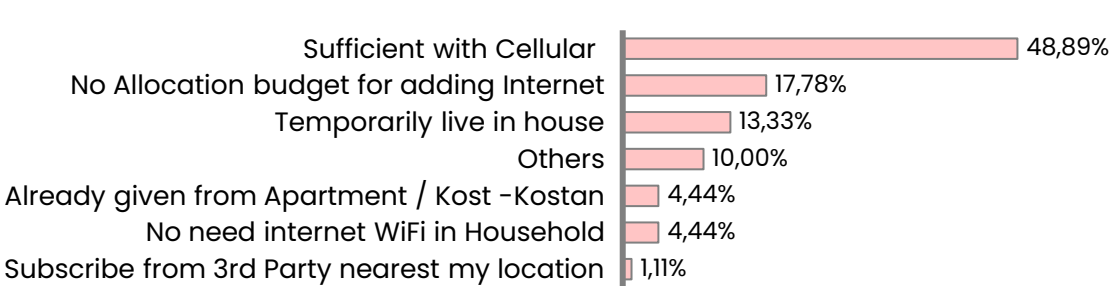
Internet Speed Needs in Households



Budget Allocation for Internet Wi-Fi



Reason no need to subscribe Home Internet

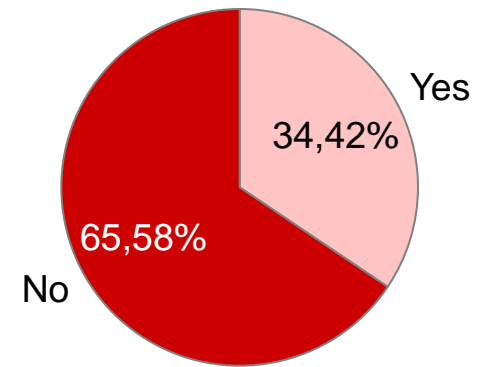


Q16: Apakah Anda menggunakan Internet Wi-Fi di Hunian Anda?  
 Q17 : Dalam waktu dekat, Apakah Anda memiliki rencana untuk menambah / membeli Internet Wi-Fi dihunian Anda ?

34.42% respondents are interested in Dragon offer. Those who's interested is from South Tangerang (44.74%).

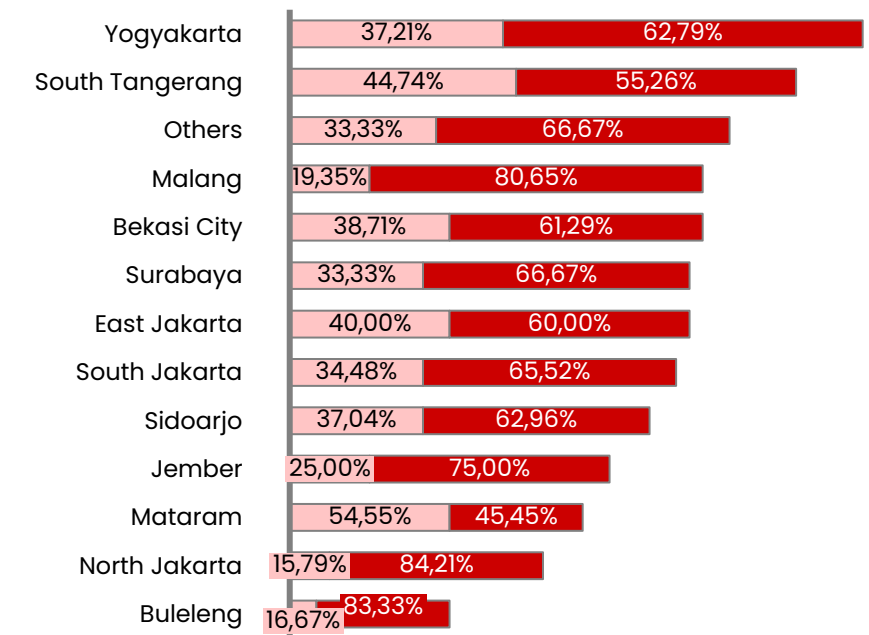


Interest Level in Dragon's Offer



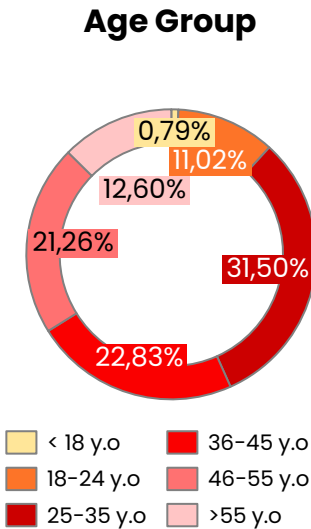
Product Option	Interest	Not Interest
Telkomsel Prabayar Kuota Keluarga 50 GB (Bebas Telepon dan SMS, untuk 2-3 Anggota Keluarga) dan IndiHome Kecepatan 10 Mbps, Harga Rp 250,000	28.48%	71.52%
Telkomsel Prabayar Kuota Keluarga 50 GB (Bebas Telepon dan SMS, untuk 2-3 Anggota Keluarga) dan IndiHome Kecepatan 30 Mbps, Harga Rp 350,000	44.12%	55.88%
Telkomsel Prabayar Kuota Keluarga 50 GB (Bebas Telepon dan SMS, untuk 2-3 Anggota Keluarga) dan Kuota Orbit 120 Gb, Harga Rp 250,000	34.88%	65.12%
Telkomsel Prabayar Kuota Keluarga 50 GB (Bebas Telepon dan SMS, untuk 2-3 Anggota Keluarga) dan Kuota Orbit 120 Gb, Harga Rp 350,000	42.86%	57.14%

City Group

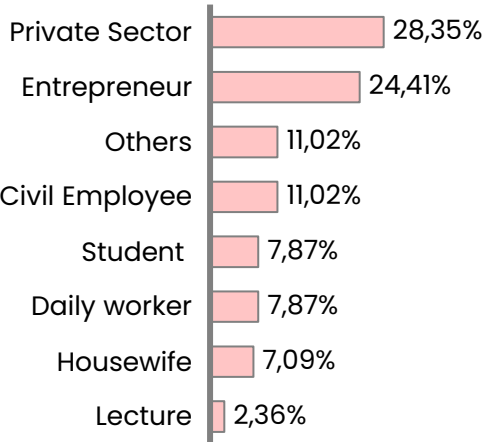


interested not interested

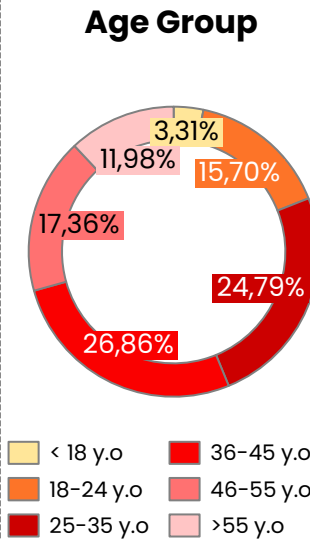
Segment Interest Profile



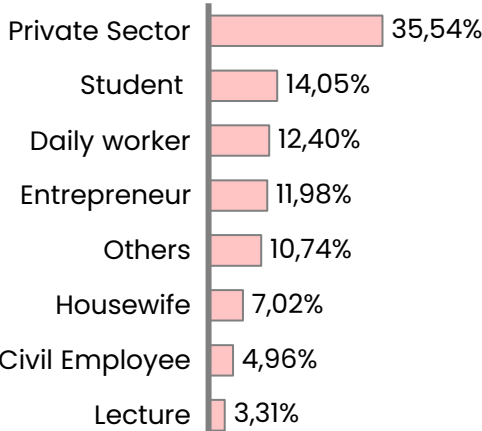
Occupation



Segment Not Interest Profile



Occupation



# Key Summary



## Summary for Pilot city

- Most of respondent are **interest with the concept of project dragon (88,93%)**, which offers a bundle of cellular and internet Wi-Fi, featuring a single bill and Cellular and Internet Wi-Fi within one brand provider.
- However, **53,18% still not familiar with Telkomsel One**, and **46,83% know about Telkomsel one** (34,40% have heard, 12,43% have received information about Telkomsel one)
- **Bigger Quota with Same Price and Internet Stable become importance's factors** for user when choosing the services
- **63,82% of respondents use Telkomsel Prepaid. IM3 Prabayar and Telkomsel Prabayar** become brand commonly used as their secondary number
- **55.04% of respondent claimed they don't use Wi-Fi**, 44.04% have intended to subscribe in the future . Meanwhile for the respondent does not need Wi-Fi the **main reason because already sufficient with cellular and no allocation budget.**
- **36,24% interest in Dragon's offer with 63,38% those who interest skewness location in Kab. Sukabumi.**

## Summary Non-Pilot city

- Most of respondent are interest with the **concept of project dragon (84.01%)**, which offers a bundle of cellular and internet Wi-Fi, featuring a single bill and Cellular and Internet Wi-Fi within one brand provider.
- **52.57% respondent aren't familiar with Telkomsel One**, and **47,43% respondents familiar with Telkomsel one** (36,31% have heard, while 11,11% have received information about Telkomsel one)
- **Non-pilot respondents claimed that Stable Internet Connection is the most important factors** for user when choosing the services.
- **62,60% of respondents use Telkomsel Prepaid. Telkomsel Prabayar and XL Prepaid become** brand commonly used as their secondary number
- **58.27% respondents already subscribe Wi-Fi** and their **top brand is IndiHome and First Media**. While **41.73% haven't used Wi-Fi and most of them doesn't plan to subscribe (58.44%)** and their **main reason is because already sufficient with cellular (48.89%).**
- **34.42% respondents interested in Dragon's offer.** Those who's interested came from **South Tangerang (13.39%) and Yogyakarta (12.60%)**

## Disclaimer

- These recommendations are based on the data and analysis provided in the survey findings skewness segment Q3 ( Mobile, Non IndiHome).
- It's important to note that market conditions and customer preferences may change over time, and the effectiveness of these recommendations may vary accordingly.
- Therefore, careful consideration and further research may be necessary before implementing any of the suggested actions.
- It is highly recommended to do an iteration for telkomsel one package (Q7) and respondents ARPHA.

## Recommendation

- **Increase Awareness** : Increase awareness about Telkomsel one, Highlighting its benefits and how it integrates with project dragon
- **Address the importance** : Emphasize the stability of internet connection as the main importance factor for cellular and Internet Wi-Fi
- **Target specific Location** : with High interest : Deployed focused marketing campaign in Kab Sukabumi, leverage local influence and community. While for non-pilot city focus on south tanggerang, Yogyakarta, Mataram, East Jakarta, Bekasi City