Telkomsel
by Telkom Indonesia

SURVEY ADD ON

Advanced Analytic And Growth Marketing

Study Background and objectives

Background

- The revenue performances from new sales for IndiHome Add-On services in H2 2023 continued to show growth below the average of H1 2023
- Indicating the needs for efforts to improve revenue performance, one of which is through campaign since the hypothesis existing customer did not understand related add on product.

Objectives

- Identifying key parameters from customer perspectives in considering purchase add ons
- Aim to achieve the revenue B2C Revenue and Synergy Revenue

Hypothesis

- Are customers in need of the various Add-On options that are available, are they unaware that these services exist, are there inconsistent experiences with the purchasing process, or are there uncompetitive prices?

Methodology

- In-house online survey conducted using Survey Monkey
- Quantitative
- Sampling method : Purposive defined sampling with descriptive analysis
- Survey period : May 2024

Segment	Criteria	Whitelist	Takers	TUR
Segment 1	• IndiHome Active User • Subscribe Add On	200,000	654	0.33%
Segment 2	• IndiHome Active User • Non-Subscribe Add on	200,000	619	0.31%
Segment 3	• IndiHome Active User • Add on Lapser	200,000	156	0.08%
Total		**600,000**	**1,427**	**0.24%**

Respondent Profile

The majority of respondent are progressive adults (36-45 years old), who work in the private sector and live in their own homes, located in Sumatera.

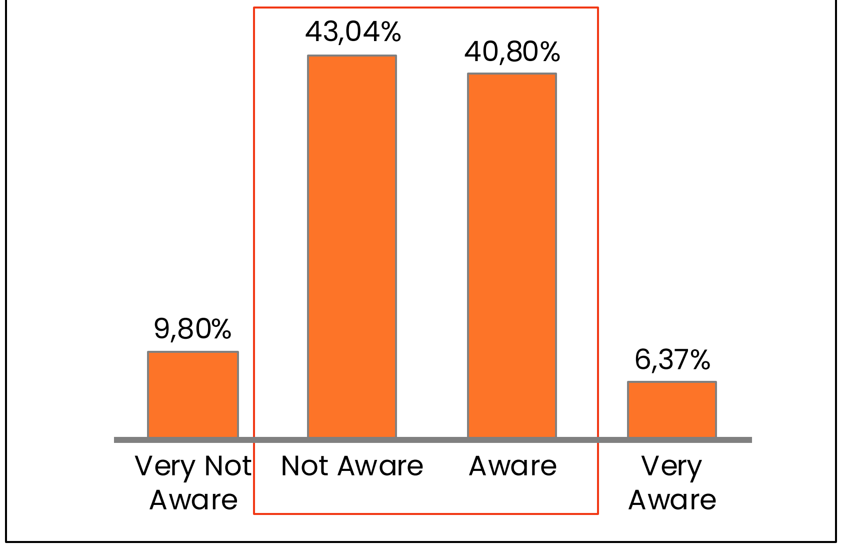
	General (as Majority)	Segment #1 (Non-Subs Add on)	Segment #2 (Lapser Add On)	Segment #3 (Subscribe Add On)
Age	36-45 Y.O (33%)	26-35 Y.O (26.3%)	46-55 Y.O (29.07%)	36-45 Y.O (34%)
Region	Sumatera (18.4%)	Jabodetabek (18.3%)	Jawa Timur + Madura (16.3%)	Kalimantan (15.5%)
Occupation	Private sector employee (25.5%)	Civil employee / SOE (13.5%)	Trader, Seller, Entrepreneur (32.6%)	Private Employee (26.4%)
Residential Type	Ordinary House (58.5%)	Ordinary House (61.5%)	House(Cluster/Residence) (26.7%)	Temporary / Rent House (10.26%)

Internet Services Add on

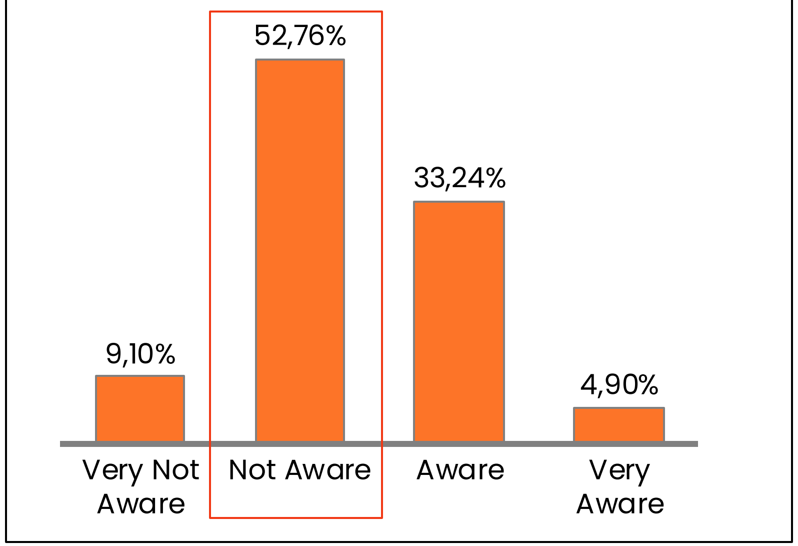
Respondents are most aware of the speed upgrade add-on (40.80%), *while awareness of other add-ons like speed on demand, upload booster, speed refreshment, and mesh Wi-Fi is significantly lower.*

Awareness about Internet Service Add On

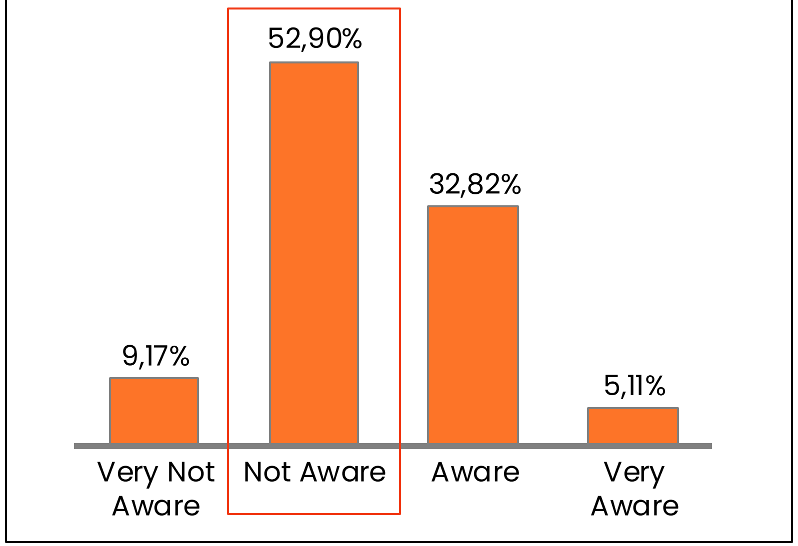
Upgrade Speed



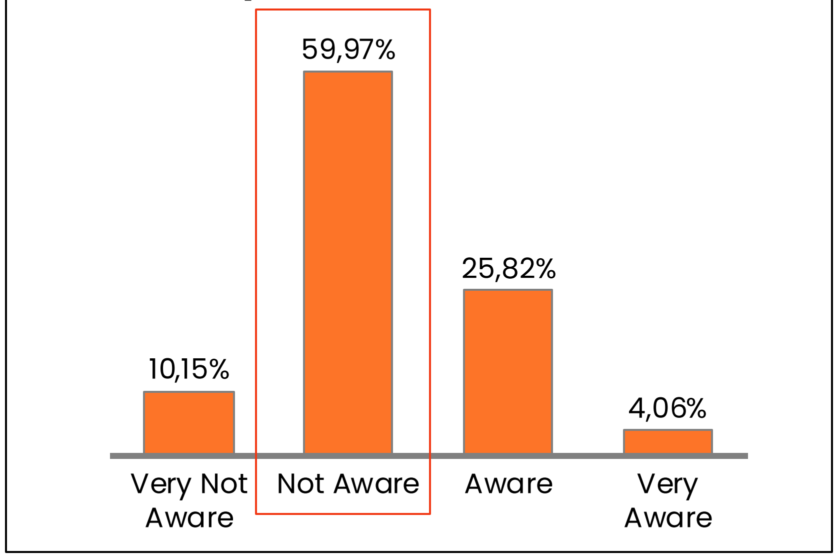
Speed on Demand



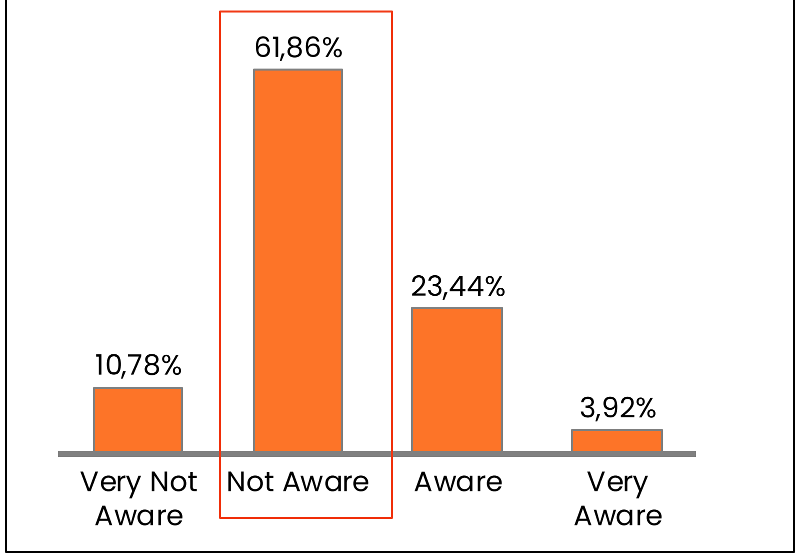
Upload Booster



Speed Refreshment



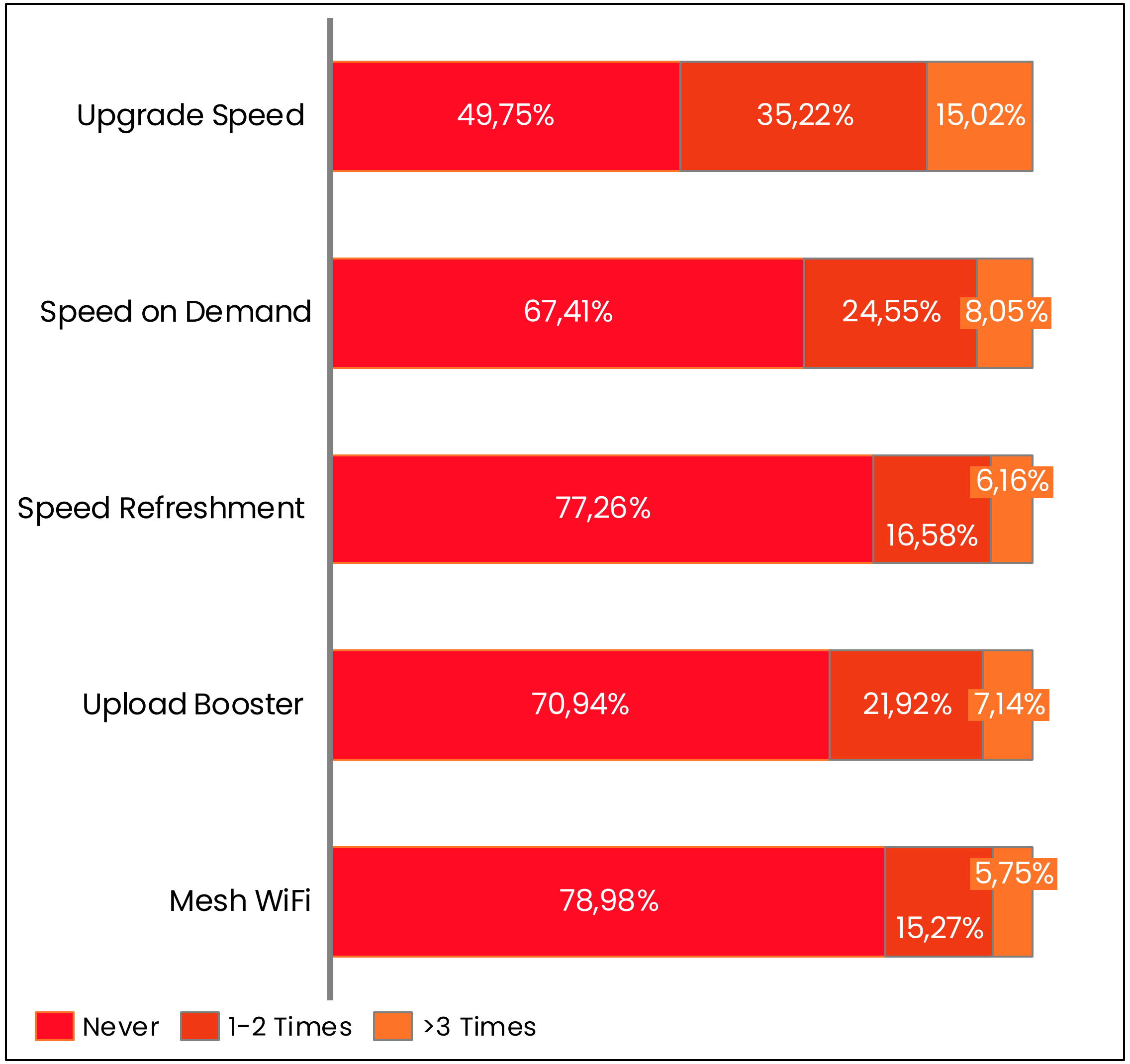
Mesh Wi-Fi



Q1 : Apakah Anda mengetahui dan pernah mendengar Layanan Add On Internet dibawah ini?

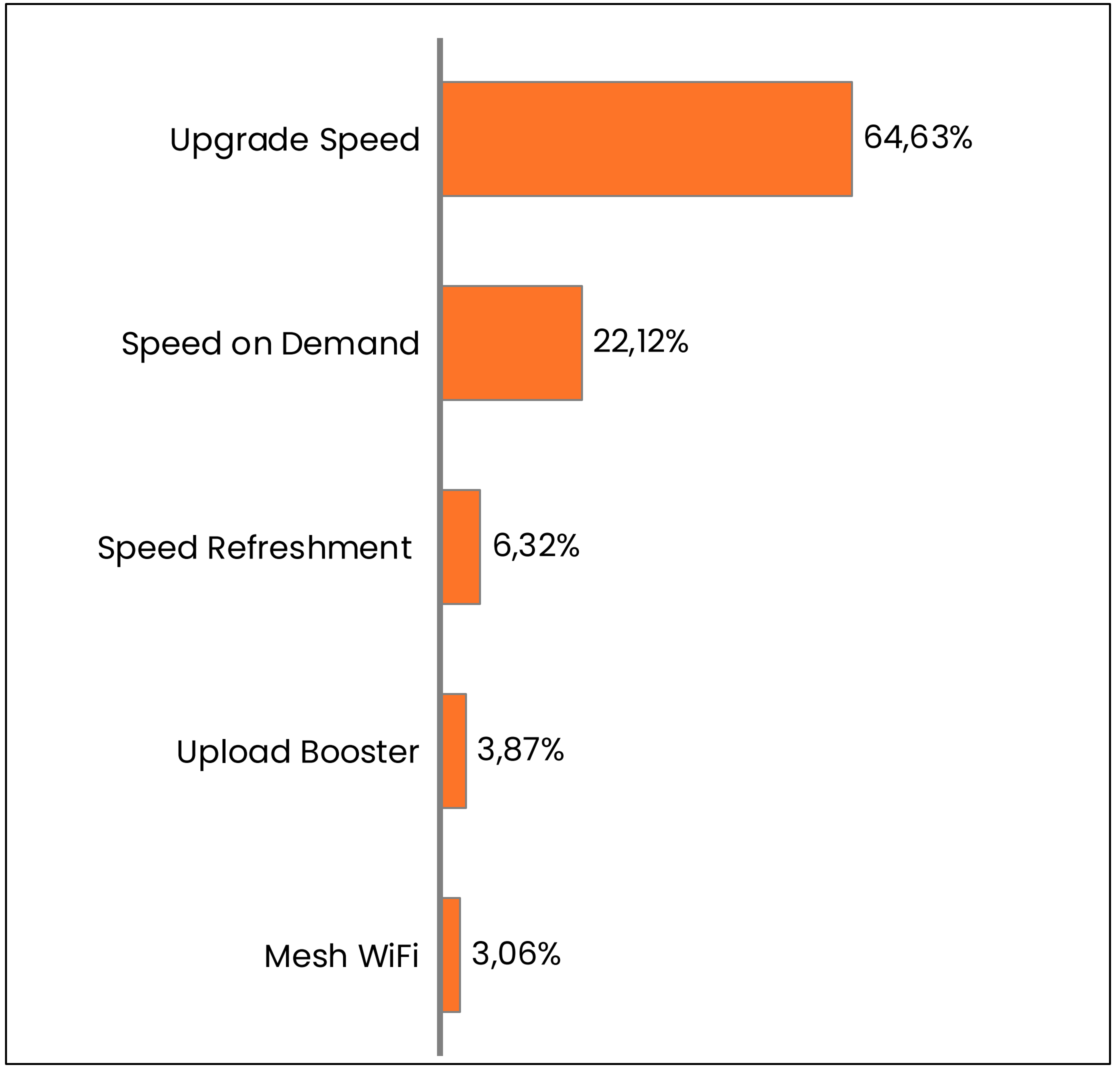
Most of respondents stated they were **unaware of these services**, and the proportion of those who had heard of them at least once or twice is still quite low. But when it comes to internet services option, **upgrading speed is a far more popular (64,63%)**

Frequent Hearing about Internet Add On



Q4 :Seberapa Sering Anda Pernah Mendengar / Mendapatkan Penawaran Produk Layanan Add on Internet dibawah ini

Internet service Add On from the most interesting to least

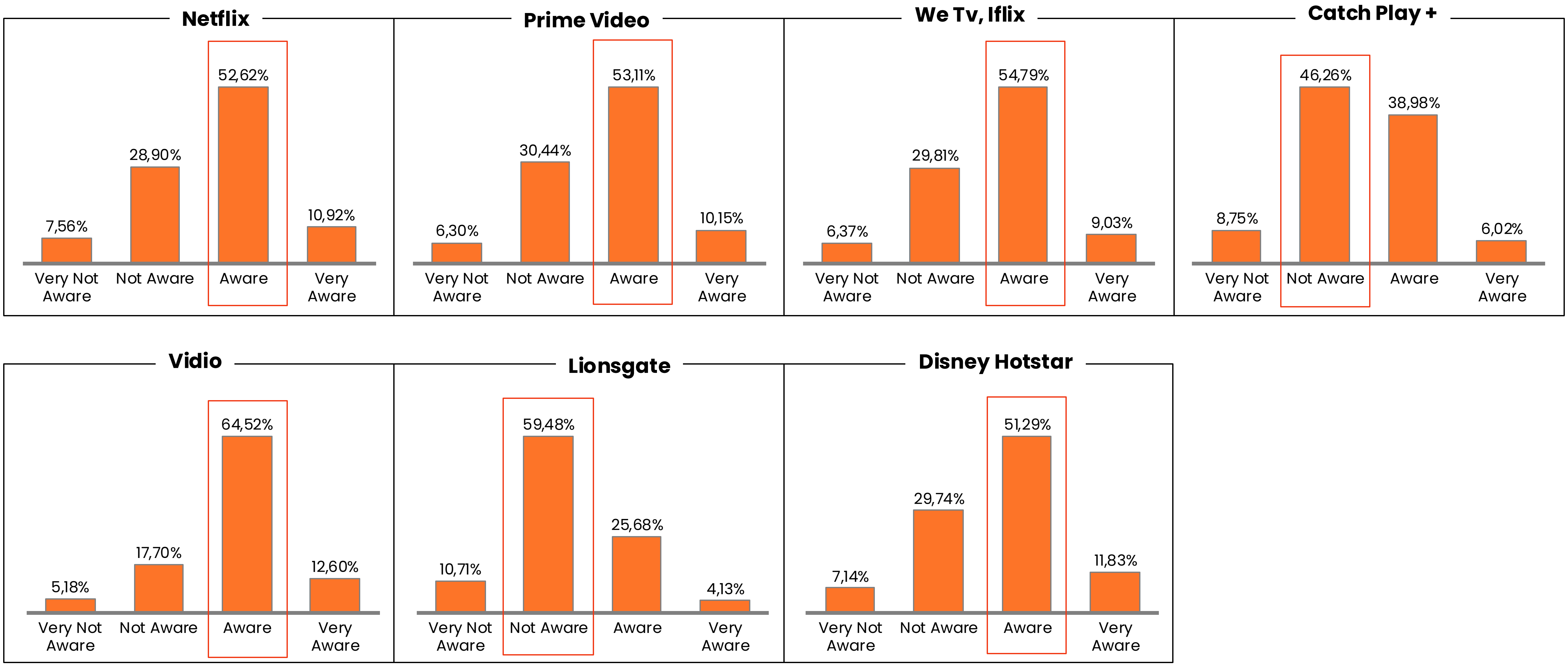


Q7: Dari pilihan layanan Add on Internet dibawah ini, Urutkan dari layanan yang Paling Menarik hingga Tidak Menarik menurut Anda ?(cth : 1. Mesh Wifi, 2.speed refreshment, 3,4,5 dst)

Entertainment Add on

For entertainment add-ons, respondents are most aware of Vidio (64.52%), followed by WeTV and Iflix (54.79%), Prime Video (53.11%), Netflix (52.62%), and Disney+ Hotstar (51.30%). *However, several OTT services like Catchplay and Lionsgate remain largely unknown to respondents.*

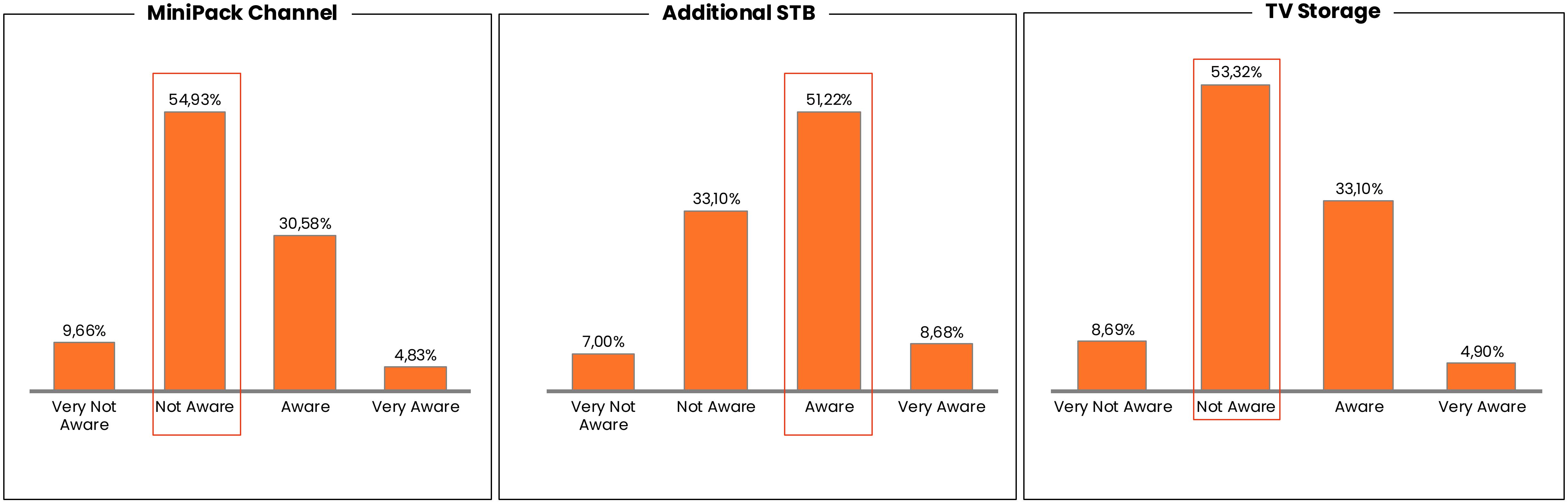
Awareness about Entertainment services add on



Q2 : Apakah Anda mengetahui dan pernah mendengar Layanan Add on Entertainment dibawah ini ?

Additionally, the feature of an additional STB (51.22%) is more widely known, while respondents are largely unaware of Minipack channels and TV storage.

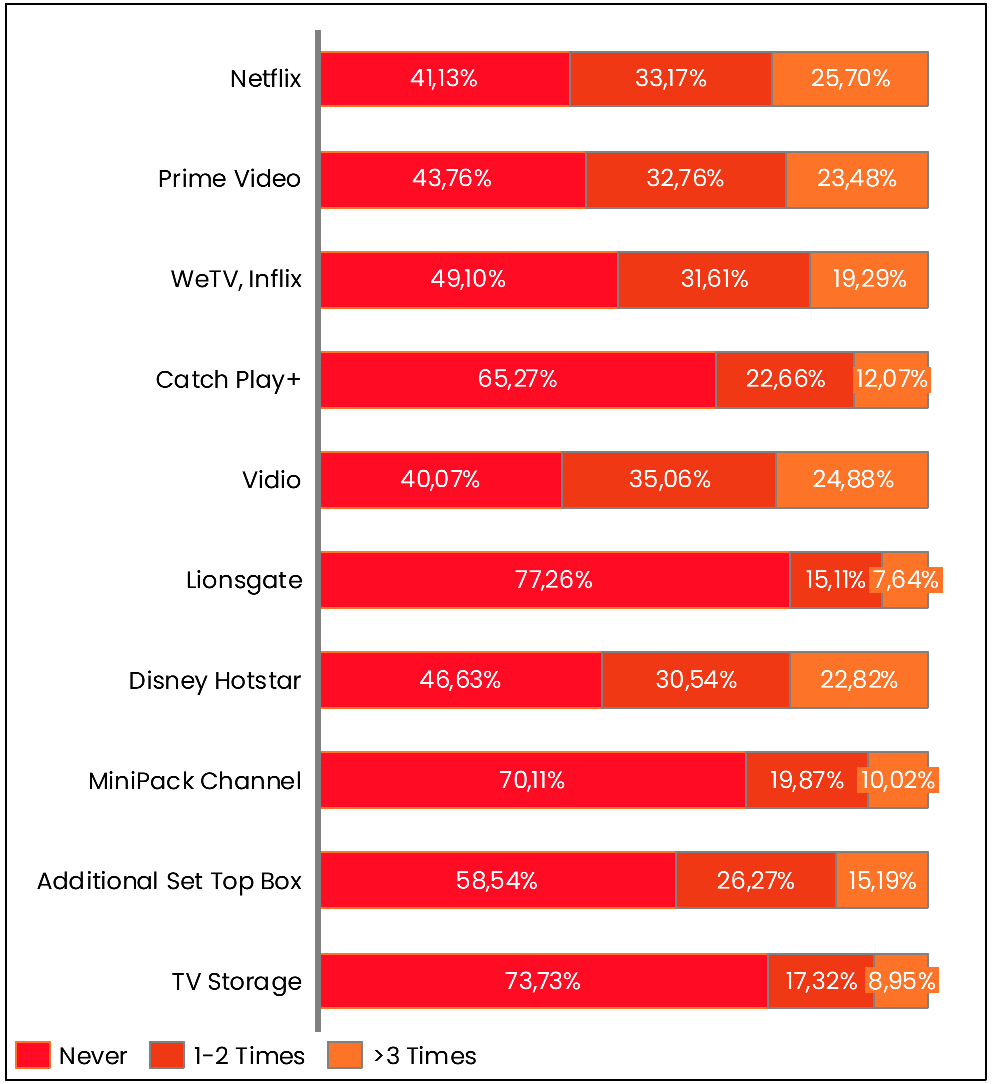
Awareness about Features Entertainment services add on



Q2: *Apakah Anda mengetahui dan pernah mendengar Layanan Add on Entertainment dibawah ini ?*

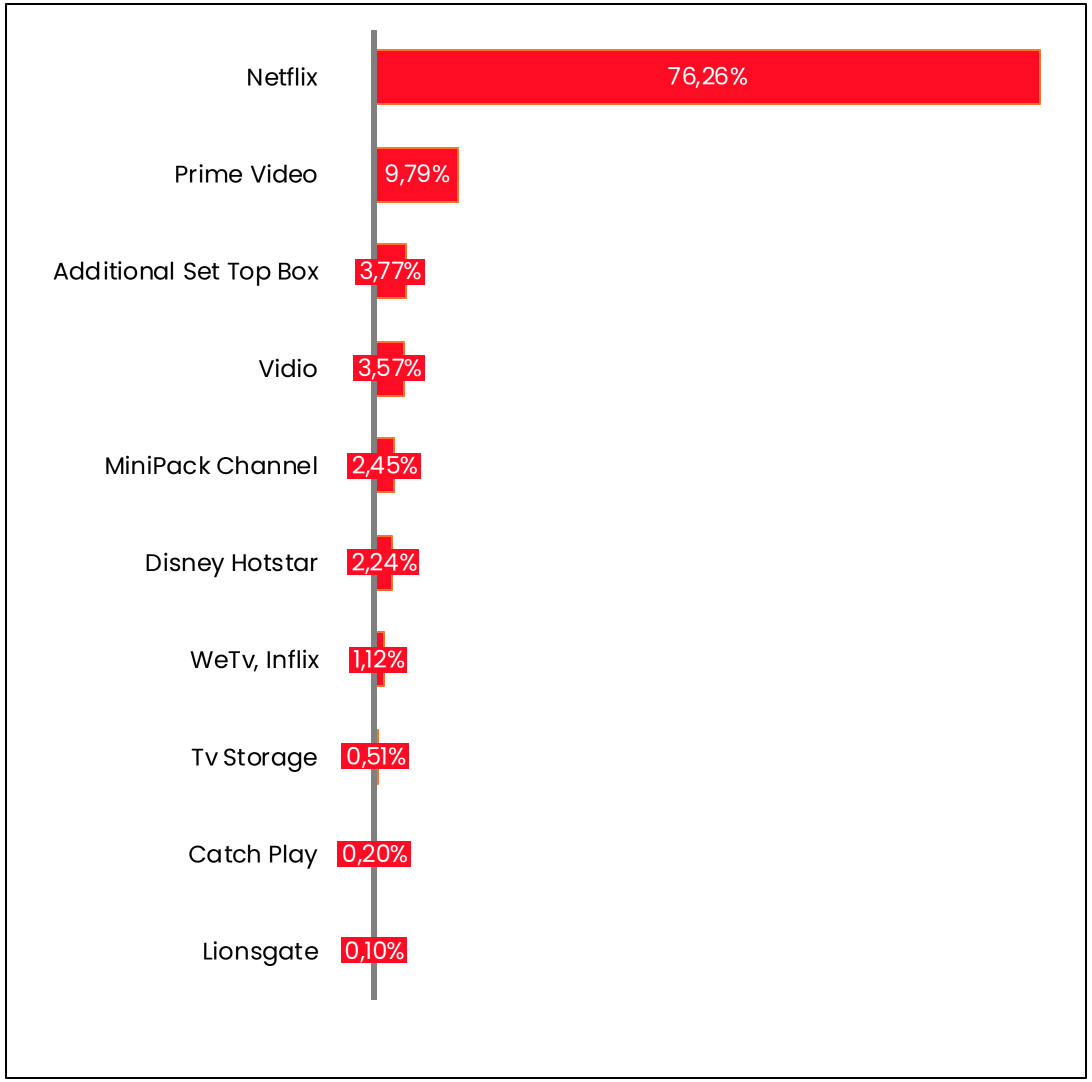
It is also noteworthy that respondents claimed to have never heard of Lionsgate, Catch play +, Minipack channels, and TV storage. **Nevertheless, the most popular entertainment add-on is Netflix, with 76.26% expressing interest.**

Frequent Hearing about Entertainment Add On



Q5 : Seberapa Sering Anda Pernah Mendengar / Mendapatkan Produk Layanan Add on Entertainment dibawah ini

Entertainment add on from most interesting to the least

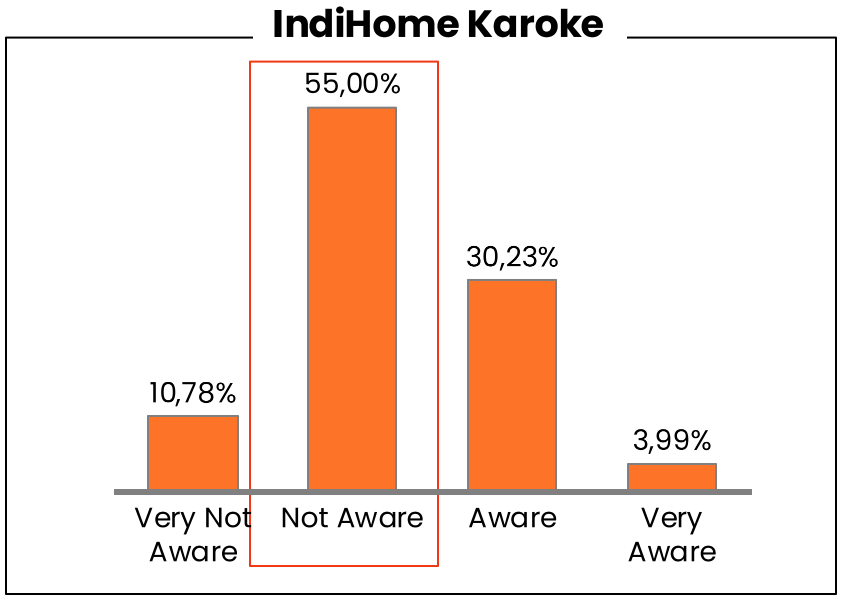


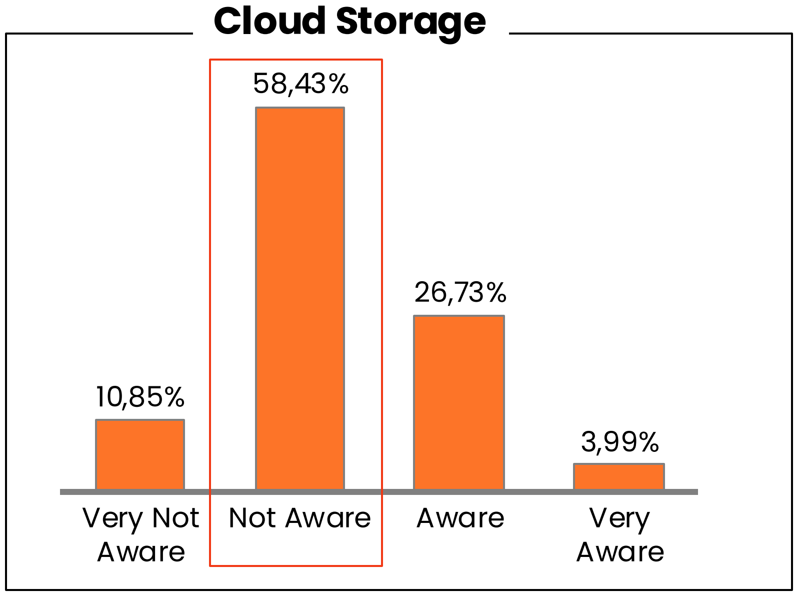
Q8 : Dari pilihan layanan Add on Entertainment dibawah ini, Urutkan dari Layanan yang paling Menarik hingga Tidak Menarik menurut Anda?(cth : 1.Netflix, 2.We Tv, 3,4,5 dst)

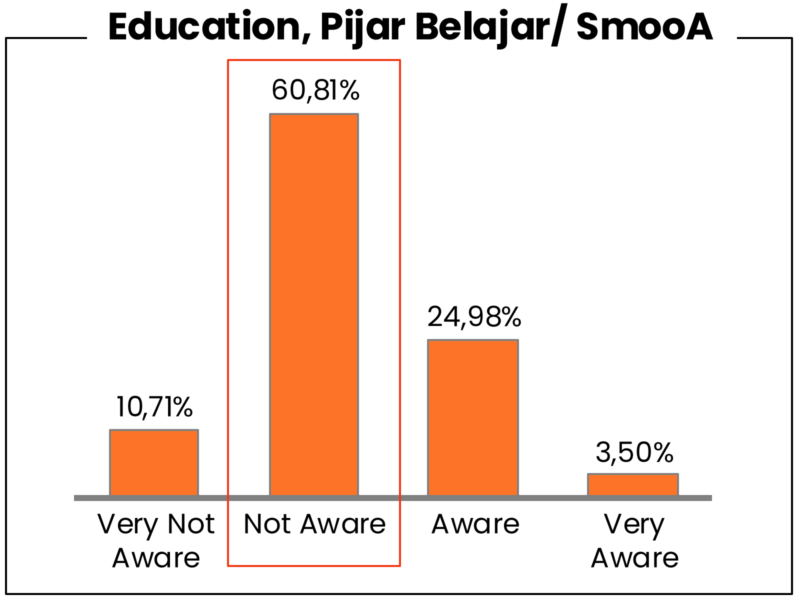
Digital Services Add on

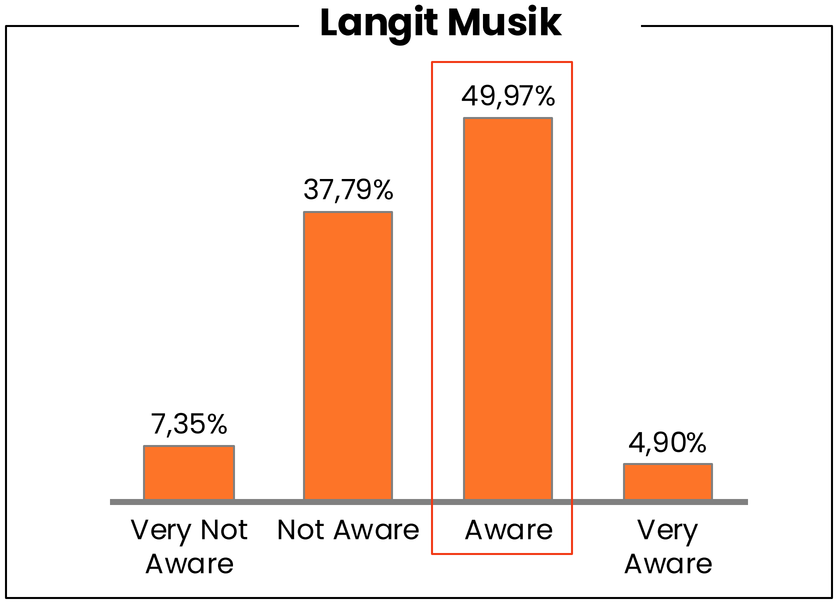
Most respondents claimed they are not aware of digital service add-ons such as IndiHome Karaoke, Cloud Storage, Education, Fita, and Benefit Games, except for Langit Music, which has an awareness rate of 49.97%

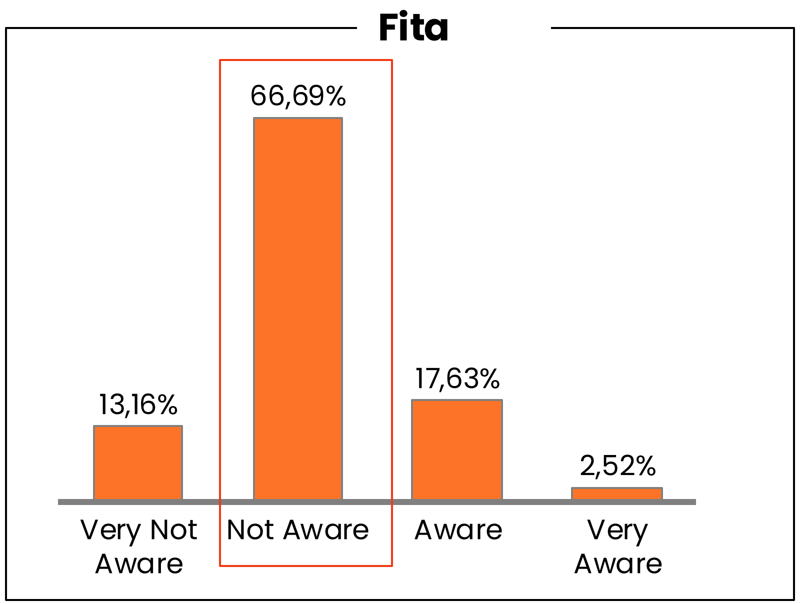
Awareness about Digital Services Add On

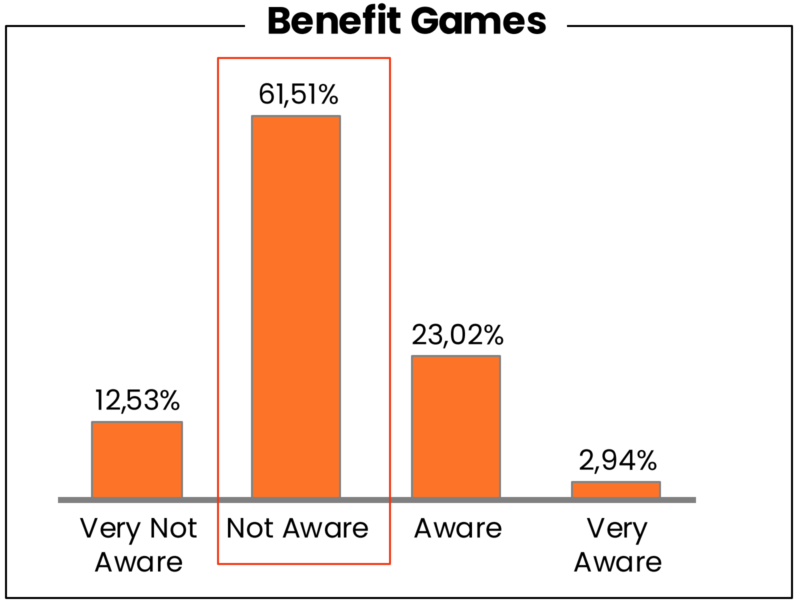








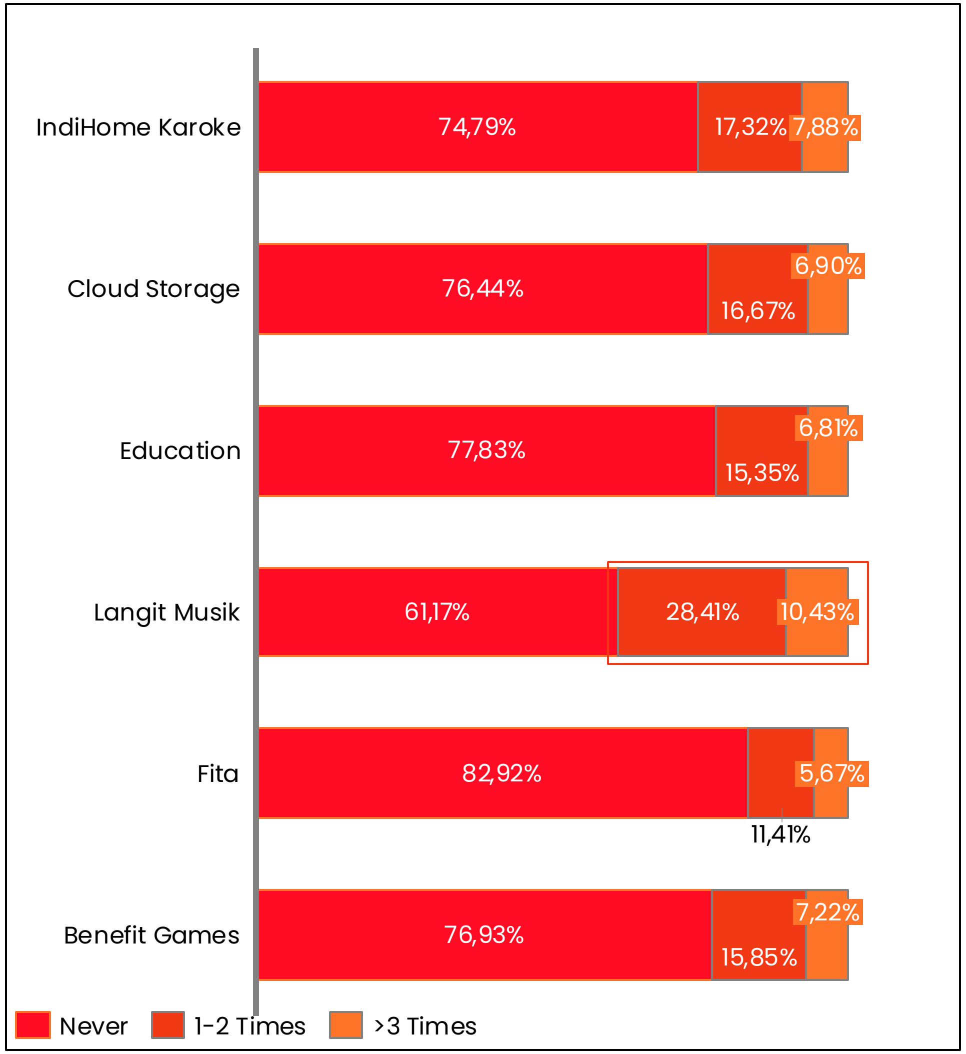




 Q3 : Apakah Anda mengetahui dan pernah mendengar Layanan Add On Digital dibawah ini?

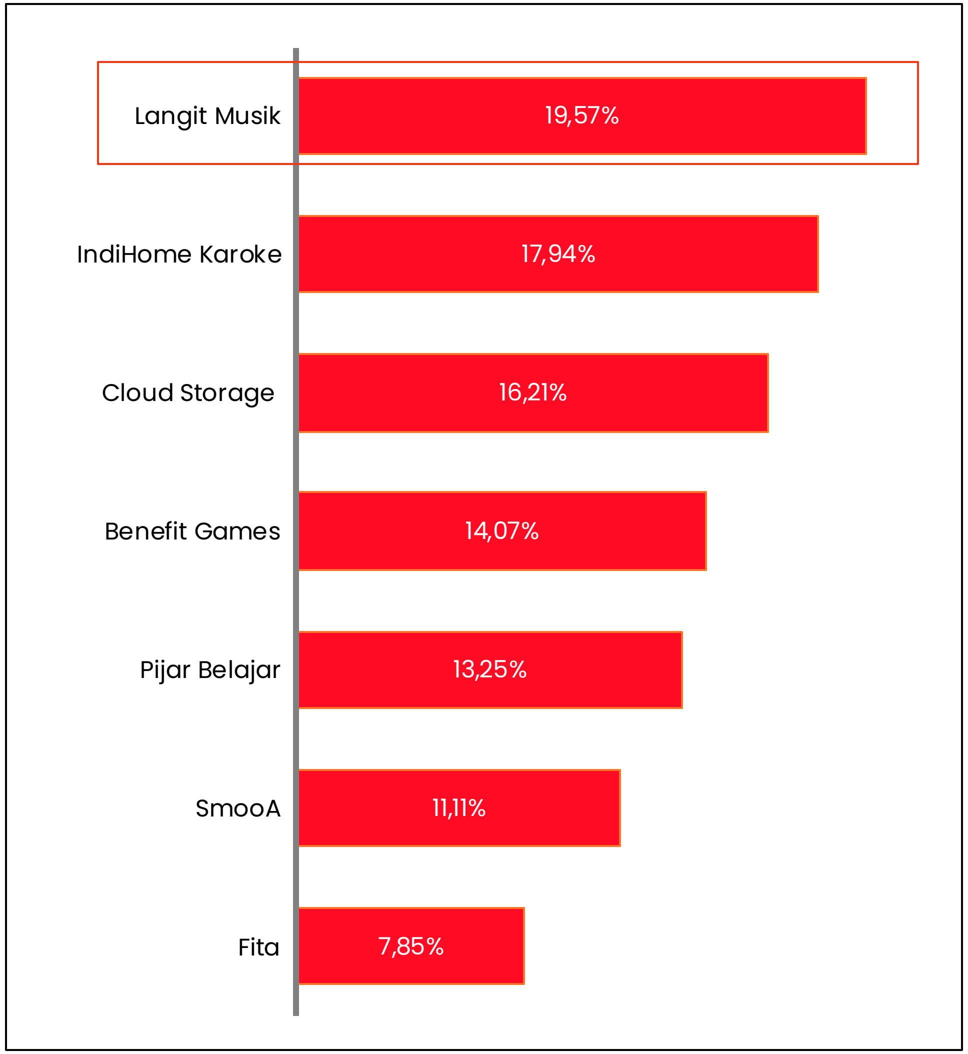
Langit Musik turns out to be the most interesting among digital service add-ons.

Frequent Hearing about Digital services Add On



Q6 :Seberapa sering Anda pernah mendengar dan mendapatkan penawaran Produk Layanan Add On Digital dibawah ini

Digital services Add On from Most Interesting to the least

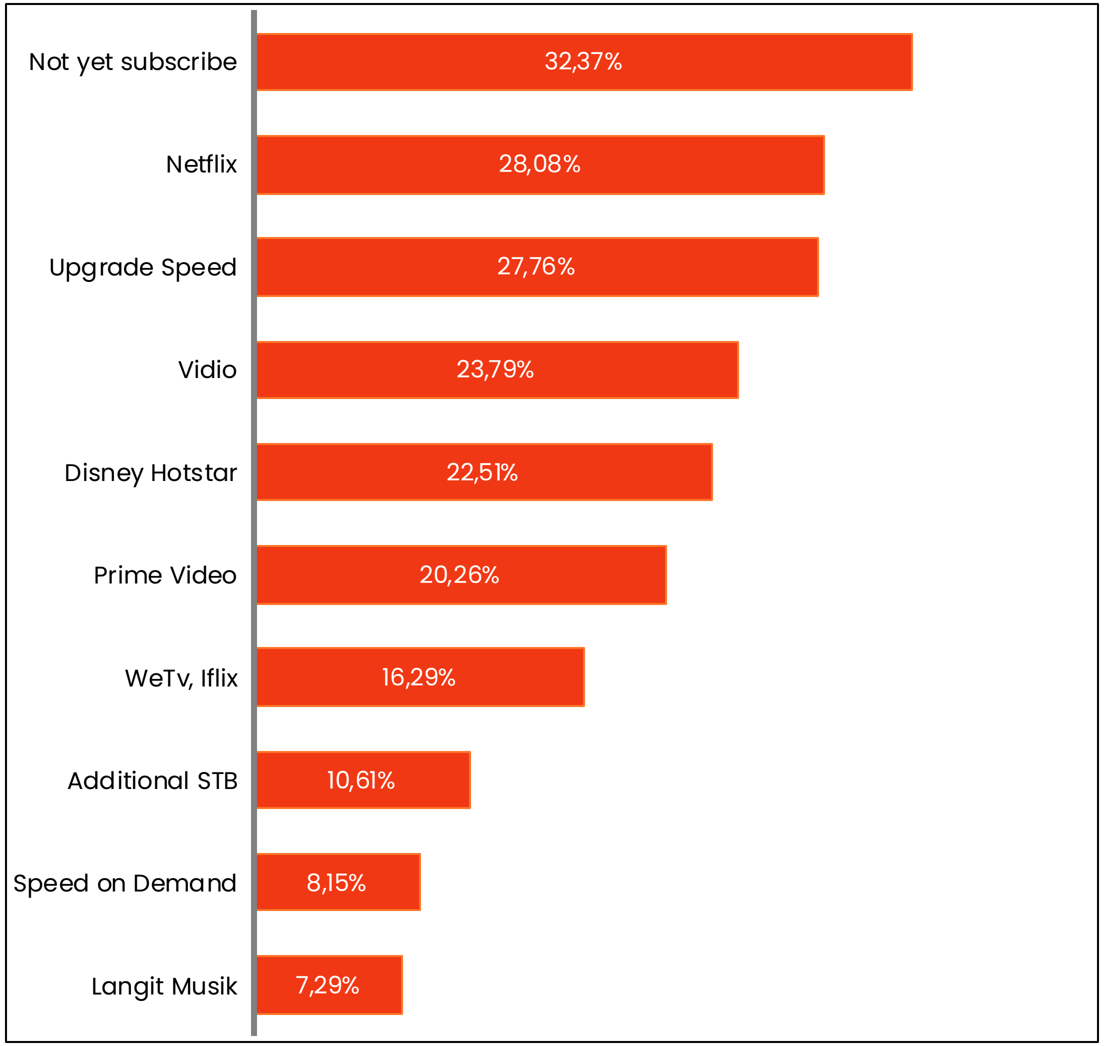


Q7 :Dari pilihan layanan Add on Internet dibawah ini, Urutkan dari layanan yang Paling Menarik hingga Tidak Menarik menurut Anda ?(cth : 1. Mesh Wifi, 2.speed refreshment, 3,4,5 dst)

Purchase Intention & Channel

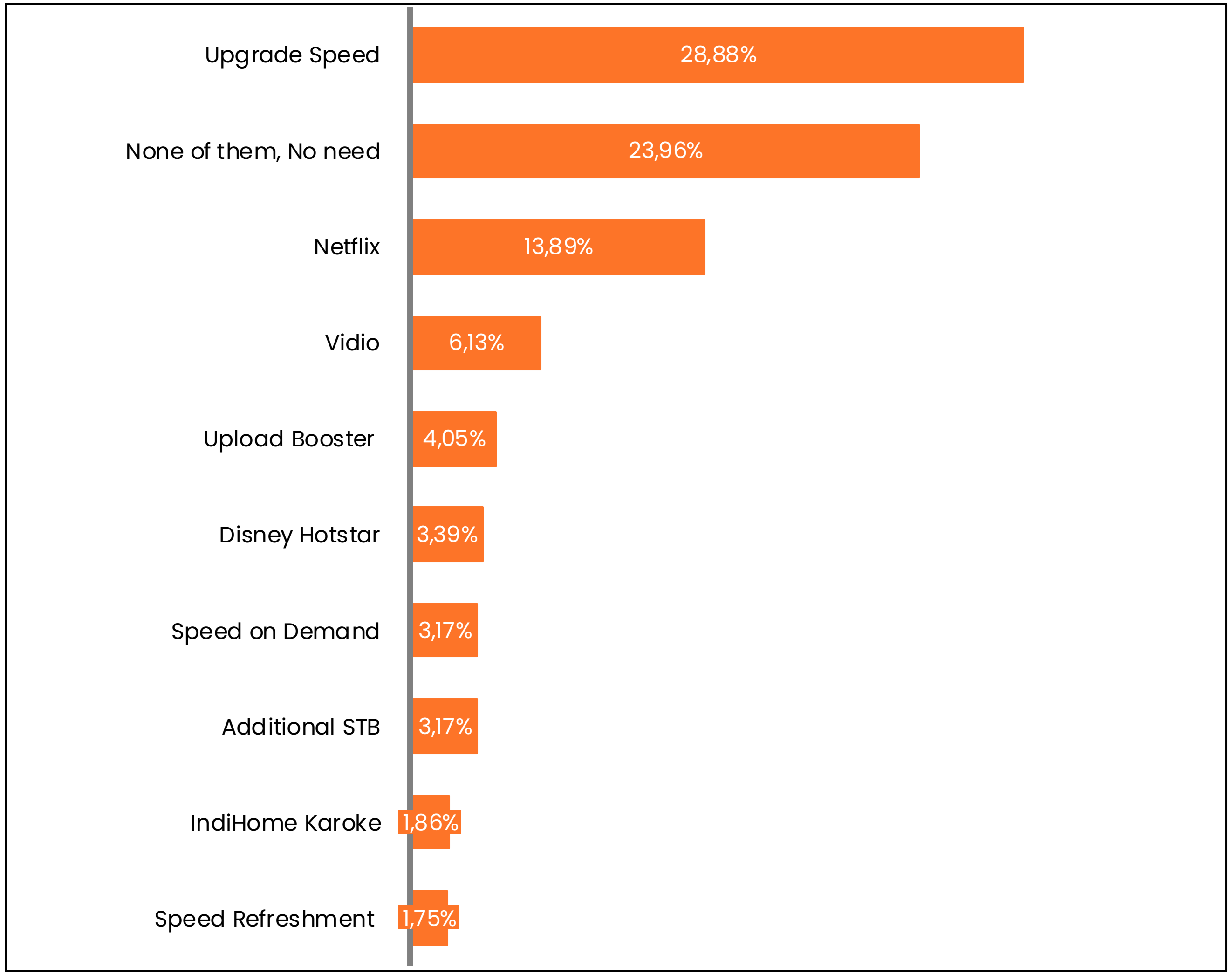
Despite the interest and awareness levels, 32.37% of respondents have not yet subscribed to any add-on services. *Among those who have subscribed, Netflix leads with 28.08%, followed by upgrade speed at 27.76%, and Vidio at 23.79%.*

Top 10 Add on services have purchased or now subscribed



Q10: Dari semua layanan add on dibawah ini, Layanan apa saja yang Mungkin pernah Anda Beli / Saat ini sedang berlangganan ?

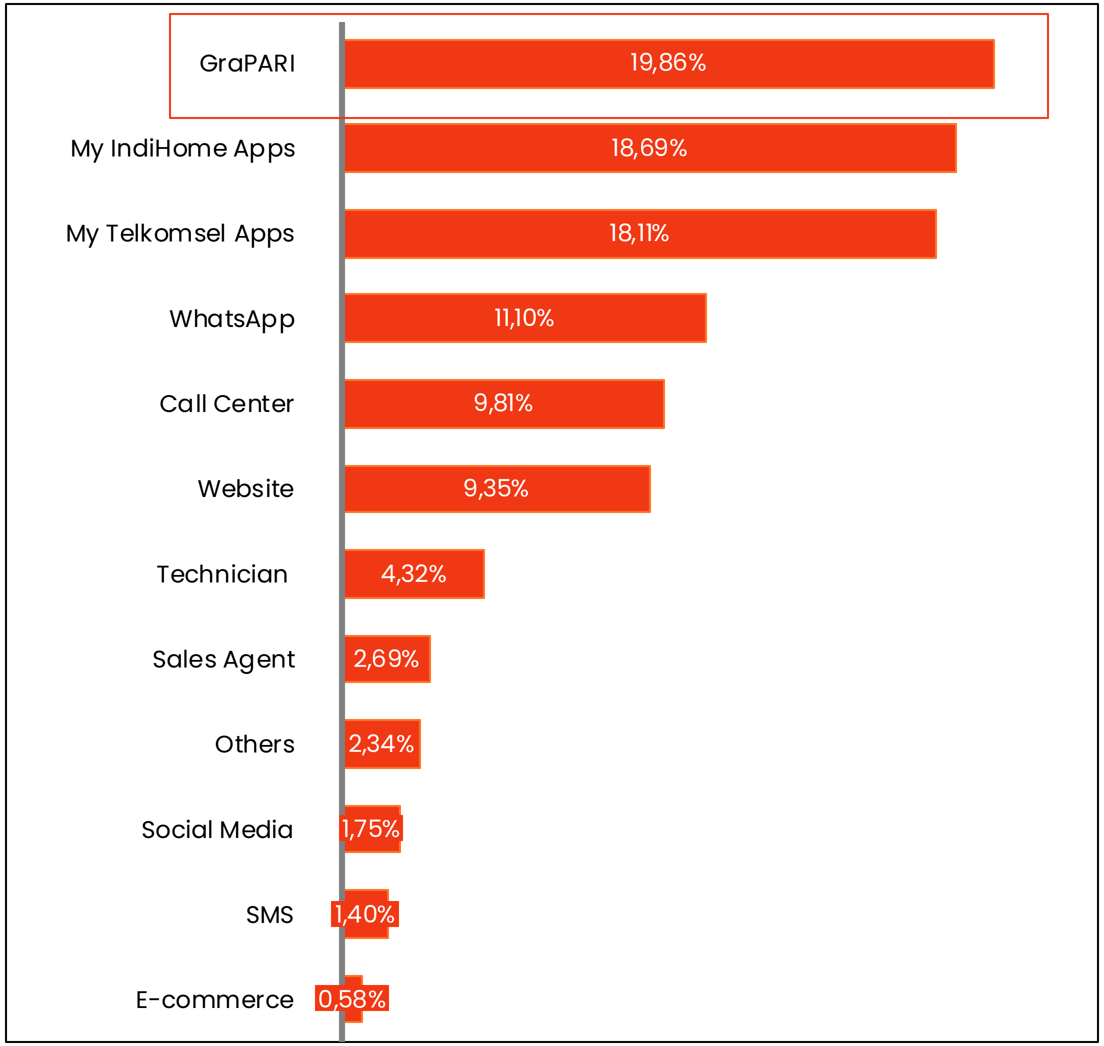
Top 10 Add on services suitable and consider purchase in the future



Q11: Dari semua layanan add on dibawah ini, Layanan apa saja yang Paling sesuai dengan kebutuhan Anda dan akan Anda pertimbangkan untuk digunakan/ dibeli kedepannya?

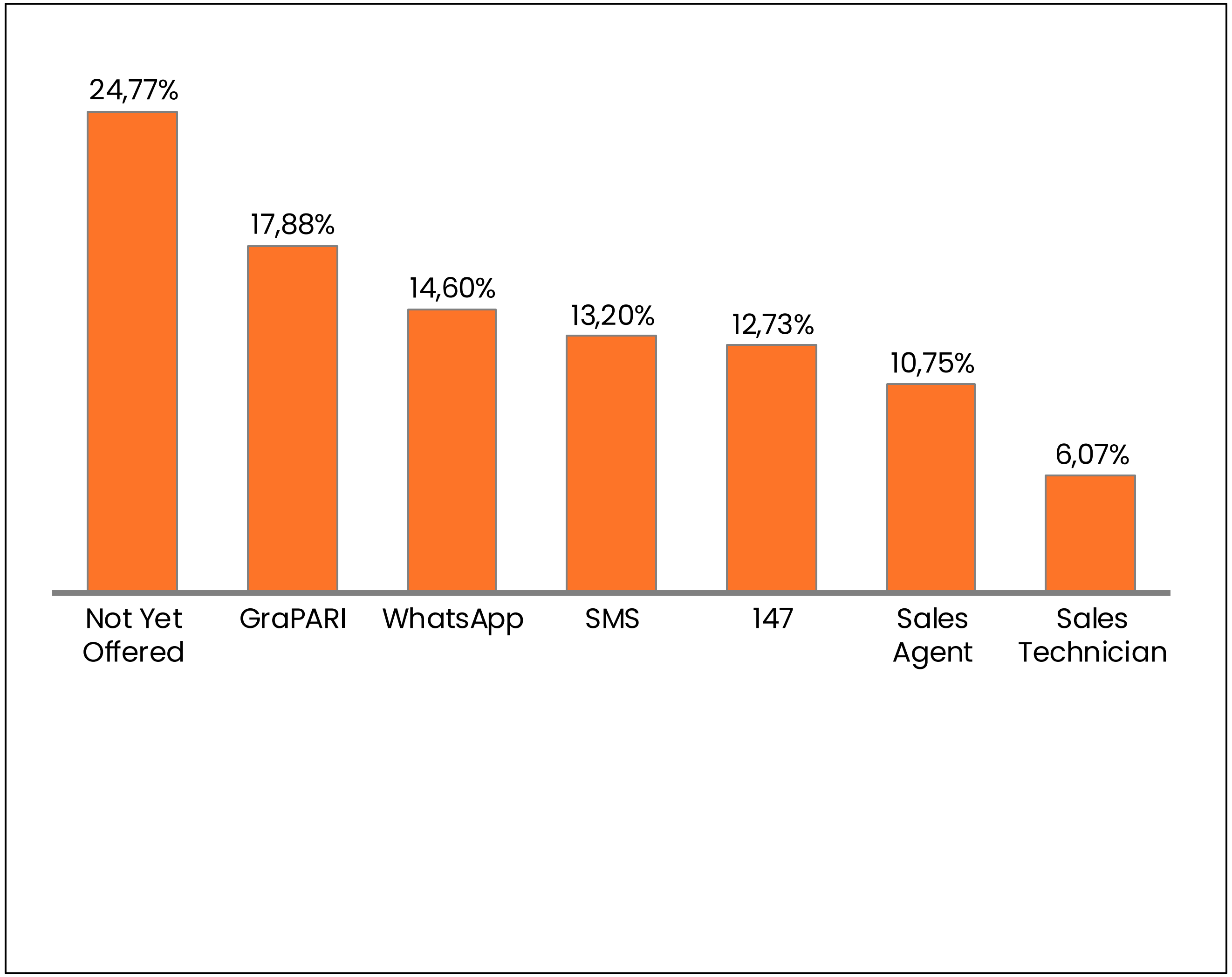
Significant findings show that Grapari is the most preferred channel for activating add-ons, chosen by 19.86% of respondents, followed closely by My Indihome app (18.69%) and My Telkomsel app (18.11%). However, 24.77% of respondents claimed they have not yet been offered add-ons through any channel. Grapari follows at 17.88%, with WhatsApp at 14.60%.

Preferences Channel to Activate Add On



Q13 : Saluran (Channel)/ Platform atau media resmi mana yang pernah Anda hubungi / menjadi preferensi kedepannya untuk mengaktifkan layanan Add On IndiHome?

Channel may have offered Add on



Q14 :Saluran (Channel) penjualan mana yang mungkin pernah menawarkan Layanan Add On IndiHome untuk Anda?

The packages offered that meet needs (39.85%) and the prices offered (39.09%) *are the two main reasons for adding add-on services.*

Reason to adding services Add on

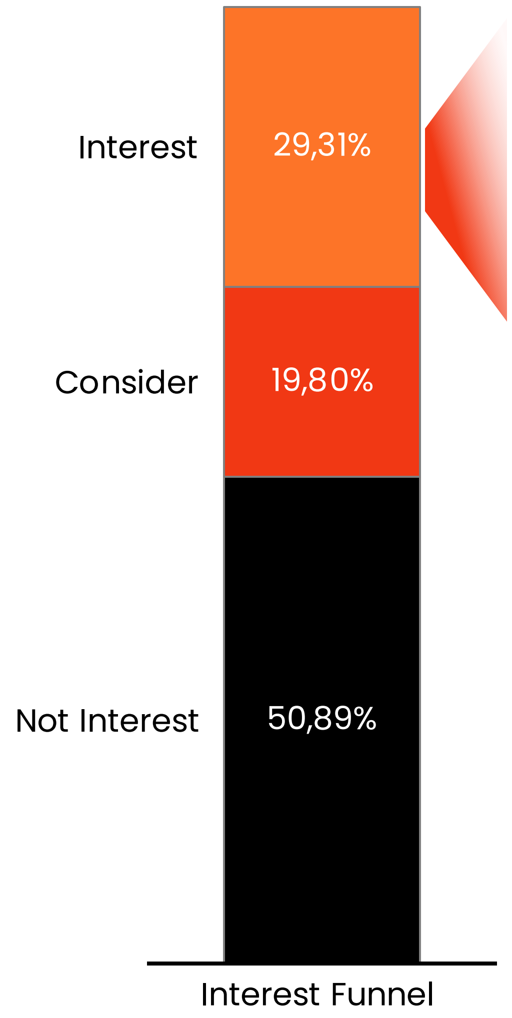
Some Negative Feedback related Add On

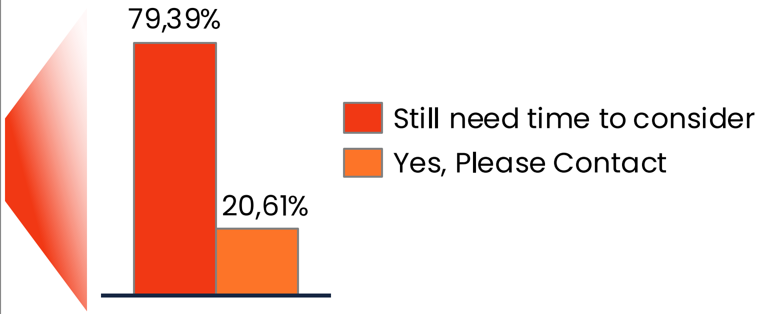
Network Stability	*Menurut saya Telkomsel, tidak perlu menambahkan add on speed or else, karena memang sudah mendapatkan dari customer loyalnya tersendiri, berfokus saja kepada kestabilan dan kecepatan dari apa yg sudah kita bayar premium brand gak usah tambah embel embel*
Network Stability	*Realisasi tentang kualitas kestabilan jaringan internetnya. Begitu banyak paket, promo dan sebagainya yang ditawarkan oleh provider. Tapi seringkali melupakan hal yang paling mendasar, yakni kualitas kestabilan jaringan internet*
Price	*Harga Pembayaran Terlalu Mahal jika di Tambahkan. Jika di tambah pajak yang terlalu tinggi maka tidak mampu lagi membayar tagihan indihome per bulan. Pendapatan tidak cukup*
Product Concern	*Indihome ada fupnya..semakin tinggi speed internet semakin banyak fupnya*

Q15 : Hal apa yang paling penting dan mungkin menjadi alasan dalam mempertimbagkan layanan tambahan (Add on) di Hunian Anda?

50.89% of respondents claimed they are not interested in purchasing add-on services, 29.31% and 19.80% are consider. From 29,31% respondent who answered interested, 79.39% still need time to consider. 48,10% respondent answered would allocate <Rp25,000 their budget if purchase add on.

Have them interested if get an offers from Add on ?





Q18 : Apakah anda berkenan untuk mendapatkan penawaran langsung?

Q17 :Jika dalam waktu dekat Anda mendapatkan penawaran layanan Add On untuk di Hunian Anda, Apakah Anda akan tertarik untuk membeli ?

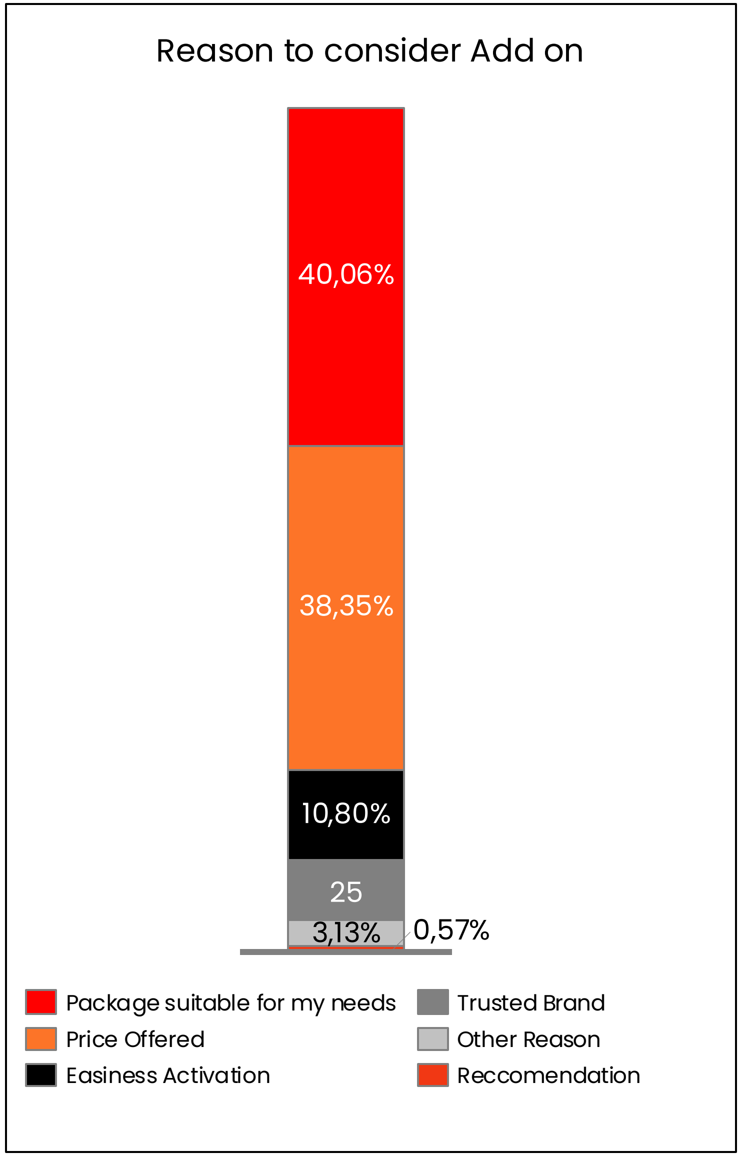
Allocation budget if purchase add on services

Q18 : Berapa tambahan alokasi budget yang Anda sediakan untuk membeli Layanan Add On IndiHome ?

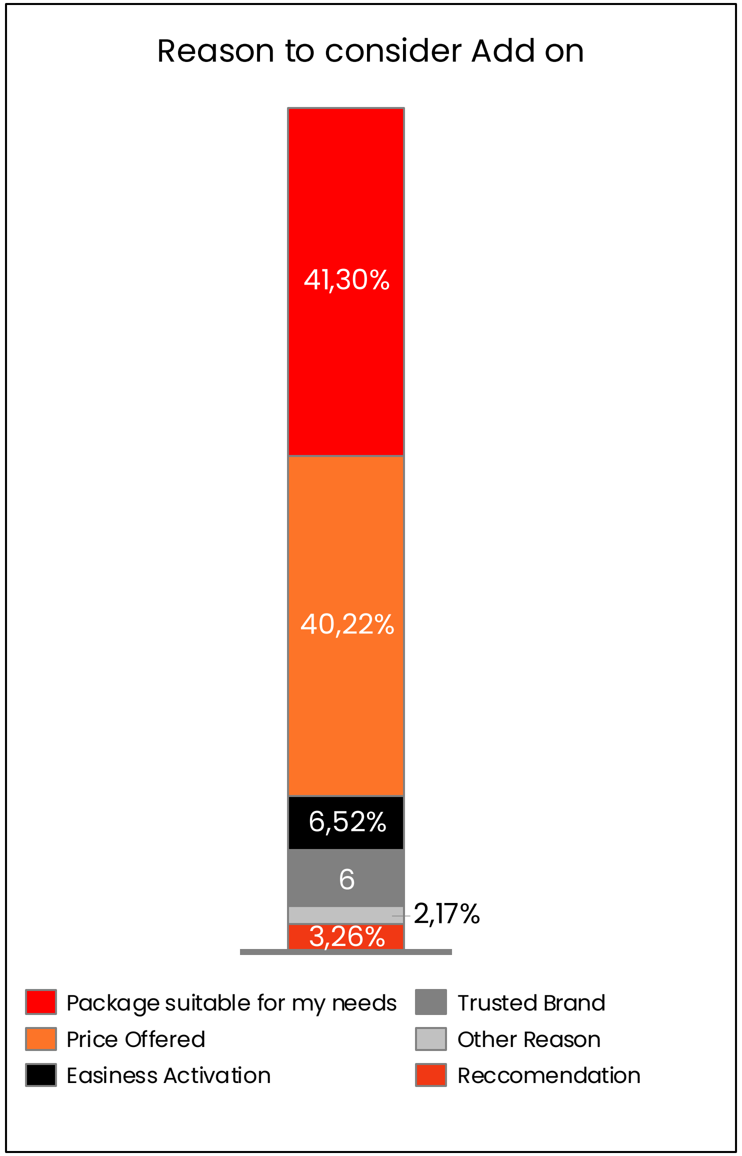
Deep Dive Segment

Subscriber add-ons and lapsed user add-ons will consider if the Offering packages that suit their needs as important factor to consider when tailoring add-on. Meanwhile, price becomes a more significant consideration.

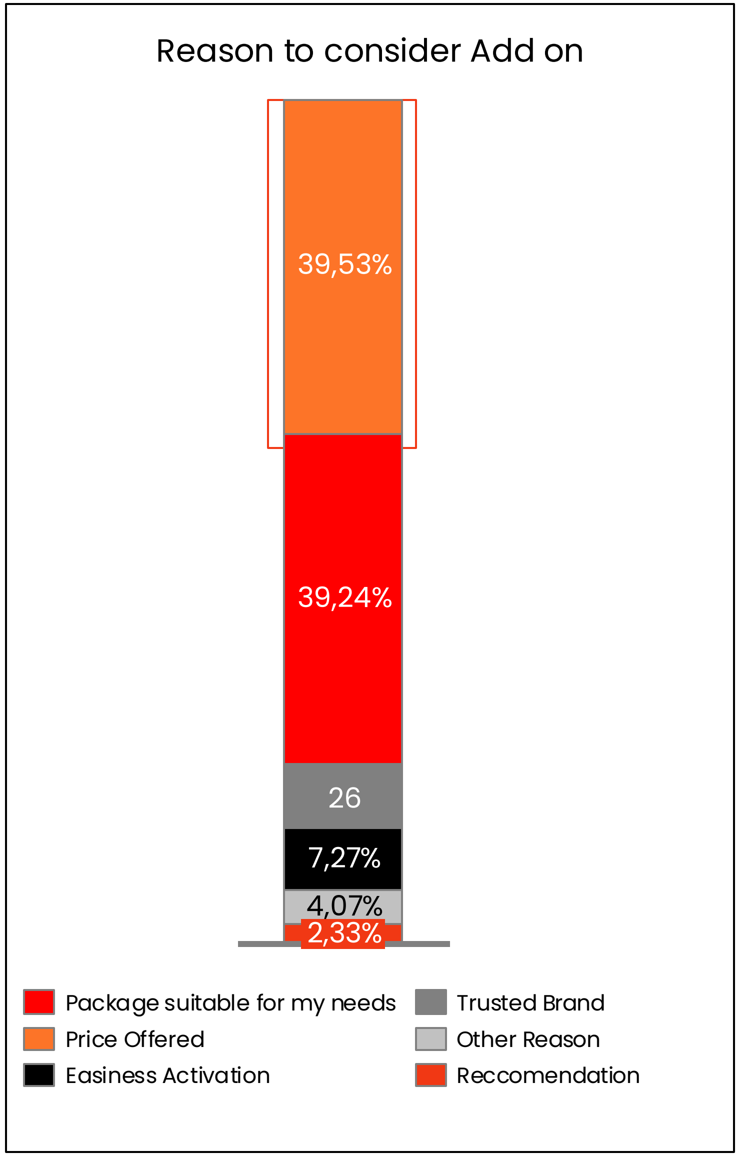
Subscribe Add On



Lapser Add on

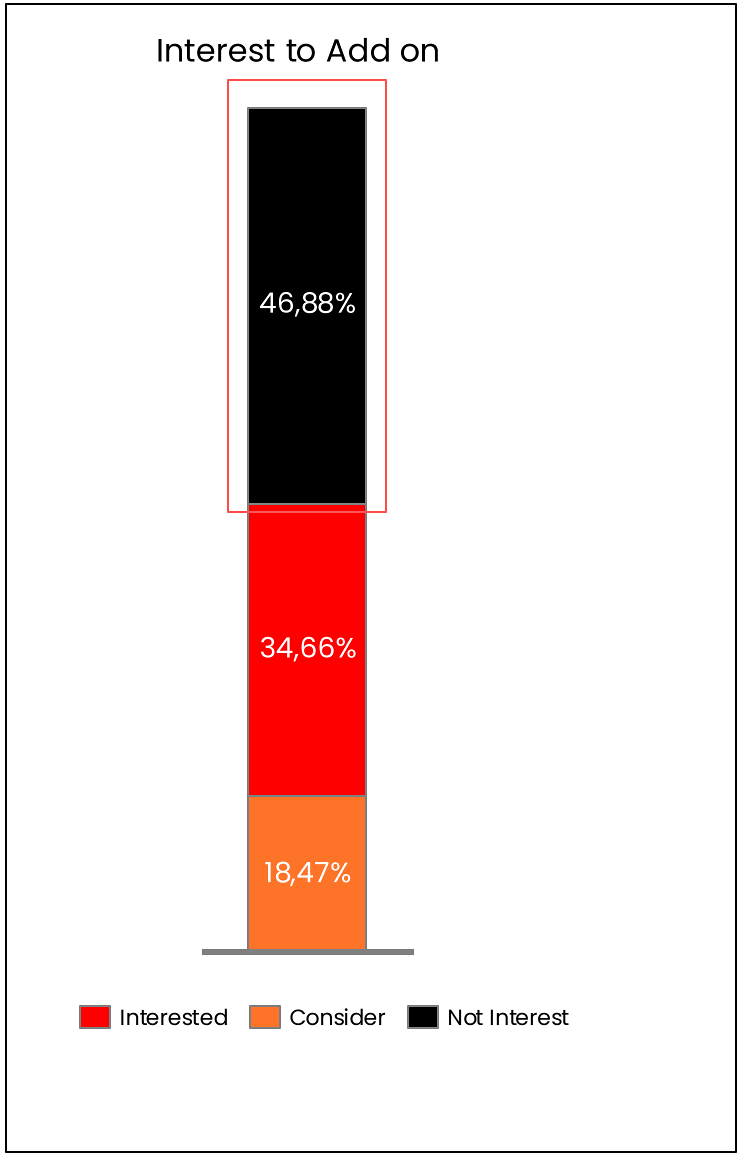


Non-Sub Add on

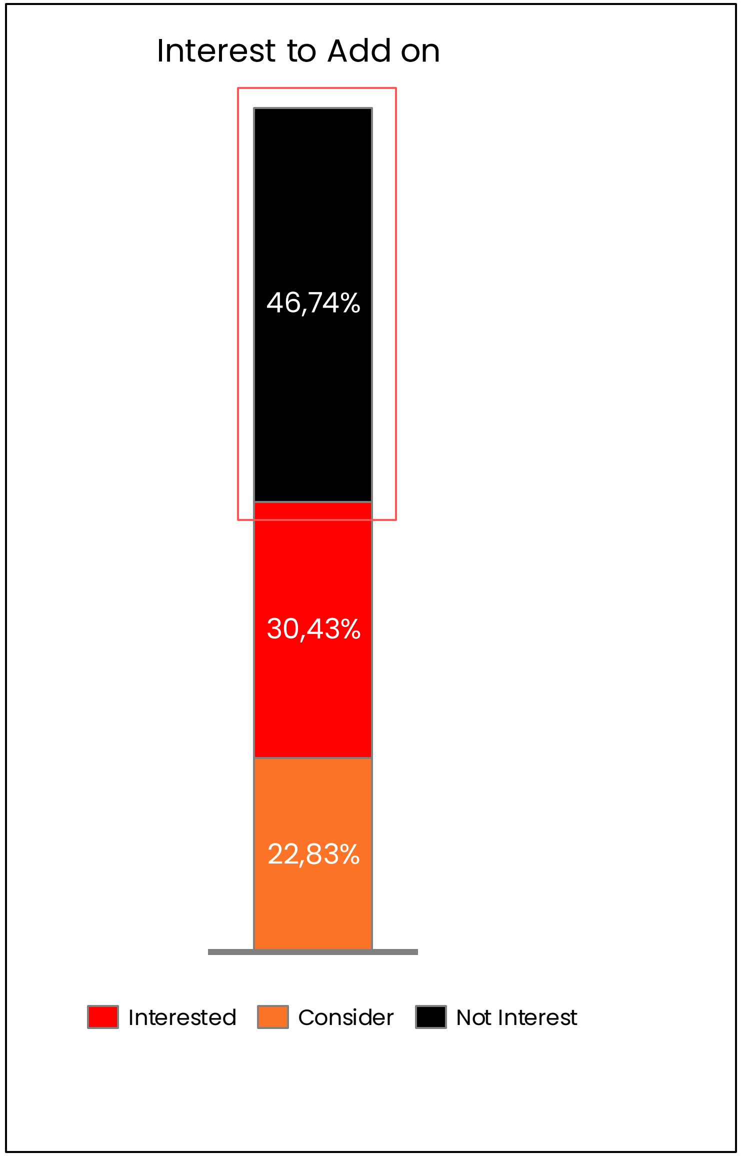


However, the interest level in add-ons was low among lapsed subscribers and non-subscribers. Surprisingly, **current subscribers also showed little interest in the add-on offerings.**

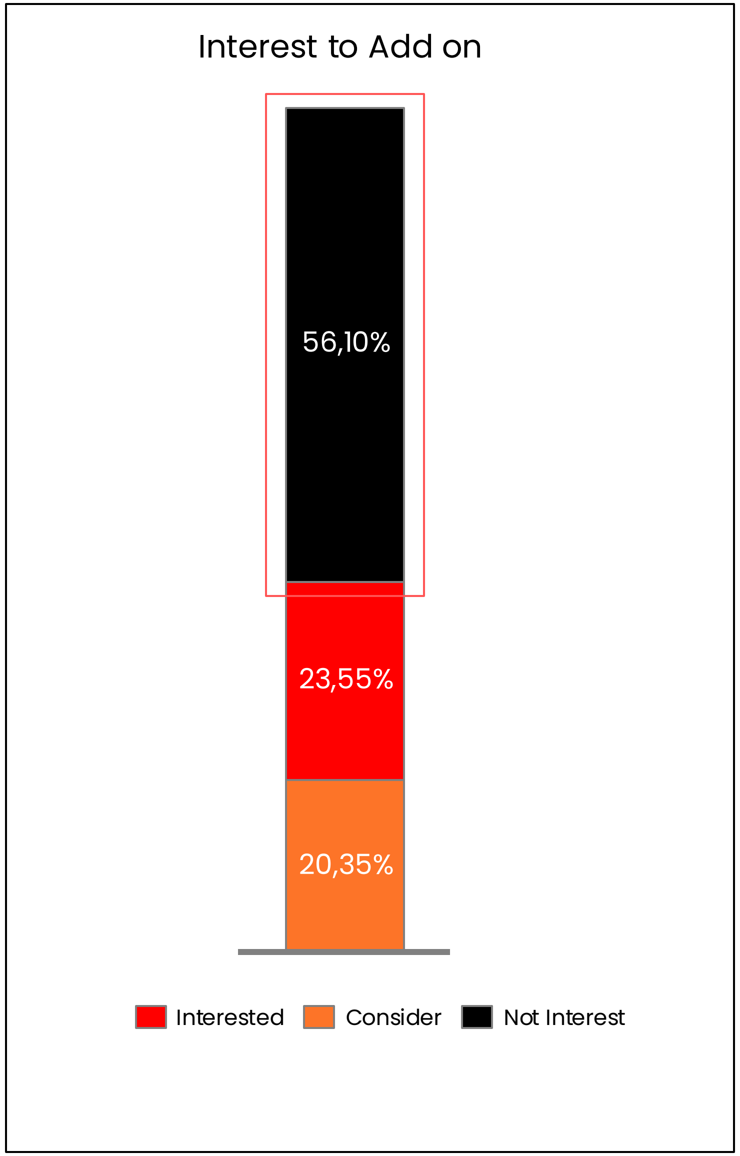
Subscribe Add On



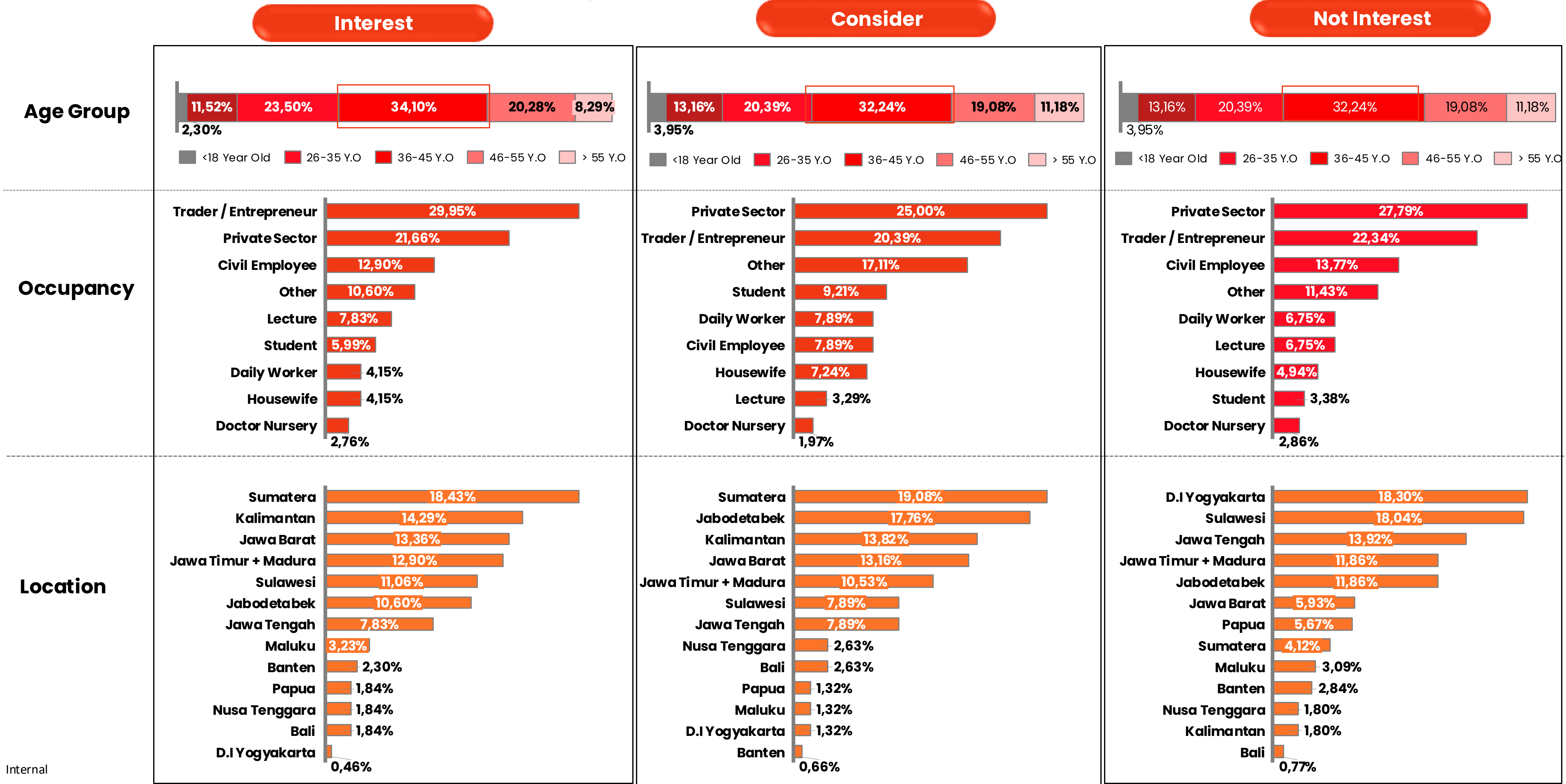
Lapser Add on



Non-Sus Add on



The age group with the highest proportion is 36-45 years. The segment showing the most interest consists mainly of traders and entrepreneurs. **Those who are either interested or considering the add-ons are predominantly located in Sumatra, while those who are not interested are mainly in D.I. Yogyakarta**.

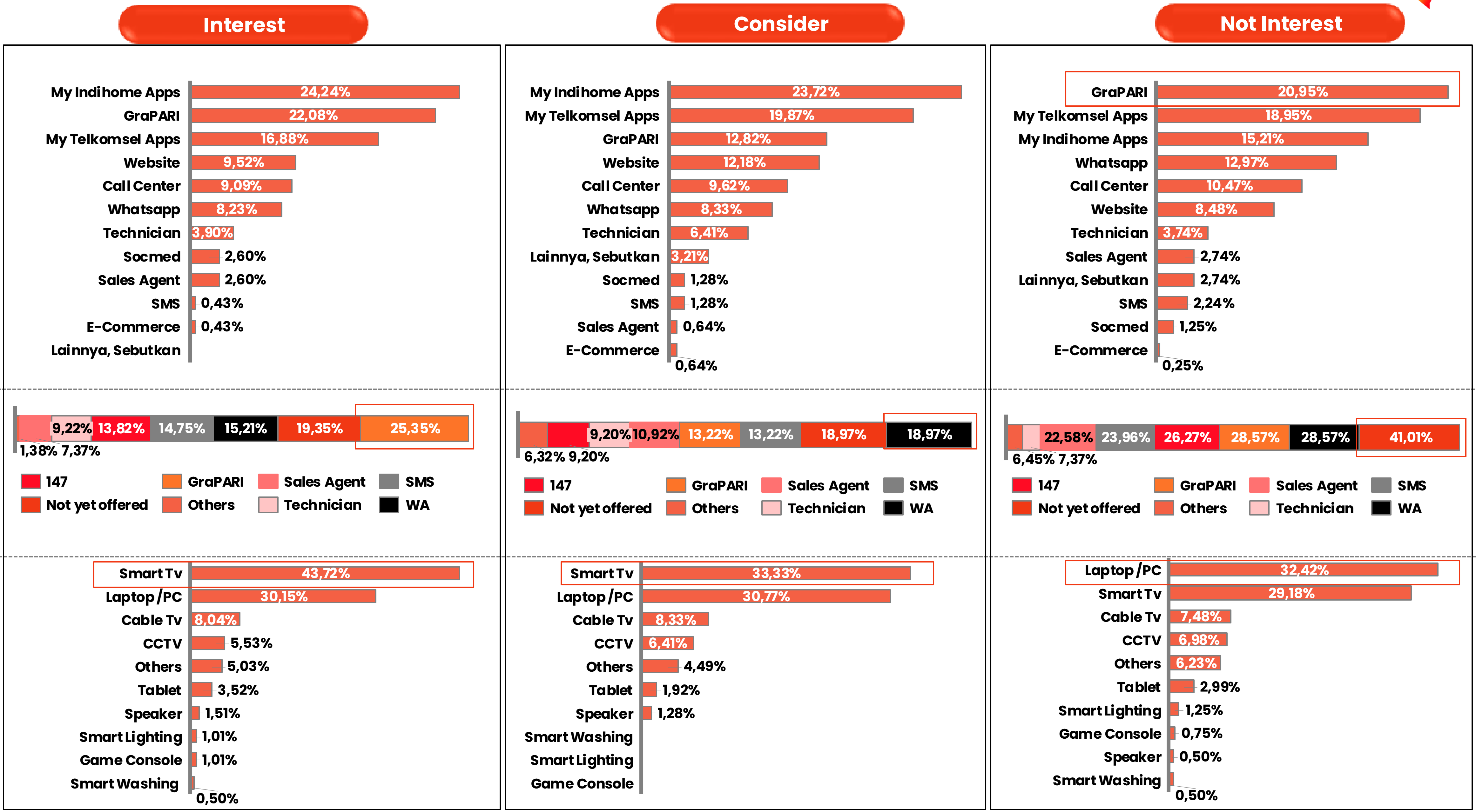


The preferred channel for the **"Interest"** and **"Consider"** segments is **My Indihome Apps**, while the **"Not Interested"** segment **prefers GraPARI**. There are differences in channel preferences: the **"Interest"** segment may benefit from offers through **GraPARI,** whereas the **"consider"** segment often receives offers via **WhatsApp**.

Channel Preferences

Channel May have offered

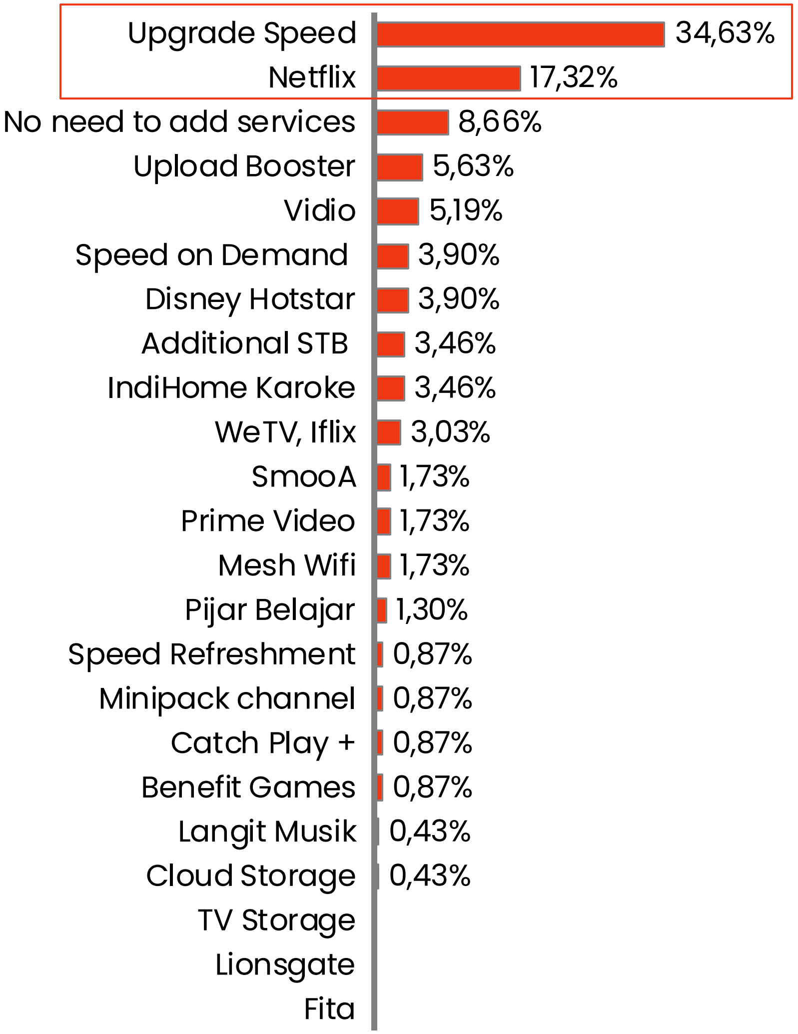
Product connect



The most suitable products for the **"interest"** and **"consider"** segments are **internet speed upgrades and Netflix** for entertainment.

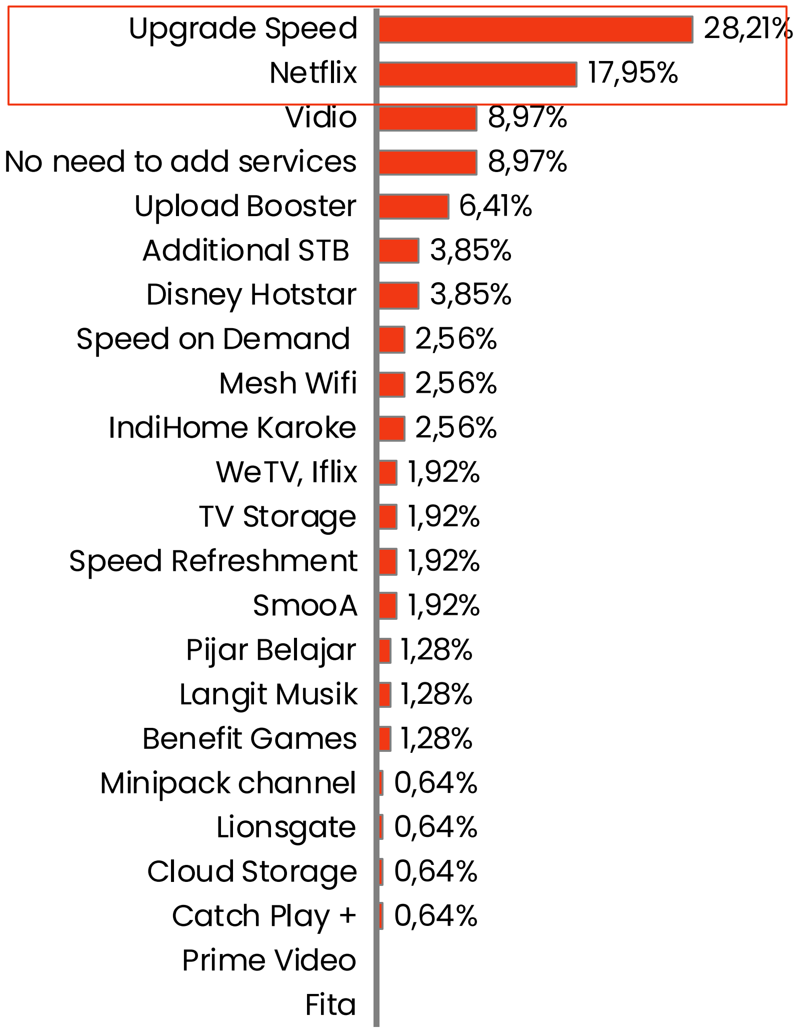
Interest

Add on that most suitable for them



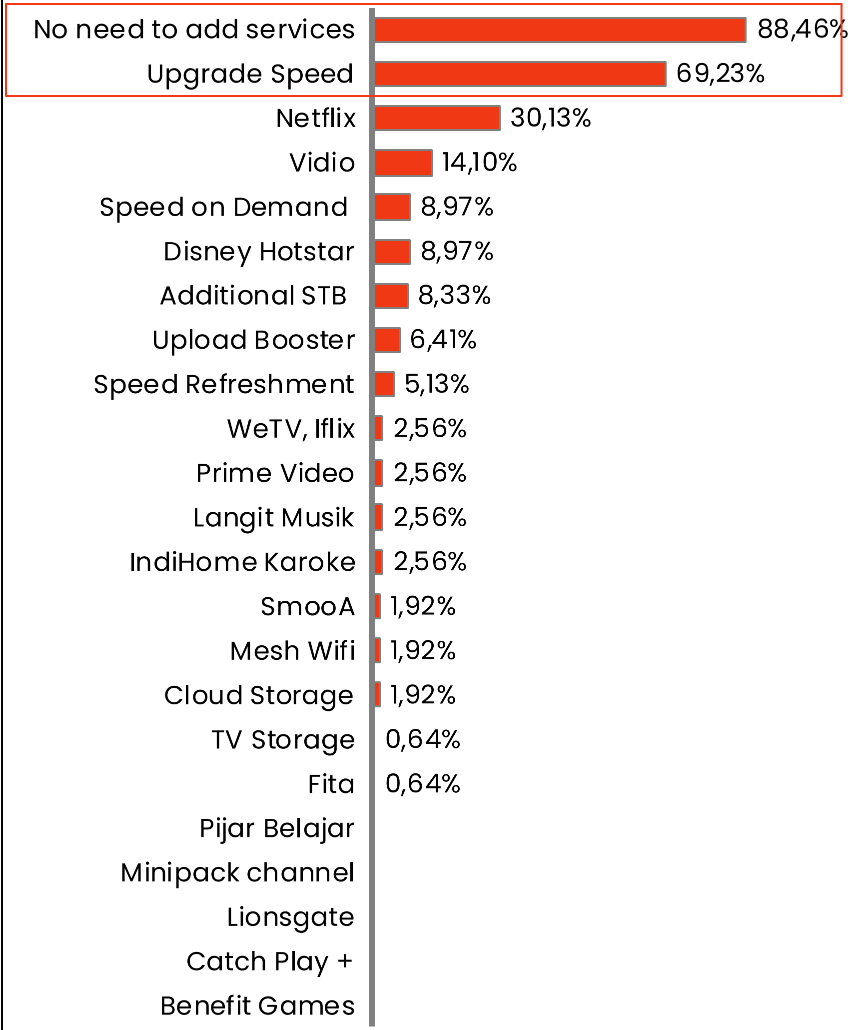
Consider

Add on that most suitable for them



Not Interest

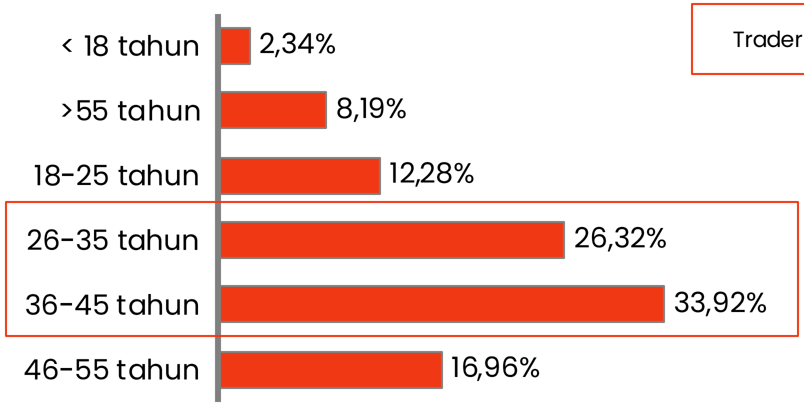
Add on that most suitable for them



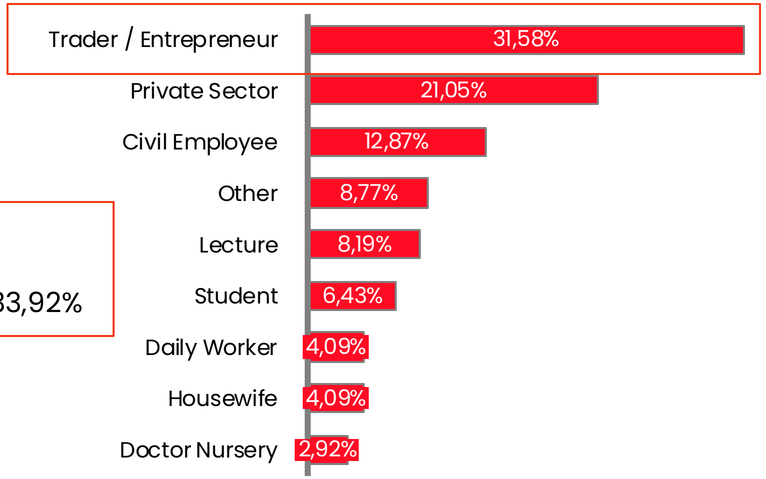
The segment that is **"interested but still needs time" is skewed towards 26-35-year-olds in Sumatera,** while those who prefer **direct contact are typically 46-55 years old and located in Kalimantan.**

Interest but still need time

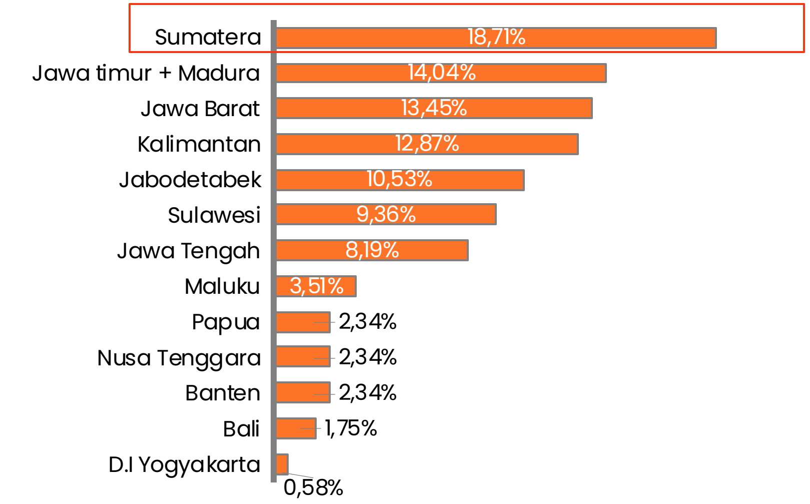
Age Group



Occupation

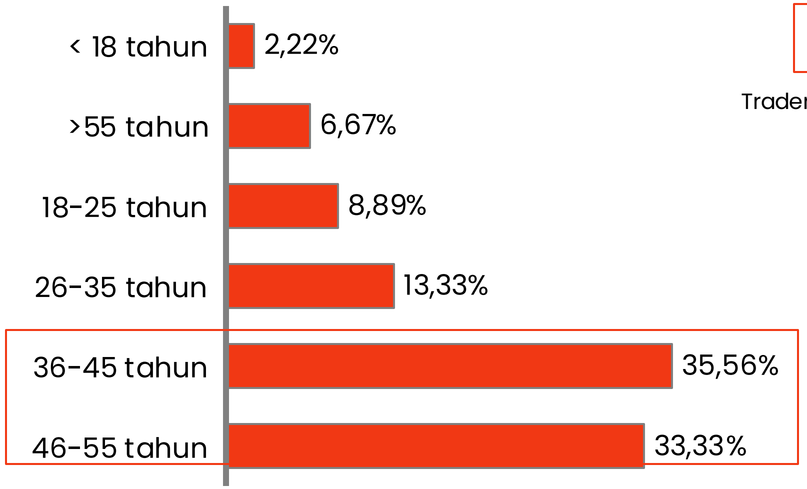


Location

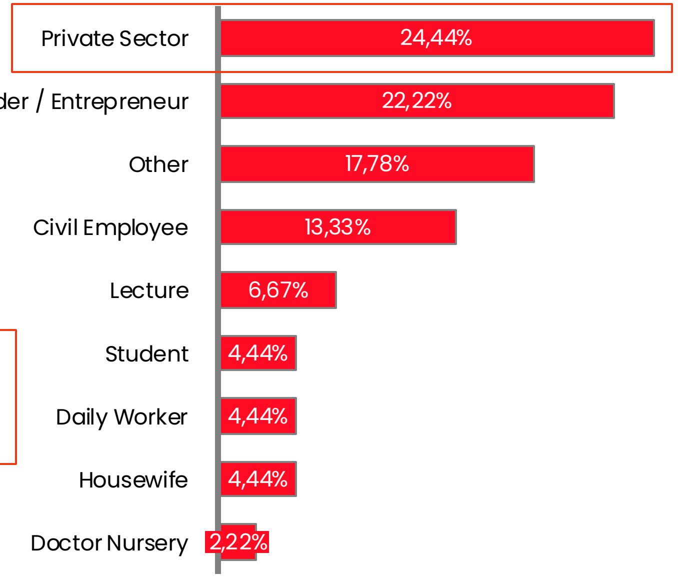


Interest to be contact

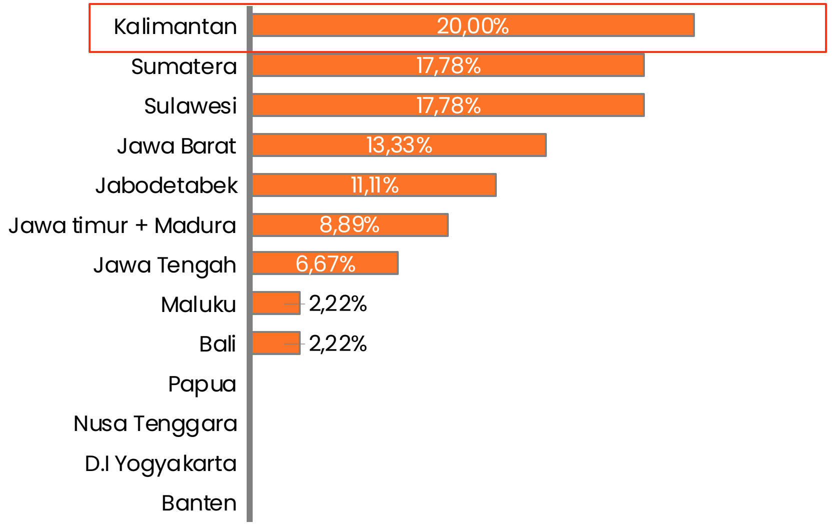
Age Group



Occupation



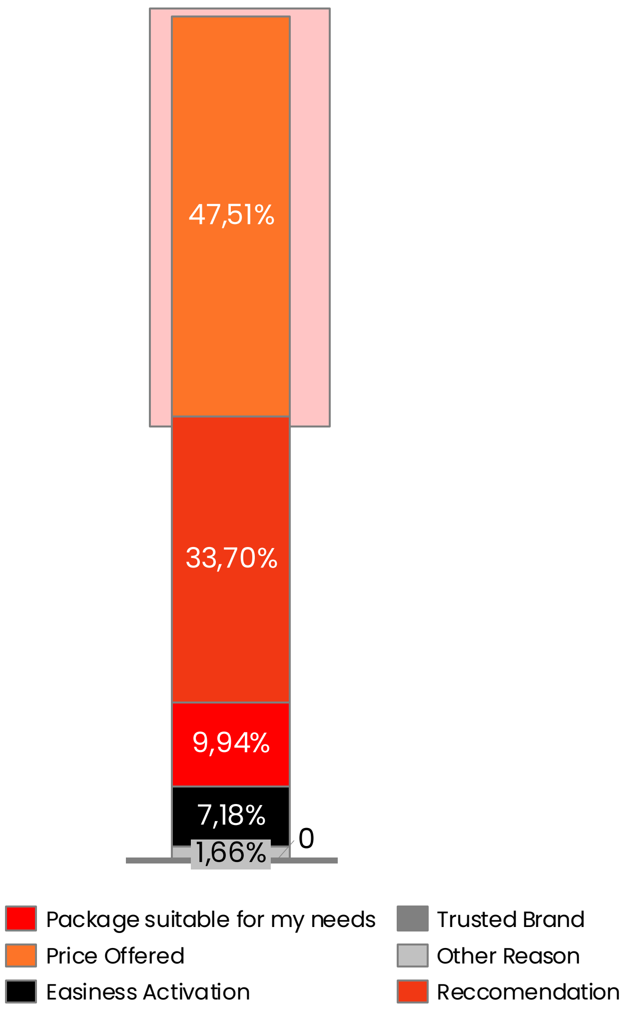
Location



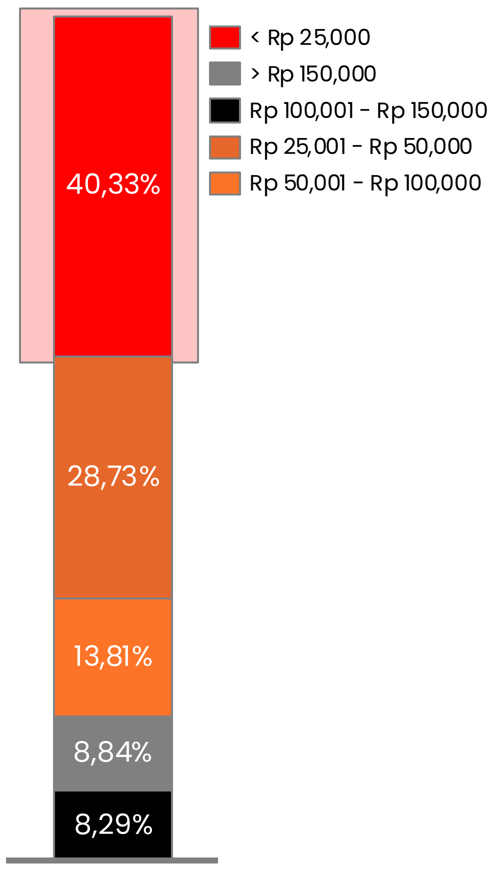
Both segments, "interested but still need time" and "interested to be contact directly," **consider price offers when deciding on add-ons. Room opportunity, the budget allocation for add-ons is higher for the segment interested in direct contact compared to those still in the consideration phase.**

Interest but still need time

Reason to consider Add on

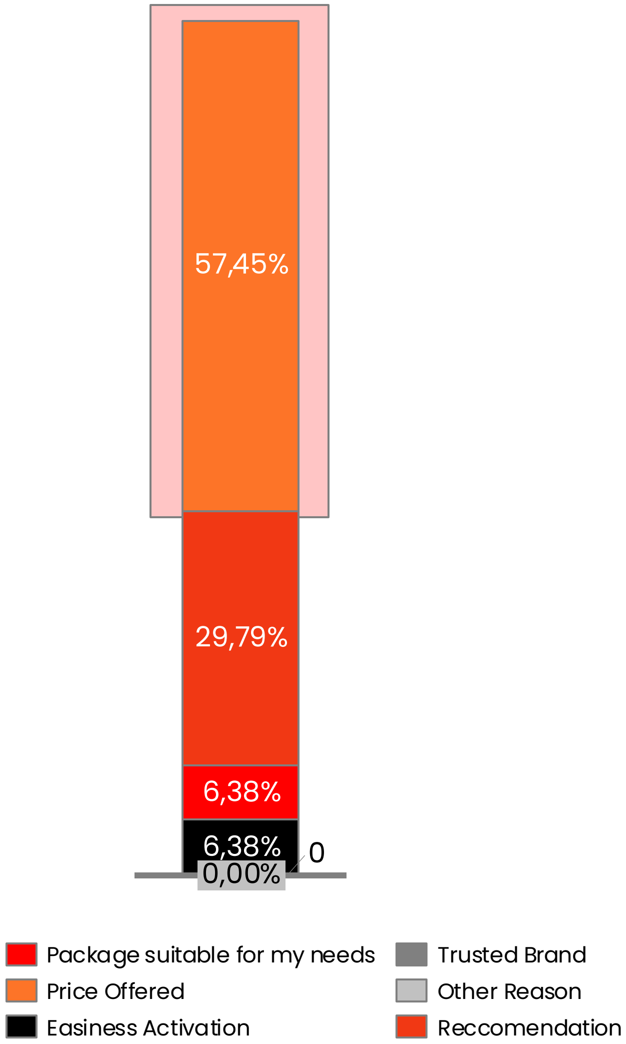


Budget allocation for Add on

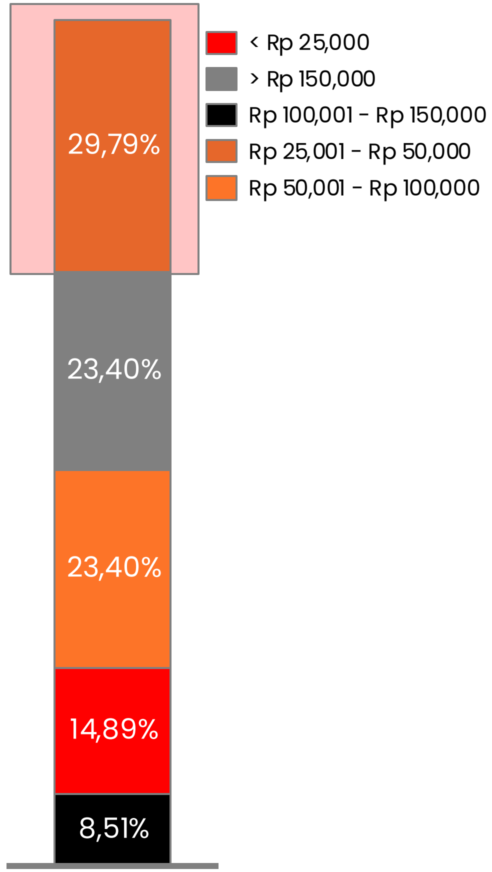


Interest to be contact

Reason to consider Add on



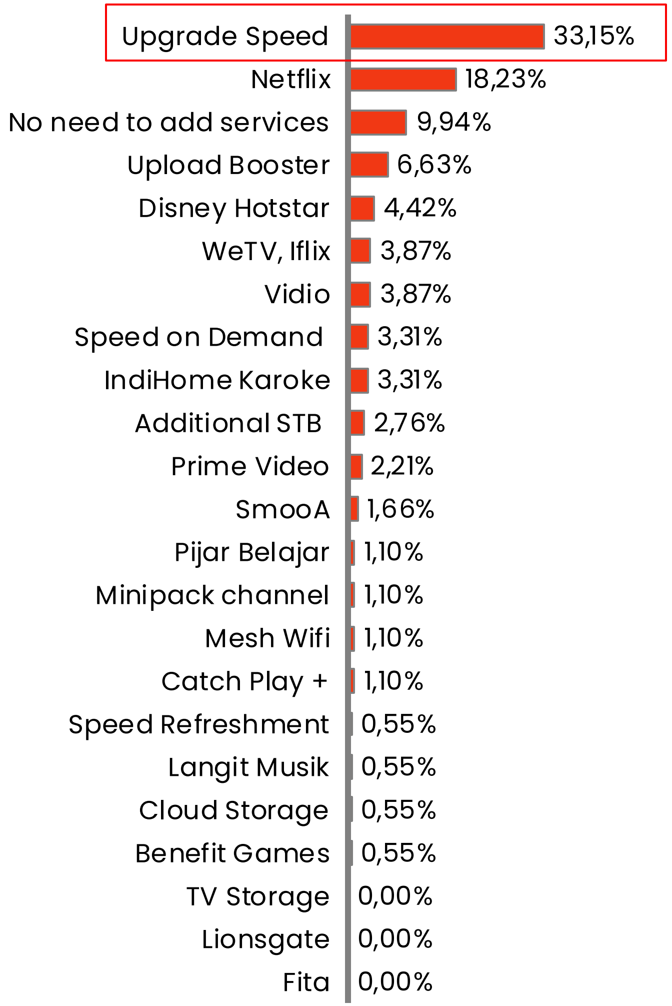
Budget allocation for Add on



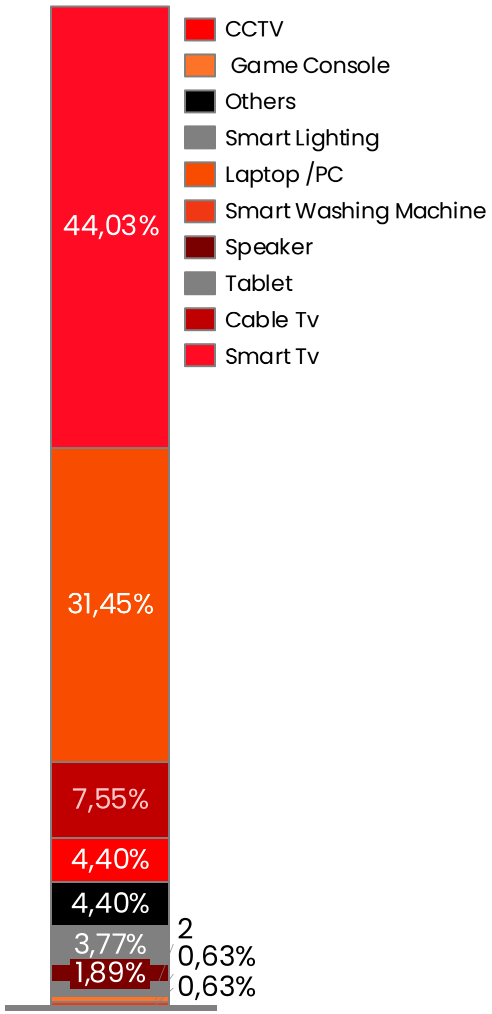
Both "Interest but still need time" and "Interest to be contacted" **prefer an upgrade in speed and** a product that **frequent connect to Wi-Fi for CCTV user.**

Interest but still need time

Add on that most suitable for them

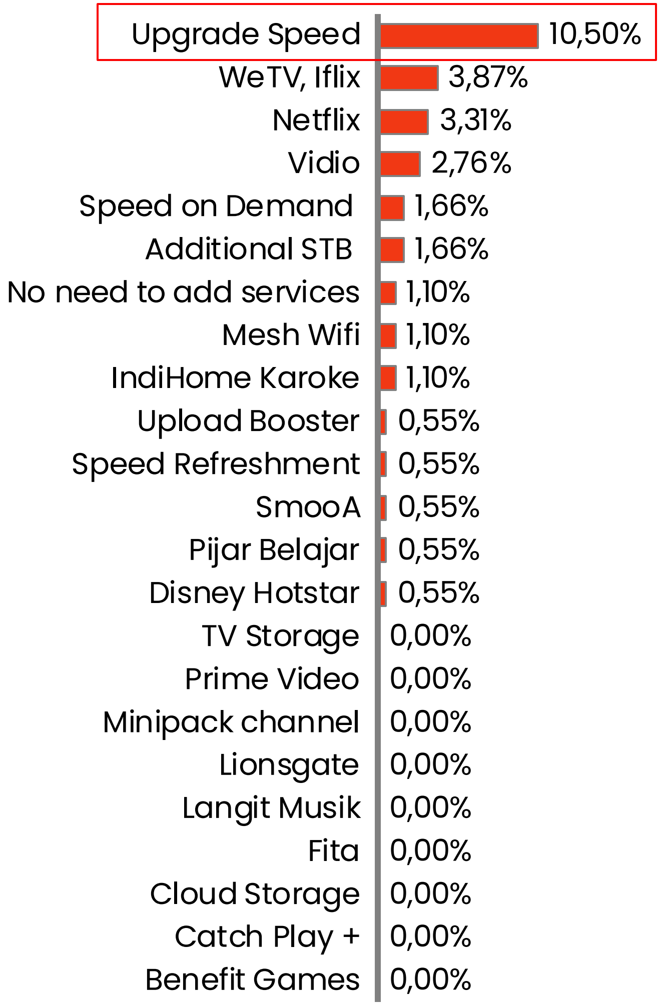


Product connect to Wi-Fi

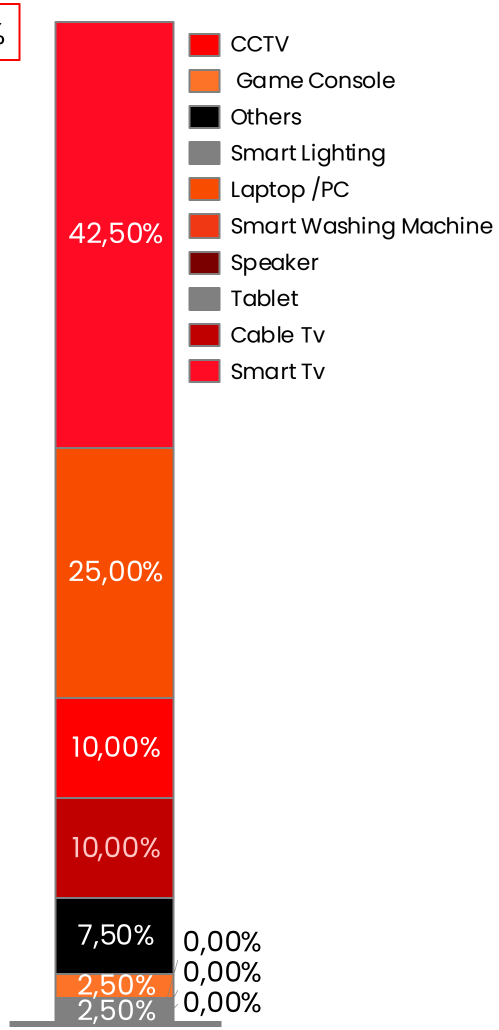


Interest to be contact

Add on that most suitable for them

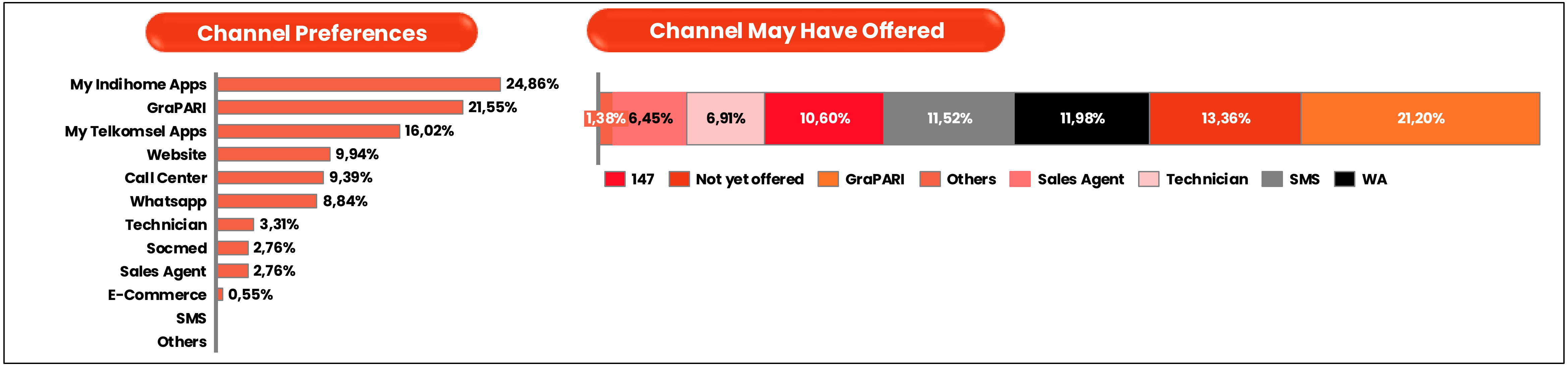


Product connect to Wi-Fi

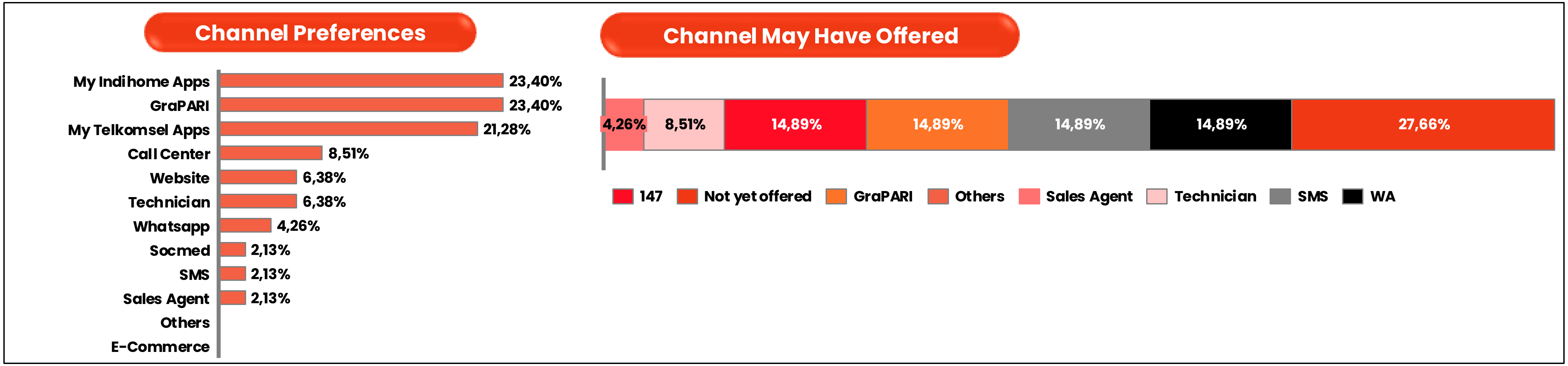


Both segments prefer the My IndiHome apps as their channel choice. The segment “interest but still need time” often **receives information about add ons at GraPARI,** while the “interest to be contact segment” **has not yet been offered information related Add on.**

Interest but still need time



Interest to be contact



Summary deep dive segment

Key Summary :

1. **Important factor : Offering packages that suit their need** is important to consider when tailoring add on. **Meanwhile, price becomes a more significant consideration for the not yet subscribe add on**
2. **Interest level :** The interest level of add ons was low among **little interest in the add on offerings for** lapsed subscribers and non-subscriber. **Surprisingly, current subscribers also showed decrease interest in the add-on offerings**
3. **Profile segment : Skewness** age group still within range **36-45 years old and location skewness for not interested are mainly in D.I Yogyakarta.**
4. **Channel :** The preferred channel for both "interest" and "consider**" segment was in My IndiHome Apps. While for the "not interest segment" prefers GraPARI .**
5. **Channel offering : meanwhile for "Consider"** segment often receives offers via **WhatsApp**.
6. **Product interest :** The most suitable products for the **"interest**" and **"consider"** segments are **internet speed upgrades and Netflix** for entertainment**.**
7. Both segments, "interested but still need time" and "interested to be contact directly," **consider price offers when deciding on add-ons.**

Recommendation

1. **Product :** Tailor add-on packages to meet the specific need for each segment, emphasizing features like Inet speed upgrade and Netflix for entertainment.
2. **Pricing strategy :** offer competitive pricing for add ons particularly targeting not yet subscribed segment to incentivize them to try new feature with budget they want to allocate.
3. **Multi-channel approach :** Combine the use of My IndiHome Apps, and WhatsApp as digital channel that respondent preferred.
4. **Retention** : Maintain current subscriber that show indication decrease interest in using add on offering.

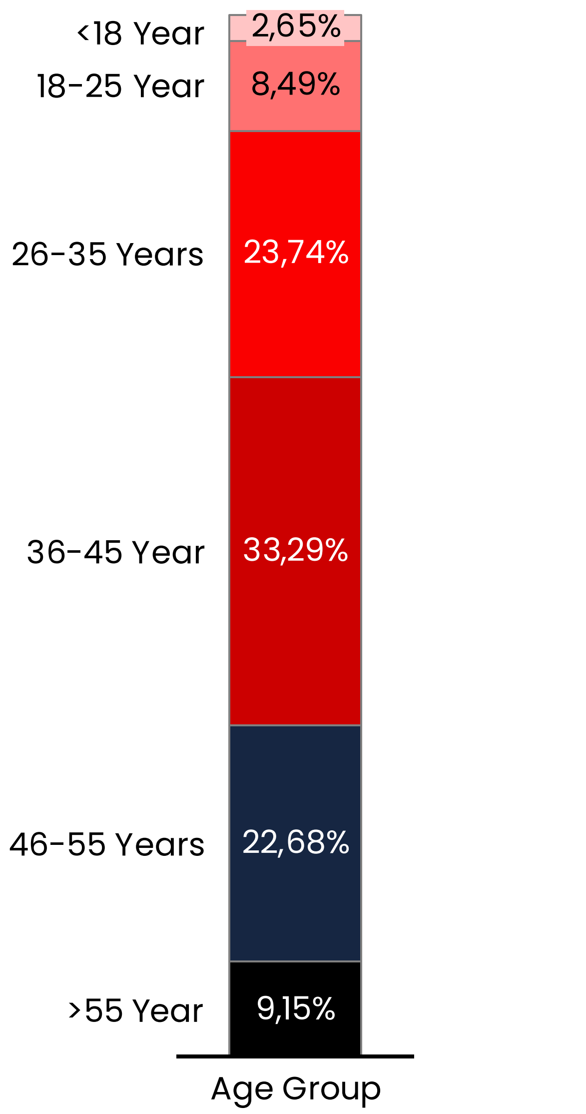
Summary and Recommendation

Summary	• **Respondent Profile**: The survey included 1,427 respondents, primarily progressive adults aged 36-45, working in the private sector, and living in their own homes in Sumatera. • **Awareness of Add-Ons**: Most respondents are aware of speed upgrade add-ons (40.80%), but awareness of other add-ons likewise speed on demand, upload booster, and mesh Wi-Fi is significantly lower. • **Interest in Speed Upgrades**: Despite low awareness of other add-ons, 64.63% of respondents are interested in upgrading their internet speed. • **Entertainment Add-Ons**: Vidio is the most recognized entertainment add-on (64.52%), followed by WeTV, Iflix, Prime Video, Netflix, and Disney+ Hotstar. Less popular services include Catchplay and Lionsgate. • **Interest in Entertainment Add On**: Among subscribers, Netflix leads with 28.08%, followed closely by speed upgrade (27.76%) and Vidio (23.79%). 32.37% of respondents have not subscribed to any add-on services. • **Activation Channels:** Grapari is the most preferred channel for activating add-ons (19.86%), followed by My Indihome app (18.69%) and My Telkomsel app (18.11%). However, 24.77% of respondents reported not being offered add-ons through any channel.
Recommendation	1. **Simplify product portfolio :** simplify and Consolidate the add-on product portfolio to focus on a few key offerings that resonate most with customers. prioritize high-demand services like speed upgrades and popular entertainment add-ons such as Netflix and Vidio. 2. **Promote Bundling Options**: Introduce bundled packages that combine complementary add-ons (e.g., speed upgrade with entertainment services) to simplify decision-making and offer better value to customers. 3. **Increase Awareness**: Provide clear and concise information about each add-on, including benefits and how to activate them, to help customers make informed decisions 4. **Streamline Activation Channels:** With a significant portion of respondents reporting not being offered add-ons through any channel, streamline activation processes across all platforms, including Grapari, My Indihome app, and My Telkomsel app, to enhance customer accessibility. 5. **Target Specific Demographic Segments:** Recognizing that the majority of respondents are progressive adults aged 36-45 in Sumatera, tailor marketing efforts and add-on offerings to meet their preferences and needs more effectively.

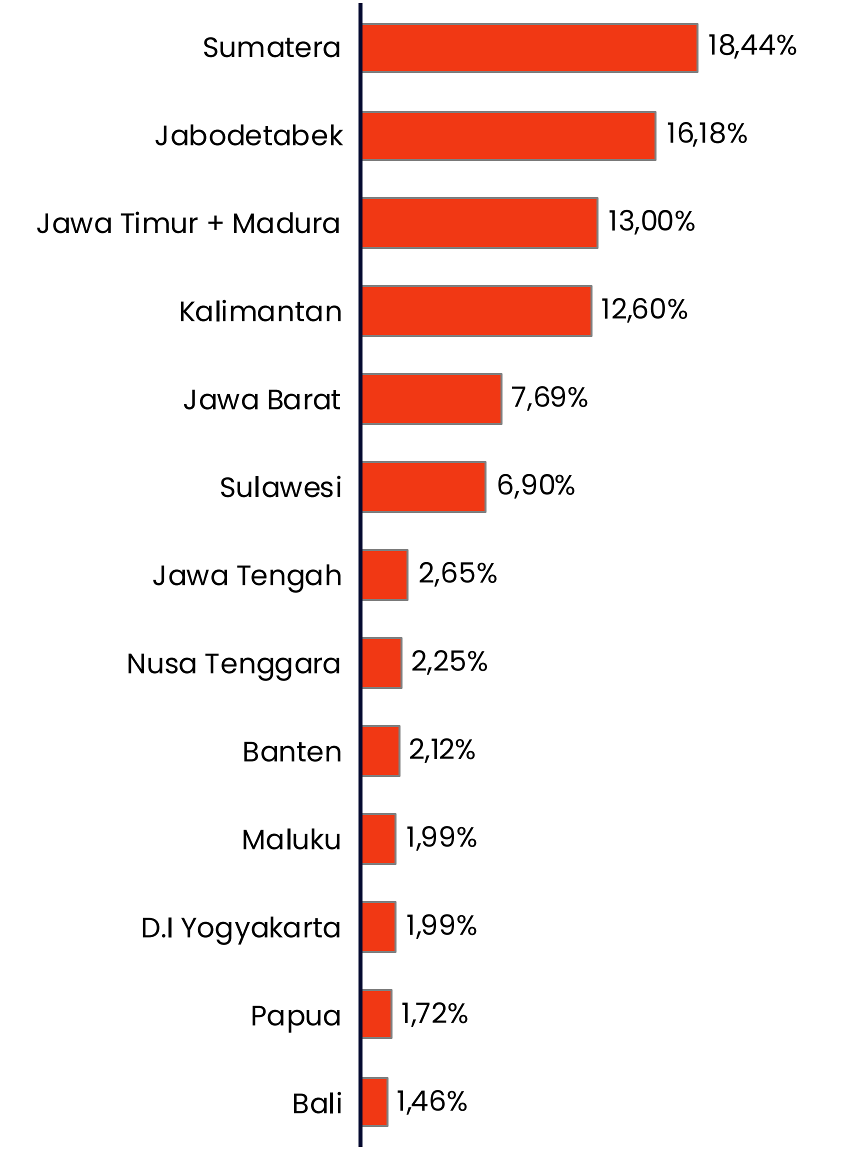
APPENDICES

33.29% of respondents are aged 36-45 years old and 22,68% are aged 46-55 years. **Geographically, 18.44% are located in Sumatera, 16.18% in Jabodetabek, and 13% in East Java and Madura**. **In terms of occupation, 25.46% are private sector employees,** while 24.14% are work as seller or trader / entrepreneurs.

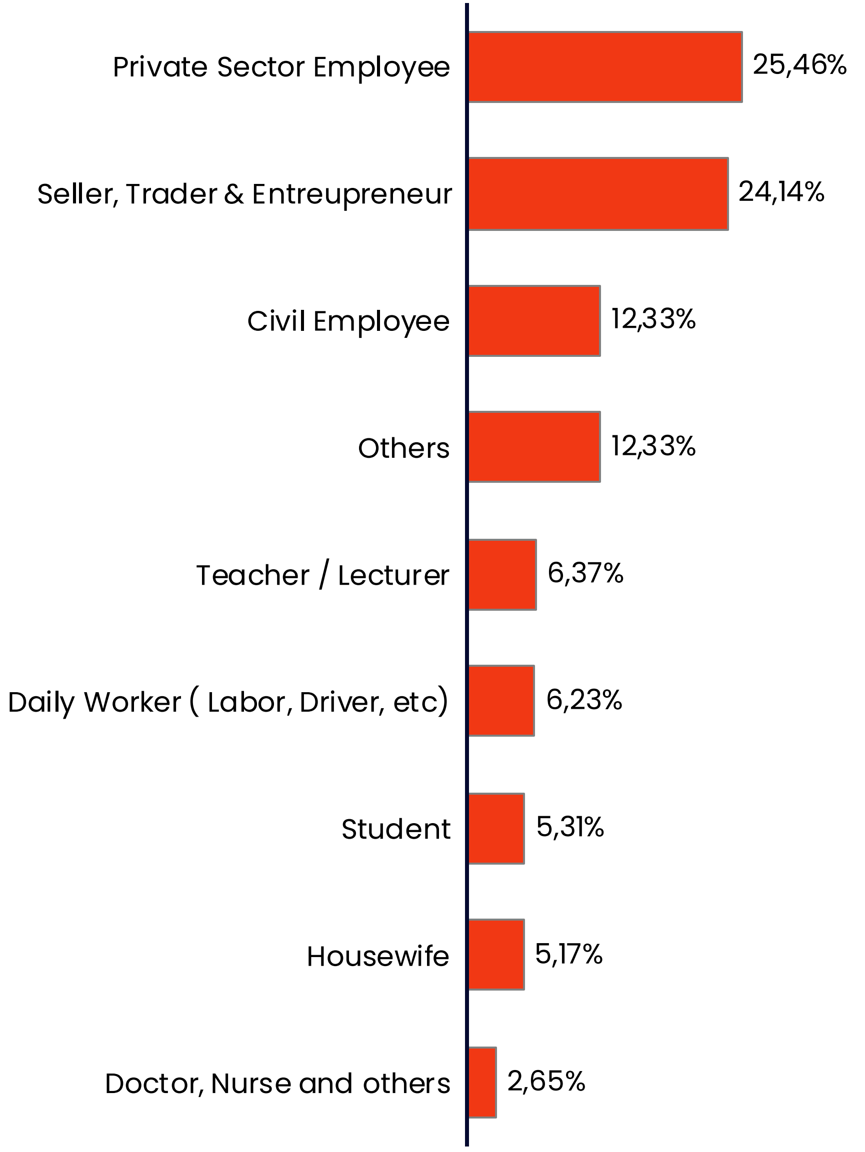
Age group



Location

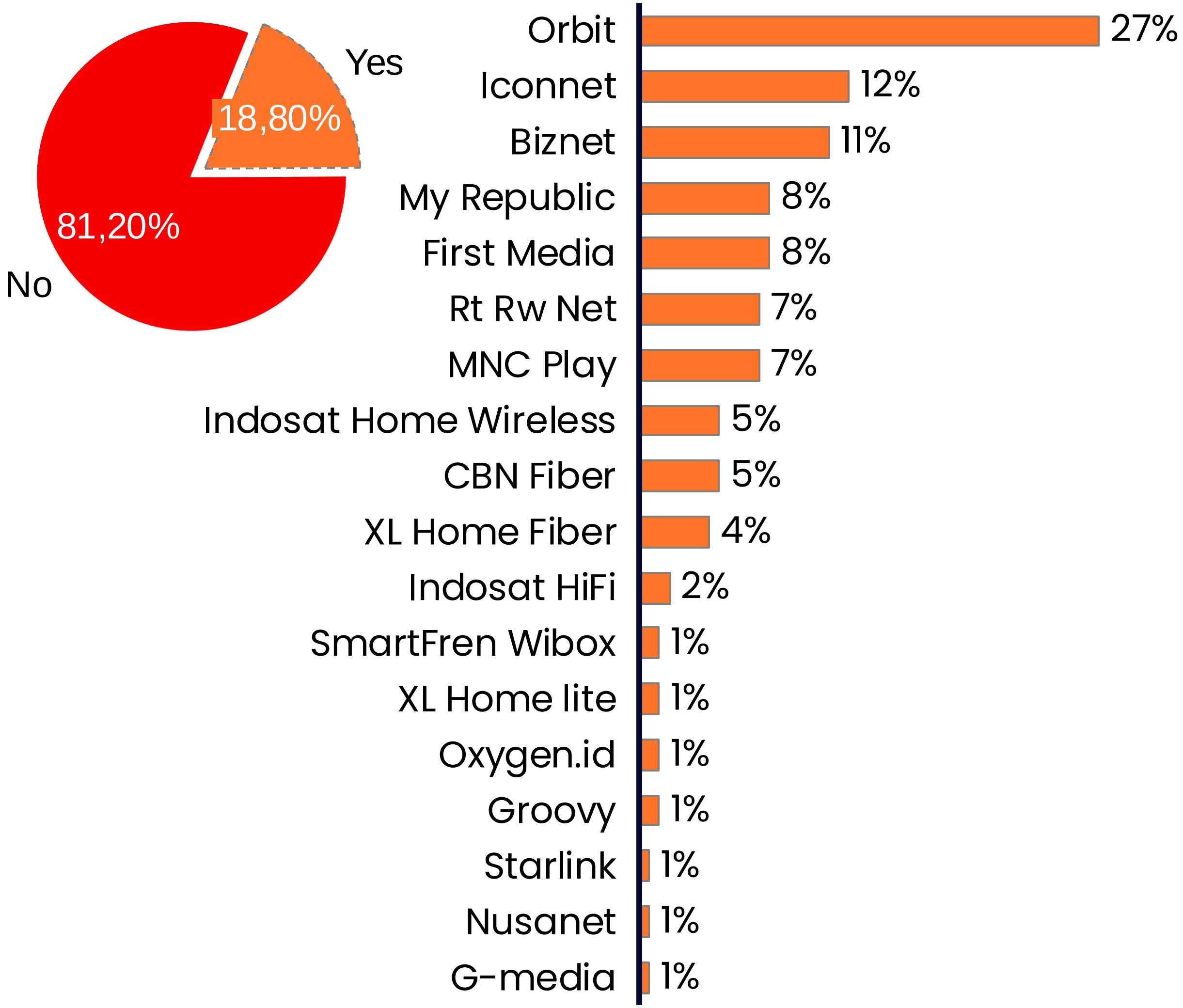


Occupation

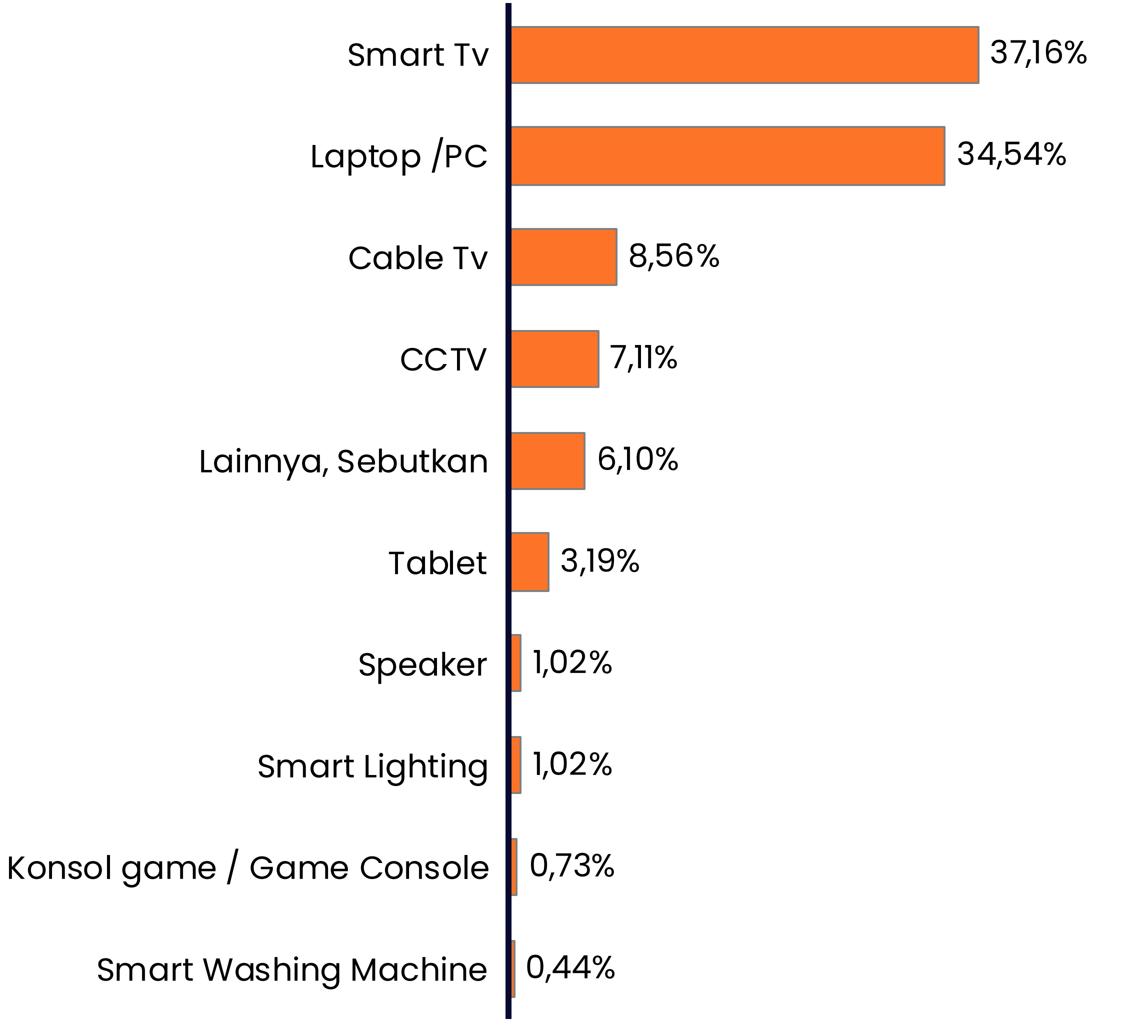


27% of respondents use Orbit as their secondary home internet brand, followed by 12% using Iconnet, 11% using Biznet, and 8% using MyRepublic. Additionally, many respondents regularly connect various devices to the internet via Wi-Fi, such as Smart TV (37.16%) laptops or PCs (34,54%)

Secondary Home Internet Brand



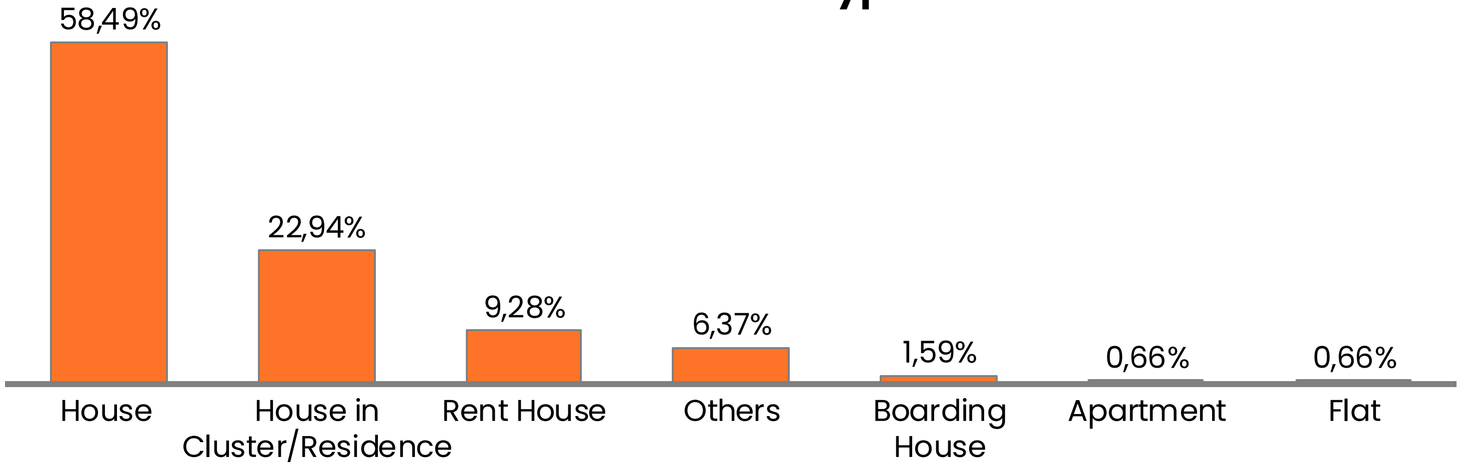
Product Identified Regularly connected via Internet Wi-Fi



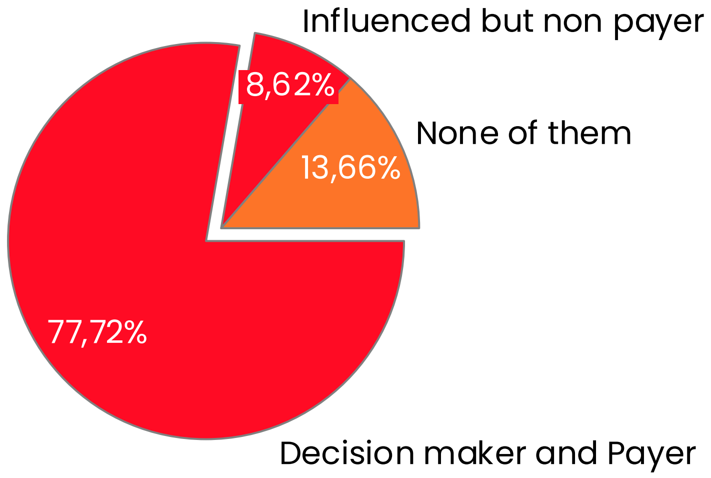
Q24 : Apakah anda menggunakan penyedia Internet lain selain IndiHome di hunian Anda?
Q25 : Sebutkan Penyedia Internet Wi-Fi lainnya yang saat ini Anda miliki ?

58.49% of respondents live in individual houses, while 22.94% reside in houses within clusters. Additionally, **77.72% of respondents identify as both the decision-maker and payer in their households.**

Residential Type



Role in Household



Verbatim Feedback for overall improvement

Product Quality	Kalau bisa agar dipertimbangkan bandwidth yang ditawarkan ke calon pelanggan/pelanggan karena saat ini sudah ada Starlink yang mampu menjangkau dengan bandwidth 300Mbps.
Price	• *Harga kurang bisa bersaing* • *Harganya turun dan sedikit diskon* • *Semoga layanan Smoaa dapat turun tarifnya* • *Harganya agar terjangkau*
Communication & Awareness	• *Jaringan sering ngelag* • *Signal akhir² ini kurang bagus* • *jaringannya diperbaik dong..jgn plendap plendup kl seperti ini trs,sy mau beralih ke biznet* • *Jaringan sering hilang lemot*
Penalty	*Kalau telat bayar jangan langsung kena denda Satu haripun telat langsung ada denda*
Communication & Awareness	• *Saya masih kurang faham mengenai add on* • *Sosialisasi nya harus lebih digalakan* • *Penawaran jarang diketahui masyarakat*

Service Quality	Pastikan tidak ada tagihan add on siluman. Beberapa kali saya mendapat tagihan add on, padahal tidak saya tambahkan dan tidak terbukti masuk di aplikasi indihome saya, tapi masih tetap ditagih
Product Quality	*Set top box saya sudah mulai suka slow respon, harusnya ada penggantian berkala pertahun*
Communication	*terlalu ribet dan kurang jelasnya penawaran awal jadi kesannya seperti ada jebakan perangkap buat calon atau customer*
Product Specification	*Mungkin berikan opsi untuk upgrade speed hingga 300mbps dibawah 500 ribu*