EZNet by Telkomsel Survey

Advanced Analytic And Growth Marketing

Background Study and objectives

Background	• The demand for internet services is expanding rapidly, This growth is apparent across various market segments, including the low-end market, which often prioritizes affordability and essential internet needs over high-speed connections. • EZNet, a provider of both postpaid and prepaid internet services, aims to cater to this segment. • Eznet by Telkomsel have released and continue to scale up in all area, however understanding the target market's perceptions and preferences, • With the launch of Eznet postpaid, is EZnet prepaid still considered appropriate to market needs? • Assessing potential offered by Eznet services through add-ons, EUP and speed limitations
Objectives	• Market Penetration and Acceptance Study of Eznet by Telkomsel • By analyzing market responses, the study aims to understand the factors driving the adoption of Eznet in the market. Additionally, the study seeks to assess the market acceptance of the Eznet brand. • Understand the level of interest in entertainment add-ons among low-end market users with low-speed internet requirement • Determine if the affordability of EZNet's pricing is attractive enough for the target market.
Methodology	• In-house online survey conducted using Survey Monkey • Quantitative • Sampling method : Purposive defined sampling with descriptive analysis • Survey period : 10-12 July 2024

Segment	Description	Whitelist	Respondents	TUR
M-TSEL & F-COMP	• Mobile Telkomsel, Non IndiHome User	100,000	265	0.3%
M-TSEL & F-COMP BCP	• Mobile Telkomsel, Access FBB Brand's Competitor (BCP base) • ARPU mobile Rp 100,000-Rp 250,000	100,000	616	0.6%
M-TSEL & F-IND CHRN	• IndiHome Churn/ Request CAPS, Telkomsel Mobile	100,000	380	0.4%
Total		**300,000**	**1,261**	**0.4%**

WiFi User and their intention to switch

Overall, 60.1 % are WiFi user and 8.9% are Potential WiFi User. Apartment and House Non-Cluster has higher portion of WiFi user (89.5% - 80.4%) with higher percentage to switch the service (64.9% - 82%). Potential user are higher among House Cluster user (14.9%).

WiFi user

	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN	Apartment	Self-owned House (Non-Cluster)	Self-owned House (Cluster)	Rent House	Dorm	Other
WiFi user	60.1%	35.8%	63.5%	71.6%	89.5%	80.4%	34.7%	32.8%	56.0%	32.0%
Potential WiFi user	8.9%	11.7%	8.6%	7.4%	0.0%	5.4%	14.9%	9.8%	9.8%	12.0%
Non-WiFi user	31.0%	52.5%	27.9%	21.1%	10.5%	14.2%	50.4%	57.4%	34.1%	56.0%

Legend: ■ WiFi user   ■ Potential WiFi user   ■ Non-WiFi user

Intention to Switch
Base: WiFi user only

	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN	Apartment	Self-owned House (Non-Cluster)	Self-owned House (Cluster)	Rent House	Dorm	Other
Definitely will not switch	5.4%	8.4%	4.6%	5.5%	0.0%	5.7%	4.3%	11.9%	5.0%	12.5%
Unlikely to switch	13.5%	23.2%	10.7%	14.0%	11.8%	14.3%	9.7%	11.9%	25.0%	37.5%
Likely to switch	37.7%	28.4%	39.4%	38.6%	41.2%	34.2%	41.7%	23.8%	40.0%	25.0%
Definitely will switch	29.8%	20.0%	34.5%	26.5%	41.2%	30.7%	31.7%	40.5%	20.0%	12.5%
Uncertain	13.6%	20.0%	10.7%	15.4%	5.9%	15.1%	12.7%	11.9%	10.0%	12.5%

Legend: ■ Definitely will not switch   ■ Unlikely to switch   ■ Likely to switch   ■ Definitely will switch   □ Uncertain

Q Apakah saat ini Anda sedang berlangganan WiFi di hunian Anda?
Q Jika ada merek layanan Fixed WiFi / Broadband Internet di rumah lainnya menawarkan Anda produk yang serupa dengan harga yang lebih murah, seberapa besar keinginan Anda untuk pindah dari {Brand WiFi} ?

Internal

EZ Net Overall

Notes: For this section, respondent based on Potential WiFi user and WiFi User with intention to switch from their current WiFi brands

EZNet: Awareness and Correct Recall

Majority respondents not aware of eznet (81%). Correct recall and awareness on EZNet has similar portion (17.2% and 18.8%).

Correct Recall

	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN
One of the Wi-Fi Internet Products from Telkomsel	17.2%	17.7%	18.2%	15.4%
One of the Wi-Fi Internet Products from IndiHome	12.2%	15.6%	11.7%	11.7%
One of the Wi-Fi Packages from Telkomsel	3.6%	6.3%	3.1%	3.2%
One of the Wi-Fi Internet Packages from IndiHome	1.4%	2.1%	0.8%	2.0%
One of the Cellular Products from Telkomsel	1.7%	3.1%	0%	2.0%
Didn't know	64.0%	55.2%	65.1%	65.6%

Awareness

	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN
Aware of EZNet	18.8%	20.8%	18.8%	18.2%
Not Aware of EZNet	81.2%	79.2%	81.3%	81.8%

Awareness X Correct Recall

	Aware of EZNet	Not Aware of EZNet
One of the Wi-Fi Internet Products from Telkomsel	51.1%	9.3%
One of the Wi-Fi Internet Products from IndiHome	27.7%	8.6%
One of the Wi-Fi Packages from Telkomsel	7.3%	2.7%
One of the Wi-Fi Internet Packages from IndiHome	0.7%	1.0%
One of the Cellular Products from Telkomsel	2.9%	1.9%
Didn't know	10.2%	76.4%

Q Apa yang Anda bayangkan ketika mendengar "EZnet" ?
Q Apakah Anda pernah mendengar atau mengetahui EZnet by Telkomsel?

Internal

EZNet: Ads Awareness

Only 18.3% respondents are familiar with respective ads, with highest portion on F-COMP segment.

Baru!
EZnet dari Telkomsel

EZnet
by Telkomsel

Internet Rumah,
Murah Mudah

Syarat dan ketentuan berlaku

Mulai dari
RP150rb /bulan

Kecepatan hingga
10Mbps

info lebih lanjut di
telkomsel.com/eznet

	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN
Highly Familiar	15.7%	20.8%	14.1%	16.2%
Moderately Familiar	2.6%	7.3%	1.8%	2.0%
Moderately Unfamiliar	19.1%	17.7%	20.6%	17.4%
Highly Unfamiliar	62.6%	54.2%	63.5%	64.4%

- ■ Highly Familiar
- ■ Moderately Familiar
- ■ Moderately Unfamiliar
- ■ Highly Unfamiliar

Q Seberapa familiar Anda ketika melihat iklan / promo di atas ini ?

EZNet: Ads Impression and Attractiveness By Segment

Majority First Impression of the respondent on EZNet find as new product (34.3%) and EZNEt By Telkomsel (27.2%), where across segment has vary skewness on first impression. Ads Attractiveness on "Internet Rumah, Mudah dan Murah" is captured by 31.2% respondents, where "Mulai dari 150 Ribu kecepatan hingga 10 Mbps" also captivate some segments.
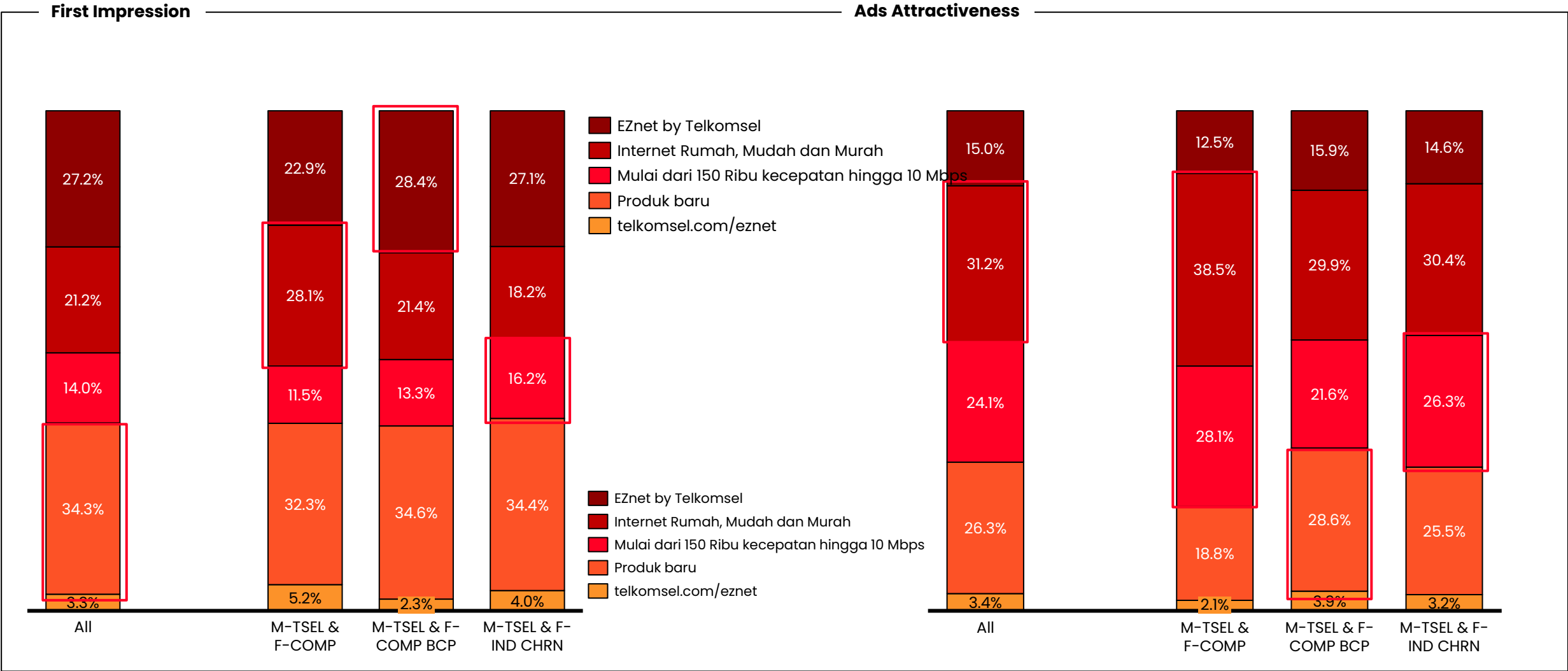

First Impression | **Ads Attractiveness**

Legend:
- EZnet by Telkomsel
- Internet Rumah, Mudah dan Murah
- Mulai dari 150 Ribu kecepatan hingga 10 Mbps
- Produk baru
- telkomsel.com/eznet

First Impression

Segment	EZnet by Telkomsel	Internet Rumah, Mudah dan Murah	Mulai dari 150 Ribu	Produk baru	telkomsel.com/eznet
All	27.2%	21.2%	14.0%	34.3%	3.3%
M-TSEL & F-COMP	22.9%	28.1%	11.5%	32.3%	5.2%
M-TSEL & F-COMP BCP	28.4%	21.4%	13.3%	34.6%	2.3%
M-TSEL & F-IND CHRN	27.1%	18.2%	16.2%	34.4%	4.0%

Ads Attractiveness

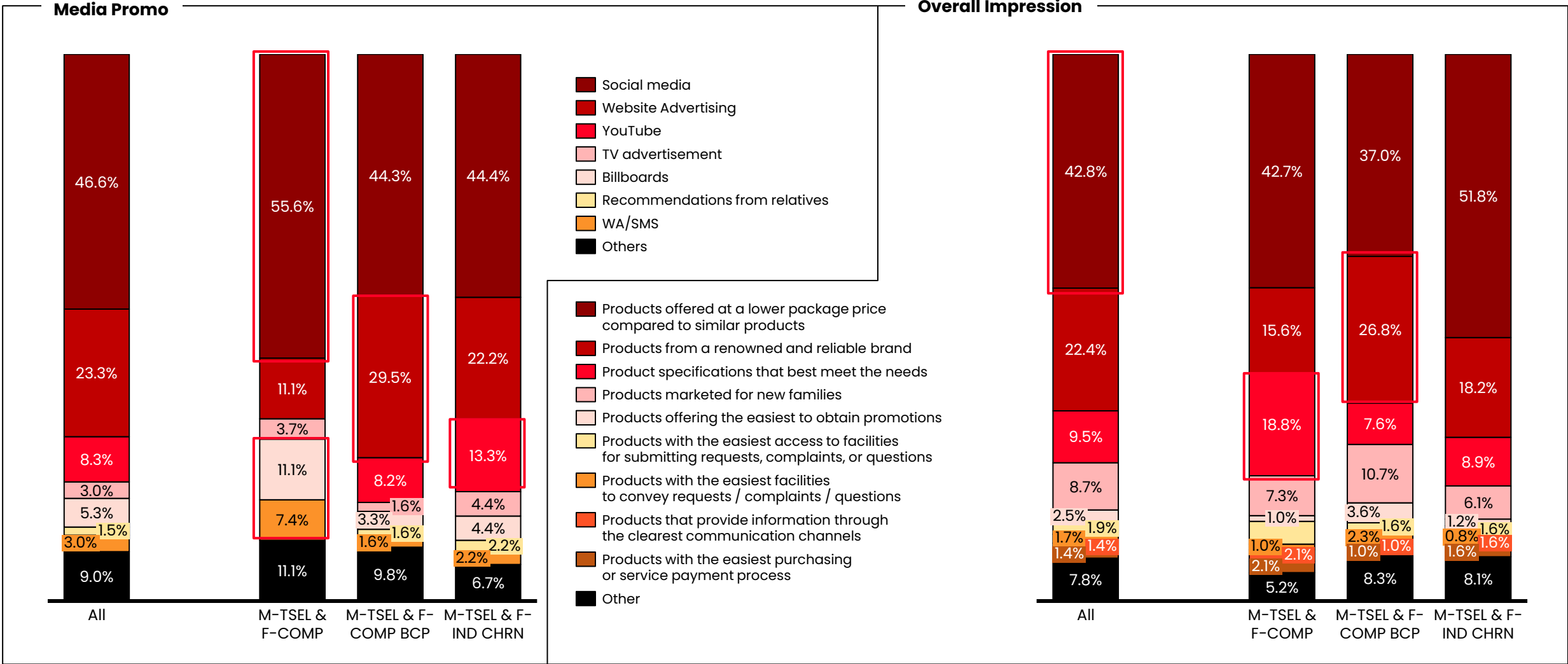| Segment	EZnet by Telkomsel	Internet Rumah, Mudah dan Murah	Mulai dari 150 Ribu	Produk baru	telkomsel.com/eznet
All	15.0%	31.2%	24.1%	26.3%	3.4%
M-TSEL & F-COMP	12.5%	38.5%	28.1%	18.8%	2.1%
M-TSEL & F-COMP BCP	15.9%	29.9%	21.6%	28.6%	3.9%
M-TSEL & F-IND CHRN	14.6%	30.4%	26.3%	25.5%	3.2%

Q Ketika melihat poster di atas pesan apa yang pertama kali Anda tangkap?
Q Ketika melihat poster di atas pesan apa yang membuat Anda tertarik?

EZNet: Ads Media Promo and Overall Impression

Among those who are familiar with EZNet Ads, 46.6% claimed to have seen it on Social Media, 23.3% on Website Advertising. While for F-COMP respondents also skew on Billboards and WA/SMS, F-COMP BCP on website advertising and F-IND CHRN on Youtube. Overall impression is found that EZNET considered as "product with lower price" while F-COMP user skew to "product with spec as needed" and F-COMP BCP user skew to "product with reliable brand"

Media Promo

All
- Social media: 46.6%
- Website Advertising: 23.3%
- YouTube: 8.3%
- TV advertisement: 3.0%
- Billboards: 5.3%
- Recommendations from relatives: 1.5%
- WA/SMS: 3.0%
- Others: 9.0%

M-TSEL & F-COMP
- Social media: 55.6%
- Website Advertising: 11.1%
- YouTube: 3.7%
- TV advertisement: 11.1%
- WA/SMS: 7.4%
- Others: 11.1%

M-TSEL & F-COMP BCP
- Social media: 44.3%
- Website Advertising: 29.5%
- YouTube: 8.2%
- TV advertisement: 3.3%
- Billboards: 1.6%
- Recommendations from relatives: 1.6%
- Others: 9.8%

M-TSEL & F-IND CHRN
- Social media: 44.4%
- Website Advertising: 22.2%
- YouTube: 13.3%
- TV advertisement: 4.4%
- Billboards: 4.4%
- Recommendations from relatives: 2.2%
- WA/SMS: 2.2%
- Others: 6.7%

Legend:
- Social media
- Website Advertising
- YouTube
- TV advertisement
- Billboards
- Recommendations from relatives
- WA/SMS
- Others

Overall Impression

All
- Products offered at a lower package price compared to similar products: 42.8%
- Products from a renowned and reliable brand: 22.4%
- Product specifications that best meet the needs: 9.5%
- Products marketed for new families: 8.7%
- Products offering the easiest to obtain promotions: 2.5%
- Products with the easiest access to facilities...: 1.9%
- Products with the easiest facilities to convey...: 1.7%
- Products that provide information...: 1.4%
- Other: 7.8%

M-TSEL & F-COMP
- Products offered at a lower package price: 42.7%
- Products from a renowned and reliable brand: 15.6%
- Product specifications that best meet the needs: 18.8%
- Products marketed for new families: 7.3%
- Products offering the easiest to obtain promotions: 1.0%
- Products with the easiest facilities: 1.0%
- 2.1%
- Other: 5.2%

M-TSEL & F-COMP BCP
- Products offered at a lower package price: 37.0%
- Products from a renowned and reliable brand: 26.8%
- Product specifications that best meet the needs: 7.6%
- Products marketed for new families: 10.7%
- Products offering the easiest to obtain promotions: 3.6%
- 1.6%
- 2.3%
- 1.0%
- 1.0%
- Other: 8.3%

M-TSEL & F-IND CHRN
- Products offered at a lower package price: 51.8%
- Products from a renowned and reliable brand: 18.2%
- Product specifications that best meet the needs: 8.9%
- Products marketed for new families: 6.1%
- 1.2%
- 1.6%
- 0.8%
- 1.6%
- 1.6%
- Other: 8.1%

Legend:
- Products offered at a lower package price compared to similar products
- Products from a renowned and reliable brand
- Product specifications that best meet the needs
- Products marketed for new families
- Products offering the easiest to obtain promotions
- Products with the easiest access to facilities for submitting requests, complaints, or questions
- Products with the easiest facilities to convey requests / complaints / questions
- Products that provide information through the clearest communication channels
- Products with the easiest purchasing or service payment process
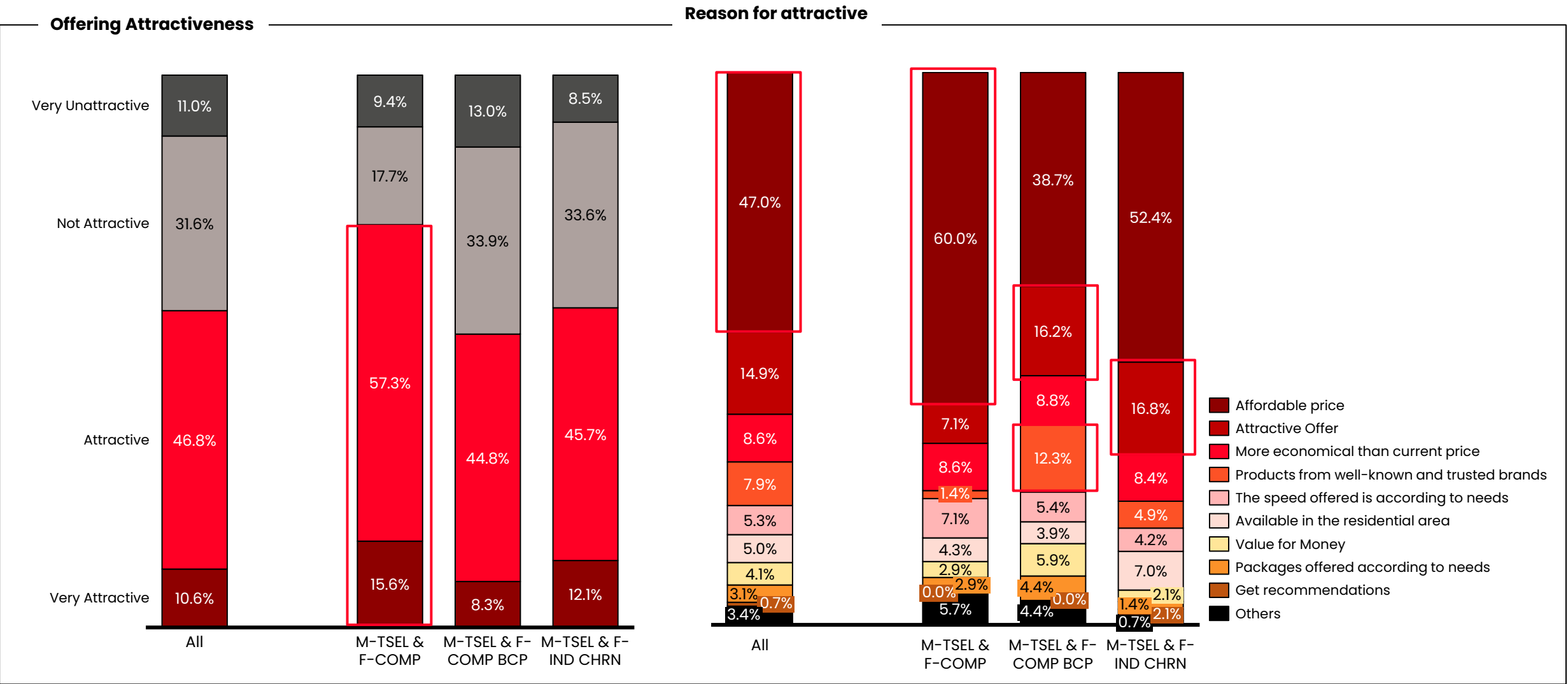- Other

Q Dimana Anda pernah mendengar atau melihat promo di atas?
Q Manakah dari pernyataan berikut yang menurut Anda menggambarkan kesan dari produk EZnet dari merek/ brand Telkomsel ?

Internal

EZNet: Offering Attractiveness and Reason

57.4% respondents interested on EZNet offering, with main reasoning due to its affordable price. Attractive offer and products from trusted brands also mention as reasoning for attractive points on EZNet offering, skew to F-COMP BCP and F-IND Churn User
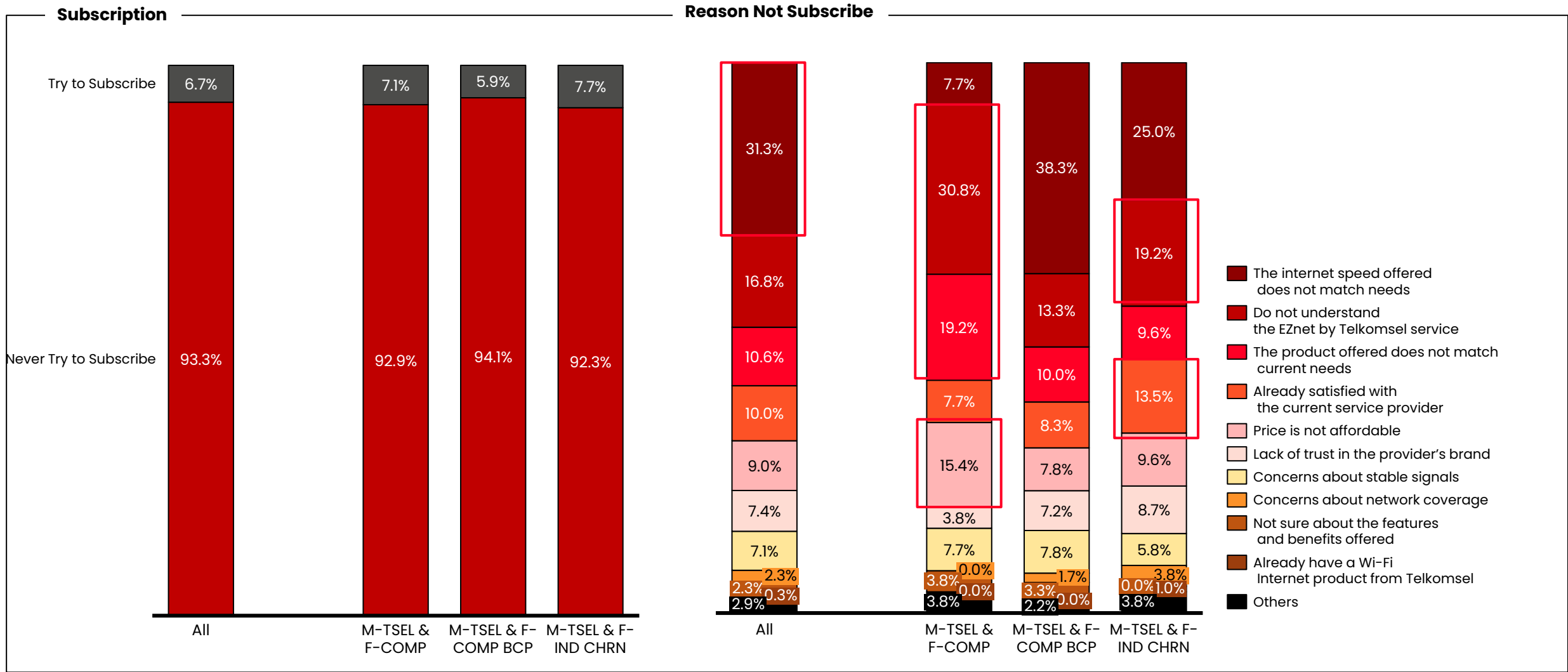
Offering Attractiveness

Category	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN
Very Unattractive	11.0%	9.4%	13.0%	8.5%
Not Attractive	31.6%	17.7%	33.9%	33.6%
Attractive	46.8%	57.3%	44.8%	45.7%
Very Attractive	10.6%	15.6%	8.3%	12.1%

Reason for attractive

Reason	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN
Affordable price	47.0%	60.0%	38.7%	52.4%
Attractive Offer	14.9%	7.1%	16.2%	16.8%
More economical than current price	8.6%	8.6%	8.8%	8.4%
Products from well-known and trusted brands	7.9%	1.4%	12.3%	4.9%
The speed offered is according to needs	5.3%	7.1%	5.4%	4.2%
Available in the residential area	5.0%	4.3%	3.9%	7.0%
Value for Money	4.1%	2.9%	5.9%	2.1%
Packages offered according to needs	3.1%	2.9%	4.4%	1.4%
Get recommendations	0.7%	0.0%	0.0%	2.1%
Others	3.4%	5.7%	4.4%	0.7%

Q Seberapa menarik menurut Anda harga EZnet by Telkomsel mulai dari Rp 150,000 kecepatan 10 Mbps?
Q Sebutkan hal apa yang membuat Anda tertarik untuk membeli produk EZnet by Telkomsel ?

Base: Respondents who's find AZNet offering attractive

Internal

EZNet: Subscription and their reason

Among those who find that EZNet offering is attractive, majority of respondents (93.3%) have never experienced to subscribe the service. Their major reason is the speed offered is not corresponding to their need, while across segment had vary reason skewness

Subscription

	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN
Try to Subscribe	6.7%	7.1%	5.9%	7.7%
Never Try to Subscribe	93.3%	92.9%	94.1%	92.3%

Reason Not Subscribe

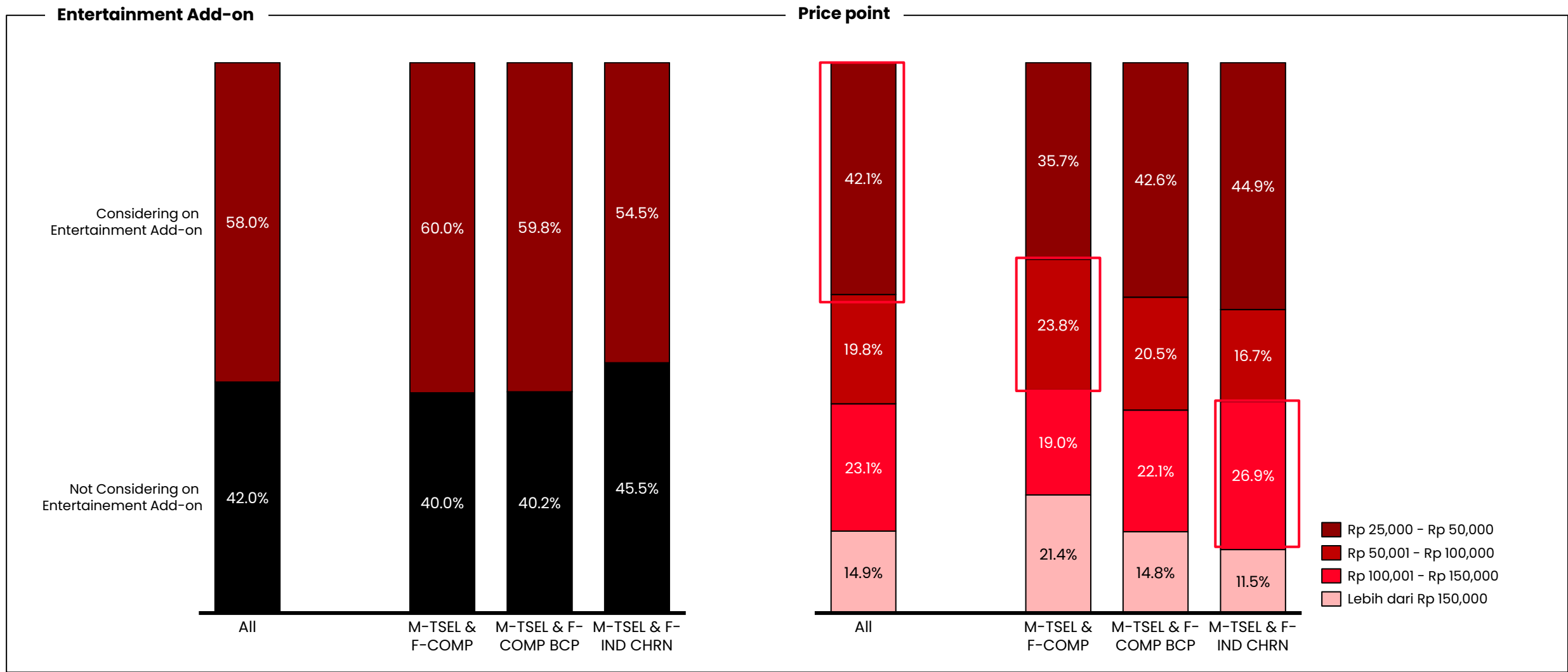|	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN
The internet speed offered does not match needs	31.3%	7.7%	38.3%	25.0%
Do not understand the EZnet by Telkomsel service	16.8%	30.8%	13.3%	19.2%
The product offered does not match current needs	10.6%	19.2%	10.0%	9.6%
Already satisfied with the current service provider	10.0%	7.7%	8.3%	13.5%
Price is not affordable	9.0%	15.4%	7.8%	9.6%
Lack of trust in the provider's brand	7.4%	3.8%	7.2%	8.7%
Concerns about stable signals	7.1%	7.7%	7.8%	5.8%
Concerns about network coverage	2.3%	0.0%	1.7%	3.8%
Not sure about the features and benefits offered	2.3%	3.8%	3.3%	0.0%
Already have a Wi-Fi Internet product from Telkomsel	0.3%	0.0%	0.0%	1.0%
Others	2.9%	3.8%	2.2%	3.8%

Q Apakah Anda pernah mendaftar / mencoba berlangganan EZnet by Telkomsel?
Q Berikan alasan anda tidak mempertimbangkan untuk menggunakan EZnet by Telkomsel?

Base: Respondents who's find AZNet offering attractive

Internal

EZNet: Additional Entertainment Offering Attractiveness and Reason

Among those who find the EZNet offering is attractive, majority of respondents (58%) are considering on-add entertainment services with pricing <50K. Although F-COMP user has skewness from 50K-100K price point while F-IND CHRN user tends to 100-150K price point.

Entertainment Add-on

	Considering on Entertainment Add-on	Not Considering on Entertainement Add-on
All	58.0%	42.0%
M-TSEL & F-COMP	60.0%	40.0%
M-TSEL & F-COMP BCP	59.8%	40.2%
M-TSEL & F-IND CHRN	54.5%	45.5%

Price point

	Rp 25,000 - Rp 50,000	Rp 50,001 - Rp 100,000	Rp 100,001 - Rp 150,000	Lebih dari Rp 150,000
All	42.1%	19.8%	23.1%	14.9%
M-TSEL & F-COMP	35.7%	23.8%	19.0%	21.4%
M-TSEL & F-COMP BCP	42.6%	20.5%	22.1%	14.8%
M-TSEL & F-IND CHRN	44.9%	16.7%	26.9%	11.5%

Q Dengan harga Rp 150,000 untuk kecepatan internet 10Mbps, Apakah anda akan mempertimbangkan menambah layanan entertainment?
Q Berapa budget yang akan Anda alokasikan untuk penambahan layanan entertainment ?

Base: Respondents who's find AZNet offering attractive
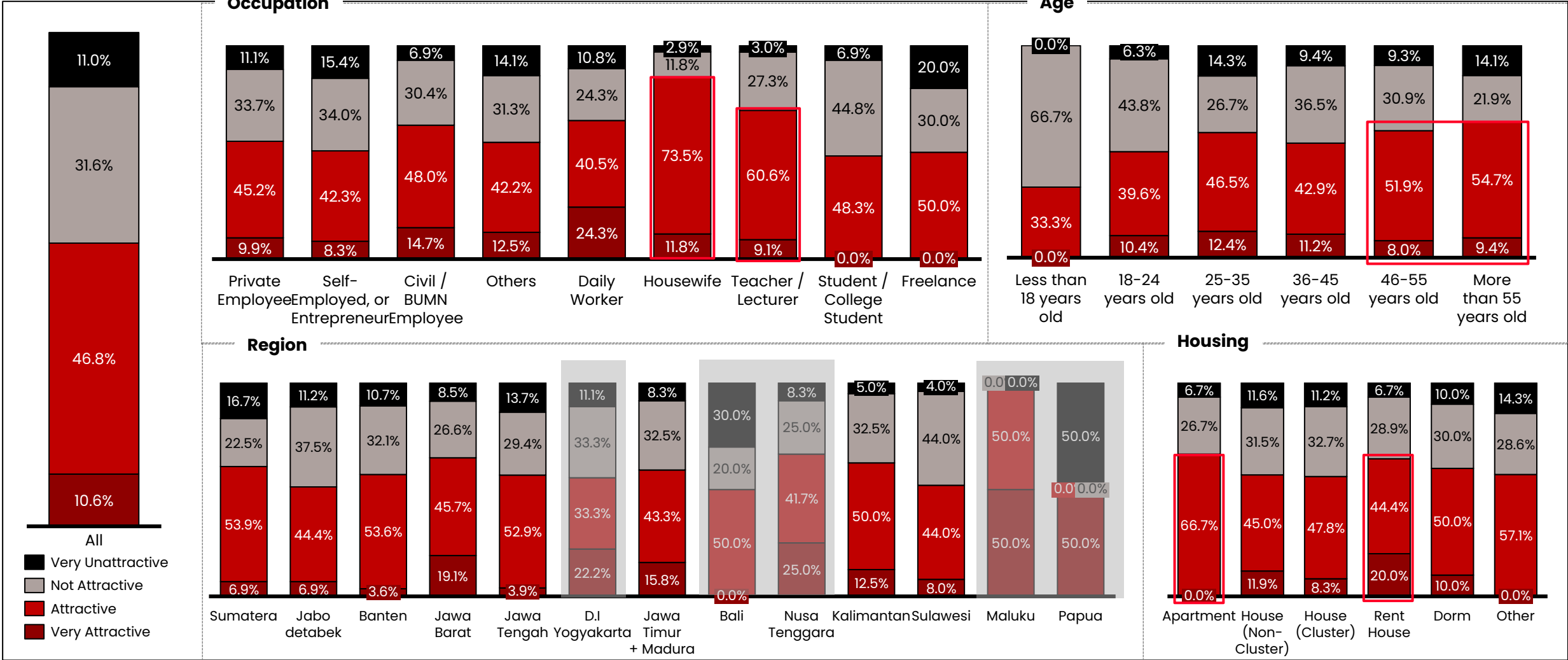
Internal

EZ Net Potential User Profile

Notes: For this section, respondent based on those that attract to EZNet offering (Interested and Very Interested)

EZNET Potential User: Demography Profile

Overall EZNet Potential User occupation skew to Housewife and Lecturer, with age group on the older age group (> 46 years old) and apartment and rent house Housing type
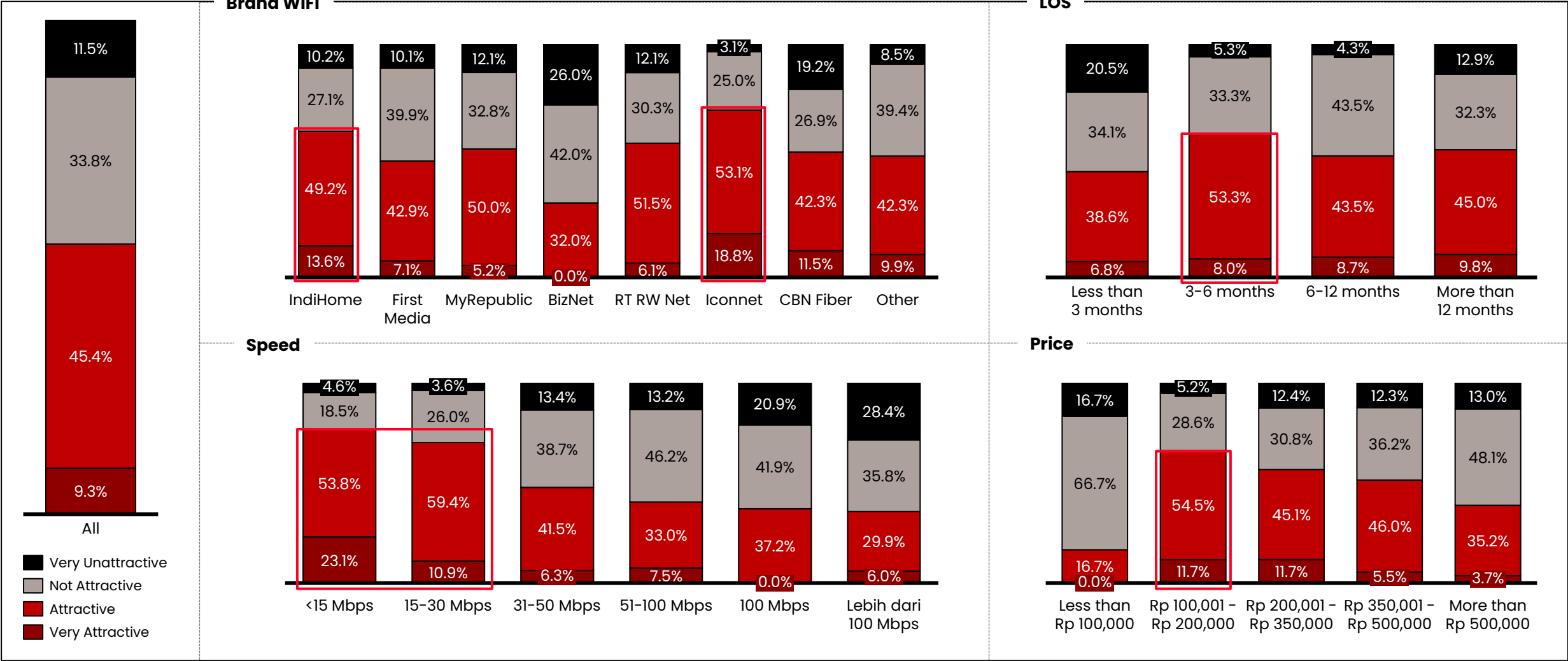

Occupation

	Private Employee	Self-Employed, or Entrepreneur Employee	Civil / BUMN Employee	Others	Daily Worker	Housewife	Teacher / Lecturer	Student / College Student	Freelance
Very Unattractive	11.1%	15.4%	6.9%	14.1%	10.8%	2.9%	3.0%	6.9%	20.0%
Not Attractive	33.7%	34.0%	30.4%	31.3%	24.3%	11.8%	27.3%	44.8%	30.0%
Attractive	45.2%	42.3%	48.0%	42.2%	40.5%	73.5%	60.6%	48.3%	50.0%
Very Attractive	9.9%	8.3%	14.7%	12.5%	24.3%	11.8%	9.1%	0.0%	0.0%

Age

	Less than 18 years old	18-24 years old	25-35 years old	36-45 years old	46-55 years old	More than 55 years old
Very Unattractive	0.0%	6.3%	14.3%	9.4%	9.3%	14.1%
Not Attractive	66.7%	43.8%	26.7%	36.5%	30.9%	21.9%
Attractive	33.3%	39.6%	46.5%	42.9%	51.9%	54.7%
Very Attractive	0.0%	10.4%	12.4%	11.2%	8.0%	9.4%

Region

	Sumatera	Jabo detabek	Banten	Jawa Barat	Jawa Tengah	D.I Yogyakarta	Jawa Timur + Madura	Bali	Nusa Tenggara	Kalimantan	Sulawesi	Maluku	Papua
Very Unattractive	16.7%	11.2%	10.7%	8.5%	13.7%	11.1%	8.3%	30.0%	8.3%	5.0%	4.0%	0.0	
Not Attractive	22.5%	37.5%	32.1%	26.6%	29.4%	33.3%	32.5%	20.0%	25.0%	32.5%	44.0%	0.0%	50.0%
Attractive	53.9%	44.4%	53.6%	45.7%	52.9%	33.3%	43.3%	50.0%	41.7%	50.0%	44.0%	50.0%	0.0
Very Attractive	6.9%	6.9%	3.6%	19.1%	3.9%	22.2%	15.8%	0.0%	25.0%	12.5%	8.0%	50.0%	0.0% 50.0%

Housing

	Apartment	House (Non-Cluster)	House (Cluster)	Rent House	Dorm	Other
Very Unattractive	6.7%	11.6%	11.2%	6.7%	10.0%	14.3%
Not Attractive	26.7%	31.5%	32.7%	28.9%	30.0%	28.6%
Attractive	66.7%	45.0%	47.8%	44.4%	50.0%	57.1%
Very Attractive	0.0%	11.9%	8.3%	20.0%	10.0%	0.0%

All

Very Unattractive	11.0%
Not Attractive	31.6%
Attractive	46.8%
Very Attractive	10.6%

Legend:
- Very Unattractive
- Not Attractive
- Attractive
- Very Attractive

Q Seberapa menarik menurut Anda harga EZnet by Telkomsel mulai dari Rp 150,000 kecepatan 10 Mbps?

Internal

EZNET Potential User: WiFi User

Across WiFi user, majority of their current subscription are ex-Indihome and Iconnet User, where Biznet user has the least interest. On speed, the one that interest to EZNet skews to <30 Mbps speed user. LOS and price point skews to 3-6 months user with budget around 100K-200K
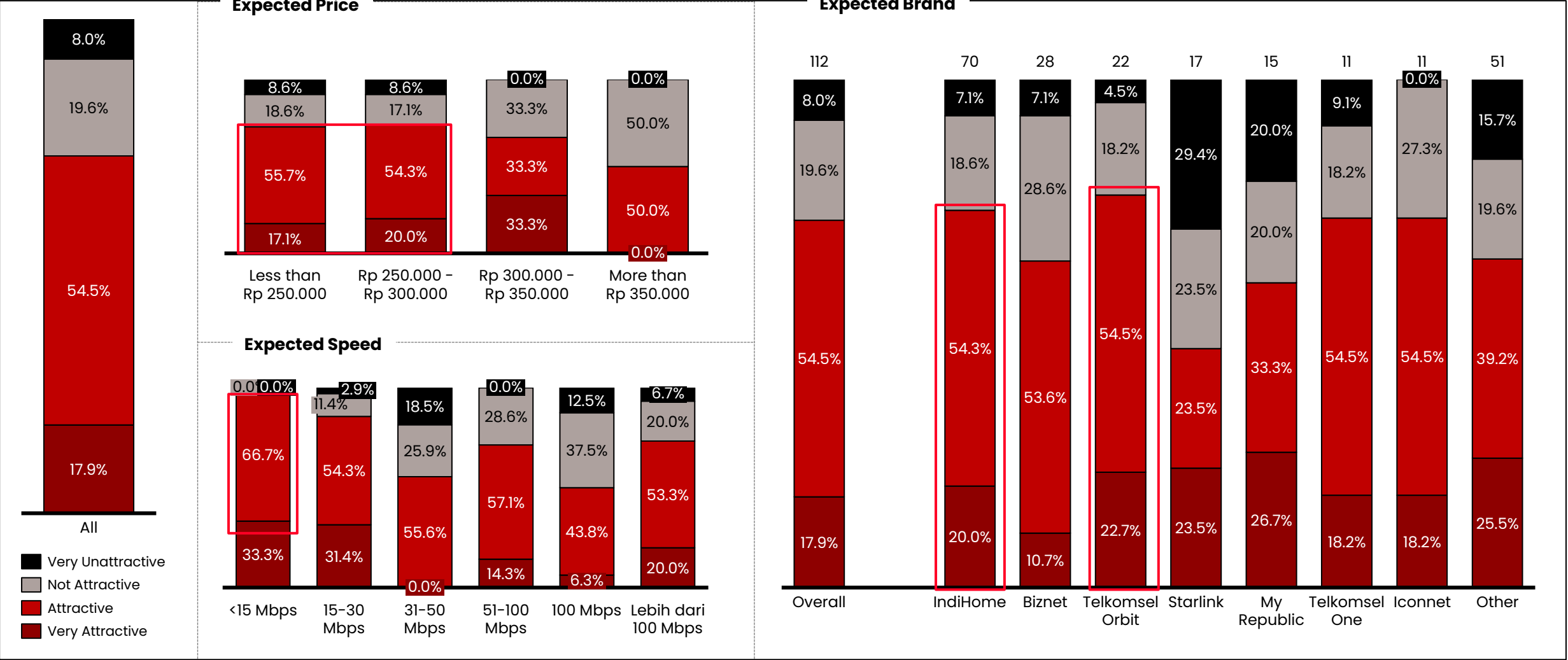
All

Category	Percentage
Very Unattractive	11.5%
Not Attractive	33.8%
Attractive	45.4%
Very Attractive	9.3%

Brand WiFi

Category	IndiHome	First Media	MyRepublic	BizNet	RT RW Net	Iconnet	CBN Fiber	Other
Very Unattractive	10.2%	10.1%	12.1%	26.0%	12.1%	3.1%	19.2%	8.5%
Not Attractive	27.1%	39.9%	32.8%	42.0%	30.3%	25.0%	26.9%	39.4%
Attractive	49.2%	42.9%	50.0%	32.0%	51.5%	53.1%	42.3%	42.3%
Very Attractive	13.6%	7.1%	5.2%	0.0%	6.1%	18.8%	11.5%	9.9%

LOS

Category	Less than 3 months	3-6 months	6-12 months	More than 12 months
Very Unattractive	20.5%	5.3%	4.3%	12.9%
Not Attractive	34.1%	33.3%	43.5%	32.3%
Attractive	38.6%	53.3%	43.5%	45.0%
Very Attractive	6.8%	8.0%	8.7%	9.8%

Speed

Category	<15 Mbps	15-30 Mbps	31-50 Mbps	51-100 Mbps	100 Mbps	Lebih dari 100 Mbps
Very Unattractive	4.6%	3.6%	13.4%	13.2%	20.9%	28.4%
Not Attractive	18.5%	26.0%	38.7%	46.2%	41.9%	35.8%
Attractive	53.8%	59.4%	41.5%	33.0%	37.2%	29.9%
Very Attractive	23.1%	10.9%	6.3%	7.5%	0.0%	6.0%

Price

Category	Less than Rp 100,000	Rp 100,001 - Rp 200,000	Rp 200,001 - Rp 350,000	Rp 350,001 - Rp 500,000	More than Rp 500,000
Very Unattractive	16.7%	5.2%	12.4%	12.3%	13.0%
Not Attractive	66.7%	28.6%	30.8%	36.2%	48.1%
Attractive	16.7%	54.5%	45.1%	46.0%	35.2%
Very Attractive	0.0%	11.7%	11.7%	5.5%	3.7%

Q Seberapa menarik menurut Anda harga EZnet by Telkomsel mulai dari Rp 150,000 kecepatan 10 Mbps?

Base: WiFi user

Internal

EZNET Potential User: Potential WiFi User

Across WiFi Potential User, those with expected price <300K has higher interest in Eznet compared to other price point, where user with expected speed <15Mbps has higher interest. Among expected brand, those who favor EZNet are the ones that consider Telkomsel brand (ex-Indihome, Orbit)

All
- Very Unattractive: 8.0%
- Not Attractive: 19.6%
- Attractive: 54.5%
- Very Attractive: 17.9%

Expected Price

	Less than Rp 250.000	Rp 250.000 - Rp 300.000	Rp 300.000 - Rp 350.000	More than Rp 350.000
Very Unattractive	8.6%	8.6%	0.0%	0.0%
Not Attractive	18.6%	17.1%	33.3%	50.0%
Attractive	55.7%	54.3%	33.3%	50.0%
Very Attractive	17.1%	20.0%	33.3%	0.0%

Expected Speed

	<15 Mbps	15-30 Mbps	31-50 Mbps	51-100 Mbps	100 Mbps	Lebih dari 100 Mbps
Very Unattractive	0.0%	2.9%	18.5%	0.0%	12.5%	6.7%
Not Attractive	0.0%	11.4%	25.9%	28.6%	37.5%	20.0%
Attractive	66.7%	54.3%	55.6%	57.1%	43.8%	53.3%
Very Attractive	33.3%	31.4%	0.0%	14.3%	6.3%	20.0%

Legend
- Very Unattractive
- Not Attractive
- Attractive
- Very Attractive

Expected Brand

	Overall	IndiHome	Biznet	Telkomsel Orbit	Starlink	My Republic	Telkomsel One	Iconnet	Other
(base)	112	70	28	22	17	15	11	11	51
Very Unattractive	8.0%	7.1%	7.1%	4.5%	29.4%		9.1%	0.0%	15.7%
Not Attractive	19.6%	18.6%	28.6%	18.2%	23.5%	20.0%	18.2%	27.3%	19.6%
Attractive	54.5%	54.3%	53.6%	54.5%	23.5%	33.3%	54.5%	54.5%	39.2%
Very Attractive	17.9%	20.0%	10.7%	22.7%	23.5%	26.7%	18.2%	18.2%	25.5%

Q Seberapa menarik menurut Anda harga EZnet by Telkomsel mulai dari Rp 150,000 kecepatan 10 Mbps?
Q Berapa ekspektasi (harapan) alokasi pengeluaran untuk berlangganan WiFi di hunian Anda?
Q Ekspektasi kecepatan internet pada paket layanan WiFi?
Internal*Q Penyedia layanan internet apa yang Anda pertimbangkan dalam 3 bulan kedepan?*

Base: Potential WiFi User

Overall Profile and Usage

Data Activities

Across segment, mainly data activities for chat app (86.8% - 90.1%) followed by mobile and internet banking as well as movie and video streaming
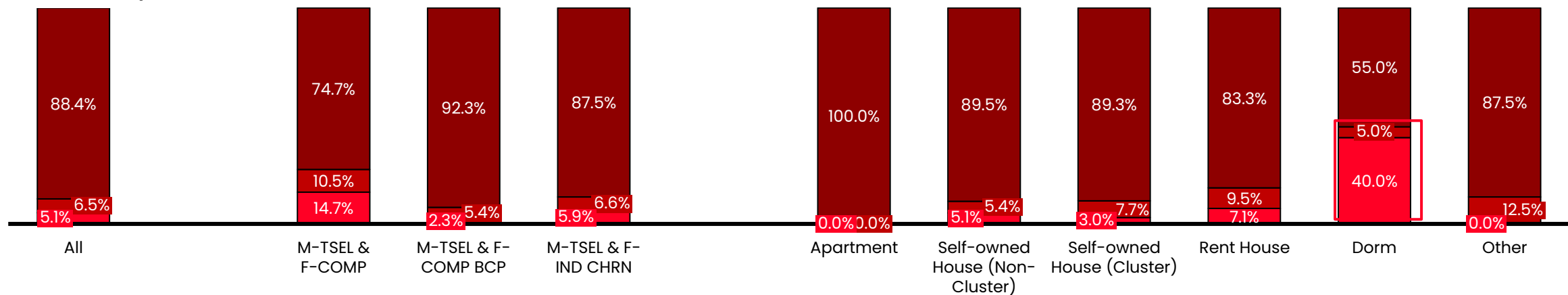
Data Activities

	All Base: 1261	M-TSEL & F-COMP Base: 265	M-TSEL & F-COMP BCP Base: 616	M-TSEL & F-IND CHRN Base: 380
Chat via App / Social Media	88.9%	86.8%	90.1%	88.4%
Voice and Video Calls via App	55.5%	41.5%	57.6%	61.8%
Email	62.6%	43.8%	67.2%	68.2%
Mobile / Internet Banking	63.2%	41.5%	68.5%	69.7%
E-Books / Electronic Books	18.8%	12.5%	20.6%	20.3%
Online Games	39.7%	26.4%	44.5%	41.3%
Movies / Videos Streaming	63.0%	43.0%	68.5%	68.2%
Music Streaming	39.1%	20.0%	45.9%	41.3%
Online Shopping (Ecommerce)	62.4%	47.5%	65.6%	67.6%
Online Grocery Shopping	19.7%	9.4%	22.1%	22.9%
Radio /TV Streaming	22.9%	13.2%	25.2%	26.1%
Online transportation	48.3%	33.2%	53.6%	50.3%
Food delivery via App	48.7%	30.9%	55.0%	50.8%
Access online news	44.6%	31.7%	46.8%	50.3%
School and Learning Online	21.7%	15.1%	24.2%	22.4%
Access Financial App	17.9%	9.4%	20.5%	19.7%
Working Online	34.5%	21.1%	39.3%	36.1%
Others	2.7%	4.2%	2.6%	1.8%

Q Aktivitas layanan internet di rumah apa saja yang dilakukan di rumah?

WiFi User: Decision Maker and Number of Person

Overall segments, 60.1% are WiFi user where 8.9% potentially using WiFi in the next 3 months. Although Cluster House and Rent House has the highest portion of Non-WiFi user, Cluster has highest potential user across all housing type.

WiFi Decision and Payer
Base: WiFi user only

	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN	Apartment	Self-owned House (Non-Cluster)	Self-owned House (Cluster)	Rent House	Dorm	Other
Payer and Decision Maker	88.4%	74.7%	92.3%	87.5%	100.0%	89.5%	89.3%	83.3%	55.0%	87.5%
Decision Maker Only	6.5%	10.5%	5.4%	6.6%	0.0%	5.4%	7.7%	9.5%	5.0%	12.5%
Utilize current subscription	5.1%	14.7%	2.3%	5.9%	0.0%	5.1%	3.0%	7.1%	40.0%	0.0%

Legend: ■ Payer and Decision Maker ■ Decision Maker Only ■ Utilize current subscripiton

Number of Person
Base: WiFi user only

	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN	Apartment	Self-owned House (Non-Cluster)	Self-owned House (Cluster)	Rent House	Dorm	Other
1	6.1%	5.3%	3.3%	8.5%	26.3%	5.4%	1.9%	8.3%	31.1%	0.0%
2	16.7%	11.6%	12.0%	0.7%	26.3%	14.4%	16.6%	27.3%	18.0%	20.0%
3	20.3%	17.9%	18.4%	20.6%	15.8%	20.2%	20.1%	26.4%	13.1%	16.0%
4	23.9%	36.8%	25.8%	26.5%	15.8%	25.8%	26.0%	14.9%	4.9%	36.0%
5	22.9%	18.9%	27.4%	30.1%	15.8%	24.6%	24.9%	17.4%	13.1%	4.0%
More than 5	10.1%	9.5%	13.0%	13.6%	0.0%	9.5%	10.5%	5.8%	19.7%	24.0%
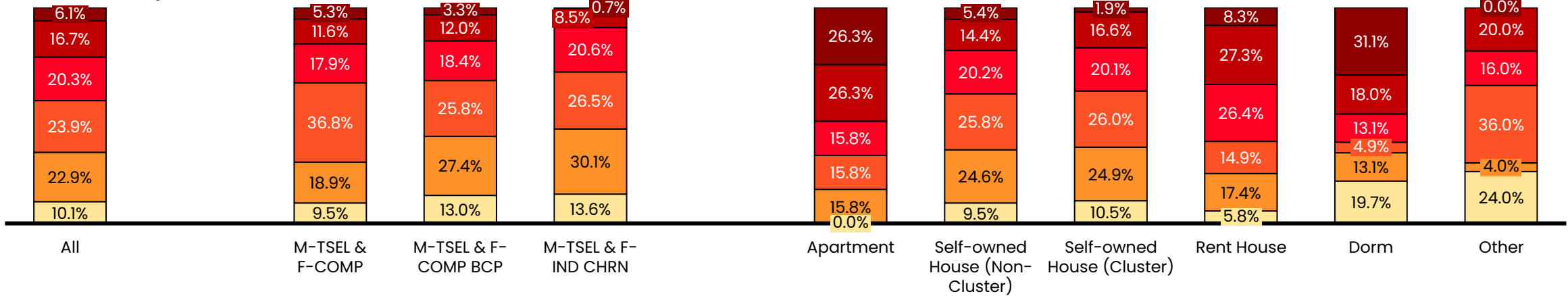
Legend: ■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ More than 5

Q Berapa jumlah orang yang menggunakan layanan internet di Hunian Anda?
Q Apakah Anda pengambil keputusan untuk layanan Wi-Fi di hunian Anda? Response

WiFi User: Brand Used

Overall segments, Indihome is still the widely used brand (32.8%) where F-COMP BCP segment has 41.7% that claimed Biznet user. First Media user skew to Apartment and Cluster while CBN Fibr skew to Apartment user..

WiFi Brand

Base: WiFi User only

	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN
IndiHome	32.8%	44.2%	18.7%	49.3%
First Media	25.2%	10.5%	41.7%	6.6%
MyRepublic	9.0%	3.2%	13.0%	5.1%
BizNet	8.0%	6.3%	9.0%	7.4%
RT RW Net	4.9%	7.4%	2.3%	7.7%
Iconnet	4.7%	6.3%	2.6%	7.4%
CBN Fiber	4.0%	3.2%	5.6%	1.8%
MNC Play	2.5%	3.2%	2.8%	1.8%
Telkomsel Orbit	2.1%	3.2%	1.5%	2.6%
XL Home Fiber / XL Satu Fiber	1.3%	1.1%	0.5%	2.6%
Oxygen.id	1.1%	3.2%	0.0%	1.8%
Indosat HiFi	0.3%	0.0%	0.0%	0.7%
Telkomsel One	0.3%	1.1%	0.0%	0.4%
Indosat Ooredoo Home Wireless	0.1%	1.1%	0.0%	0.0%
Net1	0.1%	1.1%	0.0%	0.0%
Smartfren WiBox	0.1%	0.0%	0.0%	0.4%
Starlink	0.1%	0.0%	0.3%	0.0%
XL Home IZI / XL Satu Lite	0.1%	0.0%	0.3%	0.0%
Other	3.2%	5.3%	1.8%	4.4%

Skew to Apartment and Self-owned house (cluster)

Skew to Apartment

Q Merek (Brand) layanan Internet Wi-Fi / Broadband Internet manakah yang Anda gunakan di Hunian Anda?

WiFi User: Price point and Speed

For price point, cluster house and dorm user skew to higher data price point (>350K), where cluster house skew to subscription with speed > 50 Mbps while dorm < 30 Mbps.

Price point
Base: WiFi user only

Skewness:
- **< 200K:** RT RW Net
- **200K–350K:** Myrepublic, Iconnet and CBN Fiber
- **350K–500K:** Indihome and Biznet

Legend (Price point): Less than Rp 100,000 | Rp 100,001 - Rp 200,000 | Rp 200,001 - Rp 350,000 | Rp 350,001 - Rp 500,000 | More than Rp 500,000
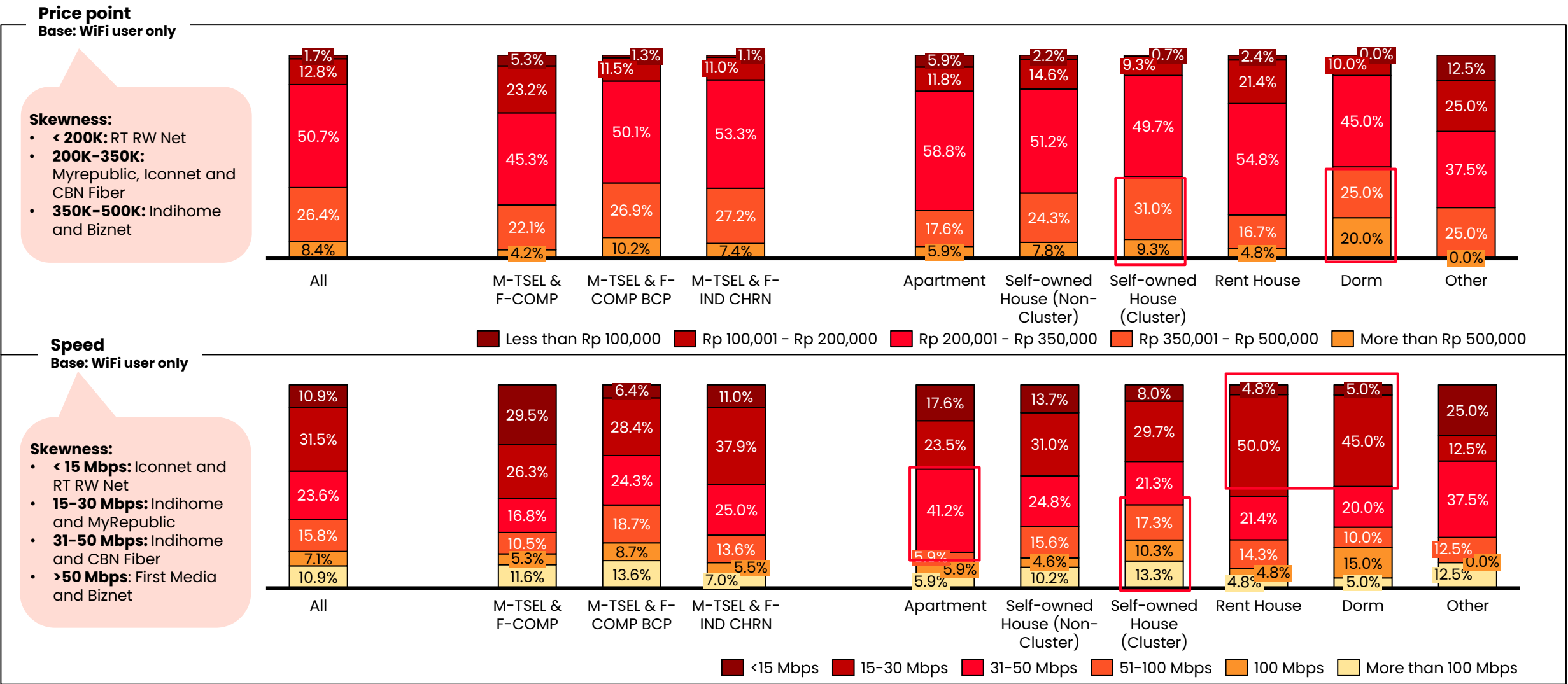
Speed
Base: WiFi user only

Skewness:
- **< 15 Mbps:** Iconnet and RT RW Net
- **15–30 Mbps:** Indihome and MyRepublic
- **31–50 Mbps:** Indihome and CBN Fiber
- **>50 Mbps:** First Media and Biznet

Legend (Speed): <15 Mbps | 15-30 Mbps | 31-50 Mbps | 51-100 Mbps | 100 Mbps | More than 100 Mbps

Q Berapa alokasi biaya yang dikeluarkan untuk berlangganan Brand WiFi tsb?
Q Berapakah kecepatan internet pada paket layanan Brand WiFi di rumah Anda saat ini ?

Internal

WiFi User: LOS

For price point, cluster house and dorm user skew to higher data price point (>350K) where cluster house user skew to long time user (>12 mo) while Dorm more to new user (<3 mos)

LOS
Base: WiFi user only

Skewness:
- **< 6 mo:** MyRepublic and RT RW Net
- **6-12 mo:** Biznet and Iconnet
- **>12 mo:** Indihome and First Media

Category	Less than 3 months	3-6 months	6-12 months	More than 12 months
All	8.0%	11.7%	10.8%	69.4%
M-TSEL & F-COMP	14.7%	10.5%	8.4%	66.3%
M-TSEL & F-COMP BCP	6.9%	9.0%	8.2%	76.0%
M-TSEL & F-IND CHRN	7.4%	16.2%	15.4%	61.0%
Apartment	5.9%	23.5%	11.8%	58.8%
Self-owned House (Non-Cluster)	8.9%	13.2%	10.5%	67.4%
Self-owned House (Cluster)	5.7%	9.3%	11.3%	73.7%
Rent House	9.5%	11.9%	11.9%	66.7%
Dorm	20.0%	15.0%	5.0%	60.0%
Other	25.0%	0.0%	12.5%	62.5%

Legend: ■ Less than 3 months ■ 3-6 months ■ 6-12 months ■ More than 12 months

Q Sudah berapa lama Anda menggunakan Brand Wifi tsb?

WiFi User: Satisfaction

Overall segments are satisfied to their WiFi subscription. Although F-IND CHURN skew to unsatisfied, as well as Apartment and Dorm user. For Indihome user, alhotugh majority satisfied with their WiFi, there's skewness to unsatisfied and highly unsatisfied.

Satisfaction on WiFi
Base: WiFi user only

	All	M-TSEL & F-COMP	M-TSEL & F-COMP BCP	M-TSEL & F-IND CHRN	Apartment	Self-owned House (Non-Cluster)	Self-owned House (Cluster)	Rent House	Dorm	Other
Highly satisfied	18.7%	16.8%	18.4%	19.9%	11.8%	19.1%	19.0%	19.0%	20.0%	0.0%
Satisfied	67.4%	68.4%	70.6%	62.5%	64.7%	66.0%	69.0%	73.8%	50.0%	87.5%
Unsatisfied	11.1%	10.5%	9.2%	14.0%	17.6%	11.9%	10.0%	4.8%	20.0%	12.5%
Highly unsatisfied	2.8%	4.2%	1.8%	3.7%	5.9%	3.0%	2.0%	2.4%	10.0%	0.0%

Legend: ■ Highly satisfied ■ Satisied ■ Unsatisfied ■ Highly unsatisfied

	IndiHome	First Media	MyRepublic	BizNet	RT RW Net	Iconnet	CBN Fiber	Other
Highly satisfied	16.9%	16.8%	16.2%	41.0%	8.1%	16.7%	20.0%	19.8%
Satisfied	66.7%	73.3%	69.1%	49.2%	78.4%	55.6%	76.7%	65.1%
Unsatisfied	12.0%	8.4%	14.7%	6.6%	10.8%	27.8%	0.0%	11.6%
Highly unsatisfied	4.4%	1.6%	0.0%	3.3%	2.7%	0.0%	3.3%	3.5%

Q Secara keseluruhan, seberapa puaskah Anda dengan produk dan layanan dari Brand WiFi tsb?

Internal

Attribute to Choose WiFi Brand

Overall, WiFi and Potential WiFi user has similar attribute importance upon choosing WiFi brand. However, WiFi user skew to main service (network and agents services) as well as pricing, while potential user skew to clarity of information, recommendation and well-known brand.

Legend:
- All (black)
- WiFi User (red)
- Potential WiFi User (grey)

Attribute	All	WiFi User	Potential WiFi User
Internet network quality	78.3%	80.5%	66.1%
Suitability of the price of the package offered	55.0%	55.8%	50.9%
Suitability of the specifications of the package offered	31.0%	31.4%	28.6%
Service of agents or technicians	27.4%	29.4%	16.1%
Loyalty programs offered	10.2%	10.9%	6.3%
Clarity of information on communication media	7.0%	6.7%	8.9%
Recommendations from family/colleagues	6.3%	5.2%	12.5%
WiFi brand from a well-known brand	5.2%	4.4%	9.8%
Reviews from social media	3.4%	3.6%	2.7%
Other	2.8%	2.6%	3.6%

Q Faktor penting yang dapat mempengaruhi keputusan Anda dalam memilih layanan WiFi?

Overall Demografi Profile

Occupation

Occupation	Percentage
Private Employee	31.3%
Self-Employed, or Entrepreneur	19.5%
Civil / BUMN Employee	10.9%
Others	10.2%
Daily Worker	9.0%
Housewife	5.8%
Teacher / Lecturer	5.7%
Student / College Student	4.8%
Freelance	2.8%

Age

Age	Percentage
Less than 18 years old	1.0%
18-24 years old	10.5%
25-35 years old	32.7%
36-45 years old	27.4%
46-55 years old	19.3%
More than 55 years old	9.1%

Region

Region	Percentage
Sumatera	17.3%
Jabo detabek	27.0%
Banten	2.8%
Jawa Barat	11.7%
Jawa Tengah	8.6%
D.I Yogyakarta	1.3%
Jawa Timur + Madura	15.1%
Bali	1.9%
Nusa Tenggara	1.9%
Kalimantan	6.3%
Sulawesi	5.3%
Maluku	0.5%
Papua	0.4%

Housing

Housing	Percentage
Apartment	1.5%
House (Non-Cluster)	52.5%
House (Cluster)	29.6%
Rent House	9.6%
Dorm	4.8%
Other	2.0%

Key Summary

Summary

- **WiFi User and their intention to switch:** Among overall segment, 60.1% are current WiFi users, while 8.9% are potential users. Higher WiFi usage is observed in apartments and non-cluster houses (80.4%-89.5%), with a significant portion considering switching providers (64.9%-82%). Potential users are more common among those living in house clusters (14.9%).
- **EZNet Ads Attractiveness:** Majority respondents have no clue on EZNet (64%) yet not aware of it (81%). 18.3% are familiar with the ads, mostly in the F-COMP segment. Most respondents perceive EZNet as a new product, except for those moderately unfamiliar with the ads.Ads promoting "Internet Rumah, Mudah dan Murah" appeal more to unfamiliar users (37.7% and 47.4%), while highly familiar users associate it with a new product (38%).
- **EZNet Product Attractiveness:** 57.4% of respondents are interested in EZNet, mainly due to its affordable price. Attractive offers and trusted brand products are also appealing, especially to F-COMP BCP and F-IND Churn users. 58% of respondents consider adding entertainment services, preferring a price point under 50K, though F-COMP users lean towards 50K-100K and F-IND CHRN users towards 100-150K.
- **EZNet Potential User:** Potential users are predominantly housewives and lecturers, aged over 46, living in apartments or rented houses. Most are familiar with WiFi, with current subscriptions mainly from Indihome and Iconnet, and less interest from Biznet users. Interested users skew to those familiar with speed <30 Mbps and tend to have a 3-6 months usage history, with a budget of 100K-200K. Among potential WiFi user, there's potential to grab those intended to use Indihome or Telkomsel Orbit.

Recommendation

- **Target Marketing and Awareness**: Increase brand awareness, as 64% of respondents are unaware of EZNet. Focus on educating potential customers about the brand and its offerings.Emphasize the "Internet Rumah, Mudah dan Murah" message in ads to appeal to unfamiliar users and highlight EZNet as a new, attractive product to those already familiar with WiFi services.
- **Promotional Offers and Pricing Strategy**: Capitalize on the interest in affordable pricing (57.4% interested due to affordability). Offer competitive packages, especially for non-cluster apartments and houses, where there's a high intention to switch providers.Introduce tailored offers for specific demographics, such as housewives and lecturers, who are potential users. Consider packages with speeds under 30 Mbps and a price range of 100K-200K, as these are preferred by the majority of interested users.
- **Expand Product Features and Bundling**: Include entertainment services as part of the package, as 58% of respondents are interested in this addition, particularly if priced under 50K.Offer flexible pricing tiers, with options under 50K, between 50K-100K, and 100K-150K, to cater to different user segments such as F-COMP BCP and F-IND CHRN users.

Disclaimer

- These recommendations are based on the data and analysis provided in the survey findings
- 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.