



Consumer Study on Fixed WiFi Operator

KPI report

Data ending: Jan'24

Feb'24

Research design: Consumer study 2024



General Respondent Criteria

- Male or female
- 18-55 years old
- All socioeconomic status
- **Fixed WiFi users (any type – fiber or cellular)**
- The individual responsible for making the purchase decision regarding the Fixed WiFi provider for a household
- Owned house or minimum 12 months rent



City Coverage

- **Offline City Coverage**

28 URBAN CITIES

29 RURAL CITIES

3 PUMA CITIES

- **Online City Coverage**

Telkomsel region boundary, including all cities within each respective region



Interview Method

Main Sample - Mixed survey method (Online & Offline)

- **Online**

Survey method: Self-completion

Recruitment method: Online survey panel

- **Offline**

Survey method: Face-to-face interview using CAPI (Computer Assisted Personal Interview)

Recruitment method: Random (general respondent) and convenience (booster respondent) sampling

Booster Sample – Competitor users

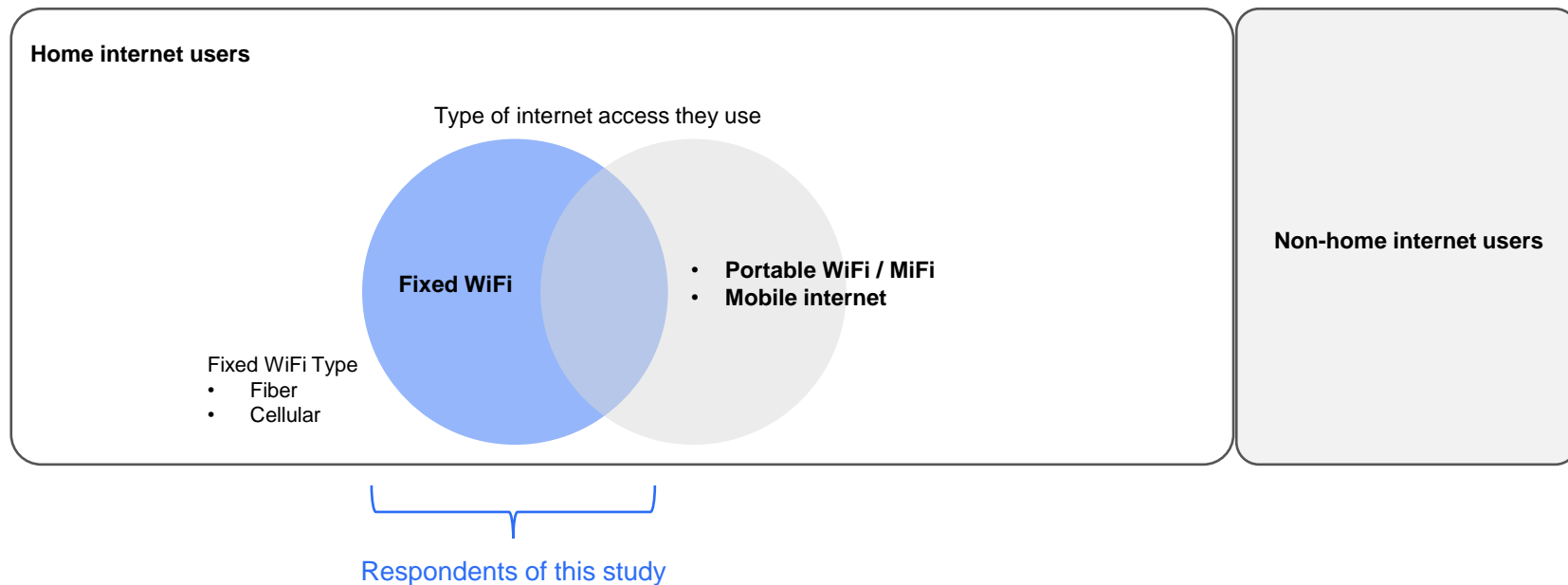
- **Offline**

Survey method: Face-to-face interview using CAPI (Computer Assisted Personal Interview)





Recruitment method: Convenience (booster respondent) sampling

The respondents of this study

The scope of respondents for brand evaluation in this study is the Fixed WiFi market.



Research design: Consumer study fixed

	Q3 2023	Q4 2023	Jan 2024
 Fieldwork Period	Sep-Oct 2023	Oct-Dec 2023	Dec 2023-Feb 2024
 Coverage	Urban + Rural, 13 TSEL regions <i>PUMA urban only</i>	Urban + Rural, 13 TSEL regions <i>PUMA urban only</i>	Urban + Rural, 13 TSEL regions <i>PUMA urban only</i>
 General Respondent Criteria	Male or Female All SES 18 – 55 Y.O. Fixed WiFi users (any type – fiber or cellular) Owned house or minimum 12 months rent Fixed WiFi Provider Decision Maker in Household	Male or Female All SES 18 – 55 Y.O. Fixed WiFi users (any type – fiber or cellular) Owned house or minimum 12 months rent Fixed WiFi Provider Decision Maker in Household	Male or Female All SES 18 – 55 Y.O. Fixed WiFi users (any type – fiber or cellular) Owned house or minimum 12 months rent Fixed WiFi Provider Decision Maker in Household
 Main Sample	<ul style="list-style-type: none">Offline: 5,865 respOnline: 5,844 resp	<ul style="list-style-type: none">Offline: 5,673 respOnline: 5,468 resp	<ul style="list-style-type: none">Offline: 5,652 respOnline: 5,478 resp
 Booster Sample	1,029 resp	550 resp	551 resp

Net Promoter Score (NPS)

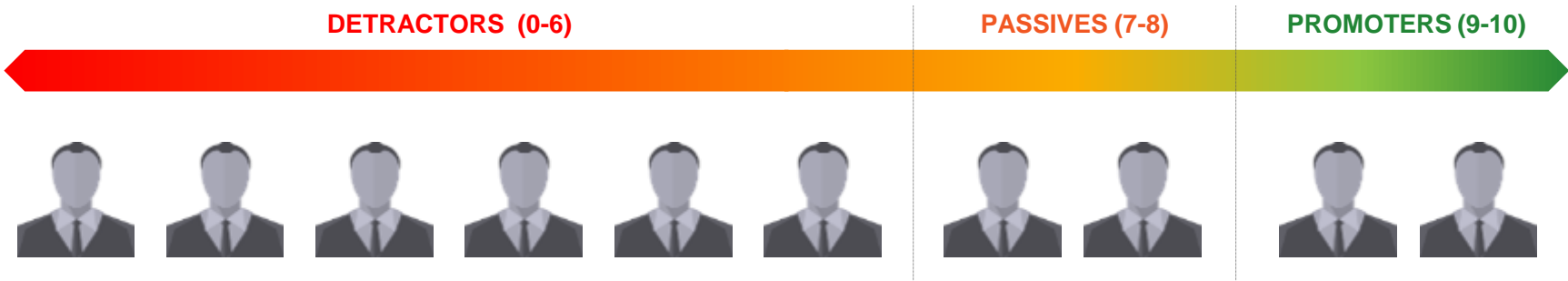
How to obtain Net Promoter Score (NPS)?

Question:

On a scale of 0-10, how likely is it that you would **recommend a brand** to others?

Response:

10 scale, 0 is very not recommended and 10 very recommended

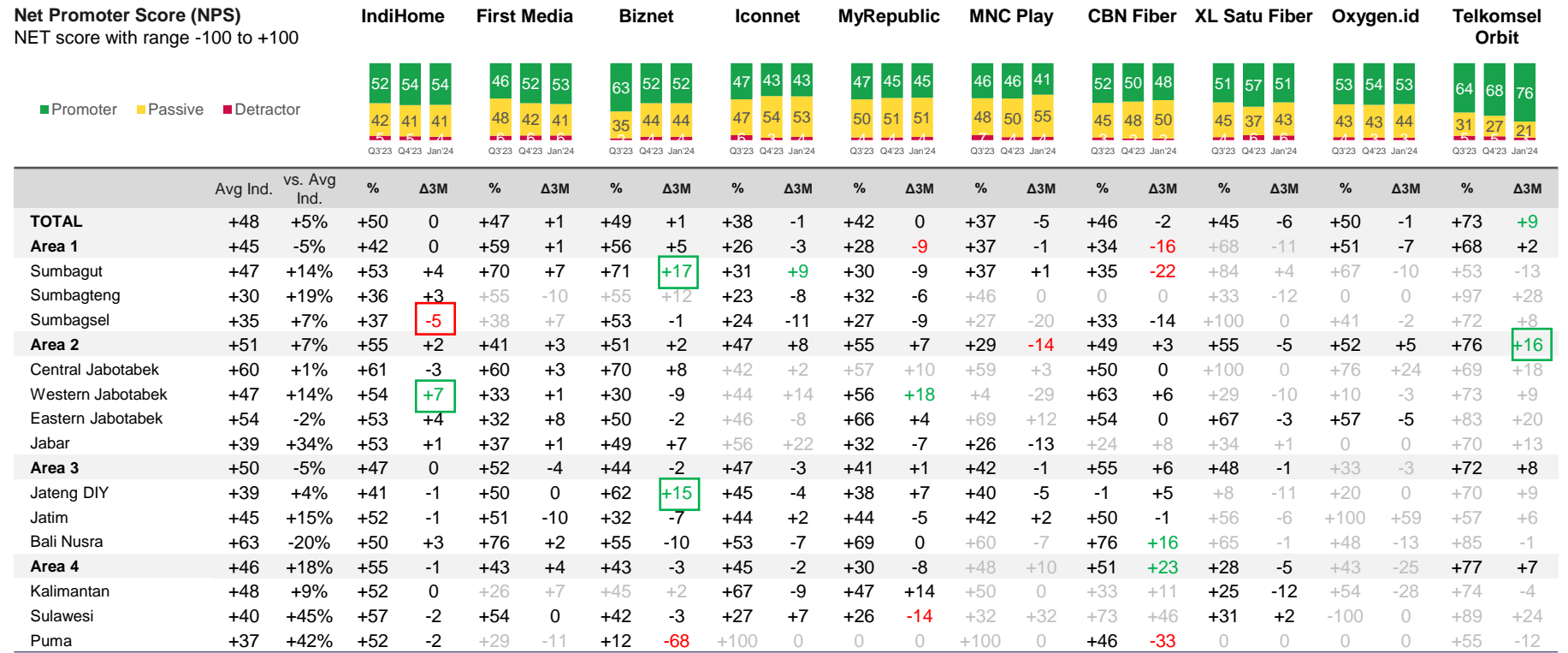


NPS: $\text{Proportion Promoters} - \text{Proportion Detractors}$

Then followed by an **open ended question on why** the respondent has rated SO

Net Promoter Score (NPS): Summary – by area & region

Western Jabo as area where Indihome NPS level improved the highest in compared to previous period, contrast with Sumbagsel. Telkomsel Orbit improved NPS level mainly contributed by Area 2. As for Biznet, the NPS level is relatively stable with both Sumbagut and Jateng DIY performed positive this period, while PUMA suffers great loss.



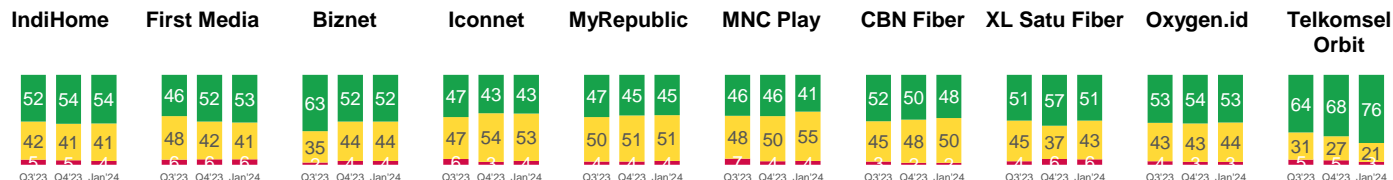
Net Promoter Score (NPS): Summary – by speed of internet, additional service & LOS

In terms of classification by usage, Indihome NPS level is relatively stable compared to Q4'23. On the other hand, both First Media and Biznet NPS level improved on high-speed internet users

Net Promoter Score (NPS)

NET score with range -100 to +100

■ Promoter ■ Passive ■ Detractor

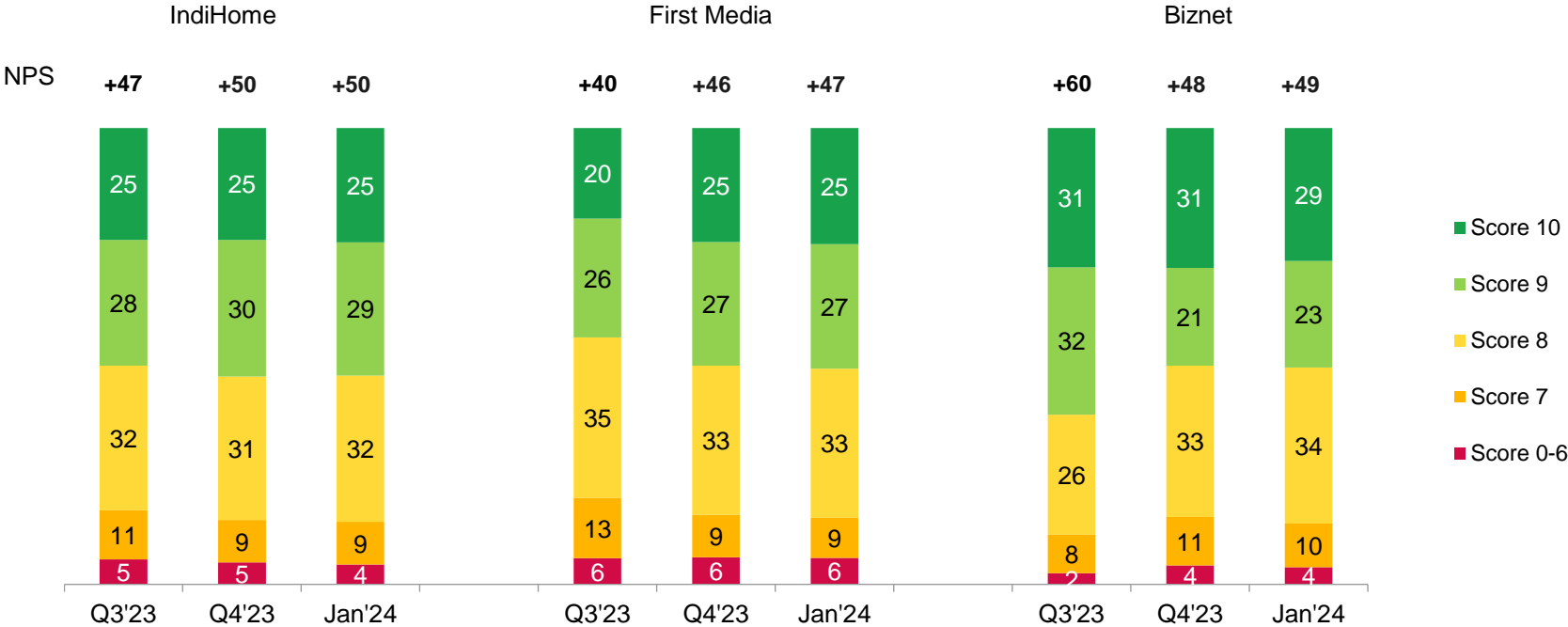


	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
TOTAL	+50	0	+47	+1	+49	+1	+38	-1	+42	0	+37	-5	+46	-2	+45	-6	+50	-1	+73	+9
Speed of Internet																				
< 15 Mbps	+36	+2	+40	+3	+30	0	+36	-8	+43	+5	+34	-6	+42	+1	+49	-9	+50	+9	+37	-12
15-30 Mbps	+48	-1	+41	+2	+40	-4	+38	+4	+38	-1	+36	-6	+36	-12	+44	-6	+50	0	+71	+20
31-40 Mbps	+54	+2	+53	+9	+61	+2	+51	+6	+53	+4	+35	-7	+47	-4	+42	+7	+25	+9	+72	+18
41-50 Mbps	+56	-2	+38	-7	+56	+10	+54	-14	+71	+1	+38	-10	+55	+9	+35	-10	+36	-7	+70	-3
51-100 Mbps	+64	+1	+67	-3	+68	-2	+50	+9	+45	-1	+81	+4	+81	+30	+60	-9	+54	-15	+65	-5
> 100 Mbps	+68	+3	+69	+20	+76	+14	+79	+9	+67	+6	+85	-15	+98	-2	+81	-10	+100	0	+92	+7
Additional service																				
Internet service only	+45	0	+34	-1	+41	0	+36	-1	+37	+1	+32	-7	+43	-3	+43	0	+48	+4	0	0
Cable TV	+47	+2	+47	+10	+57	+6	+45	-6	+66	+3	+41	-1	+38	-5	+24	-22	+56	-20	0	0
Video streaming	+58	+1	+61	-7	+63	+4	+50	-3	+56	-7	+59	+6	+50	-7	+52	-14	+70	+12	0	0
Cable TV & Video streaming	+71	0	+75	+6	+72	+4	+59	-17	+81	+9	+47	-1	+84	+1	+70	-3	+43	-57	0	0
Length of service (LOS)																				
New users (less than 1 year)	+44	0	+40	-2	+45	+2	+33	-2	+32	-3	+30	0	+47	-2	+39	+1	+63	-4	+55	+8
1 – 3 years	+51	0	+48	0	+48	+2	+44	-1	+51	+6	+35	-8	+41	-6	+42	-7	+44	+2	+74	+11
3 – 5 years	+52	+1	+58	+8	+58	-3	+46	-1	+66	+9	+42	-11	+38	-3	+60	-10	+40	-6	+90	+5
More than 5 years	+50	-1	+37	-2	+56	-14	+49	0	+33	-17	+52	+9	+100	+31	+100	0	+72	+1	+94	+9

Base: Respective Fixed WiFi users | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Movement of Net Promoter Score proportion vs. previous quarter

NPS score for IndiHome, First Media, and Biznet are generally stable in most of scales compared to previous period.



Base: Respective Fixed WiFi users

IndiHome: Net Promoter Score (NPS): Summary of the top and bottom 5 cities* in respective areas

Net Promoter Score (NPS)
NET score with range -100 to +100

Area 1				Area 2				Area 3				Area 4			
		%	Δ3M			%	Δ3M			%	Δ3M			%	Δ3M
Top 5 Cities	KOTA MEDAN	+63	▲	KOTA JAKARTA BARAT	+85			KOTA PASURUAN	+64			KOTA BALIKPAPAN	+79	▲	
	KOTA PALEMBANG	+56	▼	KAB. KARAWANG	+78			KAB. BANGKALAN	+62	▲		KOTA PALU	+69	▼	
	KAB. DELI SERDANG	+45	▲	KOTA JAKARTA PUSAT	+67			KOTA DENPASAR	+62	▲		KOTA MANADO	+63	▲	
	KOTA BANDA ACEH	+43		KOTA TANGERANG	+64	▲		KAB. SIDOARJO	+62			KOTA BANJARMASIN	+61	▲	
	KOTA B A T A M	+42	▲	KOTA TASIKMALAYA	+59	▲		KOTA SURABAYA	+58			KOTA MAKASSAR	+61	▼	
Bottom 5 Cities	KOTA BANDAR LAMPUNG	+30	▼	KAB. TANGERANG	+39	▲		KOTA YOGYAKARTA	+34	▼		KOTA TARAKAN	+36	▼	
	KOTA BENGKULU	+22	▲	KAB. BEKASI	+36	▲		KOTA MAGELANG	+30	▼		KOTA PALANGKA RAYA	+36	▲	
	KOTA PEKANBARU	+20	▼	KOTA JAKARTA UTARA	+32	▼		KAB. JEMBER	+28			KAB. GOWA	+20	▼	
	KOTA PANGKAL PINANG	+18		KOTA CIREBON	+22	▼		KOTA KUPANG	+17			KOTA SAMARINDA	+19		
	KAB. SIMEULUE	-100	▲	KAB. KEPULAUAN SERIBU	-100			KAB. CILACAP	-100	▲		KAB. SAMBAS	-100		

Base: IndiHome users | Δ3M = gap vs Q4'23 | ▲: improve rank, ▼: decline rank | *Cities with a minimum base of 30 respondents

IndiHome: Reasons for promoting

In comparison to the previous quarter, connectivity remains the primary reason to promote IndiHome. “Famous Brand” rises to fifth place, while “Widely Used Brand” falls to 6th place for the main reason. Indihome users promoters more skewed towards consumers in Area 2 and Area 4, and among 35 – 44 y.o

54%_(+0%) of IndiHome users are promoters

REASON		%	Δ3M
CONNECTIVITY	Stable and fast connection	70	
	Wide network coverage	11	
PRICE & PROMO	Affordable price	10	
AFTER-SALES SERVICES	Great service	4	
BRAND	Famous brand	3	▲
BRAND	Widely used brand	3	▼

	IndiHome Users %	IndiHome Users – Promoters Index %
Gender		
Male	52	52
Female	48	48
SES		
Upper	30	33
Middle	55	54
Lower	15	13
Age group		
18 – 24 YO	26	24
25 – 34 YO	30	31
35 – 44 YO	24	26
45 – 55 YO	20	20
Avg. age (YO)	33.57	33.95
Area		
Area 1	19	17
Area 2	32	34
Area 3	32	30
Area 4	17	19
Residential Type		
Residential	25	27
Apartment	1	1
Ordinary Housing	70	67
Others	5	4
LOS (months)	31.16	31.61

Base: IndiHome users who are promoters | Δ3M = gap vs Q4'23 | ▲: improve rank, ▼: decline rank

Puma, Male, 35-44 YO, Upper SES

Jaringan kencang, jarang loading, tidak pernah ada masalah selama menggunakannya

- Takeouts:
- High-speed connection
 - Reliability

Eastern Jabotabek, Male, 45-55 YO, Upper SES

Brand provider internet paling terkenal

- Takeouts:
- Famous brand

IndiHome: Understanding positive feedback (reasons for promoting)

The reason 'Famous brand' for promoting IndiHome has increased a significant result across regions.

Reasons for Promoting
Sorted by percentage rank

	Total		Area 1		Area 2		Area 3		Area 4		Sum bagut		Sum bagteng		Sum bagsel		Central Jabo		Western Jabo		Eastern Jabo		Jabar		Jateng DIY		Jatim		Bali Nusra		Kali mantan		Sula wesi		Puma	
	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
Stable and fast connection	70		73		66		72		73		71		68		78		63		69		68		65		76		73		60		75		70		76	
Wide network coverage	11		11		11		13		10		10		16		10		12		9		10		11		13		13		14		11		10		10	
Affordable price	10		10		12		9		9		10		11		9		9		15		8		16		9		9		12		9		10		9	
Great service	4		4	▲	4	▲	4	▼	4		4	▲	5	▲	4	▲	5	▲	4		4		3	▲	4		4	▲	3	▼	2	▼	5		5	
Famous brand	3	▲	2	▲	4		2	▲	2		3	▲	1	▲	7		2	▼	4		3	▲	1	▲	2	▲	4	▲	3	▲	2	▲	1		1	
Widely used brand	3	▼	3		3	▼	4	▲	1	▼	4		2	▲	1	▼	1	▼	1	▼	5		4		3	▼	4	▼	4		1		1	▼	0	▼

Base: IndiHome users who are promoters | Δ3M = rank vs Q4'23 | CONNECTIVITY, AFTER-SALES SERVICES, INSTALLATION & ACTIVATION PROCESS, PRICE & PROMO, PRODUCT & PACKAGE, BRAND

Understanding positive feedback (reasons for promoting)

Most users still highlight 'Stable and fast connection' as their primary reason to promote their brands also with the distinction of IndiHome and Telkomsel Orbit users, who prioritize 'Wide network coverage' as a top reason, whereas other brands skew towards 'Affordable price'.

Reasons for Promoting

Sorted by percentage rank

IndiHome	First Media	Biznet	Iconnet	MyRepublic	MNC Play	CBN Fiber	XL Satu Fiber	Oxygen.id	Telkomsel Orbit
RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M
Stable and fast connection	Stable and fast connection	Stable and fast connection	Stable and fast connection	Stable and fast connection	Stable and fast connection	Stable and fast connection	Stable and fast connection	Stable and fast connection	Stable and fast connection
Wide network coverage	Affordable price	Affordable price	Affordable price	Affordable price	Affordable price	Affordable price	Affordable price	Affordable price	Wide network coverage
Affordable price	Wide network coverage	Great service	Wide network coverage	Packages variant according to needs ▲	Good quality product ▲	Easy to use ▲	Wide network coverage	Great service	Affordable price
Great service	Packages variant according to needs	Wide network coverage	Good quality product ▲	Great service ▲	Great service ▼	Packages variant according to needs ▲	Good quality product ▲	Wide network coverage	Good quality product ▲
Easy to use ▲	Trusted brand ▲	Fast response service ▲	Easy to use ▼	Fast response service ▼	Fast response service ▼	Great service ▼	Great service	Fast response service	Packages variant according to needs ▲
Famous brand ▲	Package prices according to needs ▲	Good quality product	Packages variant according to needs ▲	Wide network coverage ▼	Easy to use ▼	Wide network coverage ▼	Packages variant according to needs ▼	Trusted brand ▲	Package prices according to needs ▲

Base: users who are promoters | Δ3M = rank vs Q4'23 | CONNECTIVITY, AFTER-SALES SERVICES, INSTALLATION & ACTIVATION PROCESS, PRICE & PROMO, PRODUCT & PACKAGE, BRAND

IndiHome: Reasons for detracting

“Unstable and slow connection” and “Unaffordable price” continue to be the main reasons for not recommending IndiHome. Meanwhile “Not Value for Money” and “The Service is not good” are slowly rise into the top reason. Negative recommendation mostly contribute by lower and young age consumers.

4%
(-1%)

of IndiHome users are
detractors

REASON		%	RANK Δ3M
CONNECTIVITY	Unstable and slow connection	59	
PRICE & PROMO	Unaffordable price	20	
PRICE & PROMO	Not value for money	2	▲
PURCHASE & PAYMENT	There is a penalty for late payment	2	▼
AFTER-SALES SERVICES	The service is not good	1	▲
AFTER-SALES SERVICES	Slow response technician	1	▼

	IndiHome Users %	IndiHome Users – Detractors Index %
Gender		
Male	52	57
Female	48	43
SES		
Upper	30	19
Middle	55	46
Lower	15	35
Age group		
18 – 24 YO	26	39
25 – 34 YO	30	23
35 – 44 YO	24	21
45 – 55 YO	20	17
Avg. age (YO)	33.57	31.87
Area		
Area 1	19	27
Area 2	32	17
Area 3	32	36
Area 4	17	21
Residential Type		
Residential	25	30
Apartment	1	3
Ordinary Housing	70	57
Others	5	9
LOS (months)	31.16	32.47

Base: IndiHome users who are detractors | Δ3M = gap vs Q4'23 | ▲: improve rank, ▼: decline rank

Jateng DIY, Male, 18-34 YO, Upper SES

Kualitasnya tidak sesuai dengan yang dipromosikan

- Takeouts:
- The price does not match the quality

Sumbagsel, Female, 18-24 YO, Lower SES

Harga paket yang dibeli selalu naik dan tanpa pemberitahuan

- Takeouts:
- Unnotified price increase

IndiHome: Understanding negative feedback (reasons for detracting)

‘Unaffordable price’ has emerged as a prominent factor influencing the recommendation of IndiHome detractors, particularly in Area 1, while ‘Not value for money is evident in Area 2 and 3. Furthermore the ‘Slow response technician’ is evident in Area 2, 3, and 4.

Reasons for Detracting
Sorted by percentage rank

	Total		Area 1		Area 2		Area 3		Area 4	
	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
Unstable and slow connection	59		49		78		63		50	
Unaffordable price	20		23	▲	13		21		21	▼
Not value for money	2	▲	5		0	▲	2	▲	2	
There is a penalty for late payment	2	▼	1		4		1		1	
The service is not good	1	▲	0		2	▲	2	▲		▼
Slow response technician	1	▼	2		0	▲	1	▲	2	▲

Understanding negative feedback (reasons for detracting)

Top 2 reason to refrain from promoting their current brand is similar, with ‘Unstable and slow connection’ and ‘Unaffordable price’

Reasons for Detracting

Sorted by percentage rank

IndiHome	First Media	Biznet	Iconnet	MyRepublic	MNC Play	CBN Fiber	XL Satu Fiber	Oxygen.id	Telkomsel Orbit
RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M	RANK Δ3M
Unstable and slow connection	Unstable and slow connection	Unstable and slow connection	Unstable and slow connection	Unstable and slow connection	Unstable and slow connection	Unstable and slow connection	Unstable and slow connection	Unstable and slow connection	Unaffordable price
Unaffordable price	Unaffordable price	Unaffordable price	The service is not good	Unaffordable price	Unaffordable price	The service is slow	Unaffordable price	Unaffordable price	Unstable and slow connection
Not value for money	▲ Unstable price	▲ Technician is slow response	Technician is slow response	Technician is slow response	There is a penalty for late payment	▼ Unaffordable price	There is a penalty for late payment		There is a penalty for late payment
There is a penalty for late payment	▼ The service is not good	▲ The service is not good	▼ Unaffordable price	▼ The service is slow		There is a penalty for late payment			
The service is not good	▲ The service is slow	▼ There is a penalty for late payment		There is a penalty for late payment	▼				
Technician is slow response	▼ There is a penalty for late payment								

Base: users who are detractors | Δ3M = rank vs Q4'23 | CONNECTIVITY, AFTER-SALES SERVICES, INSTALLATION & ACTIVATION PROCESS, PRICE & PROMO, PRODUCT & PACKAGE, BRAND

User positive feedback on IndiHome

Jabar, Female, 35-44 YO, Upper SES

Jangkauan layanan fixed wifi luas, tarif layanan internet murah dan terjangkau sesuai dengan kualitas

- Takeouts:
- Wide network coverage
 - Affordable price

Jateng DIY, Male, 35-44 YO, Upper SES

Sinyal internet kuat, cepat dan stabil, jarang gangguan, dipakai banyak orang pun tidak lemot koneksinya

- Takeouts:
- Stable connection

Puma, Male, 18-24 YO, Middle SES

Selalu memberikan pelayanan terbaik dalam hal jaringan, pemakaian, dan juga masalah dari segi harga masih terjangkau

- Takeouts:
- Best services for network, experience, and solution handling
 - Affordable price

Sulawesi, Female, 25-34 YO, Middle SES

Sinyal kuat dan tidak putus-putus, internet tercepat, petugas teknisi cepat tangani begitu setelah pendaftaran

- Takeouts:
- High-speed internet
 - Stable Network
 - Quick response

Sumbagsel, Male, 25-34 YO, Lower SES

Banyak pilihan paket promo, pelayanan agen di counter memuaskan, ramah, dan sopan, keluhan saya cepat di tanggapin

- Takeouts:
- Provides many promo packages
 - Good attitude agent / officer
 - Quick response

Eastern Jabotabek, Female, 25-34 YO, Middle SES

Biaya langganan internet perbulan terjangkau, jaringan internet stabil, internetan tidak putus putus sinyalnya

- Takeouts:
- Affordable price
 - Stable Network

Base: Indihome users

User **negative** feedback on Biznet

Eastern Jabotabek, Female, 25-34 YO, Middle SES

Kualitas jaringan internet terganggu ketika hujan deras

- Takeouts:
- *Impact of bad weather to network connection*

Central Jabotabek, Male, 18-24 YO, Middle SES

Jangkauan jaringan terlalu pendek tidak lebih dari 20 meter dari luar rumah

- Takeouts:
- *Small coverage*

Jatim, Female, 25-34 YO, Upper SES

Teknisi kadang kadang kurang tanggap kalau pas ada gangguan yang agak lama,kalau lemot lemot sebentar sudah biasa.

- Takeouts:
- *Slow response technician / officer*

Jatim, Female, 18-24 YO, Upper SES

Sering gangguan utamanya dimalam hari tapi hanya sebentar

- Takeouts:
- *Connection trouble at specific time*

Jatim, Male, 18-24 YO, Middle SES

Kendala nya pada saat hujan deras wifi agak troubel

- Takeouts:
- *Impact of bad weather to network connection*

Base: Biznet users

Customer Satisfaction

Experience with the main home internet
brand

Customer Strength Index (CSI)

Customer Satisfaction Index Metrics

There are 6 metrics used in this study to measure Customer Satisfaction Index (CSI) – Overall Satisfaction, Relative Satisfaction, Value for Money, Needs Fulfillment, Trustability, and Propensity to Stay.

Overall Satisfaction	Relative Satisfaction	Value for Money
<p>Question: To what extent would you say you are satisfied or dissatisfied with the overall products and services of _____ [Brand / Product]?</p>	<p>Question: Please compare _____ [Brand / Product] with other fixed wi-fi brands. Compared to other fixed wi-fi brands in the market, what is your overall opinion about _____ [Brand / Product]?</p>	<p>Question: The product & services and benefits that you receive from _____ [Brand / Product] make it well worth the money you pay for it</p>
<p>Response:</p> <div><div>1</div>Very dissatisfied</div> <div><div>2</div>Dissatisfied</div> <div><div>3</div>Satisfied</div> <div><div>4</div>Very satisfied</div> <div><div>5</div>Extremely satisfied</div>	<p>Response:</p> <div><div>1</div>Much worse than others</div> <div><div>2</div>Worse than others</div> <div><div>3</div>Somewhat better than others</div> <div><div>4</div>Better than others</div> <div><div>5</div>Much better than others</div>	<p>Response:</p> <div><div>1</div>Strongly disagree</div> <div><div>2</div>Disagree</div> <div><div>3</div>Somewhat agree</div> <div><div>4</div>Agree</div> <div><div>5</div>Strongly agree</div>
Needs Fulfillment	Trustability	Propensity to Stay
<p>Question: _____ [Brand / Product] is highly responsive to your needs and requirements</p>	<p>Question: _____ [Brand / Product] is a fixed wi-fi brand that you can truly trust</p>	<p>Question: If another fixed wi-fi brand were to offer you a similar product & service at marginally lower charges/price, how likely are you to shift from _____ [Brand / Product] to the other fixed wi-fi brand?</p>
<p>Response:</p> <div><div>1</div>Strongly disagree</div> <div><div>2</div>Disagree</div> <div><div>3</div>Somewhat agree</div> <div><div>4</div>Agree</div> <div><div>5</div>Strongly agree</div>	<p>Response:</p> <div><div>1</div>Strongly disagree</div> <div><div>2</div>Disagree</div> <div><div>3</div>Somewhat agree</div> <div><div>4</div>Agree</div> <div><div>5</div>Strongly agree</div>	<p>Response:</p> <div><div>1</div>Most likely to move</div> <div><div>2</div>Likely to move</div> <div><div>3</div>Somewhat unlikely to move</div> <div><div>4</div>Unlikely to move</div> <div><div>5</div>Most unlikely to move</div>

Customer Strength Index (CSI): Summary – by area & region

No major difference for Indihome CSI performance across Region, as for Telkomsel Orbit, Area 1 contributed the highest improvement for the brand. Stable performance also shown across competition brands

Customer Strength Index (CSI)			IndiHome		First Media		Biznet		Iconnet		MyRepublic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit	
Mean score with range +0 to +10																						
			7.39 7.53 7.57		7.28 7.40 7.45		7.62 7.76 7.84		7.14 7.24 7.23		7.19 7.28 7.37		7.09 7.32 7.30		7.33 7.44 7.50		7.23 7.27 7.27		7.64 7.54 7.50		7.54 7.78 7.93	
			Q3'23		Q4'23		Jan'24															
	Avg Ind.	vs. Avg Ind.	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
TOTAL	7.49	+0.95%	7.57	+0.03	7.45	+0.05	7.84	+0.08	7.23	-0.01	7.37	+0.09	7.30	-0.02	7.50	+0.06	7.27	0.00	7.50	-0.04	7.93	+0.15
Area 1	7.47	+0.21%	7.49	+0.04	7.50	-0.12	7.97	+0.19	7.07	+0.03	7.28	-0.06	7.53	-0.02	7.36	+0.04	7.37	-0.40	7.34	-0.30	7.72	+0.21
Sumbagut	7.51	+2.53%	7.70	+0.11	8.02	+0.02	7.41	-0.23	7.38	+0.11	7.09	-0.14	7.57	-0.03	7.29	+0.26	7.95	+0.18	7.43	-0.24	7.56	+0.07
Sumbagteng	7.11	+2.79%	7.31	+0.03	6.97	-0.03	7.90	+0.41	6.90	0.00	7.12	-0.07	8.51	0.00	0.00	-7.34	6.09	-0.66	7.11	+7.11	8.20	-0.02
Sumbagsel	7.45	-0.57%	7.40	-0.02	6.88	-0.24	8.17	+0.26	6.84	-0.08	7.31	-0.05	6.25	0.00	7.50	-0.17	8.18	-0.06	7.27	-0.34	7.63	+0.74
Area 2	7.58	+1.26%	7.68	+0.04	7.36	+0.08	7.84	+0.05	7.08	-0.07	7.65	+0.30	7.50	0.00	7.56	+0.19	7.54	+0.16	7.60	+0.07	8.02	+0.16
Central Jabotabek	7.94	+0.64%	8.00	+0.05	7.73	+0.02	8.11	+0.20	7.38	-0.09	7.79	+0.46	7.74	-0.43	8.00	-0.08	9.28	-0.42	6.83	+0.37	7.98	+0.10
Western Jabotabek	7.38	+2.66%	7.58	+0.04	7.20	+0.14	7.26	-0.18	7.05	+0.12	7.20	+0.30	7.35	+0.02	7.68	+0.41	7.21	-0.32	8.15	-0.16	8.32	+0.04
Eastern Jabotabek	7.64	+0.14%	7.65	+0.02	7.21	+0.20	8.00	-0.18	6.80	-0.36	8.13	+0.37	7.17	+0.20	7.48	+0.08	7.05	+0.17	7.92	0.00	8.32	+0.37
Jabar	7.52	+0.13%	7.53	+0.06	7.26	+0.01	7.76	+0.29	6.99	+0.16	7.51	-0.07	7.54	+0.26	7.05	+0.12	7.92	+0.35	7.88	0.00	7.28	+0.30
Area 3	7.49	-1.08%	7.41	+0.02	7.56	+0.04	7.84	+0.07	7.44	-0.02	7.17	+0.01	7.14	-0.02	7.56	-0.04	7.09	-0.23	7.35	+0.07	8.21	+0.15
Jateng DIY	7.28	-0.42%	7.25	-0.03	7.42	+0.14	7.63	+0.28	7.24	+0.04	7.03	+0.03	7.12	-0.09	6.63	+0.18	6.54	-0.24	6.88	0.00	8.12	+0.08
Jatim	7.46	+0.26%	7.48	+0.03	7.61	-0.09	7.97	+0.06	7.21	-0.28	7.35	+0.06	7.16	+0.04	7.14	-0.53	7.36	-0.09	7.65	0.00	7.34	-0.29
Bali Nusra	7.96	-4.12%	7.63	+0.10	8.16	+0.09	7.80	-0.44	8.11	+0.15	7.84	-0.05	6.53	-0.72	8.21	+0.40	7.26	-0.38	7.91	+0.30	9.09	+0.39
Area 4	7.41	+4.41%	7.74	+0.04	7.56	+0.26	7.43	+0.18	7.38	-0.07	7.24	+0.13	7.49	+0.22	7.35	-0.77	7.08	+0.12	7.39	-0.15	7.49	-0.03
Kalimantan	7.45	+4.94%	7.82	+0.05	7.38	-0.07	7.54	0.00	7.64	-0.02	7.58	-0.45	8.33	0.00	7.96	-0.43	6.76	-0.04	7.51	-0.19	7.03	+0.43
Sulawesi	7.43	+2.52%	7.62	0.00	7.88	+0.23	7.37	+0.38	7.15	-0.08	7.12	+0.13	6.54	+1.00	7.15	-0.23	7.43	+0.32	5.86	0.00	7.56	-0.18
Puma	7.35	+8.23%	7.96	+0.14	7.17	+0.17	7.11	-0.29	8.69	0.00	7.88	0.00	8.56	0.00	6.99	-0.13	0.00	0.00	0.00	0.00	7.99	-0.51

Base: Respective Fixed WiFi users | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Customer Strength Index (CSI): Summary – by speed internet, additional service & LOS

Similar also across usage profile for Indihome, performance is stable. On other hand, Telkomsel Orbit shown improvement among loyal users

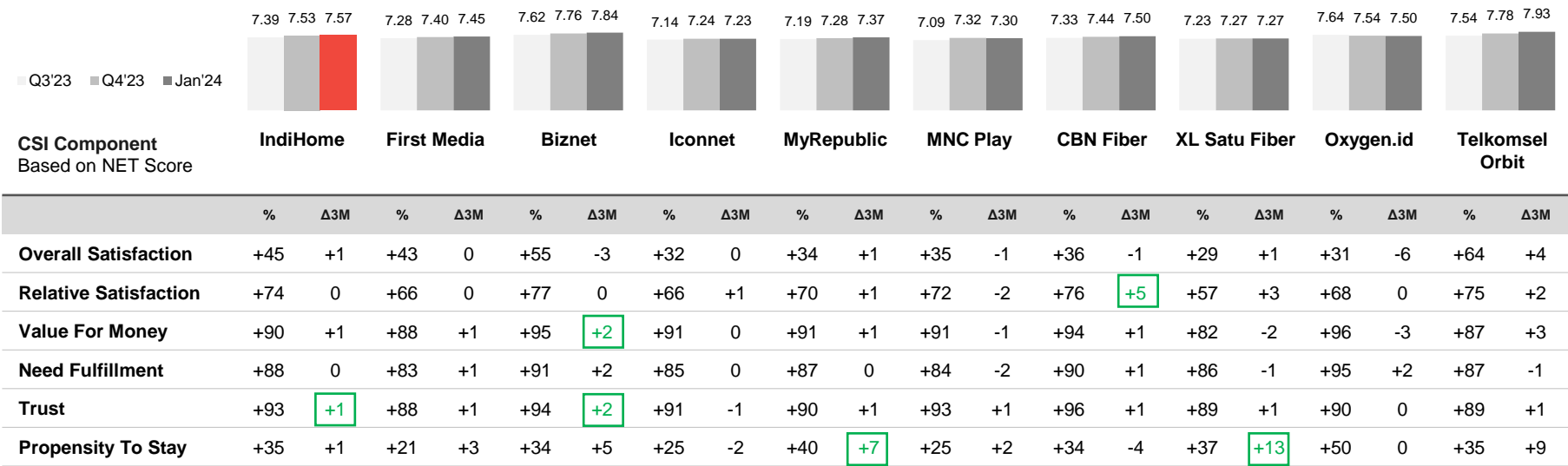
Customer Strength Index (CSI) Mean score with range +0 to +10	IndiHome		First Media		Biznet		Iconnet		MyRepublic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit	
	7.39 7.53 7.57		7.28 7.40 7.45		7.62 7.76 7.84		7.14 7.24 7.23		7.19 7.28 7.37		7.09 7.32 7.30		7.33 7.44 7.50		7.23 7.27 7.27		7.64 7.54 7.50		7.54 7.78 7.93	
	Q3'23	Q4'23	Q3'23	Q4'23	Q3'23	Q4'23	Q3'23	Q4'23	Q3'23	Q4'23	Q3'23	Q4'23	Q3'23	Q4'23	Q3'23	Q4'23	Q3'23	Q4'23	Q3'23	Q4'23
	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
TOTAL	7.57	+0.03	7.45	+0.05	7.84	+0.08	7.23	-0.01	7.37	+0.09	7.30	-0.02	7.50	+0.06	7.27	0.00	7.50	-0.04	7.93	+0.15
Speed of Internet																				
< 15 Mbps	7.15	+0.01	7.10	+0.03	7.22	-0.12	7.06	+0.05	7.08	+0.07	7.19	-0.02	7.25	+0.05	6.76	-0.16	7.64	-0.17	7.02	-0.12
15-30 Mbps	7.53	+0.01	7.31	+0.20	7.75	+0.08	7.29	-0.01	7.33	+0.06	7.24	-0.03	7.42	+0.06	6.91	+0.02	7.18	-0.05	7.04	+0.02
31-40 Mbps	7.73	+0.10	7.51	0.00	8.07	+0.03	7.13	-0.01	7.74	+0.14	7.68	+0.15	7.28	-0.11	7.98	-0.02	7.53	+0.36	8.00	+0.69
41-50 Mbps	7.79	+0.02	7.37	-0.15	7.75	+0.34	7.81	-0.33	7.51	-0.08	7.38	-0.32	7.77	+0.13	7.30	+0.03	7.52	-0.30	7.99	-0.39
51-100 Mbps	7.86	+0.04	7.91	-0.02	8.27	+0.08	8.07	+0.19	7.65	+0.51	7.84	-0.39	7.58	-0.11	8.08	-0.21	8.03	+0.17	7.66	-0.26
> 100 Mbps	8.07	+0.07	8.09	+0.22	8.48	+0.12	7.54	-0.22	8.00	-0.09	8.74	+0.08	8.29	-0.10	8.50	+0.08	10.00	+1.26	8.99	+0.39
Additional service																				
Internet service only	7.39	+0.02	7.16	+0.10	7.69	+0.05	7.11	0.00	7.29	+0.08	7.09	-0.15	7.46	+0.05	7.13	+0.12	7.34	-0.04	0.00	0.00
Cable TV	7.51	+0.08	7.33	+0.05	7.76	+0.14	7.54	-0.30	7.45	+0.17	7.40	+0.14	7.23	-0.17	6.96	+0.12	7.70	-0.38	0.00	0.00
Video streaming	7.81	+0.02	7.82	-0.15	8.19	+0.12	7.85	-0.17	7.72	+0.16	7.75	+0.35	7.48	0.00	7.27	-0.54	8.48	+0.59	0.00	0.00
Cable TV & Video streaming	8.20	+0.07	8.17	+0.21	8.19	+0.22	7.96	-0.15	8.10	+0.15	7.83	+0.09	7.98	-0.01	8.39	+0.17	8.20	-0.32	0.00	0.00
Length of service (LOS)																				
New users (less than 1 year)	7.43	+0.02	7.13	+0.01	7.47	-0.04	7.15	0.00	7.27	+0.05	6.89	+0.08	7.40	-0.11	7.20	+0.01	7.42	-0.04	7.14	-0.03
1 – 3 years	7.61	+0.07	7.56	+0.03	7.97	+0.17	7.29	-0.05	7.54	+0.03	7.37	0.00	7.55	+0.11	7.28	-0.03	7.63	+0.05	7.96	+0.30
3 – 5 years	7.60	-0.02	7.49	+0.15	7.96	-0.05	7.39	+0.10	7.75	+0.58	7.35	-0.29	6.96	+0.09	7.41	+0.15	7.35	-0.25	8.60	+0.25
More than 5 years	7.53	+0.02	7.48	+0.06	7.86	-0.06	9.30	0.00	6.71	-0.06	7.58	+0.07	8.29	-0.03	7.39	-0.01	6.46	-0.76	9.09	-0.15

Base: Respective Fixed WiFi users | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

CSI and components' overall assessment: National level

Stable performance in CSI level are resulted from CSI components, except Trust performance that shown improvement than previous period. Improvement also shown in Biznet, MyRepublic, CBN Fiber and XL Satu Fiber despite is yet to reflect on CSI level.

Customer Strength Index (CSI)
Mean score with range +0 to +10

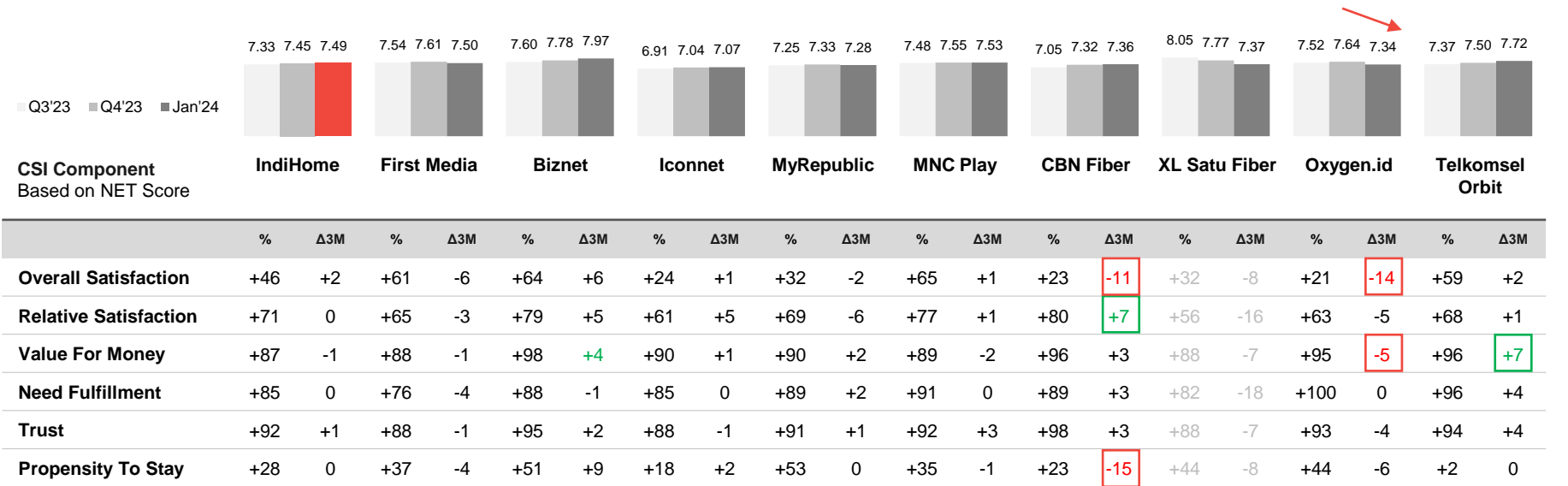


Base: Respective Fixed WiFi users | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

CSI and components' overall assessment: Area 1

No major difference on CSI performance for Indihome in Area 1, while Telkomsel Orbit value for money is improved compared to previous period. On the other hand, CBN Fiber suffer a declined on Overall Satisfaction and Propensity To Stay, but also improved in Relative Satisfaction. Declined also shown in Oxygen.id on both Overall Satisfaction and Value for Money which reflected on CSI score declining.

Customer Strength Index (CSI)
Mean score with range +0 to +10

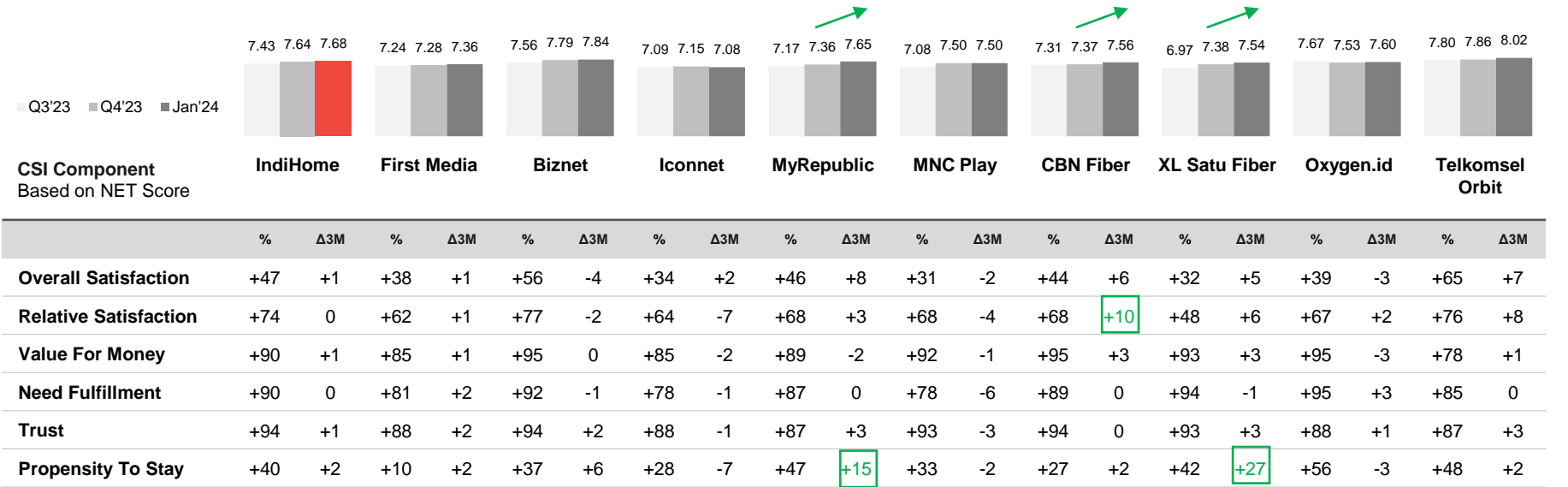


Base: Respective Fixed WiFi users | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

CSI and components' overall assessment: Area 2

Similar with Area 1, Indihome performance in this area also relatively stable than previous period. Improvement shown for both MyRepublic and XL Satu Fiber on Propensity to Stay along with CBN Fiber with Relative Satisfaction, which impacted to CSI score, especially MyRepublic

Customer Strength Index (CSI)
Mean score with range +0 to +10

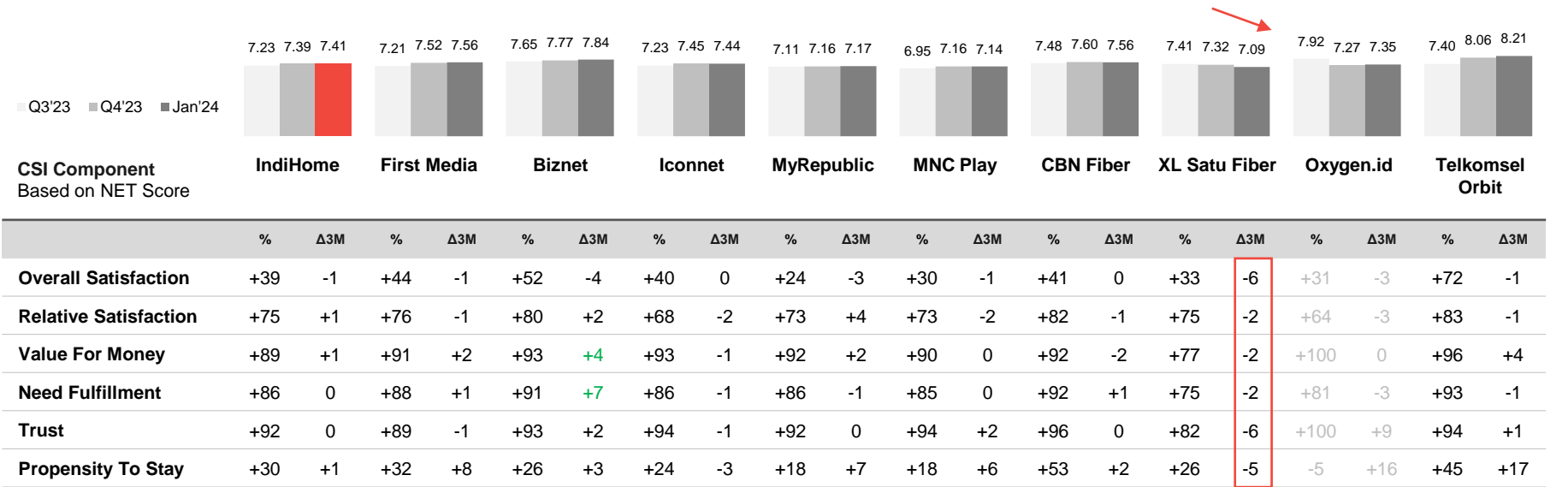


Base: Respective Fixed WiFi users | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

CSI and components' overall assessment: Area 3

In overall, no major difference on performance across brands in Area 3, except for XL Satu Fiber that declined in CSI score which contributed from negative trend on the components

Customer Strength Index (CSI)
Mean score with range +0 to +10

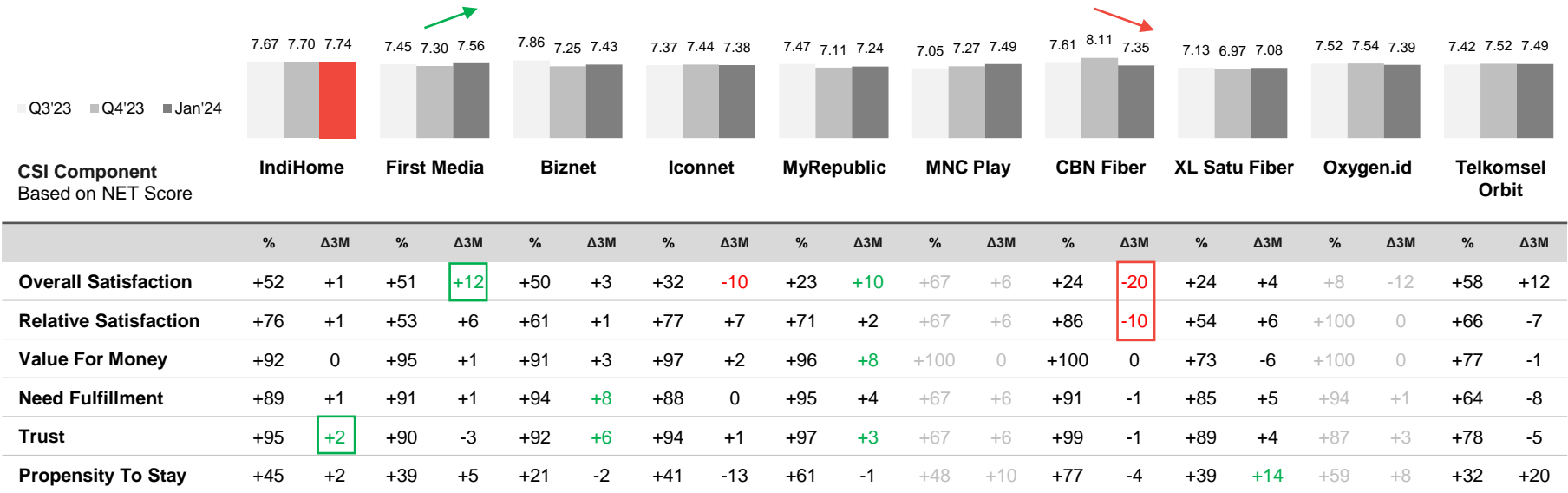


Base: Respective Fixed WiFi users | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

CSI and components' overall assessment: Area 4

In Area 4, Indihome manage to improve its Trust level compared to previous period. On the competition brand, First Media scored the highest improvement on CSI score, contributed by Need Fulfillment and Propensity to Stay, contrast with CBN Fiber that suffer declined CSI score driven by its Overall Satisfaction and Relative Satisfaction

Customer Strength Index (CSI)
Mean score with range +0 to +10



Base: Respective Fixed WiFi users | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Factor Satisfaction

Question example

To gain users assessment we use the Likert scale, and then group them.

How satisfied or dissatisfied are you towards overall performance of product and services from _____ brand ?

SCALE	1	2	3	4	5
-------	---	---	---	---	---

Very
dissatisfied

Dissatisfied

Satisfied

Very satisfied

Extremely
satisfied

Bottom 2 Box
(B2B)

Top 2 Box
(T2B)

NET score = T2B – B2B



List of factor satisfaction

Journey	Group Factor	Factor (English)	Factor (Bahasa Indonesia)	Applied Filter
Explore	COMMUNICATION	Clarity of information	Kejelasan informasi pada media komunikasi (seperti info paket / layanan internet, harga, promosi)	
Activate	INSTALLATION & ACTIVATION PROCESS	Ease of activation/installation	Kemudahan dalam proses aktivasi atau instalasi perangkat dan layanan internet	New users in P1Y
Buy		Ease of activating through platforms	Kemudahan dalam mengaktifkan layanan internet melalui platform (media) resmi provider yang tersedia	New users in P1Y AND contact touchpoints for activation
Activate		Neatness of equipment installation	Kerapihan pemasangan alat (kabel, router, penempatan)	New users in P1Y
Buy		Availability of various platforms for activation	Ketersediaan berbagai platform (media) resmi provider yang dapat dihubungi / digunakan untuk mengaktifkan layanan internet	New users in P1Y AND contact touchpoints for activation
Use	PRICE & PROMO	Suitability of offered package prices	Kesesuaian harga paket yang ditawarkan (layanan internet, layanan TV berbayar, dan lainnya)	
Activate		Suitability of activation/installation fee	Kesesuaian biaya instalasi / aktivasi layanan internet (harga perangkat, biaya tarik kabel, dan lainnya)	New users in P1Y
Use		Suitability of offered package promotions	Kesesuaian promosi paket yang ditawarkan (layanan internet, layanan TV berbayar, dan lainnya)	
Use		Ease of getting promotions	Kemudahan mendapatkan promosi	
Use	PRODUCT & PACKAGE	Modem device quality	Kualitas perangkat modem secara keseluruhan (ketahanan, jangkauan jaringan, jumlah perangkat yang dapat terhubung)	
Use		Suitability of offered package specifications	Kesesuaian spesifikasi paket yang ditawarkan (layanan internet, layanan TV berbayar, dan lainnya)	
Use		Ease of changing internet packages	Kemudahan dalam mengganti paket internet	Change package in P1Y
Use		Completeness of channel options in cable TV	Kelengkapan pilihan channel dalam paket layanan TV kabel	Current TV cable users
Use	CONNECTIVITY	Overall internet network quality	Kualitas jaringan internet secara keseluruhan (kestabilan, kecepatan, dan lainnya)	
Pay	PURCHASE & PAYMENT	Ease of purchasing packages	Kemudahan dalam proses pembelian paket atau pembayaran layanan	
Pay		Availability of various payment methods	Ketersediaan berbagai alat pembayaran pada platform (media) untuk beli paket atau bayar layanan (tunai, kartu kredit, transfer bank, dll)	
Pay		Availability of various platforms for purchasing packages	Ketersediaan berbagai platform (media) untuk beli paket atau bayar layanan (aplikasi e-commerce, m-banking, kantor pos, dll)	
Use	LOYALTY PROGRAM	Ease of obtaining rewards through loyalty programs	Kemudahan memperoleh manfaat / hadiah yang diberikan melalui program loyalitas	P3M loyalty program users
Use		Clarity of loyalty program mechanisms	Kejelasan mekanisme program loyalitas	P3M loyalty program users
Get Support	AFTER-SALES SERVICES	Speed in handling requests/complaints	Kecepatan dalam menangani dan menyelesaikan permintaan / keluhan / pertanyaan	
Get Support		Ease of access in submitting requests/complaints	Kemudahan akses dalam menyampaikan permintaan / keluhan / pertanyaan	
Get Support		Quality of solutions provided	Kualitas solusi yang diberikan untuk mengatasi permintaan / keluhan / pertanyaan	
Explore, Get Support		Overall agent or technician service	Pelayanan agen atau teknisi secara keseluruhan (kemampuan, pengetahuan, penampilan)	
Use	SELF CARE APPS	Ease of login process to self-care apps	Kemudahan akses dalam proses registrasi atau masuk ke dalam aplikasi selfcare atau layanan mandiri	P3M selfcare app users
Use		Ease of using self-care apps	Kemudahan dalam menggunakan aplikasi selfcare atau layanan mandiri	P3M selfcare app users

Factor Satisfaction: National level

The performance also shown on Factor Satisfaction, as most of the factors for Indihome are relatively stable, except for Complete channel options in cable TV and Self-care apps experience. Most of the satisfaction level is yet to be on the same level with the closest competition. On the other hand, positive performance, especially MyRepublic and XL Satu Fiber, is yet to impact the CSI level. As Iconnet suffer declining in selfcare.

Factor Satisfaction Based on NET score		IndiHome		First Media		Biznet		Iconnet		My Republic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit		vs. closest comp
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	
COMMUNICATION	Clarity of information	+34	-1	+36	+2	+42	0	+27	-2	+28	+2	+28	-6	+26	0	+26	+2	+41	+7	+51	+3	▼
	Ease of activation/installation	+38	+1	+35	-4	+37	+1	+28	-4	+33	+5	+32	+3	+31	-6	+39	+6	+54	-1	+49	0	▼
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+35	+1	+32	-8	+40	+1	+24	-2	+28	+4	+31	+5	+33	-3	+29	+4	+47	+2	+37	-2	▼
	Neatness of equipment installation	+33	+1	+37	-6	+40	+4	+26	0	+29	+4	+19	-2	+37	-2	+35	+8	+51	+4	+33	-10	▼
	Availability of various platforms for activation	+33	+1	+33	-6	+38	+3	+22	-2	+26	+1	+17	-2	+28	-6	+25	+3	+47	0	+27	-15	▼
	Suitability of offered package prices	+32	+1	+35	+1	+37	-1	+27	-3	+29	+3	+27	-2	+28	0	+31	+9	+44	+3	+42	0	▼
PRICE & PROMO	Suitability of activation/installation fee	+31	0	+36	-5	+36	+2	+31	-1	+31	+3	+21	-4	+36	0	+30	+5	+46	-3	+32	-6	▼
	Suitability of offered package promotions	+29	0	+33	0	+36	+1	+24	+1	+26	+2	+24	-5	+25	0	+30	+7	+42	+2	+42	-2	▼
	Ease of getting promotions	+23	0	+29	+2	+28	+1	+15	0	+19	+4	+17	-1	+23	+2	+23	+9	+36	+4	+37	-1	▼
PRODUCT & PACKAGE	Modem device quality	+38	0	+34	-1	+38	-1	+28	-1	+32	+4	+27	-5	+34	+3	+37	+8	+46	+1	+55	+5	▼
	Suitability of offered package specifications	+33	+1	+32	-2	+38	0	+24	-2	+28	+3	+27	-5	+28	+2	+32	+7	+40	+6	+45	0	▼
	Ease of changing internet packages	+38	+1	+30	-3	+44	+6	+35	+1	+26	-7	+55	+14	+60	0	+51	-2	+37	-3	+28	+3	▼
	Completeness of channel options in cable TV	+43	+3	+30	+1	+56	+13	+38	-11	+44	+13	+23	-7	+23	-5	+32	+2	+46	-9	0	0	▼
CONNECTIVITY	Overall internet network quality	+42	+1	+43	0	+49	+2	+30	-3	+34	+5	+34	-6	+43	+9	+36	+10	+43	-3	+61	+5	▼
PURCHASE & PAYMENT	Ease of purchasing packages	+41	+1	+38	-1	+44	+3	+31	-3	+35	+1	+33	-4	+37	+3	+37	+4	+43	+2	+60	+2	▼
	Availability of various payment methods	+42	0	+43	-1	+42	+3	+25	-3	+34	+3	+33	-4	+38	+5	+37	+6	+39	0	+55	+1	▼
	Availability of various platforms for purchasing packages	+40	+1	+44	0	+39	+3	+25	0	+31	+2	+32	-3	+35	+1	+36	+9	+46	+4	+54	-3	▼
LOYALTY PROGRAM	Ease of obtaining rewards through loyalty programs	+40	0	+34	-6	0	0	0	0	+31	+1	+28	-2	0	0	0	0	0	0	+45	+3	▼
	Clarity of loyalty program mechanisms	+42	-1	+40	-1	0	0	0	0	+41	+8	+25	-14	0	0	0	0	0	0	+52	+5	▼
AFTER-SALES SERVICES	Speed in handling requests/complaints	+35	+1	+22	-2	+50	+2	+23	0	+26	+8	+29	-1	+35	+9	+20	-5	+44	+11	+57	-1	▼
	Ease of access in submitting requests/complaints	+37	-1	+34	0	+47	+1	+29	-1	+36	+13	+33	0	+27	+9	+30	+9	+30	+4	+52	+7	▼
	Quality of solutions provided	+34	0	+30	+1	+50	-1	+26	0	+27	+8	+32	+3	+25	-7	+18	-6	+32	+1	+51	+8	▼
	Overall agent or technician service	+38	+1	+40	+2	+43	0	+31	-1	+28	0	+26	-5	+29	-5	+37	+4	+50	0	+48	+1	▼
SELF-CARE APPS	Ease of login process to self-care apps	+43	+1	+43	+2	+49	+7	+33	-10	+46	+10	+37	-5	+44	0	+44	+3	+49	0	+54	+2	▼
	Ease of using self-care apps	+44	+2	+43	0	+49	+2	+30	-8	+44	+6	+36	-4	+44	0	+43	-1	+34	-5	+55	-1	▼

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | ▲: higher vs closest comp, ▼: lower vs closest comp | Blue font: Closest competitor | Grey font: small base

Factor Satisfaction: Area 1

Indihome improvement on both Complete channel options in cable TV and Self-care apps experience are contributed by performance in Area 1, also MyRepublic improvement on Access to Requests / Complaints and Login Process to Selfcare. Negative trend of Iconnet on selfcare experience also driven by its performance in this Area.

Factor Satisfaction Based on NET score		IndiHome		First Media		Biznet		Iconnet		My Republic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit		vs. closest comp
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	
COMMUNICATION	Clarity of information	+32	0	+27	-6	+44	+5	+24	+1	+23	-1	+39	+4	+20	-2	+35	-10	+29	+3	+51	+13	▼
	Ease of activation/installation	+36	+1	+36	-18	+34	+2	+25	-2	+27	+3	+20	-7	+29	-15	+32	+6	+49	-3	+34	-20	▼
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+35	0	+43	-6	+35	-2	+19	0	+20	+2	+22	-2	+22	-8	+25	-12	+30	-8	+20	-22	▼
	Neatness of equipment installation	+31	+3	+52	-14	+52	+6	+23	-1	+26	+3	+15	-16	+32	-5	+20	-1	+31	+5	+31	-28	▼
	Availability of various platforms for activation	+29	-1	+40	-14	+43	+9	+18	-1	+25	-4	-5	-19	+15	-9	+17	-16	+28	-15	+18	-24	▼
	Suitability of offered package prices	+27	+2	+45	-5	+39	+1	+24	+2	+21	-2	+35	+6	+32	+5	+31	-3	+46	+1	+43	+3	▼
PRICE & PROMO	Suitability of activation/installation fee	+27	0	+41	-2	+38	+5	+24	+1	+30	-1	+1	-8	+33	-3	+27	0	+40	-11	+13	-15	▼
	Suitability of offered package promotions	+25	0	+50	-4	+44	+8	+20	+5	+17	-1	+41	+2	+21	-1	+32	+3	+35	-9	+37	+3	▼
	Ease of getting promotions	+17	0	+45	+2	+32	+6	+11	0	+14	+4	+28	+9	+21	-9	+31	0	+17	-4	+34	-5	▼
PRODUCT & PACKAGE	Modem device quality	+37	+2	+32	-8	+41	+3	+25	+3	+25	+1	+38	+7	+32	+3	+35	-2	+34	-1	+48	+12	▼
	Suitability of offered package specifications	+30	+1	+40	-10	+40	+3	+17	+1	+23	-1	+46	+8	+22	-3	+37	-2	+34	+6	+34	-4	▼
	Ease of changing internet packages	+40	+4	+51	-4	+51	+15	+36	-5	+28	-8	+69	+4	+13	+3	+100	0	+33	0	+22	-3	▼
CONNECTIVITY	Completeness of channel options in cable TV	+42	+6	+36	-9	+52	+2	+46	-8	+47	+23	+42	+15	+61	+32	+100	+23	+26	+26	0	0	▼
	Overall internet network quality	+40	+2	+47	-10	+54	+7	+26	0	+31	+4	+51	+4	+50	+18	+37	+6	+51	-5	+56	+4	▼
PURCHASE & PAYMENT	Ease of purchasing packages	+38	+2	+40	-9	+46	+7	+24	-2	+26	0	+45	-1	+23	+3	+35	+8	+38	0	+51	+2	▼
	Availability of various payment methods	+38	+1	+41	-11	+46	+4	+19	0	+22	+3	+43	-4	+40	+7	+31	-5	+36	+2	+54	+1	▼
LOYALTY PROGRAM	Availability of various platforms for purchasing packages	+37	+2	+47	-1	+44	+6	+20	+1	+19	-4	+37	+4	+29	-4	+32	-5	+27	-4	+55	-2	▼
	Ease of obtaining rewards through loyalty programs	+43	0	+71	0	0	0	0	0	+36	0	+14	-5	0	0	0	0	0	0	+41	+2	▼
AFTER-SALES SERVICES	Clarity of loyalty program mechanisms	+44	-2	+56	-1	0	0	0	0	+49	+1	+28	+10	0	0	0	0	0	0	+51	-4	▼
	Speed in handling requests/complaints	+31	-2	+25	-24	+41	0	+20	+4	+27	+3	+23	-2	+40	+13	+76	+3	+84	+2	+56	-7	▼
	Ease of access in submitting requests/complaints	+37	+1	+53	-8	+32	+6	+23	-2	+43	+14	+22	-2	+33	+22	+76	+34	+40	+6	+55	+10	▼
	Quality of solutions provided	+31	0	+40	-6	+36	-8	+19	0	+32	+13	+41	+4	+22	-4	+76	+3	+55	+4	+52	-6	▼
SELF-CARE APPS	Overall agent or technician service	+35	+1	+45	-3	+52	+2	+25	-1	+22	-4	+40	+4	+18	-13	+35	0	+48	+4	+44	-3	▼
	Ease of login process to self-care apps	+44	+5	+28	-5	+46	+10	+28	-15	+61	+15	+39	+5	+46	-11	+75	+13	+62	+7	+43	-1	▼
	Ease of using self-care apps	+47	+5	+30	-11	+49	-2	+28	-11	+53	+11	+35	+2	+21	-20	+66	+12	+43	+2	+44	-11	▼

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | ▲: higher vs closest comp, ▼: lower vs closest comp | Blue font: Closest competitor | Grey font: small base

Factor Satisfaction: Area 2

Satisfaction level of after sales service of Indihome's agent or technician is improved than previous period, in addition of easiness on purchasing packages. MyRepublic positive performance in National is contributed by Area 2, also some factors such as Suitable package prices, various payment methods and platform for purchasing packages on XL Satu Fiber

Factor Satisfaction Based on NET score		IndiHome		First Media		Biznet		Iconnet		My Republic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit		vs. closest comp
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	
COMMUNICATION	Clarity of information	+40	-1	+38	+3	+45	-1	+29	+6	+45	+9	+35	-15	+32	+3	+30	+6	+51	+10	+54	-2	▼
	Ease of activation/installation	+42	0	+37	-2	+44	+2	+47	-8	+56	+15	+51	+11	+30	+3	+36	+3	+63	-1	+61	+10	▼
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+37	-1	+31	-16	+50	+7	+33	+2	+54	+14	+44	+5	+45	+7	+34	+11	+59	+9	+49	+11	▼
	Neatness of equipment installation	+36	0	+38	-6	+45	+4	+32	+8	+49	+10	+34	+2	+44	-3	+39	+12	+69	+3	+21	-7	▼
	Availability of various platforms for activation	+36	0	+32	-4	+42	0	+42	+10	+41	+8	+22	+2	+40	+2	+28	0	+66	+7	+27	-16	▼
	Suitability of offered package prices	+36	+1	+33	+4	+43	0	+27	0	+41	+12	+41	-4	+30	-4	+39	+12	+44	+3	+45	-7	▼
PRICE & PROMO	Suitability of activation/installation fee	+35	0	+37	-9	+42	+2	+51	+3	+49	+10	+33	-8	+42	-2	+39	+7	+57	-1	+31	-15	▼
	Suitability of offered package promotions	+35	0	+34	+2	+39	0	+23	-2	+43	+8	+31	-14	+24	-1	+36	+8	+48	+5	+45	-7	▼
	Ease of getting promotions	+30	+1	+28	+2	+31	0	+22	+6	+33	+10	+24	-6	+29	+6	+26	+10	+44	+7	+39	-8	▼
PRODUCT & PACKAGE	Modem device quality	+44	0	+36	+1	+42	-3	+32	+7	+50	+10	+42	-11	+35	-1	+41	+6	+54	+2	+55	+2	▼
	Suitability of offered package specifications	+39	+2	+30	-1	+41	0	+30	+2	+43	+10	+41	-7	+30	+4	+35	+9	+41	+7	+47	-1	▼
	Ease of changing internet packages	+51	+3	+23	-6	+55	+9	+17	-6	+29	-15	+84	-7	+50	-19	+65	+33	+100	0	+23	+17	▼
CONNECTIVITY	Completeness of channel options in cable TV	+42	0	+27	+6	+53	+15	+57	+8	+38	+8	+31	-22	+12	-13	+34	0	+70	-15	0	0	▼
	Overall internet network quality	+48	+1	+42	+3	+53	0	+34	+1	+53	+14	+39	-8	+44	+7	+41	+9	+43	0	+64	+3	▼
PURCHASE & PAYMENT	Ease of purchasing packages	+48	+2	+39	0	+45	+4	+40	+9	+52	+6	+43	-8	+48	+1	+44	+9	+51	+5	+66	+5	▼
	Availability of various payment methods	+47	+1	+46	+2	+45	+4	+30	-2	+54	+11	+46	-6	+40	+4	+42	+10	+44	+1	+57	-2	▼
LOYALTY PROGRAM	Availability of various platforms for purchasing packages	+46	+1	+43	0	+41	+2	+29	+4	+47	+9	+46	-7	+39	+3	+40	+10	+55	+6	+60	-2	▼
	Ease of obtaining rewards through loyalty programs	+41	-3	+26	-11	0	0	0	0	+24	-2	+26	+6	0	0	0	0	0	0	+46	+6	▼
AFTER-SALES SERVICES	Clarity of loyalty program mechanisms	+44	-3	+43	+2	0	0	0	0	+35	+12	+21	-11	0	0	0	0	0	0	+60	+4	▼
	Speed in handling requests/complaints	+40	+4	+19	+3	+55	+4	+17	-1	+24	+13	+31	-5	+31	+2	+28	-6	+22	+9	+67	+20	▼
	Ease of access in submitting requests/complaints	+41	-1	+33	+4	+53	+3	+29	0	+32	+15	+47	-1	+18	-3	+22	-9	+16	+8	+61	+22	▼
	Quality of solutions provided	+42	+1	+29	+3	+59	+2	+30	+9	+22	+7	+33	+8	+29	-11	+16	-11	+16	+8	+67	+27	▼
SELF-CARE APPS	Overall agent or technician service	+45	+2	+38	+5	+48	+2	+35	+2	+39	+2	+29	-11	+37	-1	+36	0	+55	+1	+46	-3	▼
	Ease of login process to self-care apps	+48	+2	+47	+4	+53	+9	+53	+6	+50	+17	+41	-8	+33	-9	+51	0	+44	0	+61	+6	▼
	Ease of using self-care apps	+46	+3	+43	+1	+49	+4	+53	+3	+50	+11	+36	-14	+44	-9	+55	-2	+31	-8	+68	+1	▼

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Factor Satisfaction: Area 3

In Area 3, Satisfaction in most of factors for Indihome are relatively stable, except for declining on easiness purchasing packages. Meanwhile, some of XL Satu Fiber improvement in National level are contributed from Area 3. On the other hand, MNC Play satisfaction level on clarity of loyalty program is dropped, similar with Iconnet's Selfcare experience which also reflected on National level.

Factor Satisfaction Based on NET score		IndiHome		First Media		Biznet		Iconnet		My Republic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit		vs. closest comp
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	
COMMUNICATION	Clarity of information	+29	-1	+36	+3	+39	0	+29	-6	+15	-2	+22	-3	+25	+1	+34	+1	+45	+7	+56	0	▼
	Ease of activation/installation	+35	+2	+28	-3	+29	0	+25	-3	+19	-3	+22	0	+36	-5	+44	+10	+34	+8	+54	+15	▼
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+33	+2	+25	-5	+27	-7	+25	-5	+15	-3	+23	+5	+37	-2	+25	+7	+34	-4	+45	+8	▼
	Neatness of equipment installation	+31	+1	+24	-5	+29	+2	+27	-1	+16	0	+12	-2	+38	+4	+40	+19	+3	+1	+36	+1	▼
	Availability of various platforms for activation	+30	+2	+27	-6	+32	+3	+19	-5	+14	-3	+20	-1	+35	-5	+20	+12	+13	-9	+38	-6	▼
	Suitability of offered package prices	+25	-1	+33	-1	+30	-3	+30	-8	+23	-2	+16	-2	+23	-1	+23	+17	+52	0	+46	+5	▼
PRICE & PROMO	Suitability of activation/installation fee	+28	0	+29	-3	+29	+2	+32	-7	+16	-2	+20	-3	+36	+7	+28	+6	+34	+8	+48	+9	▼
	Suitability of offered package promotions	+22	-2	+25	-2	+30	-2	+31	-1	+16	-1	+15	0	+30	+1	+32	+2	+45	+7	+46	-3	▼
	Ease of getting promotions	+17	-1	+21	0	+22	+1	+18	-3	+8	-1	+9	+1	+20	+7	+9	+10	+34	+13	+43	+7	▼
PRODUCT & PACKAGE	Modem device quality	+32	-1	+31	-4	+34	-1	+28	-6	+21	-2	+17	-4	+35	+7	+41	+13	+37	+13	+63	+4	▼
	Suitability of offered package specifications	+26	-2	+29	-2	+33	-1	+29	-5	+16	-1	+16	-5	+33	+5	+33	+9	+47	+7	+54	+4	▼
	Ease of changing internet packages	+32	0	+26	+4	+30	-2	+71	+41	+22	-3	+40	+27	+94	+6	+43	-3	0	0	+11	-10	▼
	Completeness of channel options in cable TV	+34	+2	+35	-13	+65	+13	+18	-15	+60	+16	+8	+4	0	-28	+12	-3	-100	0	0	0	▼
CONNECTIVITY	Overall internet network quality	+34	0	+42	-2	+44	+1	+33	-6	+17	-3	+28	-6	+36	+3	+27	+16	+52	+8	+64	+5	▼
	Ease of purchasing packages	+34	-2	+32	0	+44	+1	+35	-6	+26	-4	+25	-2	+38	+6	+28	-5	+26	+4	+65	+4	▼
PURCHASE & PAYMENT	Availability of various payment methods	+36	-1	+39	-2	+38	+1	+29	-3	+25	-8	+24	-2	+36	+3	+37	+2	+32	+5	+53	+1	▼
	Availability of various platforms for purchasing packages	+35	-1	+41	-2	+35	+2	+29	-3	+26	-2	+23	-1	+35	+5	+35	+5	+39	+6	+48	-2	▼
LOYALTY PROGRAM	Ease of obtaining rewards through loyalty programs	+33	-2	+35	+1	0	0	0	0	+38	-3	+31	-11	0	0	0	0	0	0	+57	+3	▼
	Clarity of loyalty program mechanisms	+37	0	+27	-8	0	0	0	0	+37	-1	+23	-29	0	0	0	0	0	0	+40	+11	▼
AFTER-SALES SERVICES	Speed in handling requests/complaints	+32	+1	+27	-4	+46	-1	+29	0	+27	+5	+29	+1	+41	+21	+17	-4	0	0	+44	-17	▼
	Ease of access in submitting requests/complaints	+34	-1	+28	-5	+47	-4	+37	+5	+34	+7	+32	-1	+43	+22	+41	+31	0	0	+44	-5	▼
	Quality of solutions provided	+30	0	+30	+2	+43	-3	+27	-2	+30	+2	+29	0	+19	-5	+12	-5	0	0	+15	-13	▼
	Overall agent or technician service	+32	-1	+39	0	+35	-5	+38	-1	+21	+1	+20	-2	+31	+1	+47	+5	+61	+2	+54	+4	▼
SELF-CARE APPS	Ease of login process to self-care apps	+38	0	+42	+3	+47	+2	+29	-10	+33	0	+32	-6	+58	+20	+31	+13	+66	0	+61	+2	▼
	Ease of using self-care apps	+38	-1	+46	+1	+50	0	+24	-11	+32	-2	+36	0	+56	+19	+31	+1	+66	0	+49	+8	▼

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | ▲: higher vs closest comp, ▼: lower vs closest comp | Blue font: Closest competitor | Grey font: small base

Factor Satisfaction: Area 4

A bit different with other Area, Indihome in Area 4 perform positive trend in most of factors, such as suitable package prices, complete channel cable TV, easiness on obtain rewards and self-care experience. Both First Media and MyRepublic shown positive performance in most of factors, contrast with CBN Fiber that declined in almost all factors.

Factor Satisfaction Based on NET score		IndiHome		First Media		Biznet		Iconnet		My Republic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit		vs. closest comp
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	
COMMUNICATION	Clarity of information	+37	0	+46	+6	+32	+3	+26	-6	+16	+9	+75	+5	+16	-32	+16	+3	0	-6	+33	+2	▼
	Ease of activation/installation	+42	+3	+54	+34	+25	+4	+29	-9	+14	+6	+100	0	+9	-35	+40	+6	+32	-13	+51	0	▼
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+36	+2	+39	+17	+30	+4	+29	-4	+12	+6	+88	0	+26	-13	+30	+2	+35	-16	+43	+1	▼
	Neatness of equipment installation	+36	+1	+48	+22	+33	+7	+34	-7	+19	+6	0	0	+8	-43	+34	+3	+33	-11	+65	0	▼
	Availability of various platforms for activation	+40	+4	+40	+13	+28	+7	+22	-10	+16	+11	0	0	+7	-8	+30	+5	+14	-3	+32	+1	▼
	Suitability of offered package prices	+39	+4	+43	+3	+31	+6	+30	-4	+21	+11	+100	0	+22	-33	+28	+6	+35	+5	+29	+4	▼
PRICE & PROMO	Suitability of activation/installation fee	+36	+1	+47	+11	+22	-7	+36	+9	+19	+11	0	0	+18	-28	+27	+4	+13	-11	+53	+14	▼
	Suitability of offered package promotions	+37	+1	+34	+1	+40	+12	+19	-1	+19	+8	+74	+5	+18	-9	+23	+12	+15	+4	+32	-1	▼
	Ease of getting promotions	+28	0	+55	+14	+31	+7	+15	+5	+23	+6	+86	+3	+18	-16	+26	+11	+40	-8	+27	+7	▼
PRODUCT & PACKAGE	Modem device quality	+41	+1	+48	+9	+26	+1	+33	-9	+16	+7	+15	+16	+15	-53	+31	+10	+25	-12	+55	+2	▼
	Suitability of offered package specifications	+39	+2	+47	+5	+34	+5	+25	-2	+18	+12	+1	+18	+19	-34	+29	+6	+47	-2	+39	-3	▼
	Ease of changing internet packages	+20	-4	+72	0	+58	+16	+9	-18	0	0	0	0	0	0	+40	-10	0	-29	+71	+4	
	Completeness of channel options in cable TV	+56	+7	+52	+19	+45	+29	+50	-25	0	0	+100	0	0	0	+26	+5	+71	-10	0	0	▼
CONNECTIVITY	Overall internet network quality	+48	+2	+48	+11	+43	+13	+31	-6	+20	+4	+44	-8	+29	-47	+36	+9	+14	-24	+55	+8	▼
	Ease of purchasing packages	+45	+1	+61	+6	+25	+1	+32	-10	+19	+6	+67	+6	+25	-32	+36	+4	+18	-21	+50	-10	▼
PURCHASE & PAYMENT	Availability of various payment methods	+46	+2	+58	+6	+35	+6	+30	-13	+21	+8	+8	+17	+26	-14	+34	+6	+12	-20	+56	+6	▼
	Availability of various platforms for purchasing packages	+44	+1	+59	+4	+37	+7	+26	-3	+21	+11	+41	+11	+9	-23	+34	+14	+40	+6	+50	-8	▼
LOYALTY PROGRAM	Ease of obtaining rewards through loyalty programs	+47	+6	+56	+14	0	0	0	0	+14	+16	+71	0	0	0	0	0	0	0	+32	+2	
	Clarity of loyalty program mechanisms	+45	+4	+65	-6	0	0	0	0	+29	+21	+90	0	0	0	0	0	0	0	+49	+1	
AFTER-SALES SERVICES	Speed in handling requests/complaints	+32	-2	+34	+9	+55	+21	+32	-7	+54	+29	+17	0	0	0	-9	-2	+27	+9	+47	-20	
	Ease of access in submitting requests/complaints	+35	-4	+22	+6	+40	+23	+25	-8	+53	+15	-66	0	0	0	+15	+9	+68	-11	+34	-23	
	Quality of solutions provided	+33	-3	+14	+5	+50	+25	+37	-3	+19	+22	+17	0	0	0	+9	+4	+41	-38	+57	+12	
	Overall agent or technician service	+39	0	+47	+6	+34	+13	+26	-2	+26	+5	+60	+7	+33	-36	+32	+7	+18	-12	+47	+12	▼
SELF-CARE APPS	Ease of login process to self-care apps	+41	-1	+46	+1	+35	+15	+36	-14	+12	-4	+60	+7	+70	-30	+38	+1	+38	-21	+39	-6	▼
	Ease of using self-care apps	+47	+6	+66	-2	+41	+14	+26	-9	+10	-6	+34	+12	+70	-30	+34	-2	0	-17	+48	-12	▼

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | ▲: higher vs closest comp, ▼: lower vs closest comp | Blue font: Closest competitor | Grey font: small base

Brand Performance

Evaluation of the Fixed WiFi brand in the market

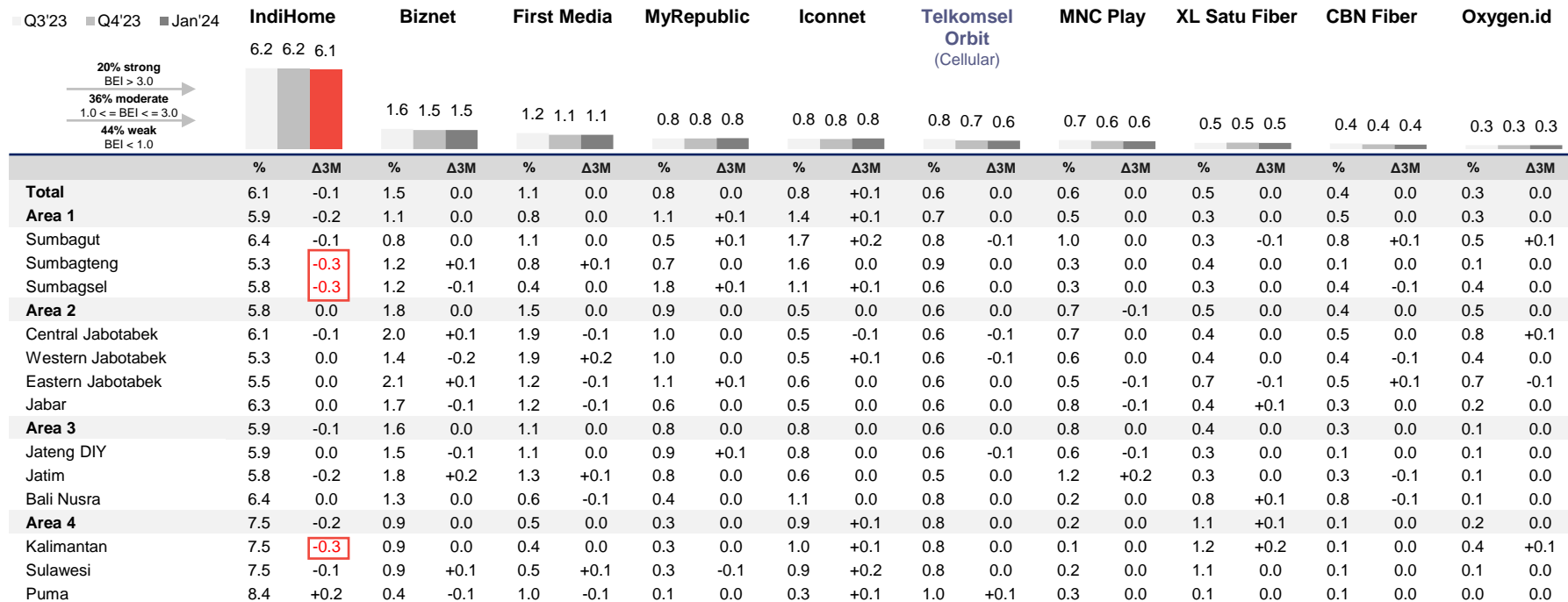
Brand Equity Index (BEI)

BEI: Summary – by area & region

Brand equity performance across brands are relatively stable, even though Indihome equity is declined in Sumbagteng, Sumbagsel and Kalimantan

Brand Equity Index (BEI)

Mean score with range +0 to +10



Base: Fixed WiFi users | sort by largest BEI | Δ3M = gap vs Q4'23 (significant if +/- 0.3 points) | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand Leverage

Brand leverage: National level

Overall brand leverage of WiFi Brands on a national level generally stable. However, IndhiHome’s performance has declined across most of leverage parameters. On the other hand, Iconnet improves the awareness up to preferer level.

Brand Leverage In percentage (%)		Fixed WiFi Fiber																Fixed WiFi Cellular							
		IndiHome		First Media		Biznet		Iconnet		MyRepublic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit		Isat Home Wireless		XL Satu Lite	
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
Recommender	57	-1	6	0	8	0	5	0	5	0	3	0	2	0	3	0	2	0	2	0	0	0	0	0	0
Preferer	58	-1	5	0	7	0	5	+1	5	0	3	0	2	0	3	0	2	0	2	0	0	0	0	0	0
BUMO user	58	-2	6	0	6	0	5	+1	4	0	3	0	2	0	2	0	2	0	2	0	0	0	0	0	0
Current user	59	-2	6	0	7	0	5	+1	5	0	3	0	2	0	3	0	2	0	3	0	1	0	0	0	0
Trial P3M	60	-2	7	0	7	0	6	+1	5	0	3	0	2	0	3	0	2	0	3	0	1	0	0	0	0
Trial P1Y	62	-1	8	0	9	0	6	+1	6	0	4	0	2	0	3	0	2	0	4	0	1	0	1	0	0
Considerer	67	-2	17	0	22	0	12	+1	12	0	9	0	6	0	8	0	5	0	11	0	4	0	3	0	0
Aware	96	0	49	-1	56	-1	35	+1	40	0	35	0	21	0	26	-1	19	0	31	0	16	0	12	0	0
Rejecter Not Consider Not Aware	63	0	53	0	53	0	53	0	43	0	53	0	43	0	53	0	53	0	43	0	43	0	43	0	0
Retention	99		95		92		96		95		95		94		94		96		83		81		58		
Conversion	61		13		12		15		11		8		8		10		9		8		3		2		

Base: Fixed WiFi users | Retention: Current user / Trial P3M Conversion: Current user / Aware | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand leverage: Area 1

Indihome's decline and Iconnet improvement in national are driven by its performance in Area 2. On the other hand, XL Satu Lite manage to improve its awareness level this period

Brand Leverage In percentage (%)																									
Fixed WiFi Fiber																		Fixed WiFi Cellular							
	IndiHome		First Media		Biznet		Iconnet		MyRepublic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit		Isat Home Wireless		XL Satu Lite		
	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	
Recommender	55	-3	3	0	5	0	10	+1	7	+1	2	0	3	0	1	0	2	0	2	0	1	0	0	0	
Preferer	56	-3	3	0	5	0	10	+1	7	+1	2	0	3	0	1	0	2	0	2	0	1	0	0	0	
BUMO user	56	-2	3	0	4	0	11	+1	6	+1	2	0	3	0	1	0	2	0	2	0	1	0	0	0	
Current user	57	-2	4	0	4	0	11	+1	7	+1	2	0	3	0	1	0	2	0	2	-1	1	0	0	0	
Trial P3M	58	-2	4	0	5	0	11	+1	7	0	2	0	3	0	1	0	2	0	3	0	1	0	0	0	
Trial P1Y	61	-2	5	0	6	0	12	+2	8	+1	3	0	3	0	2	0	2	0	4	0	1	0	1	0	
Considerer	63	-3	12	+1	16	0	17	+2	14	+2	7	0	7	+1	6	0	5	0	12	0	4	0	3	0	
Aware	95	-1	37	0	48	-2	48	+2	42	0	32	0	22	+1	22	-1	19	+1	36	0	15	-1	12	+2	
Rejecter Not Consider Not Aware	63	-1	43	-1	53	-1	53	0	43	-1	43	0	33	-1	53	+1	63	0	43	0	43	0	53	+1	
Retention	99		94		92		99		96		95		98		85		94		84		95		61		
Conversion	60		11		9		22		16		7		12		5		10		7		5		2		

Base: Fixed WiFi users | Retention: Current user / Trial P3M Conversion: Current user / Aware | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand leverage: Area 2

As in Area 2, Indihome’s performance is relatively stable even though user’s funnel are going to negative trend, in addition of declined in First Media awareness level

Brand Leverage In percentage (%)

	Fixed WiFi Fiber										Fixed WiFi Cellular													
	IndiHome		First Media		Biznet		Iconnet		MyRepublic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit		Isat Home Wireless		XL Satu Lite	
	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
Recommender	53	0	8	0	11	-1	2	0	5	0	3	0	2	0	3	0	3	0	2	0	1	0	0	0
Preferer	54	0	8	0	10	0	2	0	5	0	2	0	2	0	3	0	3	0	2	0	0	0	0	0
BUMO user	54	-1	8	0	8	0	2	0	4	0	2	0	2	0	2	0	3	0	2	0	0	0	0	0
Current user	54	-1	9	0	9	0	2	0	5	0	2	0	2	0	3	0	3	0	3	0	1	0	0	0
Trial P3M	55	-1	9	0	10	0	3	0	5	0	3	0	2	0	3	0	3	0	4	0	1	0	0	0
Trial P1Y	58	-1	11	-1	12	0	3	0	6	+1	3	0	2	0	3	0	3	0	5	0	1	0	0	0
Considerer	66	0	24	-1	27	+1	10	0	15	0	10	-1	7	0	9	-1	8	+1	11	0	5	0	3	0
Aware	97	+1	66	-2	66	0	29	0	50	0	44	0	27	0	25	-1	27	0	29	-1	17	0	12	-1
Rejecter Not Consider Not Aware	73	+1	63	-1	53	0	53	0	43	0	53	0	33	0	53	-1	53	-1	33	0	43	0	43	0
Retention	99		96		91		90		91		93		93		95		98		81		75		36	
Conversion	56		14		13		9		10		5		7		11		11		11		3		1	

Base: Fixed WiFi users | Retention: Current user / Trial P3M Conversion: Current user / Aware | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand leverage: Area 3

Similar in Area 3, Indihome's performance in this Area performed a similar pattern

Brand Leverage In percentage (%)

	Fixed WiFi Fiber																		Fixed WiFi Cellular					
	IndiHome		First Media		Biznet		Iconnet		MyRepublic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit		Isat Home Wireless		XL Satu Lite	
	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
Recommender	55	-1	6	0	9	0	5	0	5	0	5	0	2	0	2	0	0	0	2	0	0	0	0	0
Preferer	57	-1	6	0	8	+1	5	0	5	0	5	+1	2	0	2	0	0	0	2	0	0	0	0	0
BUMO user	57	-2	5	0	7	+1	5	0	4	+1	5	0	2	0	2	0	0	0	1	0	0	0	0	0
Current user	57	-2	6	0	7	+1	5	0	5	+1	5	0	2	0	2	0	0	0	2	0	1	0	0	0
Trial P3M	58	-1	6	0	8	+1	5	0	5	+1	5	+1	2	0	2	0	0	0	2	0	1	0	0	0
Trial P1Y	60	-2	7	+1	9	+1	6	0	5	+1	6	+1	2	0	2	0	0	0	3	0	1	0	1	0
Considerer	64	-2	16	0	22	0	11	+1	11	0	10	0	4	-1	6	0	2	0	9	0	4	0	2	0
Aware	96	0	47	+1	57	-1	32	+1	37	0	36	+1	18	0	20	-1	12	0	29	0	16	0	10	0
Rejecter Not Consider Not Aware	73	+1	53	+1	63	+1	53	0	53	0	63	+1	43	0	43	0	63	0	43	0	43	0	43	0
Retention	99		95		94		97		99		97		92		88		90		87		81		83	
Conversion	60		13		13		16		13		14		10		9		3		6		4		3	

Base: Fixed WiFi users | Retention: Current user / Trial P3M Conversion: Current user / Aware | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand leverage: Area 4

Similar condition with Area 4 where most of Indihome parameters going to negative trend. On the other hand Iconnet are increasing in all leverage parameters

Brand Leverage In percentage (%)

	Fixed WiFi Fiber																		Fixed WiFi Cellular					
	IndiHome		First Media		Biznet		Iconnet		MyRepublic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit		Isat Home Wireless		XL Satu Lite	
	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
Recommender	75	-2	2	0	4	0	5	+1	1	0	0	0	0	0	7	+1	1	0	2	0	0	0	0	0
Preferer	77	-2	2	0	3	0	5	+1	1	0	0	0	0	0	7	+1	1	0	2	0	0	0	0	0
BUMO user	78	-2	2	0	2	0	5	+1	1	0	0	0	0	0	7	+1	1	0	2	0	0	0	0	0
Current user	79	-2	3	0	2	0	5	+1	1	0	0	0	0	0	7	+1	1	0	3	0	0	0	0	0
Trial P3M	79	-2	3	0	3	0	6	+1	1	0	1	0	0	0	7	+1	1	0	3	0	0	0	1	0
Trial P1Y	81	-2	3	0	4	0	6	+1	1	0	1	0	0	0	8	+1	1	0	5	0	0	0	1	0
Considerer	78	-2	10	+1	14	+1	11	+2	5	0	4	0	3	0	15	+1	3	0	13	0	4	0	3	0
Aware	97	-1	24	-1	42	-2	41	+1	20	0	17	0	12	0	45	0	13	0	36	-1	14	0	14	-1
Rejecter Not Consider Not Aware	43	+1	43	0	53	-1	63	-1	43	0	43	0	43	0	73	0	53	+1	43	-1	43	0	43	0
Retention	100		84		82		96		81		72		79		98		92		85		52		50	
Conversion	81		11		6		13		5		2		2		16		8		8		1		2	

Base: Fixed WiFi users | Retention: Current user / Trial P3M Conversion: Current user / Aware | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Top brands dominating the Fixed WiFi market

In total level, IndiHome facing a notable decline followed by the number in each Area that show a declining number, while Iconnet as competitors succes to gain more subs on Area 4. Furthermore, Faznet have gain more consumers in Area 1, especially in Sumbagsel

Brand Used Most Often
In percentage (%)

	Total		By Area								By Region																									
			Area 1		Area 2		Area 3		Area 4		Sum bagut		Sum bagteng		Sum bagsel		Central Jabo		Western Jabo		Eastern Jabo		Jabar		Jateng DIY		Jatim		Bali Nusra		Kali mantan		Sula wesi		Puma	
	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M		
IndiHome	58	-2	56	-2	54	-1	57	-2	78	-2	60	-3	50	-3	58	-2	58	-1	49	-2	49	0	59	-1	56	-1	55	-2	64	-1	78	-2	77	-2	86	+2
Biznet	6	0	4	0	8	0	7	+1	2	0	2	0	3	0	5	0	8	+1	6	0	10	0	7	-1	5	0	9	+2	6	0	2	0	2	0	1	-1
First Media	6	0	3	0	8	0	5	0	2	0	6	-1	4	0	2	0	11	0	13	+1	5	-1	6	0	6	0	6	0	3	0	0	-1	2	+1	7	-3
Iconnet	5	+1	11	+1	2	0	5	0	5	+1	12	+2	12	0	8	+1	3	-1	3	0	1	0	2	+1	6	+1	3	0	8	0	5	+1	6	+2	0	0
MyRepublic	4	0	6	+1	4	0	4	+1	1	0	1	0	3	0	12	+1	2	-1	6	0	6	+1	3	+1	6	+1	4	0	1	0	1	0	1	-1	0	0
MNC Play	3	0	2	0	2	0	5	0	0	0	5	-1	1	0	0	0	2	0	4	0	1	0	3	0	3	-1	8	+1	1	0	0	0	0	0	0	0
XLSatu Fiber	2	0	1	0	2	0	2	0	7	+1	1	0	1	+1	1	0	1	0	2	0	4	-1	2	+1	1	0	1	0	6	+2	8	+2	7	0	0	0
Telkomsel Orbit	2	0	2	0	2	0	1	0	2	0	3	-1	2	0	1	0	2	0	1	-1	3	+1	1	0	1	0	1	0	3	+1	1	0	2	0	4	+1
CBN Fiber	2	0	3	0	2	0	2	0	0	0	5	+1	0	0	2	-1	2	0	2	-1	2	0	1	0	0	0	2	0	5	-1	0	0	0	0	0	0
Oxygen.Id	2	0	2	0	3	0	0	0	1	0	3	0	0	0	2	0	4	+1	2	0	5	0	1	0	0	0	0	0	1	0	2	0	0	0	0	0
Faznet	1	0	3	+1	0	0	0	0	0	0	0	0	6	+1	4	+2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mega Vision	1	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	-2	4	+1	0	0	0	0	0	0	0	0	0	0	0	0
Bnetfit	0	0	0	0	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0
Life Media	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	0	0	0	0	0	0	0	0	0	0	0	0
Others	9	0	7	0	10	+1	11	0	2	0	2	0	17	0	4	-1	8	+1	13	+2	10	+1	9	-1	10	0	13	-1	4	+1	2	0	3	0	1	0

Base: Fixed WiFi users | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand Imagery

List of Imagery

the questioning sentences used in the questionnaire (imagery section) are as follows:

“Manakah dari pernyataan-pernyataan di bawah ini yang menurut Anda menggambarkan merek penyedia layanan Fixed WiFi / Broadband Internet di rumah yang Anda ketahui? [multiple answers]”

Imagery (English)	Imagery (Bahasa Indonesia)
Clear media communication	Informasi melalui media komunikasi yang paling jelas
Simple activation/installation	Proses aktivasi atau instalasi perangkat dan layanan internet yang paling mudah
Effortless activation process	Proses aktivasi layanan internet melalui platform (media) resmi provider yang paling mudah
Neat installation setup	Pemasangan alat yang paling rapi
Various official platforms for activation	Platform (media) resmi provider untuk aktivasi layanan internet yang paling beragam
Suitable package pricing	Harga paket yang paling sesuai dengan kebutuhan
Suitable activation/installation fees	Biaya instalasi/aktivasi layanan internet yang paling sesuai dengan kebutuhan
Suitable promotions	Promosi paket yang paling sesuai dengan kebutuhan
Easy to obtain promotions	Promosi yang paling mudah didapatkan
High quality modem	Perangkat modem yang paling berkualitas
Suitable package specification	Spesifikasi paket yang paling sesuai dengan kebutuhan
Easy to switch package	Proses pergantian paket internet yang paling mudah
Complete channel choice for cable TV	Paket layanan TV kabel yang memiliki pilihan channel paling lengkap
High quality internet network	Jaringan internet yang paling berkualitas
Convenient purchase/payment	Proses pembelian atau pembayaran layanan yang paling mudah
Various payment method for purchase/payment	Alat pembayaran untuk beli paket atau pembayaran layanan yang paling beragam
Various platforms for purchase/payment	Platform (media) untuk beli paket atau pembayaran layanan yang paling beragam
Easy to obtain loyalty program benefits	Program loyalitas dengan manfaat yang paling mudah diperoleh
Transparent loyalty program processes	Mekanisme program loyalitas yang paling jelas
Fast handling of requests/complaints	Penanganan permintaan / keluhan / pertanyaan yang paling cepat
Easy request submission	Fasilitas menyampaikan permintaan / keluhan / pertanyaan yang paling mudah diakses
Provide best solutions for requests/complaints	Solusi untuk mengatasi permintaan / keluhan / pertanyaan yang paling berkualitas
High quality service of agents / technicians	Pelayanan agen atau teknisi yang paling berkualitas
Smooth selfcare app usage	Aplikasi selfcare atau layanan mandiri yang paling lancar saat dibuka
User-friendly selfcare app	Aplikasi selfcare atau layanan mandiri yang paling mudah digunakan

Brand imagery: National level

Perceptions total among fixed wifi users show a notable decline, particularly in terms of product & package, connectivity, purchase & payment and selfcare apps. Furthermore, IndiHome and all competitors have significant decline on attributes high quality modem in terms of product & package

Brand imagery In percentage (%)		TOTAL		IndiHome		First Media		Biznet		Iconnet		My Republic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen. id		TSEL Orbit	
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
COMMUNICATION	Clear media communication	17	-1	17	-2	15	-1	15	-1	16	-1	15	0	18	0	15	0	18	-1	19	0	19	0
	Simple activation/installation	18	0	20	0	18	0	15	0	16	0	15	0	16	0	19	-1	16	0	20	-1	20	0
INSTALLATION & ACTIVATION PROCESS	Effortless activation process	17	0	17	0	15	0	14	+1	14	0	15	0	16	0	17	0	18	0	19	0	20	-1
	Neat installation setup	19	0	24	-1	19	0	17	0	18	+1	17	+1	18	-1	21	-1	16	0	18	0	18	0
	Various official platforms for activation	15	-1	15	-1	14	-1	13	-1	12	0	14	-1	16	0	16	0	14	0	18	-1	19	-1
PRICE & PROMO	Suitable package pricing	28	0	30	-1	29	0	29	0	31	0	29	0	27	0	28	0	27	0	28	+1	26	-1
	Suitable activation/installation fees	19	0	19	0	19	-1	18	0	20	0	18	0	18	0	18	+1	18	+1	19	0	19	-1
	Suitable promotions	22	0	21	-1	22	0	21	-1	22	0	22	0	21	0	21	-2	23	-1	22	-1	22	0
	Easy to obtain promotions	21	-1	20	-1	20	-2	18	0	23	-1	21	0	21	-1	20	0	23	0	24	-1	23	-1
PRODUCT & PACKAGE	High quality modem	7	-5	12	-5	8	-4	13	-5	11	-3	12	-5	11	-4	12	-4	10	-6	10	-5	12	-7
	Suitable package specification	22	0	24	-1	23	0	22	-1	21	0	21	0	20	0	22	+1	22	-1	22	-1	23	-1
	Easy to switch package	15	-1	15	-1	15	-1	14	-1	14	-1	15	0	16	-1	18	-2	16	-1	17	-2	19	-1
	Complete channel choice for cable TV	17	-1	19	-1	20	0	13	-1	12	0	13	0	24	0	17	-1	16	-1	17	-1	17	-1
CONNECTIVITY	High quality internet network	28	-1	42	-1	25	-2	32	0	23	0	26	-1	24	-1	26	+1	26	-1	23	0	35	0
PURCHASE & PAYMENT	Convenient purchase/payment	19	-1	21	0	17	-1	17	0	17	-1	17	-1	17	-1	20	0	19	-1	19	-1	21	0
	Various payment method for purchase/payment	15	-1	15	0	15	0	13	-1	14	-1	14	0	17	-1	17	-1	16	0	16	0	19	-1
	Various platforms for purchase/payment	17	0	18	0	17	0	14	0	16	-1	16	0	17	0	19	-1	17	0	18	-1	20	0
LOYALTY PROGRAM	Easy to obtain loyalty program benefits	14	0	13	0	13	-1	12	-1	12	0	13	0	15	0	14	-1	14	0	15	-1	17	-1
	Transparent loyalty program processes	13	0	12	0	11	-1	11	0	12	0	12	-1	14	0	14	-2	13	+1	13	0	16	0
AFTER-SALES SERVICES	Fast handling of requests/complaints	16	-1	18	-1	15	0	14	0	13	0	14	0	16	0	17	-1	13	0	17	-1	18	-1
	Easy request submission	16	0	16	-1	15	0	14	0	14	-1	14	0	16	-1	17	0	15	0	16	0	18	0
	Provide best solutions for requests/complaints	15	-1	15	-1	14	0	14	-1	13	-1	14	0	17	-1	16	0	14	0	18	-2	18	-1
	High quality service of agents / technicians	16	0	20	-1	16	0	15	0	14	+1	14	0	15	0	19	-1	13	0	17	0	18	+1
SELF CARE APPS	Smooth selfcare app usage	15	-1	16	-1	13	-1	14	-1	12	-1	13	0	15	0	15	-1	16	-1	16	-1	21	0
	User-friendly selfcare app	16	-1	17	-1	15	0	14	-1	15	-1	14	-1	16	-1	15	0	16	-1	16	-2	21	0

Base: Fixed WiFi users who are aware of respective brand(s) | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand imagery: Area 1

Similar with national level, high quality modem have significant decline in total and for all players except CBN Fiber. In the other hand, Biznet exhibits a significant rise in brand perceptions about high quality internet network regarding price & promo and connectivity.

Brand imagery In percentage (%)		TOTAL		IndiHome		First Media		Biznet		Iconnet		My Republic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen. id		TSEL Orbit	
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
COMMUNICATION	Clear media communication	16	-1	16	-1	17	-1	14	-2	13	-1	17	-1	18	+2	14	-1	20	0	16	-1	20	+1
	Simple activation/installation	18	0	18	0	16	-1	14	+1	15	0	17	+2	20	+2	19	+1	17	+3	18	0	18	-2
INSTALLATION & ACTIVATION PROCESS	Effortless activation process	16	0	16	0	14	-1	14	+1	11	0	13	-1	17	+1	16	0	21	+2	17	-1	17	-1
	Neat installation setup	19	-1	25	-1	17	0	17	-1	18	+1	16	-1	18	-2	25	+4	17	-3	16	0	18	0
	Various official platforms for activation	15	-1	14	0	14	0	13	+1	10	0	14	-1	16	-1	16	+2	13	0	19	-1	16	0
PRICE & PROMO	Suitable package pricing	27	+1	30	0	27	+1	25	+1	32	+2	25	+1	23	0	27	+2	28	+3	25	-1	26	+1
	Suitable activation/installation fees	18	0	19	+1	19	+1	14	+1	21	+1	15	-1	20	+2	17	+3	17	+2	15	-1	16	0
	Suitable promotions	20	-1	21	-1	22	+1	20	0	21	+1	18	-1	18	-1	17	-1	21	-2	21	+1	20	-1
	Easy to obtain promotions	20	-1	19	-1	19	-3	17	-1	22	0	19	-3	18	-2	20	-1	25	+3	20	-4	21	-3
PRODUCT & PACKAGE	High quality modem	6	-5	11	-4	5	-5	6	-5	8	-3	4	-4	6	-5	10	-2	6	-5	3	-7	8	-6
	Suitable package specification	19	0	22	0	22	+2	16	-2	19	0	17	+1	16	0	19	0	15	-2	17	-1	20	0
	Easy to switch package	15	-1	14	0	17	-1	15	-1	12	0	13	-2	17	0	16	-2	16	-3	14	-1	17	-1
	Complete channel choice for cable TV	16	0	18	0	20	+2	12	+1	11	+1	14	+2	23	+1	16	0	18	0	14	-2	16	0
CONNECTIVITY	High quality internet network	28	0	42	-2	23	+1	29	+4	24	+1	20	-1	24	0	29	+4	24	-1	25	-1	40	+2
PURCHASE & PAYMENT	Convenient purchase/payment	19	0	22	+1	17	-1	17	0	16	+1	18	+2	20	+3	21	+1	18	0	17	-2	21	+1
	Various payment method for purchase/payment	15	0	14	0	16	0	11	0	10	0	13	+1	16	-1	15	0	17	+1	14	-1	16	0
	Various platforms for purchase/payment	17	0	16	0	15	0	15	-1	15	-1	15	-1	18	0	18	-1	19	+1	19	+1	20	0
LOYALTY PROGRAM	Easy to obtain loyalty program benefits	14	-1	13	+1	15	-1	13	+1	11	0	12	-2	12	-1	11	-3	14	0	16	0	16	-2
	Transparent loyalty program processes	13	-1	12	-1	13	0	11	-1	9	0	13	-1	15	+1	13	-2	18	+1	11	-2	16	-1
AFTER-SALES SERVICES	Fast handling of requests/complaints	16	-1	16	-1	15	0	15	+1	13	0	15	+1	16	-2	17	-3	14	-2	14	-2	16	-1
	Easy request submission	16	0	17	0	17	0	13	0	11	-1	15	+2	17	-1	15	0	15	0	14	-1	17	+1
	Provide best solutions for requests/complaints	14	0	14	0	15	0	11	0	11	-1	15	+1	17	-1	14	+2	13	-2	15	-2	16	-1
SELF CARE APPS	High quality service of agents / technicians	16	0	17	0	16	-1	14	-1	13	+1	14	0	14	0	16	-3	12	+1	16	-2	18	0
	Smooth selfcare app usage	14	-1	14	-1	15	-1	13	0	11	0	13	+2	15	-2	13	-2	14	-2	16	0	19	-1
	User-friendly selfcare app	15	-1	15	-1	14	+1	13	-2	13	0	12	-1	15	-2	14	-1	15	-2	18	-1	19	-1

Base: Fixed WiFi users who are aware of respective brand(s) | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand imagery: Area 2

Still similar with national level, high quality modem have significant decline in total and for all players. Furthermore, First Media also facing significant decline on high quality internet network attributes.

Brand imagery In percentage (%)		TOTAL		IndiHome		First Media		Biznet		Iconnet		My Republic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen. id		TSEL Orbit	
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
COMMUNICATION	Clear media communication	18	-1	18	-1	16	-1	15	-1	17	-2	16	+1	19	0	17	+1	18	-3	20	-1	21	0
	Simple activation/installation	20	0	22	0	21	+1	18	0	18	-1	15	0	16	-1	20	-2	17	-1	22	-1	22	0
INSTALLATION & ACTIVATION PROCESS	Effortless activation process	19	0	20	0	16	0	17	+1	18	-1	17	-1	17	0	17	0	21	-2	20	0	24	-1
	Neat installation setup	20	0	24	-1	21	+1	20	+1	20	+1	20	+2	18	-1	20	-1	17	+1	21	+1	20	+1
	Various official platforms for activation	17	-1	18	-1	16	-1	15	-1	17	-1	15	-2	18	+1	17	-1	16	-1	16	-3	22	-1
PRICE & PROMO	Suitable package pricing	30	0	31	-2	31	0	32	-1	29	-2	29	0	30	+1	32	0	28	0	31	0	29	0
	Suitable activation/installation fees	20	0	20	0	20	-1	19	0	21	-2	20	0	19	+1	21	+1	20	0	20	0	21	-1
	Suitable promotions	24	0	23	-1	24	0	22	-1	24	+1	24	+1	21	+1	22	-2	26	+2	21	-3	28	+2
	Easy to obtain promotions	22	0	20	-1	21	-1	18	0	23	-1	21	+1	19	-1	23	+1	24	-1	25	-1	26	+1
PRODUCT & PACKAGE	High quality modem	8	-5	14	-5	10	-4	9	-4	8	-4	8	-5	8	-3	10	-5	3	-7	8	-3	3	-8
	Suitable package specification	24	0	26	-2	25	0	24	-1	24	0	22	-2	22	0	27	+2	24	-1	23	-2	25	0
	Easy to switch package	17	-1	17	-1	16	-1	14	-1	16	-2	17	+1	17	-1	18	-2	17	-1	18	-1	22	-2
	Complete channel choice for cable TV	19	-1	22	-1	22	0	15	-1	15	0	14	0	25	+1	18	-2	17	-1	18	-1	20	-2
CONNECTIVITY	High quality internet network	28	-2	39	-2	25	-3	35	-1	20	0	28	-1	21	-3	28	+1	26	-2	24	0	34	-2
PURCHASE & PAYMENT	Convenient purchase/payment	20	-1	22	0	19	-1	19	0	17	-1	17	-1	17	-2	19	+1	21	-2	19	-2	23	-2
	Various payment method for purchase/payment	17	0	18	0	16	0	13	-2	16	-2	15	-1	17	-1	18	0	18	-1	16	0	21	-1
	Various platforms for purchase/payment	19	0	20	0	18	-1	15	-1	17	0	17	+1	16	0	20	-1	19	-2	18	-3	24	-1
LOYALTY PROGRAM	Easy to obtain loyalty program benefits	16	0	15	0	14	-1	12	-1	16	0	14	+1	17	+1	15	0	16	0	15	-2	19	-1
	Transparent loyalty program processes	15	0	14	0	12	-1	12	-1	16	+1	13	-1	16	0	13	-3	16	+1	14	+1	20	0
AFTER-SALES SERVICES	Fast handling of requests/complaints	17	-1	20	-1	17	0	17	0	16	0	17	0	17	+1	17	-1	14	-1	18	0	21	-1
	Easy request submission	17	0	18	-1	17	+1	16	0	16	-2	15	0	15	-1	20	0	17	-1	18	-1	21	-1
	Provide best solutions for requests/complaints	17	-1	17	-1	16	0	15	0	15	-1	16	0	16	-1	18	0	16	-2	19	-1	19	-1
	High quality service of agents / technicians	18	0	22	-1	17	+1	17	0	20	0	16	+1	16	+1	18	-1	15	0	19	0	21	0
SELF CARE APPS	Smooth selfcare app usage	16	-1	17	-1	14	-1	15	-1	15	-2	15	0	15	0	15	-1	16	-3	16	-1	28	0
	User-friendly selfcare app	18	-1	19	-1	17	0	14	0	18	-2	15	-1	16	-2	15	0	17	-1	14	-3	25	0

Base: Fixed WiFi users who are aware of respective brand(s) | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand imagery: Area 3

High quality modem attributes still have significant decline in total and for all players. In addition, IndiHome show another notable significant decline particularly in terms of communication, price & promo and selfcare apps.

Brand imagery In percentage (%)		TOTAL		IndiHome		First Media		Biznet		Iconnet		My Republic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen. id		TSEL Orbit	
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
COMMUNICATION	Clear media communication	16	-1	16	-3	13	-2	13	-1	16	0	14	0	18	0	12	-1	18	+1	21	+3	17	0
	Simple activation/installation	16	-1	20	0	14	-2	13	-1	17	-1	15	-1	13	-1	13	-1	15	-1	16	-1	18	0
INSTALLATION & ACTIVATION PROCESS	Effortless activation process	16	0	16	+1	14	-1	13	0	15	+1	13	0	14	0	15	0	17	+1	19	+1	17	-1
	Neat installation setup	17	-1	22	-1	16	-2	15	0	18	0	16	0	18	0	17	-3	13	0	14	0	15	-2
	Various official platforms for activation	14	-1	14	-1	12	-2	10	-1	11	-1	12	-1	14	0	15	0	15	-1	15	+1	17	-1
PRICE & PROMO	Suitable package pricing	27	-1	28	-1	28	0	29	0	33	0	31	-1	27	-2	24	-3	25	0	26	+2	23	-3
	Suitable activation/installation fees	17	-1	17	-1	17	-2	17	-2	20	-1	17	0	15	-1	18	0	18	+1	19	+1	17	-2
	Suitable promotions	21	-1	20	-2	20	0	20	-1	26	+1	21	0	21	-1	17	-1	20	-2	20	+1	19	-1
	Easy to obtain promotions	20	-1	20	-3	20	-2	17	0	21	-1	22	-2	21	-1	16	0	18	-1	19	+1	21	-1
PRODUCT & PACKAGE	High quality modem	7	-5	12	-6	6	-4	8	-5	9	-3	8	-5	7	-4	7	-4	4	-6	1	-4	4	-7
	Suitable package specification	21	-1	23	-1	21	-1	21	0	21	-1	23	+1	19	0	20	0	20	-2	19	-1	20	-2
	Easy to switch package	13	-1	13	-2	11	-2	10	-1	11	-1	12	-2	14	-1	13	-3	11	-2	13	-2	16	-1
	Complete channel choice for cable TV	14	-1	17	-1	17	0	10	-1	9	-1	10	-1	22	-1	12	-1	12	-2	12	-2	12	-1
CONNECTIVITY	High quality internet network	28	-1	43	0	25	-2	33	0	26	-1	25	-1	25	0	26	0	23	-1	18	0	32	0
PURCHASE & PAYMENT	Convenient purchase/payment	17	-1	20	-1	15	-1	15	0	18	-1	14	-2	15	-1	18	-2	15	-1	16	0	18	0
	Various payment method for purchase/payment	14	-1	15	-1	14	-1	11	-1	13	-1	13	-1	14	-1	15	-2	14	-1	15	0	16	-2
	Various platforms for purchase/payment	17	0	18	0	16	0	13	-1	14	-2	15	0	19	0	15	0	18	+1	14	0	16	-1
LOYALTY PROGRAM	Easy to obtain loyalty program benefits	11	-1	11	-1	9	-1	9	-1	10	0	11	0	12	-1	11	-2	13	-2	12	0	12	-1
	Transparent loyalty program processes	11	0	10	-1	9	0	9	0	11	-1	9	0	11	0	10	0	12	+1	14	+1	13	0
AFTER-SALES SERVICES	Fast handling of requests/complaints	13	-1	16	-1	13	-1	12	-1	13	-1	11	0	13	0	13	-1	13	+1	13	-1	14	-3
	Easy request submission	14	-1	16	-1	12	-1	11	0	12	-1	11	-1	14	0	13	-1	13	-1	14	+1	16	0
	Provide best solutions for requests/complaints	13	-1	14	-1	12	-1	11	-1	13	0	11	-2	15	-1	12	-2	13	+1	11	-3	16	-1
	High quality service of agents / technicians	15	0	19	-1	14	0	14	0	15	+1	13	0	14	-1	17	-1	13	0	13	0	15	0
SELF-CARE APPS	Smooth selfcare app usage	13	-1	14	-2	12	-1	12	-2	10	-1	11	-1	12	0	12	-1	12	+1	14	0	15	-1
	User-friendly selfcare app	14	-1	15	-1	12	-1	11	-1	14	0	11	-1	14	-1	15	+2	13	-1	12	0	18	0

Base: Fixed WiFi users who are aware of respective brand(s) | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand imagery: Area 4

In overall, high quality modem perception still declining in total and for all players. In the other hand, First Media attributes about effortless activation process and various platforms for purchase perception are getting better, likewise Iconnet's high quality services of agents and MNC Play's user-friendly selfcare app perception.

Brand imagery In percentage (%)		TOTAL		IndiHome		First Media		Biznet		Iconnet		My Republic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen. id		TSEL Orbit	
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
COMMUNICATION	Clear media communication	16	-1	15	-1	16	+1	14	-1	14	+1	11	0	20	0	14	-4	13	0	19	+1	17	0
	Simple activation/installation	17	+1	19	0	19	+2	13	0	13	+2	11	0	18	+2	16	+2	16	+3	12	-2	18	+1
INSTALLATION & ACTIVATION PROCESS	Effortless activation process	16	+1	16	0	20	+6	13	+2	14	+2	12	+2	21	+4	14	-4	14	0	21	+5	18	+1
	Neat installation setup	18	-1	25	-1	18	0	13	-1	16	+2	17	-1	14	-2	14	-4	16	-1	15	-2	17	+1
	Various official platforms for activation	15	+1	14	+1	16	+1	10	-1	10	+1	13	0	22	+4	17	+2	12	+2	19	+2	16	0
PRICE & PROMO	Suitable package pricing	28	0	33	0	29	0	23	-2	28	+1	29	+3	17	+1	26	+2	30	+1	29	+3	23	-1
	Suitable activation/installation fees	18	0	18	-1	19	+1	16	+2	15	+3	15	-1	17	-2	19	+1	17	0	21	+3	17	0
	Suitable promotions	20	-1	19	-1	20	-2	20	-1	18	-2	19	-2	19	+1	17	+1	19	-2	23	+1	20	+1
	Easy to obtain promotions	21	-1	20	0	20	+1	20	0	19	-4	23	+1	18	+4	24	-2	22	-2	22	0	19	0
PRODUCT & PACKAGE	High quality modem	5	-6	10	-6	2	-7	5	-5	6	-2	2	-5	2	-7	0	-8	7	-4	3	-11	3	-8
	Suitable package specification	21	0	24	-1	25	+3	19	+1	18	+1	20	+1	20	-2	16	-4	20	+2	21	+2	23	-1
	Easy to switch package	14	-1	15	0	17	0	11	-2	12	+1	13	0	15	-2	15	-1	13	-1	13	-3	17	0
	Complete channel choice for cable TV	17	0	19	0	23	-2	13	0	9	0	14	+3	34	-1	14	0	14	0	18	+1	19	+3
CONNECTIVITY	High quality internet network	28	-1	48	-3	27	+4	24	-1	18	0	19	0	14	-3	27	-2	26	0	22	-1	34	0
PURCHASE & PAYMENT	Convenient purchase/payment	19	0	22	-1	22	+2	15	-1	12	-2	15	+1	15	0	16	-5	16	0	22	+3	21	+2
	Various payment method for purchase/payment	15	0	13	+1	17	+2	12	0	11	+2	15	+1	20	+1	15	-2	13	+1	21	+1	16	-2
	Various platforms for purchase/payment	16	+1	17	0	19	+5	13	+2	15	+1	15	-1	21	+3	16	0	12	+1	12	0	16	0
LOYALTY PROGRAM	Easy to obtain loyalty program benefits	13	0	12	0	16	+1	11	-1	10	-1	12	+1	17	+2	11	-4	12	+1	16	+1	17	+1
	Transparent loyalty program processes	13	+1	12	+1	14	+2	9	+2	10	+2	10	0	20	+2	13	0	9	+1	12	-1	16	+3
AFTER-SALES SERVICES	Fast handling of requests/complaints	15	0	18	+1	15	+1	13	+1	11	+1	13	+3	14	0	16	-2	10	0	12	-2	16	+2
	Easy request submission	14	0	14	-1	16	+2	11	+2	10	+2	14	0	18	-3	19	0	10	+1	20	+3	14	0
	Provide best solutions for requests/complaints	15	0	14	0	16	+3	13	-1	11	+1	14	-1	17	+2	15	-3	11	+1	18	0	18	+2
	High quality service of agents / technicians	15	+1	17	+1	14	+2	12	+1	12	+4	10	0	17	+2	15	0	13	+1	17	+1	17	+3
SELF-CARE APPS	Smooth selfcare app usage	15	+1	16	+1	14	0	12	+1	10	+1	13	+1	15	+1	12	-1	15	0	15	0	19	+2
	User-friendly selfcare app	16	+1	18	0	16	+2	14	0	12	-1	16	0	20	+6	18	-1	15	+1	14	+2	22	+2

Base: Fixed WiFi users who are aware of respective brand(s) | Δ3M = gap vs Q4'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Summary: Customer satisfaction

In overall, most of brands performance are relatively stable in NPS and CSI, except for Telkomsel Orbit that perform positive in NPS score, driven by Area 2, and also improved in CSI Area 1. While most of competition brands differs on positive or negative trend in area, but still not impact performance in national level

Summary NPS & CSI		IndiHome		First Media		Biznet		Iconnet		MyRepublic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit	
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
TOTAL	NPS	+50		+47		+49		+38		+42		+37		+46		+45		+50		+73	▲
	CSI	7.57		7.45		7.84		7.23		7.37		7.3		7.5		7.27		7.5		7.93	
Area 1	NPS	+42		+59		+56		+26		+28	▼	+37		+34	▼	+68		+51		+68	
	CSI	7.49		7.5		7.97		7.07		7.28		7.53		7.36		7.37		7.34	▼	7.72	▲
Area 2	NPS	+55		+41		+51		+47		+55		+29	▼	+49		+55		+52		+76	▲
	CSI	7.68		7.36		7.84		7.08		7.65	▲	7.5		7.56		7.54		7.6		8.02	
Area 3	NPS	+47		+52		+44		+47		+41		+42		+55		+48		+33		+72	
	CSI	7.41		7.56		7.84		7.44		7.17		7.14		7.56		7.09	▼	7.35		8.21	
Area 4	NPS	+55		+43		+43		+45		+30		+48		+51	▲	+28		+43		+77	
	CSI	7.74		7.56	▲	7.43		7.38		7.24		7.49		7.35	▼	7.08		7.39		7.49	

Base: Respective Fixed WiFi users | CSI is significant if +/- 0.2 points | NPS significance based on NET score | Δ3M = gap vs Q4'23 | ▲: significantly improve ▼: significantly decline

Summary: Brand Performance

Also similar trend for brand equity and share. Even though Indihome share is declined compared to previous period, the equity remain stable. Similar also with improvement share of Iconnet in Area 4 which is yet reflected in National.

Summary BEI & Brand Share		IndiHome		First Media		Biznet		Iconnet		MyRepublic		MNC Play		CBN Fiber		XL Satu Fiber		Oxygen.id		Telkomsel Orbit	
		%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M	%	Δ3M
TOTAL	BEI	6.1		1.1		1.5		0.8		0.8		0.6		0.4		0.5		0.3		0.6	
	Share	58	▼	6		6		5		4		3		2		2		2		2	
Area 1	BEI	5.9		0.8		1.1		1.4		1.1		0.5		0.5		0.3		0.3		0.7	
	Share	56		3		4		11		6		2		3		1		2		2	
Area 2	BEI	5.8		1.5		1.8		0.5		0.9		0.7		0.4		0.5		0.5		0.6	
	Share	54		8		8		2		4		2		2		2		3		2	
Area 3	BEI	5.9		1.1		1.6		0.8		0.8		0.8		0.3		0.4		0.1		0.6	
	Share	57		5		7		5		4		5		2		2		0		1	
Area 4	BEI	7.5		0.5		0.9		0.9		0.3		0.2		0.1		1.1		0.2		0.8	
	Share	78		2		2		5	▲	1		0		0		7		1		2	

Base: Fixed WiFi users | BEI is significant if +/- 0.3 points | Brand Share significance based on % | Δ3M = gap vs Q4'23 | ▲: significantly improve ▼: significantly decline

IndiHome: CSI vs. NPS Summary

CSI increase			
CSI stable	Sumbagsel	All regions except Sumbagsel and Western Jabotabek	Western Jabotabek
CSI decrease			
	NPS decrease	NPS stable	NPS increase

IndiHome: Summary of issue(s) and improvement(s)

From factor satisfaction result, the issues and improvements for each group are:

CSI increase			
CSI stable	(-) Unstable signal / weak signal / network lost, expensive rates		(+) Affordable prices, suitable variety packages to needs
CSI decrease			
	NPS decrease	NPS stable	NPS increase



Thank You