

TRENDSPOTTING STUDY

Connect With Us:

The Telecommunications Industry
in Indonesia

Feel Cozy With The Latest Trends



This report aims to provide the telecommunications industry with an understanding of the consumers' behaviors focusing on what netizens talk about their Internet Service Providers (ISPs) and what challenges faced by the industry based on conversations on various social media platforms.

In terms of **media type**, this report includes materials from:

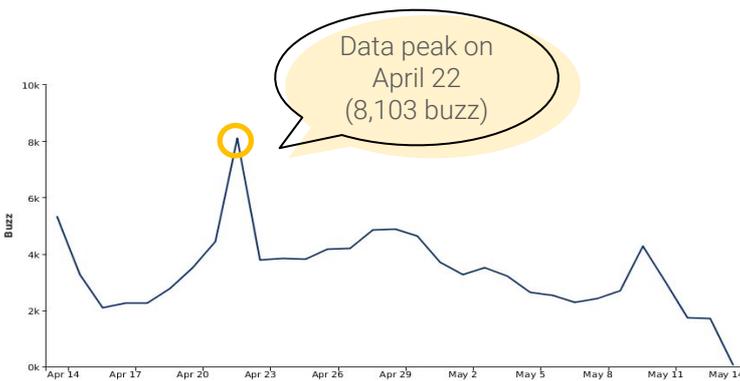
Social

- Twitter
- Facebook
- Blogs
- Forums
- YouTube

The date range for this study is Apr 15 - May 14, 2021.

Call Out the Data in Social Media

The conversations' peak occurred on Apr 22, with 8,103 buzzes that mostly talked about the giveaway ran by XL Axiata on Twitter. The cluster 'XL Prioritas Ada, Satu Produk XL Axiata' contained more than 1,500 buzzes, mainly from netizens' participation who interacted with the giveaway post by retweeting and replying under the tweet with a shout-out to XL Axiata's product, XL Prioritas, along with the #BersamaJadiLebihBaik hashtag.



From Isentia's Workbench with data range Apr 15 to May 14.



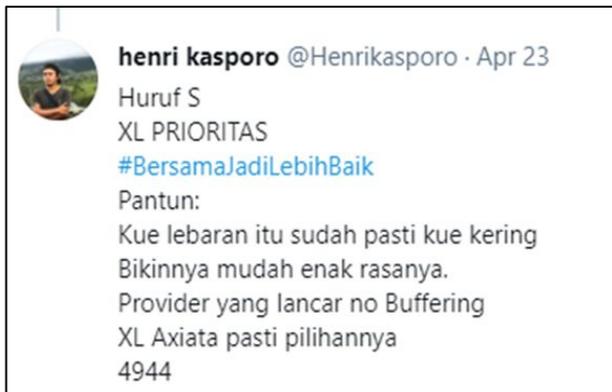
From Isentia's Workbench with Apr 22 data.

In other words, the giveaway contest can help companies to boost their brand awareness as the netizens engaged with the content. Ensure your competition actively involves audiences by inviting them to do something interactive (e.g. tag-a-friend giveaways). Don't forget to spotlight your products to spark interest in netizens who have never used them.

Dig Deeper Into the Data

“XL Prioritas #BersamaJadiLebihBaik.”

With 20,822 buzzes, XL AXIATA organized a giveaway contest to boost engagement in social media. Netizens could win the new Samsung A32S by participating in several ways, such as following XL Axiata’s official Twitter account and replying to the giveaway tweet using the #BersamaJadiLebihBaik hashtag.



“Kasih an anak-anak sekolah yang sedang ujian online.”

With 10,352 buzz, TELKOM’s services got disrupted after its underwater optical cable broke off in Jayapura, Papua Province. Consequently, internet services were affected, though calls and SMS still functioning. Netizens felt pity towards students that may have difficulty in taking online class due to this incident.



“Semoga menjadi rekan bisnis yang baik.”

With 3,611 buzz, TELKOMSEL invested an additional \$300 million (Rp 4.4 trillion) in Indonesian ride-hailing and payments firm, Gojek. Netizens welcomed the collaboration of both local companies and look forward to good business cooperation between the two in the future.



What Disturbs the Network?

Telecommunications play essential role in supporting society as the pandemic drive the demand for digital connectivity. As the competition growing in the industry to deliver the best services to suit the customers' needs, the telecom companies are also facing many challenges in this era.

Top 5 challenges in telecommunication industry:

1. Slow Data Speed
2. No Signal
3. Internet Connection Reliability
4. Customer Service Satisfaction
5. 5G Adoption



[Not] Fast and [Not] Furious

Slow internet connection was among the top reasons customers made complaints on social media. **Netizens reported a range of issues about slow data speeds with unknown reasons, although they have enough data package to cope with their demand.** Some complaints came from those who live outside Jakarta or big city, while others complained to have a poor internet connection at night.

In fact, the slow connection has been a big issue for everyone especially during the pandemic where working or studying took place from home. The ISPs should try to invest more in network infrastructure and identify which location need internet speed boost the most. The customers may consider switching to a different provider if the resolution of this problem taking too long.

Understanding complaints on data speed from netizens is a good way to manage the potential crisis that could rise in the social media.



The Pandemic Generation



The COVID-19 pandemic forced schools to close and switch from face to face classes to distance learning. For the rural areas or outside big cities with a lack of internet access and smart devices, online learning was challenging and can contribute to students falling behind academically. On this matter, teachers and students shared their **difficulty in taking online classes due to the limited internet access** at home.

Thus, **telecommunication companies have to improve digital infrastructure in rural areas** by partnering with governments to install wider coverage of internet networks. Furthermore, when the internet access fulfilled, they may consider offering free data plans for educational purposes to ease students' burden as part of the company's CSR program.

Social media could help the companies in identifying which areas/regions most affected by signal problems.

Manage the Risk, Break the Impact

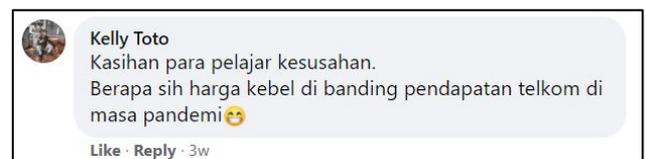
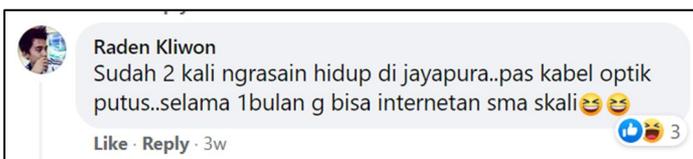


```
function XMasCaptchal(const s: string): Integer;  
var  
  i : integer;  
  j : integer;  
begin  
  Result:=0;  
  for i:=1 to length(s) do begin  
    j:=i+1;  
    if j>length(s) then j:=1;  
    if (s[i] in ['0'..'9']) and (s[i]=s[j])
```

Following the disruption of Telkom services in Jayapura due to its undersea cable breakage, **customers' access to the internet was totally cut off**. Netizens voiced their opinion that this was not the first time such an incident happened in the same area. Others regretted that this incident occurred during the pandemic, which impacted distance learning and other online activities.

Considering the issue, telco companies need to make **better risk management to prevent internet connection disruption for the same reasons** in the future. A total-internet shutdown can be avoided by providing a good and reliable backup alternative to not interrupt customers' activity.

With this, risk management could be implemented by monitoring conversations on the issue in the social media.



Automation: A Blessing or a Curse?

Customers get frustrated when they feel like their complaints are being ignored or not answered correctly. First, many netizens were left with anger over **unresolved complaints from the chatbot and poor experience from automated, lifeless replies**. Then, they ended up criticizing the customer service's response, calling it way too scripted and unable to solve their problems.

Chatbots are great, but human customer services are on the next level. Using a chatbot is efficient as it provides a quick and easy solution. Still, customers should also choose **to switch to human customer service** when the chatbot cannot answer the complaint or request properly. Telco companies should train their customer service team regularly to deliver excellent customer support. **Templates are okay, but personalized ones will be better** (e.g. addressing the customer by name). On top of that, customer service should provide solution accurately and quickly, then **revert to check with the customers whether the issue has been resolved**.



Notification: Updates Available

Recently, Telkomsel and Smartfren reportedly have won the 5G network auction held by the Ministry of Communication and Information. Responding to the 5G network development plan, **netizens said that internet providers need to expand and improve the quality of the 4G network** first before making the transition to 5G network. They argued that even the 3G and 4G networks had not reached all regions across Indonesia yet; not to mention that in some places, the 4G network still had slow data connection.



To tackle the uneven frequency range, telco companies together with the government should also prioritize **the optimization of the existing 4G network while implementing the 5G**. It is crucial to ensure that the network can reach all layers of the society, including those in the remote areas.



What Customers Say Matters

Use the Eagle Eye

Nowadays, **social media is the preferred channel to praise brands** for giving good services and **the select forum to make complaints**. Thus, telco companies need to frequently track the mention of their brands and keep an eye on the general conversations to spot the potential crisis that can affect their brands' reputation.

Isentia can assist telco brands in **monitoring what people write about them on social media**, including the good and the bad, **even when they are not tagged**. This will help to notify telco brands should there be an issue they need to address. Furthermore, we can also **identify the most influential social media accounts** that are interacting with the brands.

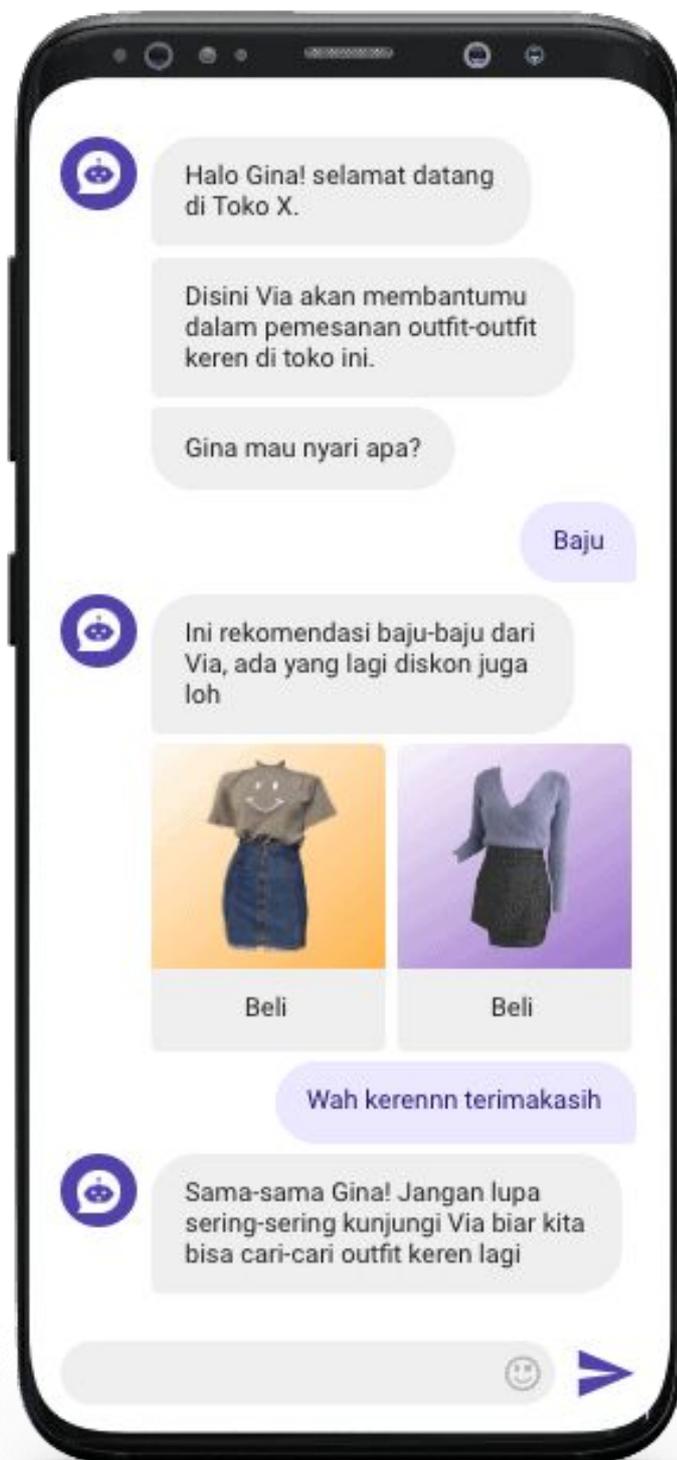


Customer is King: Happy King, Happy People

Show That You Care!

Most of the poor customer experiences in telco industry came from unresolved complaints responded by chatbot and lifeless responses by customer support agent. **Customers of telco providers crave for more personalized reply with personal touch.** They want their problems to be addressed and understood inside out.

Isentia can help to **counter the customers' dissatisfaction about automated responses by analyzing their preferences,** such as where and how they want their complaints to be addressed (e.g. live chat, call, e-mail). Understanding their preferences will help telco brands to avoid the wrong moves (e.g. being too chatty).

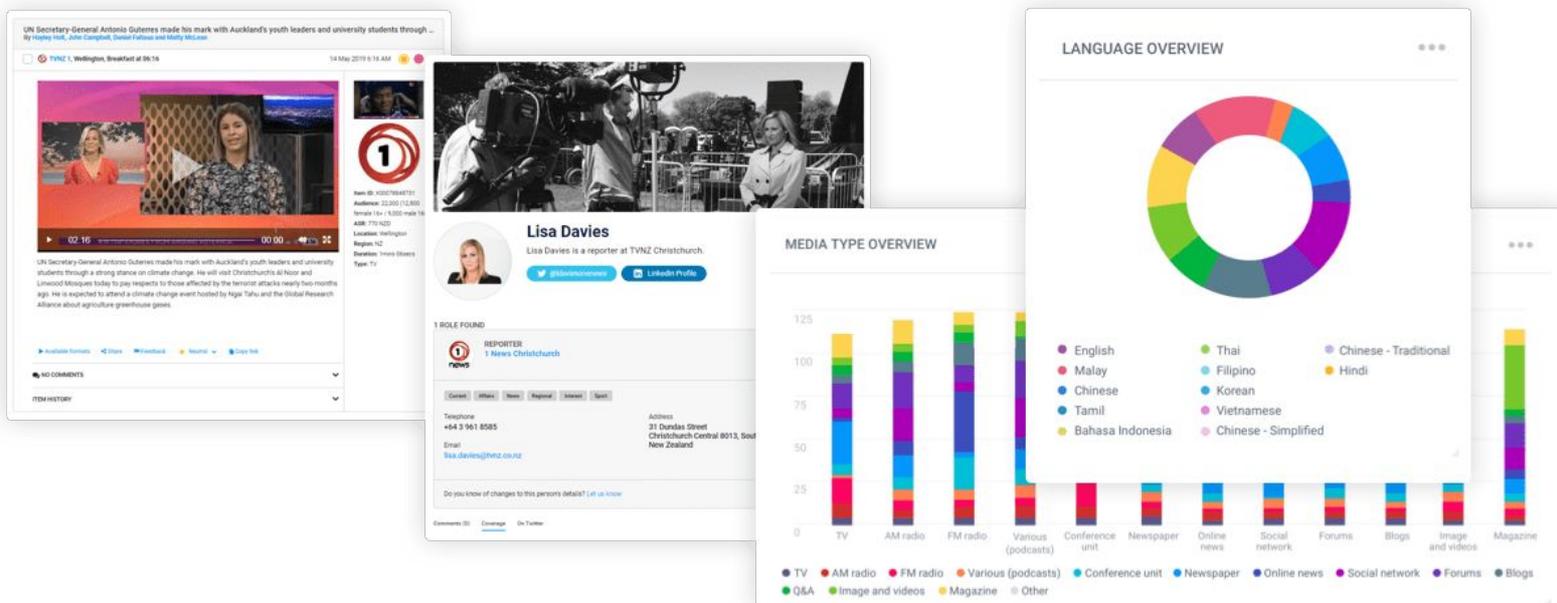


Stay Ahead of the Game

Run Faster and Win the Race

The pandemic makes the telecommunication industry's role more important than ever. When people have to stay away from each other, the telco industry keeps them connected digitally. Telco's crucial role in the new average era opens up opportunities, but at the same time, it also inflicts more intense competition.

With Isentia, you can monitor what is being said about them and their competitors. We analyze each brand's strengths and weaknesses by looking at how netizens talk about its product, campaign, services and many others. We are also able to measure the reputation of telco brands and compare their performance within the industry.



What Our Insights Leaders In Indonesia Say



Yudha Prawira, Insights Manager, Indonesia

"At a time when everyone is active online in the midst of a pandemic, the telecommunications industry is the foundation of some industries to survive and continue to grow. Thus, the telecommunication industry is not only thinking about strategies in building their business in the midst of the COVID-19 pandemic, but also how to support other industries to be able to face this pandemic together."

Rendy Ezra Mangara, Research Manager, Indonesia

"The COVID-19 pandemic continues to push the telecommunication industry to find ways to develop various innovations and technologies amidst the increasing need for digital activities. The role of government in supporting this industry is also very necessary to accelerate the development of the telecommunications industry."



Nur Fitriana, Junior Insights Analyst, Indonesia

The sudden disruption of daily life caused by the Covid-19 pandemic has forced people to drive their activities remotely. The ongoing shift has surged the demand for better internet connectivity, wider network coverage, and its reliability. However, the demand could also lead to public's distrust if reality doesn't meet expectations. As the backbone of the new normal rush, the telecom industry has a chance to fulfil its commitment as internet service providers.





Please do not hesitate to get in touch with us for more information on this whitepaper.

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