

# TELCO MARKET INTELLIGENCE REPORT

28 Feb – 31 Mar 2024

dataxet xsonar

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### Data Collection Overview

Collection Period: 28 Feb - 31 Mar 2024

Data Source (Channel)	Collection Method	Scope		Total Post (Growth)	
Twitter	Keyword, #Hashtag, Username	Conversations (Tweet and Interaction) related to the Brand that's located in Indonesia and use Indonesian language	X	46,606	(33%)
Facebook	Public page ID, #Hashtag	Conversations on brand's official page	f	369	(15%)
Instagram	Brand official account, #Hashtag	Conversations on brand's official page	O	1,950	(-32%)
TikTok	Public page ID, #Hashtag	Keywords containing certain hashtag	J	305	(-13%)
YouTube	Keyword	Video (content) related to the Brand that use Indonesian language		310	(43%)
Media	Keyword	Articles from 493 National & Regional News Portals		179	(67%)

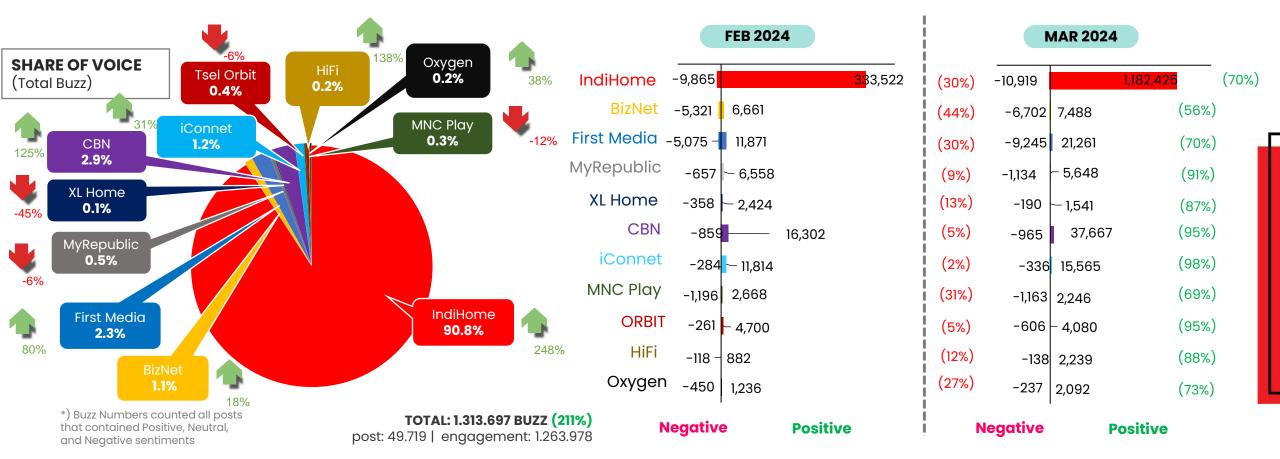


# COMPETITIVE HIGHLIGHTS

## Social Media Share of Voice



### Engagements on All Play Sports increase IndiHome's overall share of voice significantly



### Insight

- The overall buzz showed significant increase. This was contributed by massive increase on several brands such as IndiHome, HiFi, and CBN.
- IndiHome gained the highest increase contributed by engagements on All Play Sports and All Play Entertainment. The positive sentiment also led by IndiHome in this period.
- Meanwhile, HiFi increase contributed by its campaign of #BerasaKoneksinya.
- Network Issues is still the top negative issues across all brands in this period.

# Social Media Activity – By Buzz



Posts on All Play Sports resulting a massive increase on IndiHome's Product & Pricing issues.

### Buzz

	IndiHome	<b>BizNet</b>	First Media	MyRepublic	XL Home	CBN	iConnet	MNC Play	Orbit	HiFi	Oxygen
Program &	43,883	5,554	11,240	3,145	601	36,898	14,286	963	2,938	2,153	1,661
Promotion	(-75%)	(65%)	(68%)	(-52%)	(6%)	(129%)	(22%)	(-25%)	(62%)	(161%)	(116%)
Product &	1,128,161	20	1,262	131	769	137	1,168	115	981	1	162
Pricing	(656%)	(-96%)	(-30%)	(6450%)	(-41%)	(44%)	(58300%)	(-67%)	(-64%)	(-86%)	(37%)
Corporate	173	469	641	2,258	3	240	5	474	0	32	137
	(-81%)	(-37%)	(-63%)	(5151%)	(-99%)	(2900%)	(150%)	(73%)	(0%)	(700%)	(-12%)
Services	11,522	2,593	9,376	232	164	548	134	934	244	53	151
	(19%)	(-1%)	(334%)	(373%)	(-47%)	(171%)	(54%)	(8%)	(-4%)	(18%)	(-32%)
Network	9,605	5,554	7,987	1,016	194	809	308	923	523	138	218
	(11%)	(17%)	(76%)	(61%)	(-51%)	(5%)	(10%)	(-15%)	(223%)	(17%)	(49%)

### Insight

• Engagements on All Play Sports posts resulting significant increase. Showing high interests on sports from IndiHome's audience.

# Social Media Activity – By Channel



IndiHome still led the overall buzz in almost all channels.

Buzz

	IndiHome	<mark>BizNet</mark>	First Media	MyRepublic	XL Home	CBN	iConnet	MNC Play	Orbit	HiFi	Oxygen
Instagram	554,987	3,780	7,470	4,893	1,063	36,902	15,331	1,307	2,393	2,143	1,767
	(123%)	(-1%)	(83%)	(-20%)	(-35%)	(149%)	(31%)	(-20%)	(-26%)	(200%)	(97%)
Twitter	21,758	8,169	17,429	1,279	372	1,439	449	2,000	938	207	403
	(13%)	(10%)	(159%)	(87%)	(564%)	(38%)	(18%)	(-3%)	(94%)	(21%)	(-41%)
Facebook	780	259	5,512	417	289	251	46	30	546	26	71
	(-73%)	(-59%)	(-3%)	(49%)	(0%)	(-79%)	(100%)	(-53%)	(-41%)	(-77%)	(45%)
Youtube	97,642	1,820	5	15	0	23	70	24	1	1	75
	(996%)	(2933%)	(150%)	(650%)	(0%)	(1050%)	(100%)	(167%)	(100%)	(100%)	(2400%)
TikTok	518,176	17	90	157	0	17	0	48	808	0	13
	(720%)	(-35%)	(-79%)	(1%)	(-100%)	(-86%)	(0%)	(-48%)	(173%)	(0%)	(-75%)
Media	1	145	0	21	7	0	5	0	0	0	0
	(-91%)	(1015%)	(0%)	(0%)	(-91%)	(0%)	(67%)	(0%)	(0%)	(0%)	(0%)

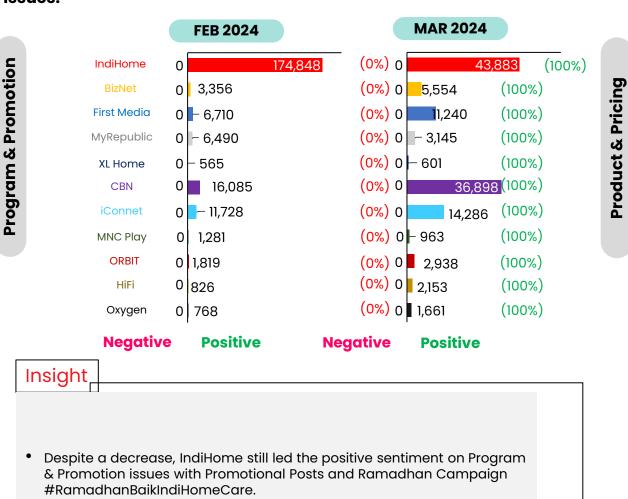
### Insight

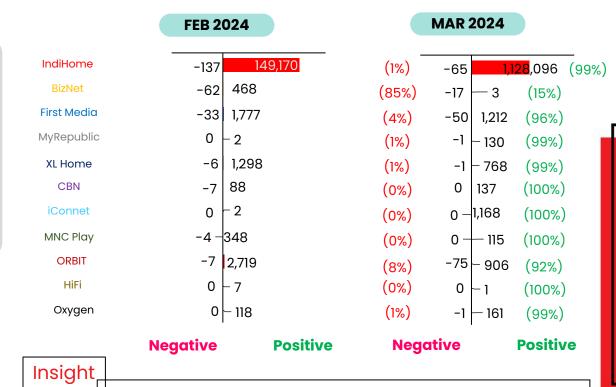
• Consistency in creating posts on main channel such as Instagram and TikTok resulting IndiHome's lead over other brands in terms of number of buzz.

# Social Media Activity – By Sentiment



Engagements on All Play Sports and continuous collaboration from Funplanet TV resulting IndiHome's significant buzz on Product & Pricing issues.



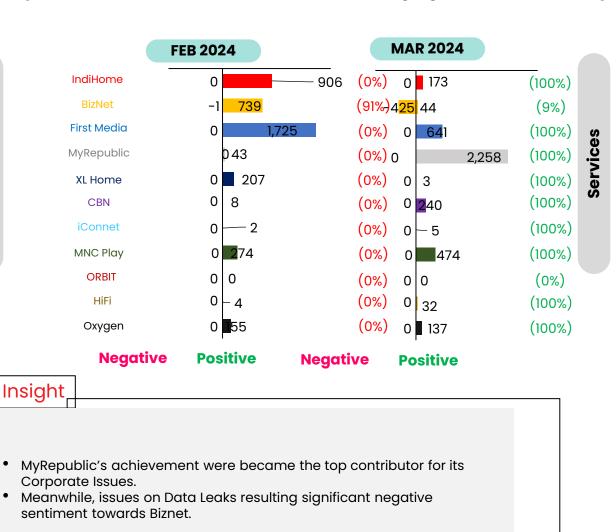


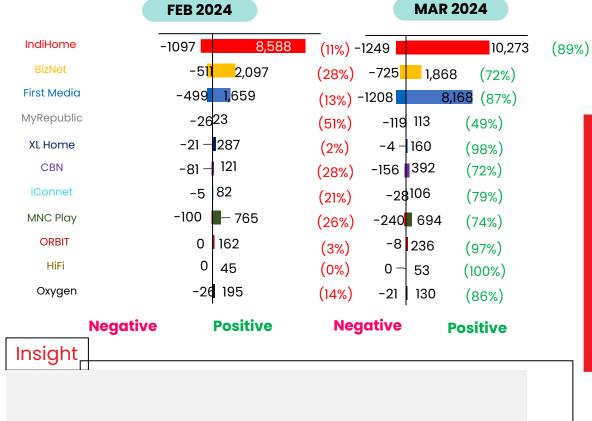
- Other than All Play Sports, Funplanet TV, All Play Entertainment, and Studio Dangdut still became the top contributor for IndiHome on Product & Pricing issues.
- Meanwhile, negative sentiment dominated by complaints on expensive package price.

# Social Media Activity – By Sentiment



MyRepublic Achievement on Ookla Awards resulting significant buzz on Corporate Issues.





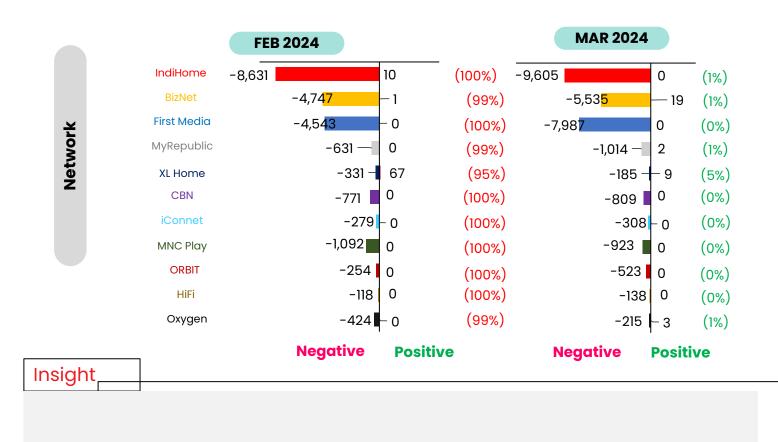
- Positive sentiment on services issues still dominated by Customer Service's response towards complaints and queries from the audience.
- Meanwhile, irresponsive Customer Service became the top negative issues across all brands.

Corporate

# Social Media Activity – By Sentiment



Network Instability still became the top negative issues on Network.



• IndiHome gained the highest negative sentiment on Network issues with most of the conversations came from audience complaints on Network Instability. This was followed by First Media and Biznet.

# Buzz to Post Comparison



In terms of posts and buzz proportion, IndiHome, First Media, and CBN dominates with the highest number came from Program & Promotion Issues.

Issue		Program &	Promotion	Product	& Pricing	Corp	orate	Ser	vices	Net	work
issue		<b>Positive</b>	Negative	Positive	Negative	Positive	Negative	Positive	Negative	Positive	Negative
	Total Post	1,209	_	653	57	11		9,714	1,127		8,790
IndiHome	Buzz	43,883		1,128,096	65	173		10,273	1,249		9,605
	Share of Post	<b>3%</b>		0%	88%	6%		95%	90%		92%
	Total Post	50		3	13	2	170	1,690	632	17	4,355
BizNet	Buzz	554		3	17	44	425	1,868	725	19	5,535
	Share of Post	9%		100%	76%	5%	40%	90%	87%	89%	79%
	Total Post	141		35	40	22		7,173	965		6,399
First Media	Buzz	11,240		1,212	50	641		8,168	1,208		7,987
	Share of Post	1%		3%	80%	3%		88%	<u>80%</u>		80%
	Total Post	171		6	1	130		99	74	2	768
MyRepublic	Buzz	3,145		130	1	2,258		113	119	2	1,014
	Share of Post	<u>5%</u>		<u>5%</u>	100%	6%		88%	62%	100%	76%
	Total Post	29		55	1	2		121	1	9	143
XL Home	Buzz	601		768	1	3		160	4	9	185
	Share of Post	5%		7%	100%	67%	<u></u>	76%	25%	100%	77%
	Total Post	165		5		10		342	127		639
CBN	Buzz	36,898		137		240		392	156		809
	Share of Post	0% 334		4%_ 4		4%		<u>87%</u> 87	81%		79%
<b>IConnet</b>	Total Post Buzz	334 14,826		4 1,168		5 5		106	20 28		239 308
Connet	Share of Post	14,826 2%		0%		100%		82%	28 71%		78%
	Total Post	98		<u>0%</u> 15		28		611	143		
MNC Play	Buzz	963		115		474		694	240		923
MINCPILLY	Share of Post	10%		13%		6%		88%	60%		75%
	Total Post	123		64	43	076		193	3		
ODDIT											
ORBIT	Buzz	2,938		906	75 570			236	8		523
	Share of Post	4%		7%	57%			82%	38%		49%
	Total Post	51		1		7		46			101
HiFi	Buzz	2,153		1		32		53			138
	Share of Post	2%		100%		22%		87%			73%
	<b>Total Post</b>	75		18	1	8		118	14	2	153
Oxygen	Buzz	1,661		161	1	137		130	21	3	215
	Share of Post	5%		11%	100%	6%		91%	67%	67%	71%



# COMMUNICATIONS PERFORMANCE

# Communication Performance Overview



### All Play Sports managed to became the top contents for IndiHome that came from TikTok.

Brand	IndiHome	<b>BizNet</b>	First Media	MyRepublic	XL Home	CBN	iConnet	MNC Play	Orbit	HiFi	Oxygen
Content	All Play Sports	#PakeBizn et	First Media Giveaway	Ookla Awards	<u>XL SATU</u>	#CBNxBaliUnite	Iconnet Promo	MNC Play Promo	<u>Tsel Orbit</u> <u>Promo</u>	#BerasaKoneks inya	Oxygen Giveaway
Channel	TikTok	Instagram	Instagram	Instagram	Instagram	Instagram	Instagram	Instagram	Instagram	Instagram	Instagram
Buzz	452.966	2.129	2.195	655	119	17.888	4.286	139	466	589	440
EVO Focus	Offer	Offer	Offer	Experience	Offer	Value	Offer	Offer	Offer	Offer	Offer

### Insight

• Instagram is still the top media in creating awareness and reach audience across all brands. However, IndiHome managed to gained significant buzz from TikTok through audience engagements on All Play Sports posts.

# Communication Performance Overview

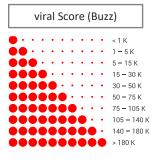


The rebranding of UseeSports to All Play Sports resulting significant domination on Top Issues.

Top Issue	Brand	February 2024	March 2024	Sentiment	Top Channel (buzz)
All Play Sports All Play Entertainment Funplanet TV	IndiHome IndiHome IndiHome	 •••••00000		Positive Positive	TikTok (471.483); IG (377.621); YT (90.631) IG (63.739); TikTok (38.326); YT (2.461) IG (69.313); YT (3.044)
#CBNxBaliUnited	CBN	•••000000	•••••00000	Positive	IG (34.189)
Poor Network	IndiHome	••0000000	••0000000	Negative	TW (9.605)
Poor Network	First Media	••0000000	••00000000	Negative	TW (7.987)
Poor Network	Biznet	••00000000	••00000000	Negative	TW (5.535)



• Meanwhile, Network Instability still heavily addressed towards IndiHome, Biznet, and First Media.



# Top Conversation Buzz - IndiHome



### **OVERALL INSIGHTS**

### **OFFICIAL ACCOUNTS**

### NON - OFFICIAL ACCOUNTS

- Sports and Entertainment dominating the top conversations on Official Accounts.
   Signifying high interests from audience towards these two themes.
- Meanwhile, collaboration posts were effective in creating more buzz which indicating high opportunity to collaborate further in creating awareness towards IndiHome's products.







All Play Sports; @allplaysports.tv Buzz; 452.966 (Link Surce)

Funplanet TV; @funplanet.tv Buzz; 33.372 (Link Source)

All Play Entertainment; @allplayent.tv Buzz; 15.673 (Link Source)



Ramadan



Funplanet TV; @tercipungcipung Buzz; 33.372 (Link Source)

> APOSE; @wendicagur Buzz; 2.405 (Link Source)

IndiHome Promo; @pinopenjanpi Buzz; 6 (Link Source)

# Top Conversation Buzz - Competitors



### **OVERALL INSIGHTS**

### **OFFICIAL ACCOUNTS**

### NON - OFFICIAL ACCOUNTS

- Most of the competitors showing
   Giveaway posts as the top contents to
   gain engagements. However, Biznet
   focusing on spreading awareness on its
   products using #PakeBiznet. MyRepublic
   achievement on Ookla Awards were
   spread massively in order to gained
   audience trusts towards Myrepublic
   Network.
- Meanwhile, CBN still led the Non-Official accounts with continuous collaboration. However, a change Iconnet where they collaborate in promotion and creating offline activationwas shown by #PesanBuatSangMantan.







First Media Giveaway; @First Mediaworld Buzz; 2.195 (Link Source)

#PakeBiznet; @Biznethome Buzz; 2.129 (Link Source)





#CBNxBaliUnited; @baliunitedfc Buzz; 17.888 (Link Source)



Iconnet
Achievement;
@pricebook\_id
Buzz; 1.661
(Link Source)



#PesanBuatSangMa ntan; @agil.alf Buzz; 198 (Link Source)

### Top Authors – Instagram



IndiHome still dominating the top authors for Official Accounts and Non-Official Accounts on Instagram

### TOP AUTHORS - OFFICIAL ACCOUNT

Authors	Total Post	Engage ment	Brand	Sample Post	Sentiment
First Media World	51	6,406	First Media	<u>First Media Promo</u>	Positive
Funplanet.TV	45	35,896	IndiHome	Monstars on Funplanet	Positive
allplay ent.	44	63,677	IndiHome	All Play Entertainment TV	Positive
IndiHomeCare	34	20,496	IndiHome	#IndiHomeCareBagiTHR	Positive
allplay sports	28	377,611	IndiHome	All Play Sports TV	Positive

# TOP AUTHORS - NON OFFICIAL ACCOUNT

Authors	Total Post	Engage ment	Brand	Sample Post	Sentiment
baliunitedfc	6	34,183	CBN	#CBNxBaliUnited	Positive
Pricebook_id	2	5,945	Iconnet	<u>Iconnet Promo</u>	Positive
tercipungcipung	1	33,371	IndiHome	Monstar on Funplanet TV	Positive
wendicagur	1	2,404	IndiHome	APOSE on All Play Entertainment	Positive
Elcamp.id	1	628	First Media	#PesanBuatSangMantan	Positive

### Top Authors – Twitter



Most of the top authors for Official Accounts was came from promotional posts and Customer Service's Response while Non-Official Accounts came mostly from complaints on Poor Network.

### TOP AUTHORS - OFFICIAL ACCOUNT

Authors	Total Post	Engage ment	Brand	Sample Post	Sentiment
urmo0od	71	9	Biznet	<u>Poor Network</u>	Negative
mrscyjars	35	21	First Media	Poor Network	Negative
secgron	7	571	CBN	CBN Data Leaks	Negative
novarowisnu	3	73	First Media	Poor Network	Negative
adityajuliannn	1	103	Biznet	Telkomsel Orbit Promo	Positive

# TOP AUTHORS - NON OFFICIAL ACCOUNT

Authors	Total Post	Engage ment	Brand	Sample Post	Sentiment
IndiHomeCare	9,765	796	IndiHome	#PanduanIndiHomeCare	Positive
First Media	7,229	1,019	First Media	<u>Customer Service Response</u>	Positive
Biznet Home	1,672	178	Biznet	<u>Customer Service Response</u>	Positive
MNC Play	672	152	MNC Play	MNC Play Promo	Positive
CBN Fiber	357	111	CBN	CBN Promo	Positive

### Top Authors – TikTok



While IndiHome dominating both Official and Non-Official Accounts. Tsel Orbit gained exposure from Promotional Posts on TikTok.

### TOP AUTHORS - OFFICIAL ACCOUNT

Authors	Total Post	Engage ment	Brand	Sample Post	Sentiment
StudioDangdut.TV	35	3,900	IndiHome	Studio Dangdut	Positive
All Play Ent.	29	38,297	IndiHome	All Play Entertainment TV	Positive
allplay sports	16	471,467	IndiHome	All Play Sports TV	Positive

# TOP AUTHORS – NON OFFICIAL ACCOUNT

Authors	Total Post	Engage ment	Brand	Sample Post	Sentiment
murahmeriahmewah	1	241	Tsel Orbit	<u>Telkomsel Orbit Promo</u>	Positive
ryanrenaldi6	1	195	Tsel Orbit	<u>Telkomsel Orbit Promo</u>	Positive
agus_1146	1	17	Biznet	<u>Biznet Promo</u>	Positive
cosmomediaindonesi a	1	17	First Media	<u>First Media Promo</u>	Positive
joliesshop7	1	15	Tsel Orbit	Telkomsel Orbit Promo	Positive



# CAMPAIGN PERFORMANCE

# All Brands Hashtag Performance



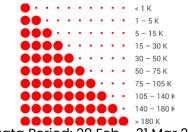
### #CBNxBaliUnited gained the highest increase in this period through its collaboration posts.

Brand	Top Hashtag	Feb 2024	Mar 2024	Growth	Top Channel
IndiHome	#IndiHomeTVOriginal	••••••	••••••	8%	IG
IndiHome	#AllPlayEnt	••••••	••••••	20%	IG
IndiHome	#APOSEPindahKantor		••••••		IG
CBN Fiber	#CBNxBaliUnited	•••0000000	•••••0000	173%	IG
CBN Fiber	#BaliUnited	•••000000	•••••0000	172%	IG
Oxyegn	#ConnectionMatters	•••••00000	•••000000	-48%	IG
First Media	#LebihKencangLebihBebas	•••000000	•••000000	40%	IG
First Media	#First Media	•••000000	•••000000	40%	IG
First Media	#BebasFUP	•••000000	•••000000	48%	IG
IndiHome	#IndiHomeByTelkomsel	•••000000	•••000000	-28%	IG

<sup>\*</sup>Top Campaign Hashtags based on Virality Score

### Insight

• The collaboration also resulting an increase on #BaliUnited hashtag.



# IndiHome Brands Hashtag Performance



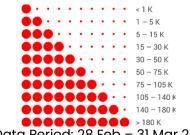
### #IndiHome gained significant growth. This was contributed by IndiHome promotional posts.

Brand	Top Hashtag	Feb 2024	Mar 2024	Growth	Top Channel
IndiHome	#IndiHomeTVOriginal	••••••	••••••	8%	IG
IndiHome	#AllPlayEnt	••••••	••••••	20%	IG
IndiHome	#APOSEPindahKantor		••••••		IG
IndiHome	#IndiHomeByTelkomsel	•••0000000	•••0000000	-28%	IG
IndiHome	#DariRumahTanpaBatas	•••0000000	•••0000000	25%	IG
IndiHome	#JumatBerbagiIndiHome	••00000000	••0000000	85%	IG
IndiHome	#IndiHome	•00000000	••00000000	655%	IG
IndiHome	#RamadhanBaikIndiHomeCare		••0000000		IG
IndiHome	#PanduanIndiHomeCare	••00000000	••0000000	-37%	IG
IndiHome	#StudioDangdut	•••••00000	••0000000	-95%	IG

<sup>\*</sup>Top Campaign Hashtags based on Virality Score

### Insight

• #JumatBerbagiIndiHome also showed significant increase contributed by giveaway posts.





# Account Performance

### IndiHome Account Performance



All Play Sports led the number of Buzz on Instagram, TikTok, and YouTube.

	Instagram			TikTok		YouTube			
	Posts	Engagements	Buzz	Posts	Engagements	Buzz	Posts	Engagements	Buzz
FunplanetTV	45	35,896	35,941	34	75	109	78	2,966	3,044
All Play Ent.	44	63,677	63,721	29	38,297	38,326	40	2,366	2,406
All Play Sports	28	377,611	377,639	16	471,467	471,483	16	90,615	90,631
Studio Dangdut	9	631	640	35	3,900	3,935	26	964	990



All Play Sports Buzz; 452.966 (Link Source)



All Play Entertainment Buzz; 33.537 (Link Source)



Studio Dangdut Buzz; 848 (Link Source)



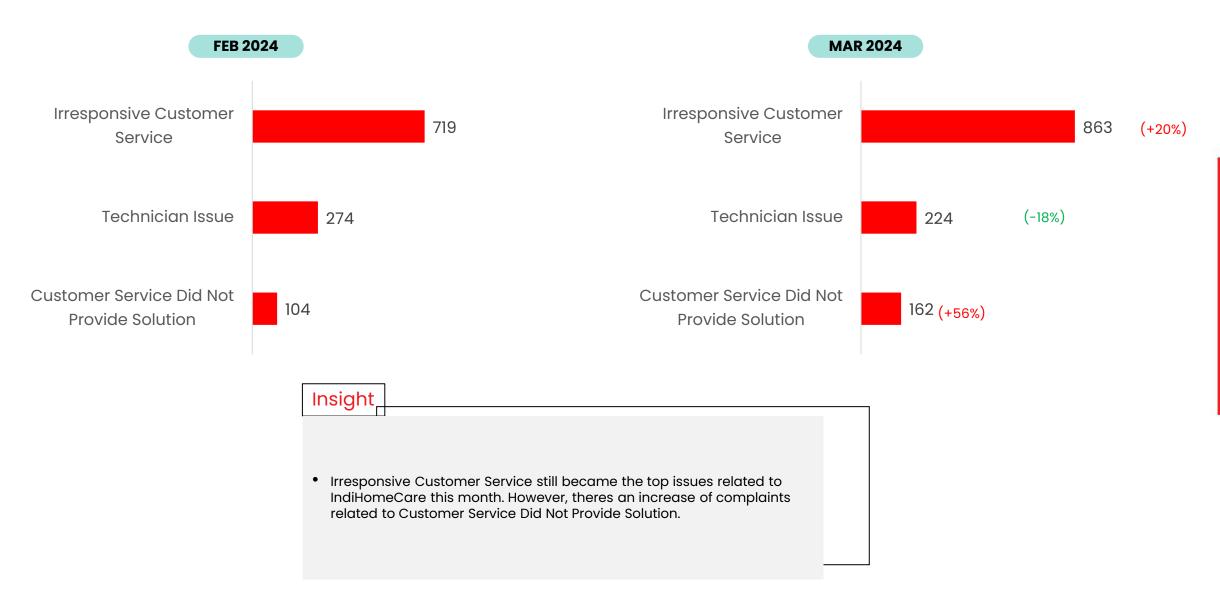
Funplanet TV Buzz; 33.372 (Link Source)



# Deep Dive IndiHome Care

# Customer Service - Issues





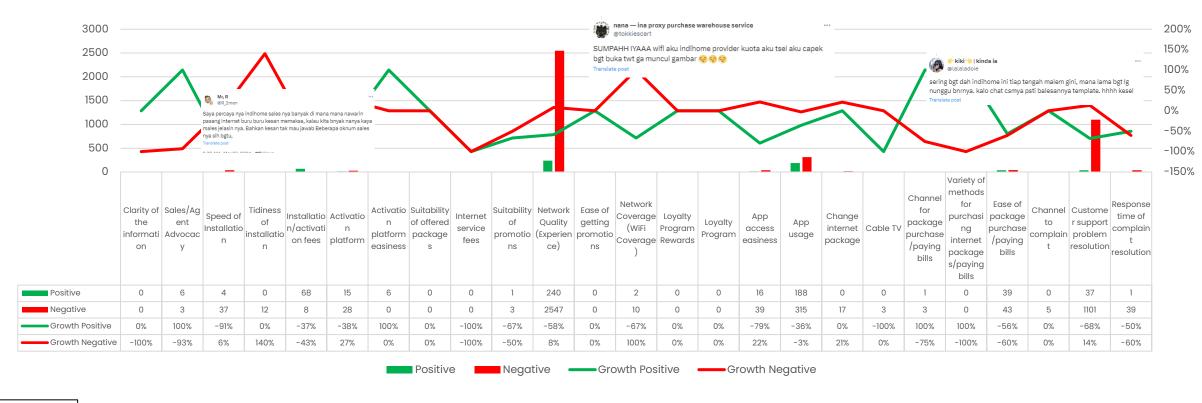


# Deep Dive Issues

# Deep Dive - IndiHome



Network Quality is still the top negative issues for IndiHome.



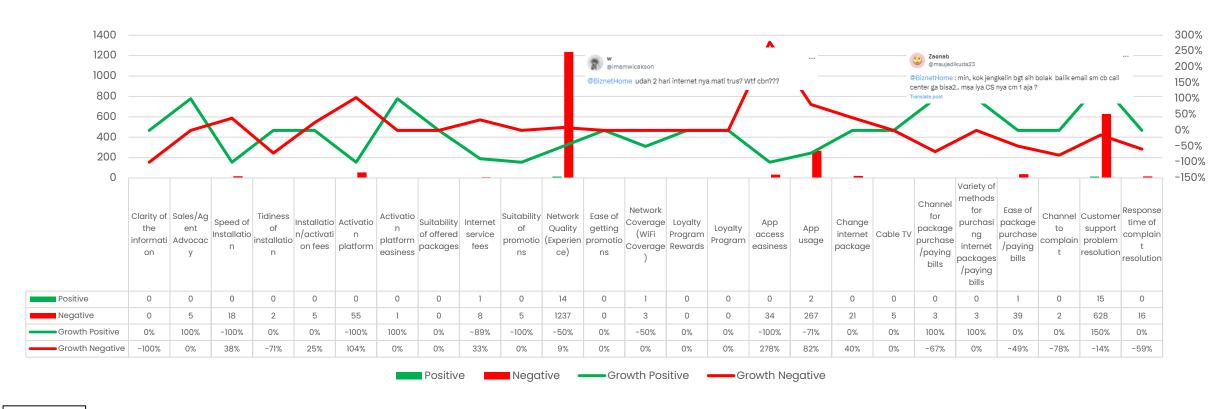
Insight

• Other than that, IndiHome still gained significant negative sentiment on Customer Support Problem Resolution.

# Deep Dive - Biznet



### Similar to IndiHome, Biznet top issue also related to Network Quality.



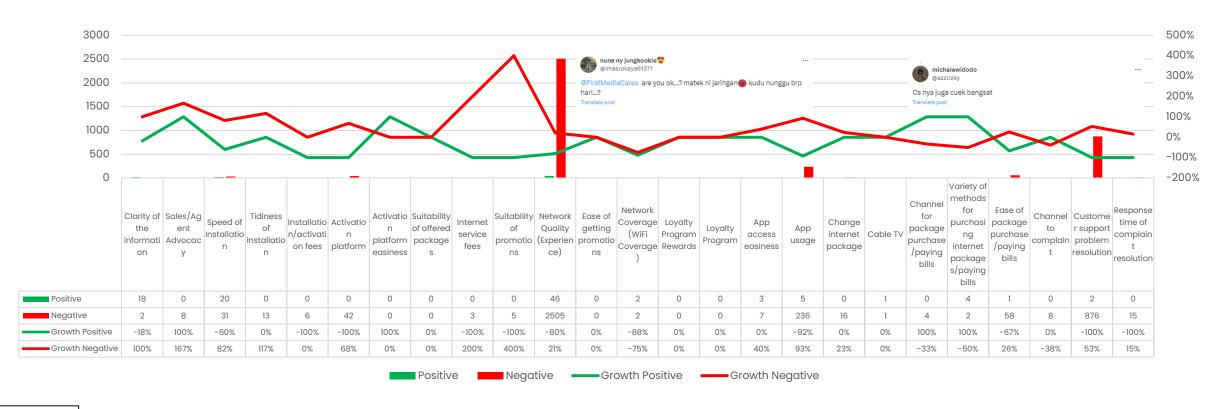
Insight

• Biznet also still showed high negative sentiment regarding Customer Support Problem Resolution issue.

# Deep Dive – First Media



Network Quality became the top negative issue for First Media.



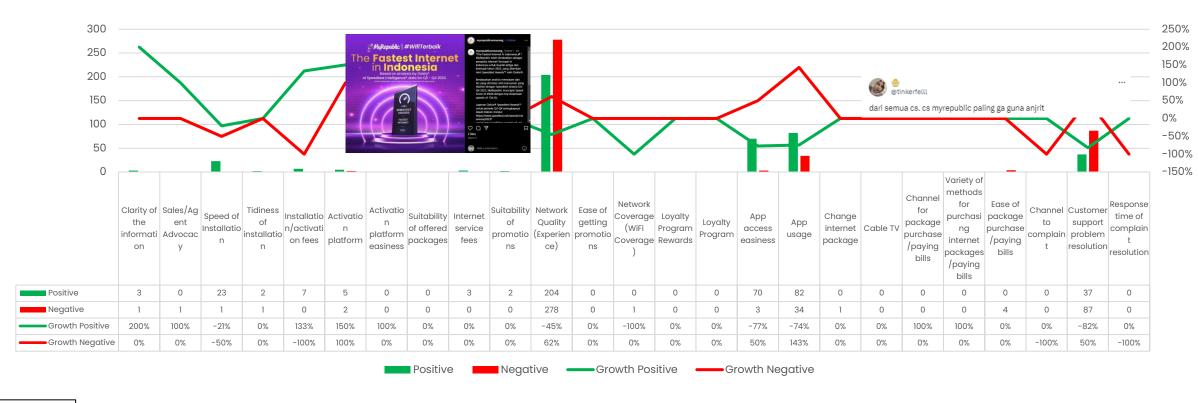
Insight

• First Media also showed high negative sentiment on Customer Support issue.

# Deep Dive - MyRepublic



MyRepublic showed high positive sentiment on Network Quality due to posts on Ookla Awards.



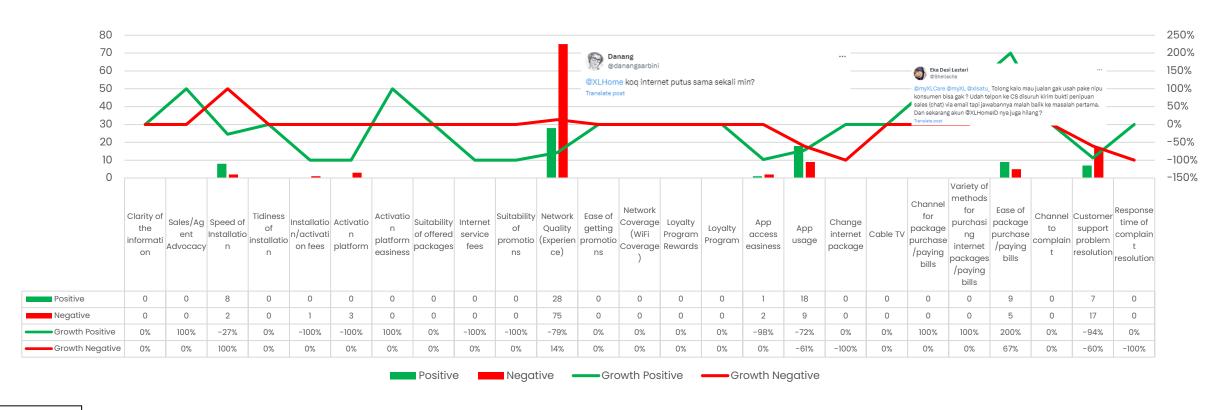
Insight

• However, negative sentiment on Network Quality still showed bigger proportion for MyRepublic.

# Deep Dive - XL Home



XL Home showed high negative sentiment from Network Quality.



Insight,

• This period also showed high negative sentiment on Customer Support due to complaints on irresponsive and no solution from Customer Service.

# Deep Dive - CBN



CBN main issues came from Network Quality. Several mention showed lack of network for all day long.



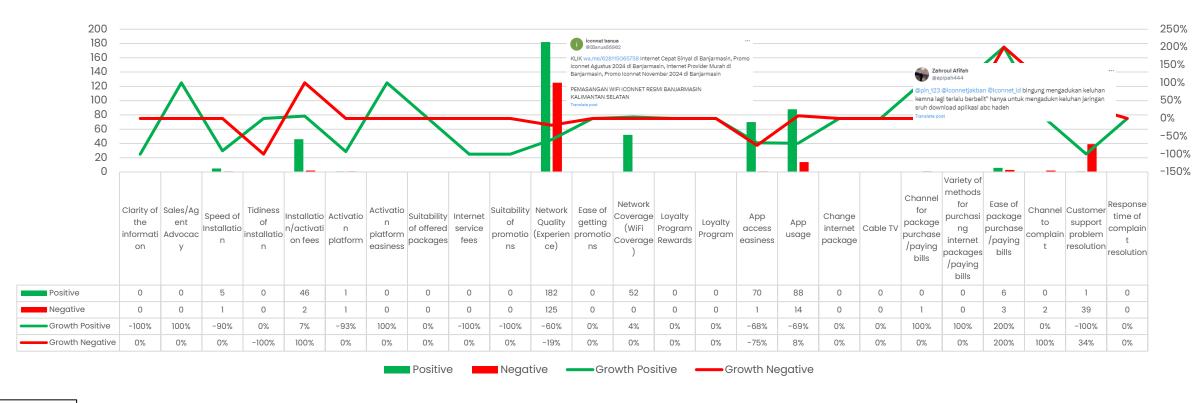
Insight

• Other than Network Quality, CBN showed high negative sentiment on Customer Support Problem Resolution.

# Deep Dive - ICONNET



Iconnet still showed the highest positive sentiment on Network Quality which came mostly from agents posts promoting the products.



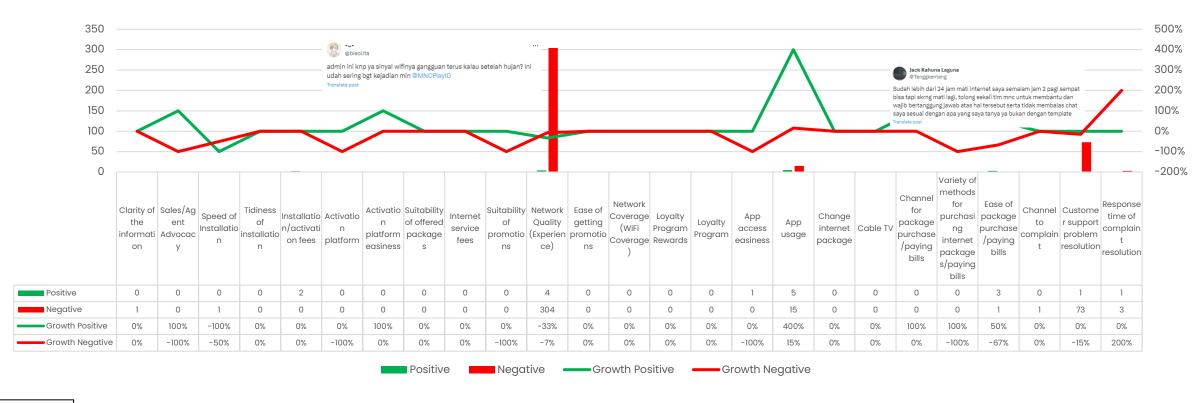
Insight

• Meanwhile, negative sentiment still came mostly from complaints on Network Quality and Customer Support.

# Deep Dive - MNC PLAY



Network Quality still dominating the negative issue on MNC Play.



Insight

• Several complaints mentioning Network Instability during rain.

# Deep Dive - TSEL ORBIT



Tsel Orbit gained significant exposure from Network Quality due to promotional posts on Tsel Orbit WiFi.



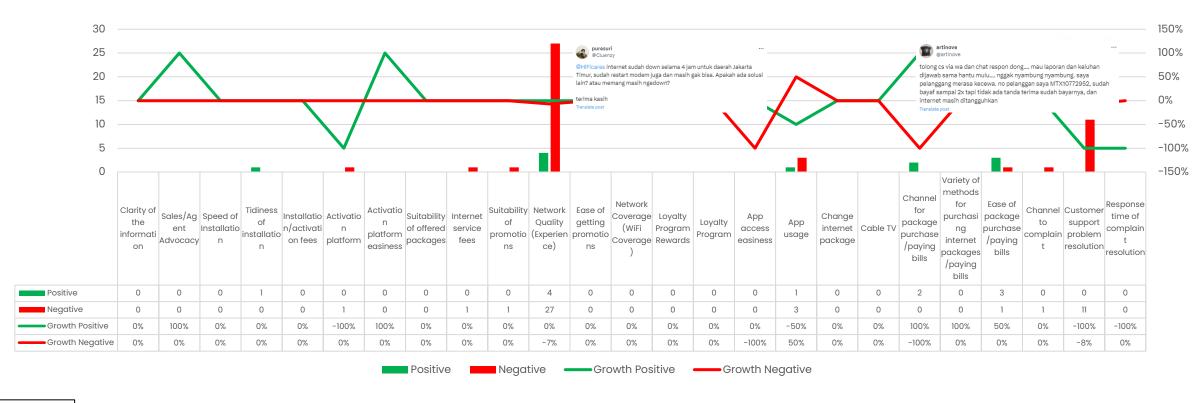
Insight

• Tsel Orbit also showed high negative sentiment on Customer Support Problems.

# Deep Dive - HIFI



### Hifi Network Quality showed high proportion on negative sentiment.



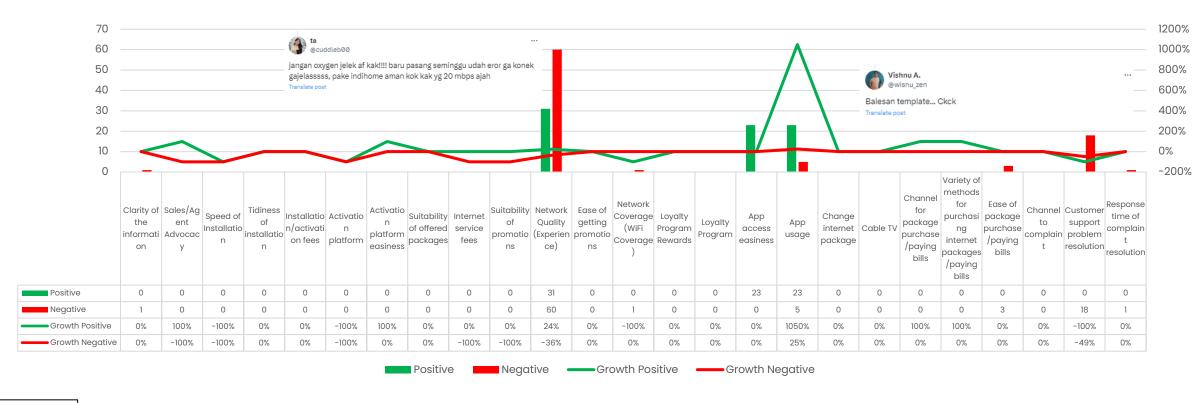
Insight

• This period showed irresponsive customer service as the main issue on Customer Support.

# Deep Dive - OXYGEN

# data:et:sonar

### Oxygen main negative issues is Network Quality.



### Insight

• Other than that, negative issue also showed high numbers of Customer Support Problem Resolution.

### Top Negative Word - Network















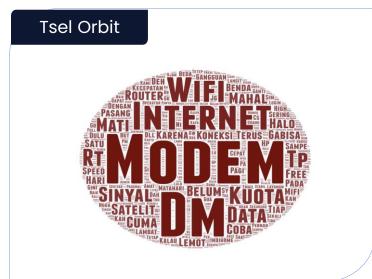
<sup>\*)</sup> Wordcloud is generated from **content posts** with negative sentiments. This list already excluded dominant words mainly refers to network performances

### Top Negative Word - Network

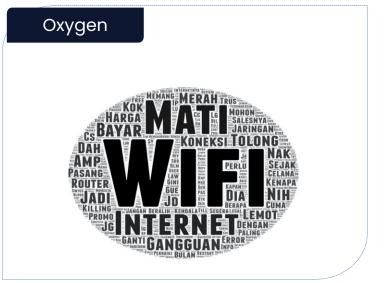










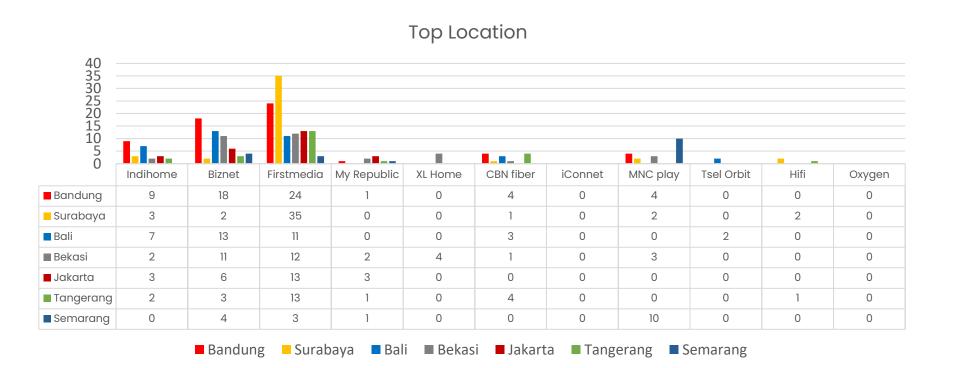


<sup>\*)</sup> Wordcloud is generated from **content posts** with negative sentiments. This list already excluded dominant words mainly refers to network performances

# Deep Dive – Network



Related to Network Issues, most of the conversations mentioned location Bandung and Bali as the top location for IndiHome.





### Insight

• Meanwhile, First media showed high complaints on Surabaya and Bandung



# SUMMARY, TAKEAWAYS, & RECOMMENDATION

### Recommendation/Opportunity



### **KEY ATTRIBUTES**

- **Promos:** IndiHome Promo (8K), Iconnet Installment Promo (12K), Firstmedia Installment Promo (3K)
- Collaboration: CBN x Bali United (34K), #PesanBuatsangMantan (1K)
- Gamification: IndiHome Giveaway (5K), Firstmedia Giveaway (6K)
- Network Issues: Poor Network (27K)
- Services: Irresponsive Customer Service (2K)

### **TAKEAWAYS**

• IndiHome managed to gained significant increase through rebranding of UseeSports to All Play Sports followed by continuous collaboration on Funplanet TV. The consistency of IndiHome's products promotion also managed to maintained its leads amongst other brands in this period.

# COMMUNICATION DEVELOPMENT

• IndiHome's rebranding of All Play Sports managed to created significant buzz. This brings high opportunity to create more collaboration with atheletes or sports figure in order to create more awareness towards All Play Sports.

# INFLUENCER COLLABORATION

• The success of generating high number of buzz from All Play Sports signifying high opportunity to collaborate with engaging influencers from sports category. This can create more buzz and engagements from audience and brings more awareness towards All Play Sports from audience with sports interests. Several KOLs can be approach such as <a href="mailto:occupation-color: buzz">occupation-color: occupation-color: occupation

