



Consumer Study on Telco Operator

KPI report







Data ending: Feb'24

Mar'24



Research design: Consumer study 2024

The samples are collected using both offline and online method. Then, for analysis purposes, Nielsen rolled data 3 months data.

Starting January 2024, there is an updated city coverage included in this study.

	Dec 2023 (Offline + Online)	Jan 2024 (Offline + Online)	Feb 2024 (Offline + Online)
 Fieldwork Period	Dec 2023	Jan 2024	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>
 Sampling Method	Random and Online survey panel	Random and Online survey panel	Random and Online survey panel
 Interview Method	<ul style="list-style-type: none">• Door to Door in respondent's house (Face to Face Interview)• and Self-completion	<ul style="list-style-type: none">• Door to Door in respondent's house (Face to Face Interview)• and Self-completion	<ul style="list-style-type: none">• Door to Door in respondent's house (Face to Face Interview)• and Self-completion
 Target Respondents	<ul style="list-style-type: none">• Offline: 5,051 resp• Online: 4,361 resp	<ul style="list-style-type: none">• Offline: 5,651 resp• Online: 3,923 resp	<ul style="list-style-type: none">• Offline: 5,628 resp• Online: 3,902 resp
 Respondent Criteria	<ul style="list-style-type: none">• HP users• Male or female• 12-55 YO, All SES	<ul style="list-style-type: none">• HP users• Male or female• 12-55 YO, All SES	<ul style="list-style-type: none">• HP users• Male or female• 12-55 YO, All SES

Sample size and coverage

Respondent Type	
	
	
Respondent Type	Achieved Sample
Offline Study	16,330
Online Study	12,186
Total	28,963



1

Starting Jan 2024, the projection will be gradually updated into 2024 population figure of Male / Female, 12-55 YO, All SES, and Mobile Phone Users = 165,439,000

2

Analysis is based on TSEL Area & Region definition as per table “Area Coverage” (figures indicate Projected Mobile Users).

Area coverage

Area 1

Sumbagut,
Sumbagteng,
Sumbagsel:
27%

n = 7,810 |
N = 36,973,000

Area 2

Jabotabek,
Jabar:
23%

n = 6,785 |
N = 47,749,000

Area 3

Jateng DIY,
Jatim,
Bali Nusra:
33%

n = 9,486 |
N = 56,157,000

Area 4

Kalimantan,
Sulawesi,
Puma:
17%

n = 4,882 |
N = 24,337,000

Contents

[Customer satisfaction](#) **05**
CSI | NPS | CSI components | Factor
satisfaction

[Brand performance](#) **75**
BEI | Brand leverage | Data card share |
Brand imagery

[Omnichannel Evaluation](#) **93**

[Summary](#) **97**

Customer satisfaction

Identify, track, and review how to better meet your customers' expectations and secure their loyalty

Net Promoter Score (NPS)

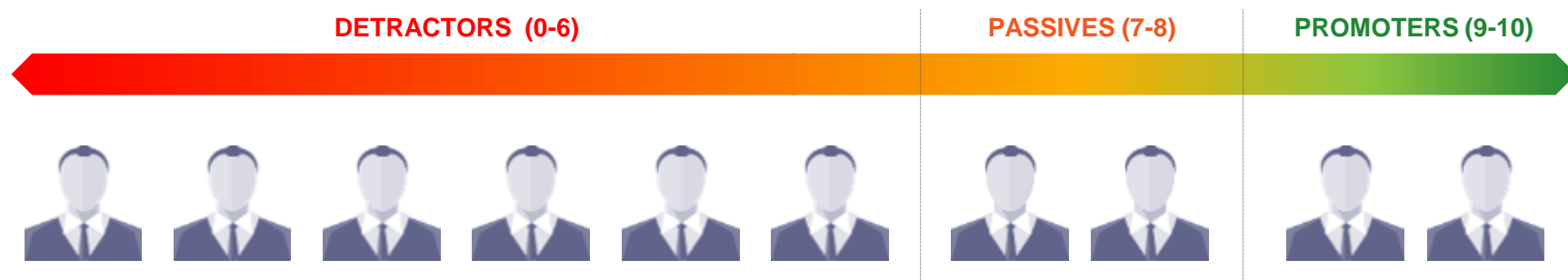
How to obtain Net Promoter Score (NPS)?

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:

Proportion **Promoters** – Proportion **Detractors**

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

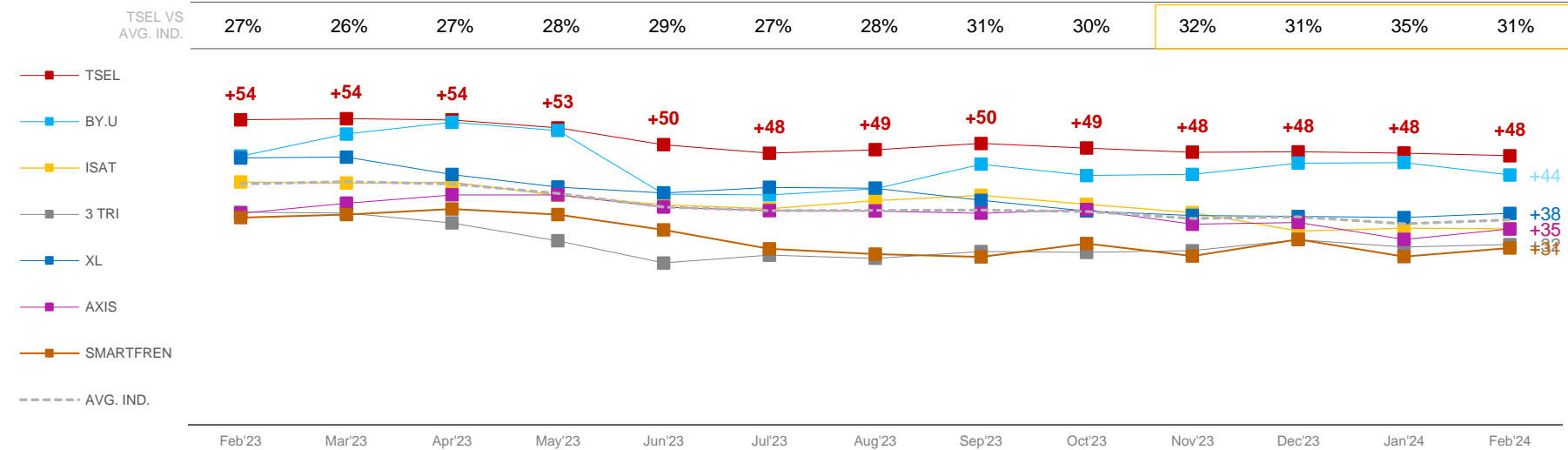
Net Promoter Score (NPS): National level tracking

TSEL's NPS remains relatively stable overall, while AXIS and SMARTFREN have seen slight increases in the past month. This has led to a narrowing gap between TSEL and the industry average.

Net Promoter Score (NPS): P1Y Trend

NET score with range -100 to +100

★ Met Telkomsel target (60% above average industry)
Average industry is calculated by averaging value from 6 telco operators: TSEL, ISAT, 3 TRI, XL, AXIS, SMARTFREN



Base: Respective primary card users | NET Score: %Promoter - %Detractor

Net Promoter Score (NPS): Summary

TSEL's NPS has primarily decreased in NON-JAVA regions, such as SUMBAGTENG, KALIMANTAN, and PUMA. Additionally, there has been a decline in JATIM. Following TSEL, XL AXIATA and SMARTFREN have experienced declines in AREA 1. Meanwhile, TSEL, 3 TRI, and AXIS are showing an increase in advocacy in AREA 2 (Eastern Jabo & Jabar), while ISAT has experienced a decline.

			TSEL				BY.U				ISAT				3 TRI				XL				AXIS				SMARTFREN					
			<div><div>58</div><div>32</div><div>101</div></div>	<div><div>59</div><div>31</div><div>101</div></div>	<div><div>59</div><div>31</div><div>101</div></div>	<div><div>58</div><div>32</div><div>101</div></div>	<div><div>55</div><div>34</div><div>101</div></div>	<div><div>59</div><div>29</div><div>102</div></div>	<div><div>56</div><div>34</div><div>101</div></div>	<div><div>51</div><div>43</div><div>101</div></div>	<div><div>47</div><div>43</div><div>101</div></div>	<div><div>46</div><div>43</div><div>101</div></div>	<div><div>46</div><div>43</div><div>101</div></div>	<div><div>45</div><div>44</div><div>101</div></div>	<div><div>41</div><div>48</div><div>101</div></div>	<div><div>43</div><div>46</div><div>101</div></div>	<div><div>42</div><div>47</div><div>101</div></div>	<div><div>43</div><div>47</div><div>101</div></div>	<div><div>47</div><div>43</div><div>101</div></div>	<div><div>47</div><div>42</div><div>101</div></div>	<div><div>47</div><div>43</div><div>101</div></div>	<div><div>47</div><div>43</div><div>101</div></div>	<div><div>44</div><div>48</div><div>101</div></div>	<div><div>44</div><div>48</div><div>101</div></div>	<div><div>43</div><div>47</div><div>101</div></div>	<div><div>43</div><div>48</div><div>101</div></div>	<div><div>39</div><div>53</div><div>101</div></div>	<div><div>41</div><div>51</div><div>101</div></div>	<div><div>39</div><div>52</div><div>101</div></div>	<div><div>40</div><div>51</div><div>101</div></div>		
			Nov23	Dec23	Jan24	Feb24	MMM'Y1	MMM'Y2	MMM'Y3	MMM'Y4	MMM'Y1	MMM'Y2	MMM'Y3	MMM'Y4	MMM'Y1	MMM'Y2	MMM'Y3	MMM'Y4	MMM'Y1	MMM'Y2	MMM'Y3	MMM'Y4	MMM'Y1	MMM'Y2	MMM'Y3	MMM'Y4	MMM'Y1	MMM'Y2	MMM'Y3	MMM'Y4		
AVG. IND.*			Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Total	+36	31%	+48	+0	-1	+44	-2	+0	+35	+0	-3	+32	+0	+1	+38	+1	+0	+35	+2	-1	+31	+2	+1									
Java	+37	39%	+51	+0	+0	+41	-2	-1	+35	-1	-4	+30	+0	+2	+40	+1	+2	+33	+4	+3	+32	+0	+3									
Non-Java	+35	25%	+44	-1	-2	+55	-1	+5	+33	+3	+0	+36	+0	+0	+29	-1	-6	+37	+0	-5	+30	+4	-3									
Area 1	+30	37%	+41	+0	+0	+44	-4	+6	+23	+4	+2	+36	+0	+2	+21	-5	-14	+36	+1	-5	+24	-1	-8									
Sumbagut	+32	42%	+46	+2	+2	+49	+9	-23	+42	-8	+6	+36	+5	+10	+8	-4	-39	+33	+3	-10	+29	+16	+23									
Sumbagteng	+25	24%	+31	+0	-4	+37	+0	+30	+22	+1	-3	+32	+3	+15	+25	-2	+0	+17	-3	-12	+24	+2	+1									
Sumbagsel	+33	37%	+46	-3	+1	+45	-22	-31	+16	+8	+2	+37	-3	-9	+26	-6	-8	+50	+1	+6	+23	-6	-21									
Area 2	+38	54%	+59	+1	+4	+44	-3	-2	+38	-2	-3	+34	+4	+10	+41	+2	+3	+31	+4	+4	+26	+3	+1									
Western Jabotabek	+29	94%	+56	+1	+1	+62	+1	+14	+28	+1	-6	+27	+3	-3	+18	-6	-14	+21	+2	-7	+23	-4	-7									
Central Jabotabek	+52	30%	+67	-2	-1	+69	-1	+9	+50	-5	-7	+42	+2	-1	+52	-3	+0	+52	-19	+5	+46	+2	+21									
Eastern Jabotabek	+43	30%	+55	+0	+3	+33	+1	+0	+33	-4	-5	+45	+8	+17	+49	-1	+5	+47	+14	+24	+26	+5	-10									
Jabar	+35	64%	+58	+3	+9	+35	-6	-12	+45	+1	+6	+25	+1	+12	+39	+10	+8	+26	+4	+1	+17	+6	+5									
Area 3	+35	29%	+46	-1	-3	+39	-1	-1	+33	+0	-5	+24	-5	-10	+40	+1	+2	+36	+4	+2	+35	-1	+4									
Jateng DIY	+30	25%	+38	-2	+1	+26	+4	-2	+24	+0	-2	+24	+2	+0	+32	+4	+13	+29	+0	-6	+34	+2	+5									
Jatim	+41	32%	+54	-2	-9	+38	-6	-16	+40	+0	-5	+21	-14	-22	+49	-6	+2	+40	+5	+12	+40	-8	+3									
Bali Nusra	+32	28%	+41	+3	+2	+81	+6	+11	+25	-7	-19	+37	-1	-8	+38	+5	-6	+47	+18	+5	+5	-5	-16									
Area 4	+39	19%	+47	-2	-4	+68	+7	+10	+42	+2	-1	+36	+1	-3	+37	+2	+2	+37	-6	-8	+37	+10	+3									
Kalimantan	+39	22%	+47	-1	-7	+48	+19	+21	+36	-3	-7	+31	-1	-9	+39	+4	+10	+39	-8	-16	+42	+1	-17									
Sulawesi	+41	19%	+49	-1	-1	+77	-3	-2	+50	+10	+5	+41	+3	+3	+36	+1	-6	+35	-2	+7	+35	+12	+11									
Puma	+32	5%	+34	-9	-11	+17	-35	-63	+74	+3	+32	+18	+19	+5	+59	+11	+54	-3	+0	-3	+11	+11	-82									

*Average industry is calculated by averaging value from 6 telco operators: TSEL, ISAT, 3 TRI, XL, AXIS, SMARTFREN

Base: Respective primary card users | NET Score: %Promoter - %Detractor

Gray font: Small base (number of respondents is fewer than 30) GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

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

		Area 1			Area 2			Area 3			Area 4		
		Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Top 5 Cities	Kota Palembang	+83	▲	▲	Kota Jakarta Pusat	+92	▲	▲	Kab. Trenggalek	+89		Kota Ternate	+75
	Kab. Serdang Bedagai	+79			Kota Bogor	+70	▲		Kab. Sidoarjo	+89	▲	Kab. Morowali	+74
	Kab. Bungo	+71			Kota Tangerang	+68		▲	Kab. Nganjuk	+85		Kota Balikpapan	+71 ▲ ▲
	Kab. Pringsewu	+71			Kab. Garut	+67			Kab. Mojokerto	+79	▲	Kota Banjar Baru	+70
	Kab. Tapanuli Tengah	+70			Kota Bandung	+67			Kab. Gresik	+69		Kab. Ketapang	+70
Bottom 5 Cities	Kab. Tanah Datar	-7			Kab. Lebak	-23			Kab. Jepara	-40		Kab. Sanggau	-6
	Kab. Kampar	-2		▼	Kab. Serang	+0		▼	Kab. Pacitan	-29		Kab. Pangkajene dan Kepulauan	+2
	Kab. Bengkalis	-2	▼	▼	Kab. Kuningan	+11			Kab. Jombang	-27		Kab. Pinrang	+16
	Kab. Musi Rawas	+1			Kab. Indramayu	+24			Kab. Pasuruan	+2		Kota Kendari	+22
	Kab. Bireuen	+8			Kab. Cirebon	+30		▲	Kab. Banjarnegara	+11		Kota Ambon	+22

*Cities with a minimum base of 10 respondents

▲: Improve rank ▼: Decline rank

TSEL: Reason for promoting

Advocacy for TSEL remains consistent, with network quality being the primary reason, followed by data tariff. Additionally, there is an increase in mentions of affordable tariffs overall, network reliability, and ease of use, although mentions of numerous promotions have declined.

Reason for promoting

In percentage (%)

	Feb'24	Δ1M	Δ3M
Stable signal	62		
Broad network coverage	26		
Strong internet connection	15		
Affordable data tariff	7		
Easy top-up everywhere	6		
Various packages available	6		
Cheap rates	4	▲	▲
Many promos	3	▼	▼
Network disruption-free	3	▲	▲
Easy to use	2	▲	▲

The signal is good, in line with the price.

AREA 1, MALE, 35-55 YO, MIDDLE SEC

The signal is good, smooth without any issues. The data quota price is affordable. The network is fast and stable, 4G.

AREA 2, FEMALE, 12-24 YO, UPPER SEC

For all the packages, they meet my needs well. Even the basic ones satisfy me, and I often use those features.

AREA 3, FEMALE, 25-34 YO, UPPER SEC

The more frequently I top up credit on my Telkomsel card, the more I receive incredibly cheap data package promotions. Additionally, when using the Telkomsel application and consistently purchasing data, I often receive rewards in the form of data packages.

AREA 4, MALE, 12-24 YO, MIDDLE SEC

Base: TSEL primary card users who are promoters

TARIFF | NETWORK | PRODUCT | CHANNEL | PROMO / BONUS | OTHERS

▲: Improve rank ▼: Decline rank

TSEL: Understanding positive feedback (reasons for promoting)

In AREA 2, where TSEL's NPS has improved, there is a rise in endorsements for various promotions, along with positive feedback about package options and network reliability. Conversely, in AREA 3 & 4, where TSEL's NPS has decreased, there are fewer mentions of multiple promotions. Additionally, affordability and network reliability have declined in AREA 1.

Reason for promoting

In percentage (%)

	Total			Area 1			Area 2			Area 3			Area 4		
	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Stable signal	62			57			69			66			56		
Broad network coverage	26			26			26			24			29		
Strong internet connection	15			14			16			16			12		▲
Affordable data tariff	7			7			5		▼	9			7		▼
Easy top-up everywhere	6			6			7	▼	▲	4		▼	6		
Various packages available	6			5		▲	9	▲	▲	5		▲	4	▲	
Cheap rates	4	▲	▲	3		▼	3		▼	5	▲	▲	4	▼	▲
Many promos	3	▼	▼	3	▲		3		▲	3	▼	▼	3	▼	▼
Network disruption-free	3	▲	▲	2	▼		3		▲	3	▼		3	▲	▲
Easy to use	2	▲	▲	3	▲	▲	2	▲	▼	2		▲	2		▼

Base: TSEL primary card users who are promoters

TARIFF | NETWORK | PRODUCT | CHANNEL | PROMO / BONUS | OTHERS

▲: Improve rank ▼: Decline rank

TSEL: Understanding positive feedback (reasons for promoting)

In Jabar, where the NPS has improved, there is an uptick in mentions regarding various packages and network reliability. Meanwhile, the mention of multiple promotions has decreased across all regions except Eastern Jabo. Additionally, mentions about affordable tariffs have also decreased in Sumbagteng, where the NPS has decreased.

Reason for promoting

In percentage (%)

	Sum bagut			Sum bagteng			Sum bagsel			Western Jabotabek			Central Jabotabek			Eastern Jabotabek			Jabar			Jateng DIY			Jatim			Bali Nusra			Kalimantan			Sulawesi			Puma		
	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M
Stable signal	55			57			58			65			67			69			70			68			63			68			61			54			49		
Broad network coverage	31			27			22			29			23			27			26			28			23			20			34			28			13		
Strong internet connection	14			16	▲		13			22			18			12			16			20			14			15	▲	▲	15		▲	12		▲	3	▲	▲
Affordable data tariff	7	▲	▲	6	▼		6			4	▼	▼	5		▼	3	▼	▼	6		▼	7		▲	9			11	▼	▼	5	▼	▼	7		▼	26		
Easy top-up everywhere	7	▼	▼	8		▲	3	▲	▼	6	▼	▲	7			4		▲	8	▼	▲	6	▲	▼	3	▼	▲	6			8		▲	6	▼	▼	4		▲
Various packages available	4	▲	▲	5		▲	5		▲	8	▲	▲	10		▲	9			8	▲	▲	5	▼		5			4	▲	▲	2	▼	▼	6	▲	▲	1	▼	▼
Cheap rates	4	▲	▼	2	▼		3			5	▲	▲	4		▲	2	▼	▼	3	▼	▼	4		▲	6	▲	▲	4	▼	▼	4	▼	▲	4	▲	▲	1	▼	▼
Many promos	4			2	▼		2		▲	3	▼	▼	3	▼	▼	4	▲	▲	3	▼		3	▼	▼	4	▼	▼	2	▼	▼	2	▼	▼	3	▼	▼	1	▼	▼
Network disruption-free	1	▼	▼	2	▲	▲	2	▲	▲	5	▼	▲	4	▲	▲	2	▼	▼	3	▲	▲	3	▼	▲	3	▼	▼	1	▼	▼	6	▲	▲	1	▲		3		▲
Easy to use	3		▲	2		▲	2	▲	▲	2	▲	▼	1	▲	▼	3	▲	▲	0	▼	▼	2		▲	2	▼	▲	2	▼	▲	2	▼		2	▲	▼	2	▲	▲

Base: TSEL primary card users who are promoters

TARIFF | NETWORK | PRODUCT | CHANNEL | PROMO / BONUS | OTHERS

▲: Improve rank ▼: Decline rank

TSEL vs. other operators: Understanding positive feedback (reasons for promoting)

The advocacy reasons across operators are quite similar as in previous quarter, except AXIS seems to receive higher positive mentions about their network. Meanwhile, the decreased mention regarding promotions among promoters is not only specific to TSEL users but also observed among users of all operators. Additionally, ISAT, which has experienced a notable decrease in its NPS, has also lost some mentions regarding broad network coverage.

Reason for promoting across operators

Sorted by percentage rank

TSEL	BY.U		ISAT		3 TRI		XL		AXIS		SMARTFREN	
Δ1M Δ3M	Δ1M Δ3M		Δ1M Δ3M		Δ1M Δ3M		Δ1M Δ3M		Δ1M Δ3M		Δ1M Δ3M	
Stable signal	Stable signal		Stable signal		Affordable data tariff		Stable signal		Stable signal	▲	Stable signal	
Broad network coverage	Affordable data tariff		Affordable data tariff		Stable signal		Affordable data tariff		Affordable data tariff	▼	Affordable data tariff	
Strong internet connection	Strong internet connection	▲	Cheap rates		Cheap rates		Cheap rates		Cheap rates		Cheap rates	
Affordable data tariff	Cheap rates	▲	Strong internet connection		Various packages available	▲	Strong internet connection	▲	Strong internet connection	▲	Strong internet connection	
Easy top-up everywhere	Various packages available	▼	Various packages available	▲	Strong internet connection	▲	Broad network coverage	▼	Many bonuses	▼	Various packages available	▲
Various packages available	Long active period	▼	Broad network coverage	▼	Many promos	▼	Many promos	▼	Various packages available		Unlimited internet package	
Cheap rates	Easy top-up everywhere	▼	Many promos	▼	Easy top-up everywhere	▲	Free calls to other operators	▲	Many promos	▼	Many bonuses	▲
Many promos	Broad network coverage	▼	Easy top-up everywhere		Many bonuses	▲	Many bonuses	▲	Data package bonus	▲	Broad network coverage	▼
Network disruption-free	Many promos	▲	Many bonuses		Broad network coverage	▼	Various packages available	▼	Broad network coverage	▼	Network disruption-free	▲
Easy to use	Undivided quota	▲	Network disruption-free	▲	Long active period	▼	Many people use it	▲	Easy top-up everywhere		Many promos	▼

Base: Respective primary card users who are promoters

TARIFF | NETWORK | PRODUCT | CHANNEL | PROMO / BONUS | OTHERS

▲: Improve rank ▼: Decline rank

TSEL: Reason for detracting

Detractors of TSEL mention more about expensive rates and network issues. Additionally, there are increasing mentions about short active periods and credit decreases.

Reason for detracting

In percentage (%)

	Feb'24	Δ1M	Δ3M
Expensive rates	26	▲	▲
Expensive data tariff	25	▼	▼
Unstable signal	23		
Slow data connection	5		
Narrow network coverage	3		▲
Network disruption	2	▲	▲
Unexpected charges	2	▼	▼
Expensive calls to others	1		▼
Short active period	1		▲
Credits decrease/lost	1	▲	▲

Base: TSEL primary card users who are detractors

TARIFF | NETWORK | PRODUCT | CHANNEL | PROMO / BONUS | OTHERS

▲: Improve rank ▼: Decline rank

The more frequently I activate internet packages, sometimes the package prices have already increased or changed.

AREA 1, FEMALE, 25-34 YO, MIDDLE SEC

When I commute to work in a remote area away from the city, the Telkomsel signal tends to weaken, resulting in slow internet browsing and unclear phone calls.

AREA 2, MALE, 35-55 YO, UPPER SEC

The extension of the active period sometimes has issues, even though I have already fulfilled the terms and conditions. After I complained to the provider, they were extremely unhelpful.

AREA 3, MALE, 35-55 YO, MIDDLE SEC

Sometimes, when making phone calls, the signal fluctuates, especially in remote areas or plantations, because not all places have accessible signal coverage.

AREA 4, FEMALE, 12-24 YO, MIDDLE SEC

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

TSEL: Understanding negative feedback (reasons for detracting)

The increased mention of expensive rates is noticeable in AREA 3 & 4. Meanwhile, network issues seem to be more pronounced in AREA 1 & 3. Additionally, mentions of short active periods and credit decreases are noted in NON-JAVA areas.

Reason for detracting

In percentage (%)

	Total			Area 1			Area 2			Area 3			Area 4		
	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Expensive rates	26	▲	▲	21			31	▲		27		▲	26	▲	▲
Expensive data tariff	25	▼	▼	23		▼	30	▼		24		▼	25	▼	▼
Unstable signal	23			33		▲	21	▼		15			21		
Slow data connection	5			10			3		▼	3	▼	▼	3		
Narrow network coverage	3		▲	2			8		▲	2	▼	▲	1	▼	▼
Network disruption	2	▲	▲	2		▲	2		▲	3	▲	▲	1	▲	▲
Unexpected charges	2	▼	▼	2	▼	▲	1	▼	▼	4			2	▲	▲
Expensive calls to others	1		▼	2	▲		0	▲	▲	1	▲	▼	3	▲	▲
Short active period	1		▲	1	▲	▲	1	▲	▲	1	▼	▼	3	▲	▲
Credits decrease/lost	1	▲	▲	2	▲	▲	0	▲	▲	1	▼	▼	1	▼	▼

Base: TSEL primary card users who are detractors

TARIFF | NETWORK | PRODUCT | CHANNEL | PROMO / BONUS | OTHERS

▲: Improve rank ▼: Decline rank

TSEL: Understanding negative feedback (reasons for detracting)

In Sumbagteng, where the NPS has decreased, slow data connection and network disruptions are gaining more mentions. Furthermore, there are also mentions of expensive calls to others and credit decreases. Network issues are also rising as reasons in Jatim. In Kalimantan & PUMA, the issues seem to lean more toward expensive data tariffs. Additionally, in Kalimantan, there are also increased mentions of network disruptions and unexpected charges, whereas in PUMA, there are mentions of credit decreases.

Reason for detracting

In percentage (%)

	Sum bagut			Sum bagteng			Sum bagsel			Western Jabotabek			Central Jabotabek			Eastern Jabotabek			Jabar			Jateng DIY			Jatim			Bali Nusra			Kalimantan			Sulawesi			Puma		
	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M
Expensive rates	24		▼	14	▼	▼	27	▼	▲	35	▲		15	▼	▼	38			28	▲		30		▲	32			13			25	▼		28	▲		16	▼	▼
Expensive data tariff	24	▼	▼	16	▼		29	▲		30	▼	▲	31			32		▲	28	▲		18		▼	25			31	▲		25	▲		26	▼	▼	24	▲	▲
Unstable signal	32	▲	▲	41			26		▼	18	▼	▼	23	▲	▲	19	▼	▼	24	▼		12			18			16	▼		10			30		▲	8		
Slow data connection	11			16	▲	▲	3	▼	▼	3	▲	▲	0	▲	▼	3	▼	▼	5		▲	3			2	▲	▲	3	▼	▲	5			2	▼	▼	5		▼
Narrow network coverage	1	▲	▲	4			3		▼	2	▼	▼	5	▼	▲	25	▲	▲	1	▲	▲	2	▲	▲	1		▲	4		▲	2	▼	▼	1	▼	▼	4		▼
Network disruption	0	▼	▼	2	▲	▲	2		▼	4	▼	▲	6	▲	▲	0		▲	2	▲	▲	1	▲	▲	8		▲	0	▼	▼	3	▲	▲	0	▲	▼	5		▲
Unexpected charges	0	▼	▼	2	▼	▼	3	▲	▲	0	▼		3	▲	▼	0		▲	1	▼	▼	6		▲	2	▲	▼	2	▲	▼	3	▲	▲	0	▲	▼	1	▲	▼
Expensive calls to others	3	▼	▲	3	▲		1	▲	▲	0	▼		0	▲	▲	0		▲	0	▲	▲	0	▼	▼	1	▲	▼	3	▲	▲	2	▼	▼	4	▼	▲	0		▲
Short active period	0	▼	▼	2	▼	▲	0	▼	▼	4	▲	▲	0	▲		0			0	▲	▲	0	▼	▼	1	▼	▼	0	▲	▼	2	▼	▲	4	▲	▲	0		▲
Credits decrease/lost	3	▲	▲	1	▲	▲	2	▲		0		▲	0	▲	▲	1	▲	▲	0	▲	▲	2	▼		0	▼	▼	0	▼	▼	2	▼	▼	0	▼	▼	1	▲	▲

Base: TSEL primary card users who are detractors

TARIFF | NETWORK | PRODUCT | CHANNEL | PROMO / BONUS | OTHERS

▲: Improve rank ▼: Decline rank

TSEL vs. other operators: Understanding negative feedback (reasons for detracting)

Similar to TSEL, detractors of other operators also seem to mention higher instances of tariff and network issues.

Reason for detracting across operators

Sorted by percentage rank

TSEL		BY.U		ISAT		3 TRI		XL		AXIS		SMARTFREN	
	Δ1M Δ3M		Δ1M Δ3M		Δ1M Δ3M		Δ1M Δ3M		Δ1M Δ3M		Δ1M Δ3M		Δ1M Δ3M
Expensive rates	▲ ▲	Unstable signal		Unstable signal		Unstable signal		Unstable signal		Unstable signal		Unstable signal	
Expensive data tariff	▼ ▼	Limited SIM card availability	▲ ▲	Slow data connection	▲ ▲	Narrow network coverage	▲ ▲	Expensive rates	▲ ▲	Slow data connection		Slow data connection	▲ ▲
Unstable signal		Narrow network coverage	▲ ▲	Narrow network coverage	▲ ▲	Slow data connection	▼ ▼	Narrow network coverage	▲ ▲	Expensive data tariff	▲ ▲	Expensive rates	▲ ▲
Slow data connection		Unfriendly service	▲ ▲	Expensive data tariff	▼ ▼	Expensive data tariff	▼ ▼	Slow data connection	▲ ▲	Expensive rates	▲ ▲	Narrow network coverage	▼ ▼
Narrow network coverage	▲ ▲	Slow data connection	▲ ▲	Expensive rates	▼ ▼	Network disruption	▲ ▲	Network disruption	▼ ▼	Narrow network coverage	▲ ▲	Network disruption	▲ ▲
Network disruption	▲ ▲	Expensive rates	▲ ▲	Network disruption	▲ ▲	Short active period	▲ ▲	Expensive data tariff	▼ ▼	Unexpected charges	▼ ▼	Expensive data tariff	▼ ▼
Unexpected charges	▼ ▼	Unfriendly, outdated app	▲ ▲	Unexpected charges	▲ ▲	No daily point program	▲ ▲	Short active period	▼ ▼	Network disruption	▲ ▲	Splitted internet quota	▲ ▲
Expensive calls to others	▼ ▼	Expensive data tariff	▼ ▼	Credits decrease/lost	▲ ▲	Expensive rates	▲ ▲	No bonus	▲ ▲	Short active period	▲ ▲	Difficulty in top-ups and packages	▲ ▲
Short active period	▲ ▲	Tough starter pack registration	▲ ▲	Bad service	▲ ▲	Limited package options	▲ ▲	Credits decrease/lost	▼ ▼	Difficulty in top-ups and packages	▲ ▲	Unexpected charges	▲ ▲
Credits decrease/lost	▲ ▲	No emergency quota/credit	▲ ▲	Unclear package offerings	▼ ▼	No bonus	▼ ▼	Not many people use it	▼ ▼	Splitted internet quota	▼ ▼	Credits decrease/lost	▲ ▲

Base: Respective primary card users who are detractors

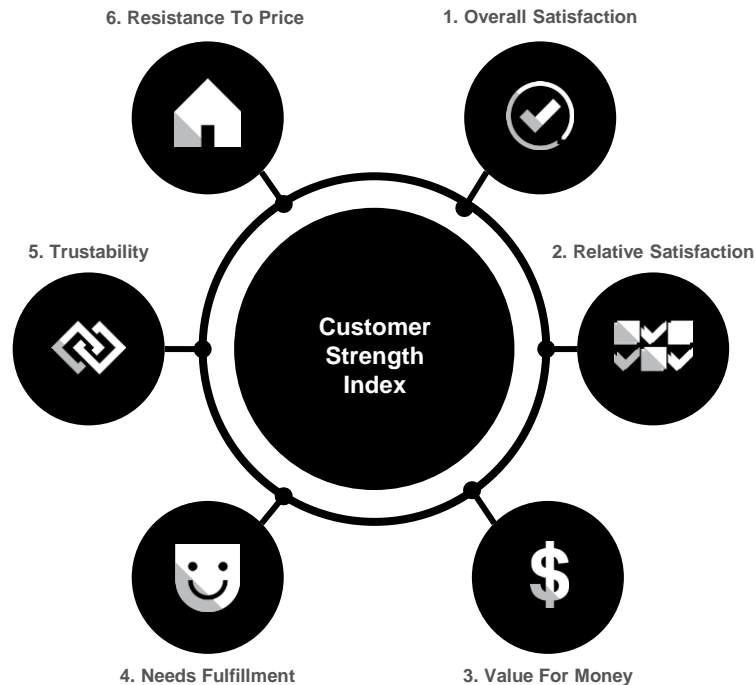
TARIFF | NETWORK | PRODUCT | CHANNEL | PROMO / BONUS | OTHERS

▲: Improve rank ▼: Decline rank

Customer Strength Index (CSI)

How to obtain Customer Strength Index (CSI)?

In Nielsen's R&D, these 6 statements consistently explained current/past behavior & future intentions (5-point scale).



- 1** To what extent would you say you are satisfied or dissatisfied with the overall products and services of _____ [Brand / Product]?
- 2** Please compare _____ [Brand / Product] with other SIM Card brands. Compared to other SIM Card brands in the market, what is your overall opinion about _____ [Brand / Product]?
- 3** The product & services and benefits that you receive from _____ [Brand / Product] make it well worth the money you pay for it
- 4** _____ [Brand / Product] is highly responsive to your needs and requirements
- 5** _____ [Brand / Product] is a SIM Card brand that you can genuinely trust
- 6** If another SIM Card 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 SIM Card brand?

The CSI ranges from a “0” to “10”, where “0” indicates the weakest relationship while “10” indicates the strongest relationship

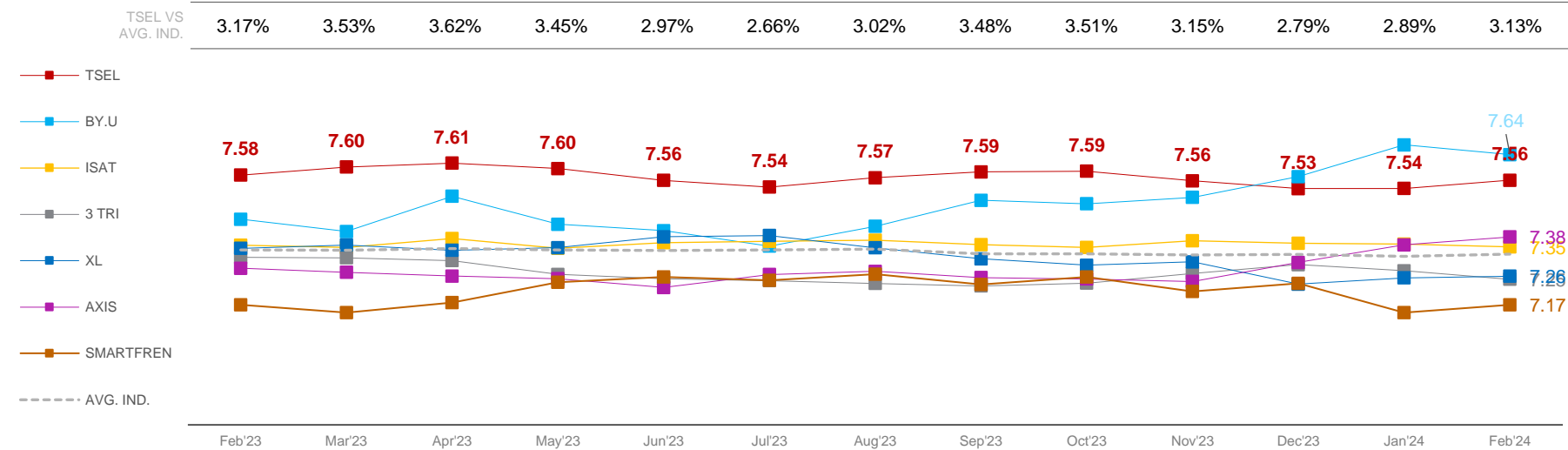
Customer Strength Index (CSI): National level tracking

Following its NPS trend, TSEL's CSI remains relatively stable overall. Meanwhile, BY.U's growth has plateaued, while AXIS is showing improvement and is now becoming one of the closest competitors to TSEL. Nevertheless, TSEL still maintains a significant lead over the average industry, as other competitors appear to be slightly declining.

Customer Strength Index (CSI): P1Y Trend

Mean score with range +0 to +10

★ Met Telkomsel target (4% above average industry)
Average industry is calculated by averaging value from 6 telco operators: TSEL, ISAT, 3 TRI, XL, AXIS, SMARTFREN



Base: Respective primary card users (CSI is significant if +/- 0.1 points)

Customer Strength Index (CSI): Summary

TSEL's CSI has declined primarily in regions where its NPS has also dropped, such as JATIM and PUMA. Additionally, it has decreased in Bali Nusra, although this has not yet impacted the NPS. Conversely, TSEL saw an increased CSI in AREA 2 regions, alongside 3 TRI and AXIS. Moreover, BY.U is experiencing positive movement in AREA 1 (SUMBATENG) and 4 (KALIMANTAN, SULAWESI).

			TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN					
			7.56 7.53 7.54 7.56			7.51 7.57 7.67 7.64			7.37 7.36 7.36 7.35			7.27 7.30 7.28 7.25			7.31 7.24 7.26 7.26			7.25 7.30 7.36 7.38			7.21 7.24 7.15 7.17					
			<div><div></div><div></div><div></div><div></div></div>			<div><div></div><div></div><div></div><div></div></div>			<div><div></div><div></div><div></div><div></div></div>			<div><div></div><div></div><div></div><div></div></div>			<div><div></div><div></div><div></div><div></div></div>			<div><div></div><div></div><div></div><div></div></div>			<div><div></div><div></div><div></div><div></div></div>			<div><div></div><div></div><div></div><div></div></div>		
			Nov'23Dec'23Jan'24Feb'24			Nov'23Dec'23Jan'24Feb'24			Nov'23Dec'23Jan'24Feb'24			Nov'23Dec'23Jan'24Feb'24			Nov'23Dec'23Jan'24Feb'24			Nov'23Dec'23Jan'24Feb'24								
			AVG. IND.*	TSEL VS AVG. IND.	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M				
Total	7.33	3.13%	7.56	+0.03	+0.00	7.64	-0.03	+0.13	7.35	-0.01	-0.02	7.25	-0.03	-0.02	7.26	+0.01	-0.04	7.38	+0.02	+0.14	7.17	+0.02	-0.04			
Java	7.32	3.83%	7.60	+0.00	-0.03	7.57	-0.07	+0.04	7.38	-0.01	-0.02	7.18	-0.06	-0.06	7.28	-0.01	-0.05	7.34	+0.03	+0.09	7.15	-0.02	-0.10			
Non-Java	7.34	2.38%	7.51	+0.06	+0.04	7.88	+0.10	+0.43	7.26	-0.01	-0.04	7.38	+0.05	+0.06	7.21	+0.05	-0.03	7.43	+0.02	+0.19	7.24	+0.14	+0.13			
Area 1	7.28	2.62%	7.47	+0.07	+0.07	7.39	-0.04	+0.12	7.16	-0.03	-0.09	7.27	-0.04	-0.16	7.15	+0.04	-0.09	7.42	+0.03	+0.19	7.19	+0.17	+0.17			
Sumbagut	7.35	3.46%	7.60	+0.09	+0.18	7.54	+0.33	-0.13	7.28	-0.10	-0.13	7.32	+0.10	+0.12	7.35	-0.02	-0.04	7.50	+0.06	+0.22	7.03	+0.30	+0.19			
Sumbagteng	7.13	2.08%	7.28	+0.02	-0.02	7.15	-0.18	+0.32	7.14	+0.12	-0.09	7.05	-0.03	-0.11	7.23	+0.00	-0.01	7.00	+0.02	-0.06	7.11	-0.10	+0.10			
Sumbagsel	7.29	2.87%	7.49	+0.10	+0.04	7.39	-0.31	-0.41	7.12	-0.06	-0.08	7.34	-0.13	-0.37	6.98	+0.08	-0.18	7.54	+0.01	+0.29	7.24	+0.17	+0.16			
Area 2	7.48	3.36%	7.73	+0.02	+0.06	7.61	-0.10	+0.03	7.53	-0.01	+0.06	7.29	+0.00	+0.02	7.50	+0.07	+0.08	7.48	+0.15	+0.27	7.36	+0.05	+0.08			
Western Jabotabek	7.33	6.66%	7.81	+0.05	+0.05	7.54	+0.00	-0.08	7.49	-0.05	+0.00	7.11	-0.10	-0.28	6.94	-0.25	-0.30	7.16	+0.03	+0.04	7.45	-0.03	-0.11			
Central Jabotabek	7.69	3.59%	7.97	-0.07	-0.04	8.00	-0.24	+0.09	7.67	-0.08	-0.04	7.42	-0.06	-0.19	7.70	+0.03	-0.02	7.79	-0.40	-0.09	7.60	-0.18	+0.18			
Eastern Jabotabek	7.55	0.88%	7.62	+0.01	+0.04	7.34	+0.17	+0.18	7.46	+0.06	+0.15	7.56	+0.13	+0.27	7.71	+0.17	+0.26	7.46	+0.15	+0.28	7.50	+0.21	+0.27			
Jabar	7.42	3.36%	7.67	+0.05	+0.11	7.63	-0.28	-0.10	7.59	-0.02	+0.08	7.09	-0.05	+0.00	7.48	+0.14	+0.11	7.57	+0.27	+0.38	7.14	+0.13	-0.01			
Area 3	7.19	4.25%	7.50	-0.02	-0.11	7.51	-0.04	+0.04	7.24	-0.01	-0.09	7.03	-0.17	-0.19	7.17	-0.05	-0.10	7.18	-0.12	-0.13	7.05	-0.05	-0.18			
Jateng DIY	7.08	4.70%	7.42	+0.10	+0.02	7.27	-0.09	-0.07	7.06	+0.00	+0.02	7.00	-0.12	-0.01	7.06	-0.02	-0.01	6.97	-0.08	-0.20	7.00	-0.05	-0.09			
Jatim	7.34	4.24%	7.66	-0.10	-0.20	7.73	-0.08	+0.08	7.37	-0.06	-0.20	7.07	-0.21	-0.37	7.41	-0.10	-0.10	7.39	-0.16	-0.13	7.18	-0.08	-0.43			
Bali Nusra	7.19	1.29%	7.29	-0.05	-0.14	7.14	+0.09	-0.63	7.49	+0.24	+0.25	6.99	-0.23	-0.36	7.07	-0.02	-0.20	7.34	-0.15	+0.10	6.98	+0.16	-0.14			
Area 4	7.41	2.38%	7.58	+0.03	-0.01	8.48	+0.48	+0.90	7.35	+0.02	+0.02	7.50	+0.14	+0.33	7.25	+0.07	+0.03	7.45	-0.02	+0.20	7.30	+0.12	+0.07			
Kalimantan	7.50	1.85%	7.64	+0.11	+0.00	7.95	+0.49	+0.59	7.33	-0.01	-0.01	7.62	+0.26	+0.42	7.32	+0.08	+0.19	7.38	-0.01	-0.02	7.71	+0.06	+0.23			
Sulawesi	7.37	2.45%	7.55	+0.01	+0.02	8.71	+0.39	+0.99	7.33	+0.05	+0.03	7.37	+0.01	+0.22	7.22	+0.07	-0.09	7.61	-0.05	+0.63	7.13	+0.09	+0.00			
Puma	7.29	3.41%	7.54	-0.17	-0.21	7.21	-0.23	-0.73	8.58	+0.20	+0.51	7.27	+0.05	-0.37	7.08	-0.28	-0.19	5.94	+0.03	+0.29	7.32	+0.23	-0.14			

Average industry is calculated by averaging value from 6 telco operators: TSEL, ISAT, 3 TRI, XL, AXIS, SMARTFREN

Base: Respective primary card users (CSI is significant if +/- 0.1 points)

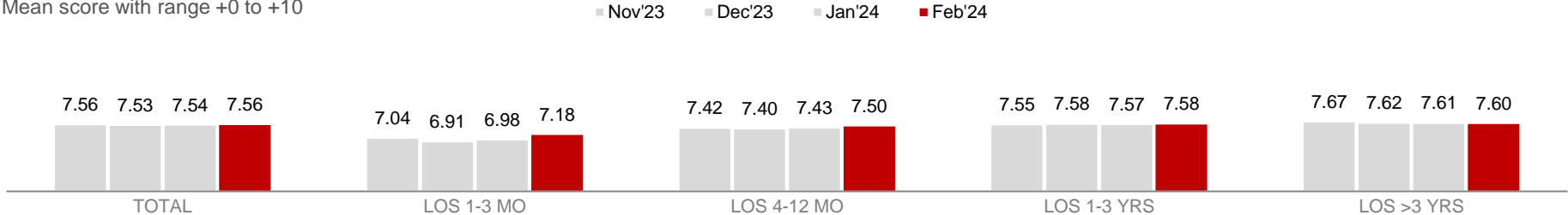
Gray font: Small base (number of respondents is fewer than 30) GREEN: Significantly improve RED: Significantly decline

TSEL: Customer satisfaction and NPS of long-term and new users

The increase in TSEL's CSI and NPS appears to be driven by new users, while the decline is attributed to older users.

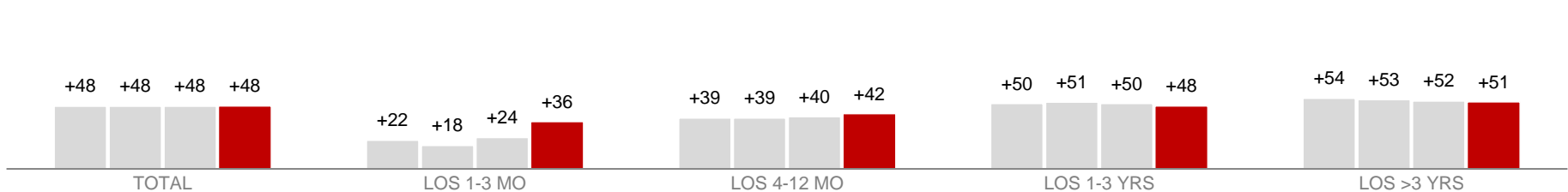
Customer Strength Index (CSI): By Length of Service (LOS)

Mean score with range +0 to +10



Net Promoter Score (NPS): By Length of Service (LOS)

NET score with range -100 to +100



Base: Respective primary card users (CSI is significant if +/- 0.1 points)

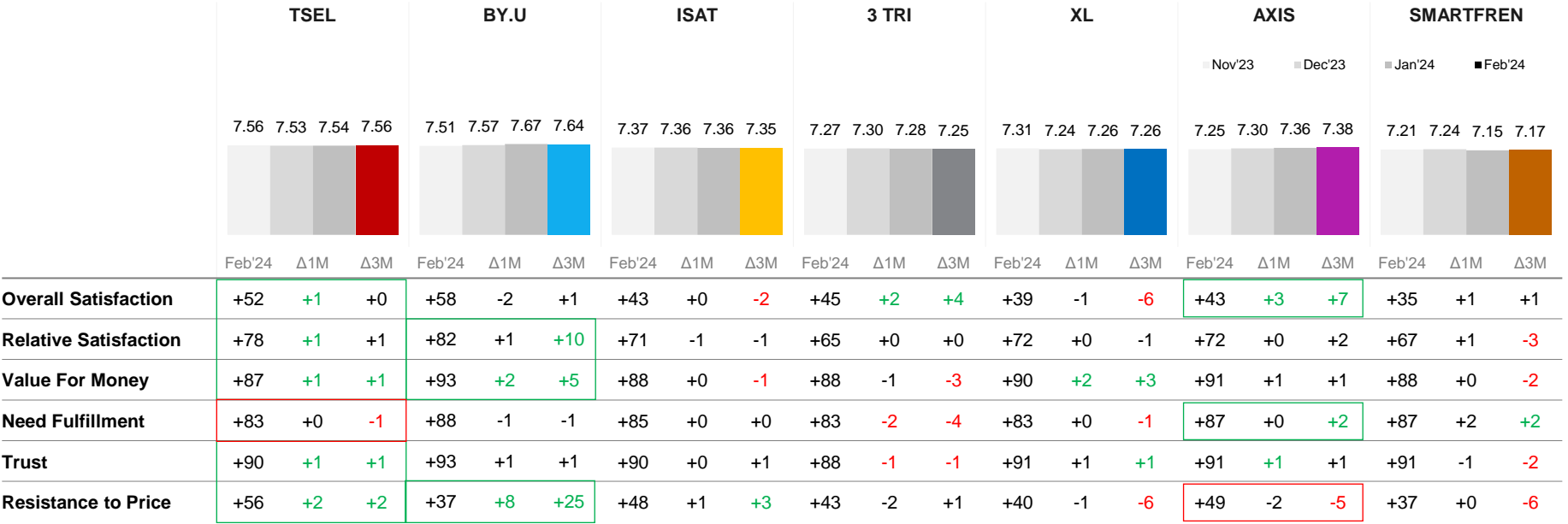
CSI components

CSI and components' overall assessment: National level

Despite maintaining stability in CSI, TSEL is showing a slight increase in most of its components, particularly in resistance to price. AXIS achieves higher CSI supported by an increase in overall satisfaction and need fulfillment, despite a drop in resistance to price. BY.U manages to improve relative satisfaction, value for money, and resistance to price.

CSI Components

NET score with range -100 to +100



Base: Respective primary card users | NET Score: %T2B - %B2B

Gray font: Small base (number of respondents is fewer than 30) GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

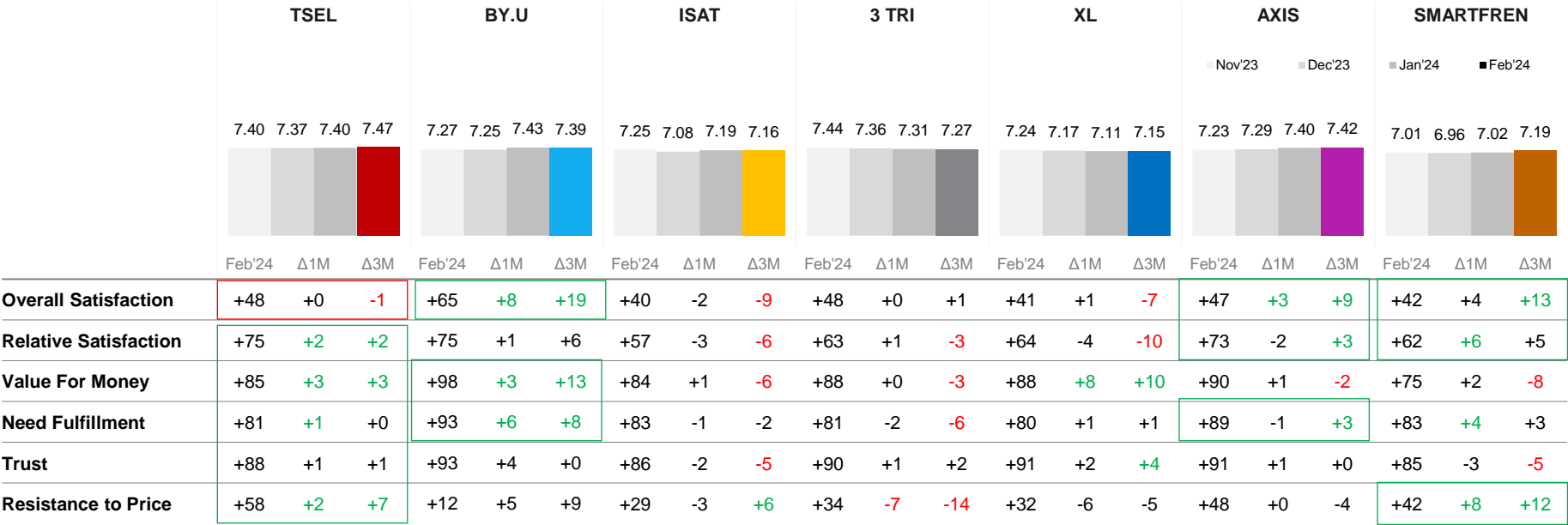
The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

CSI and components' overall assessment: Area 1

In AREA 1, TSEL's overall satisfaction has decreased. However, TSEL has seen higher growth in other components, which compensates for the decrease. Conversely, BY.U, AXIS, and SMARTFREN have improved their overall satisfaction, leading to an increase in CSI as they also enhance other components.

CSI Components

NET score with range -100 to +100



Base: Respective primary card users in AREA 1 | NET Score: %T2B - %B2B

Gray font: Small base (number of respondents is fewer than 30) GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

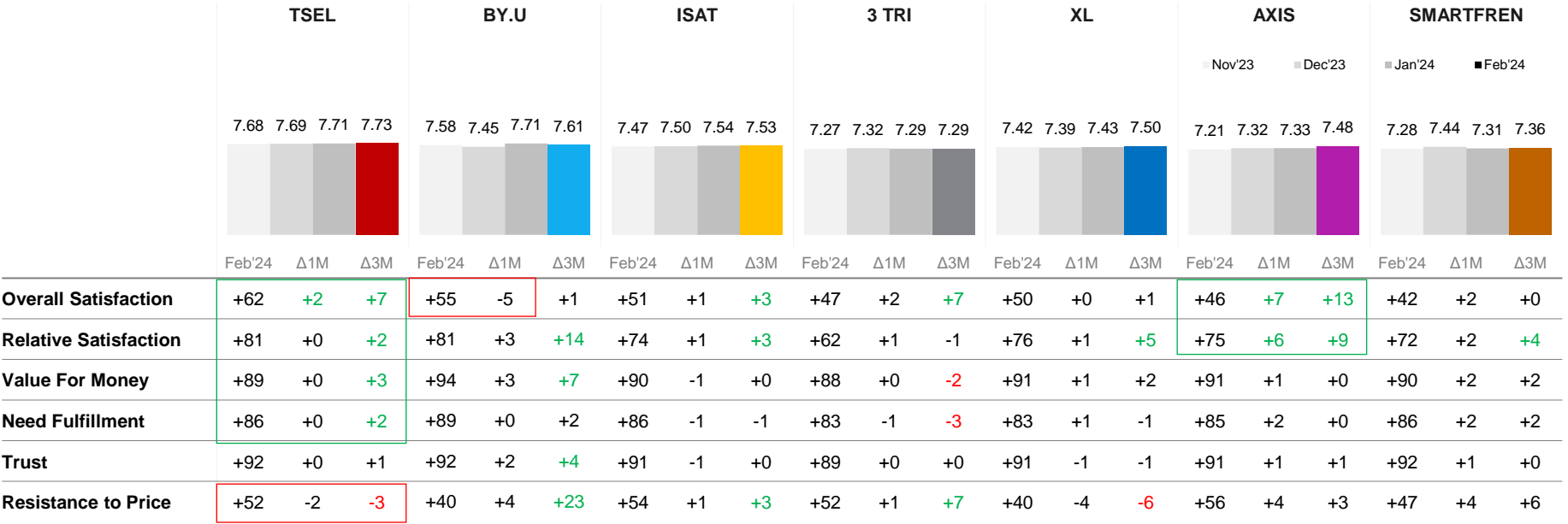
CSI and components' overall assessment: Area 2

In AREA 2, TSEL has demonstrated improvement in overall satisfaction, relative satisfaction, value for money, and need fulfilment, although its resistance to price has weakened. Conversely, AXIS has shown higher growth in overall and relative satisfaction, resulting in a significant increase in CSI.

Additionally, BY.U has also improved in several components, although its overall satisfaction weakened in the past month.

CSI Components

NET score with range -100 to +100



Base: Respective primary card users in AREA 2 | NET Score: %T2B - %B2B

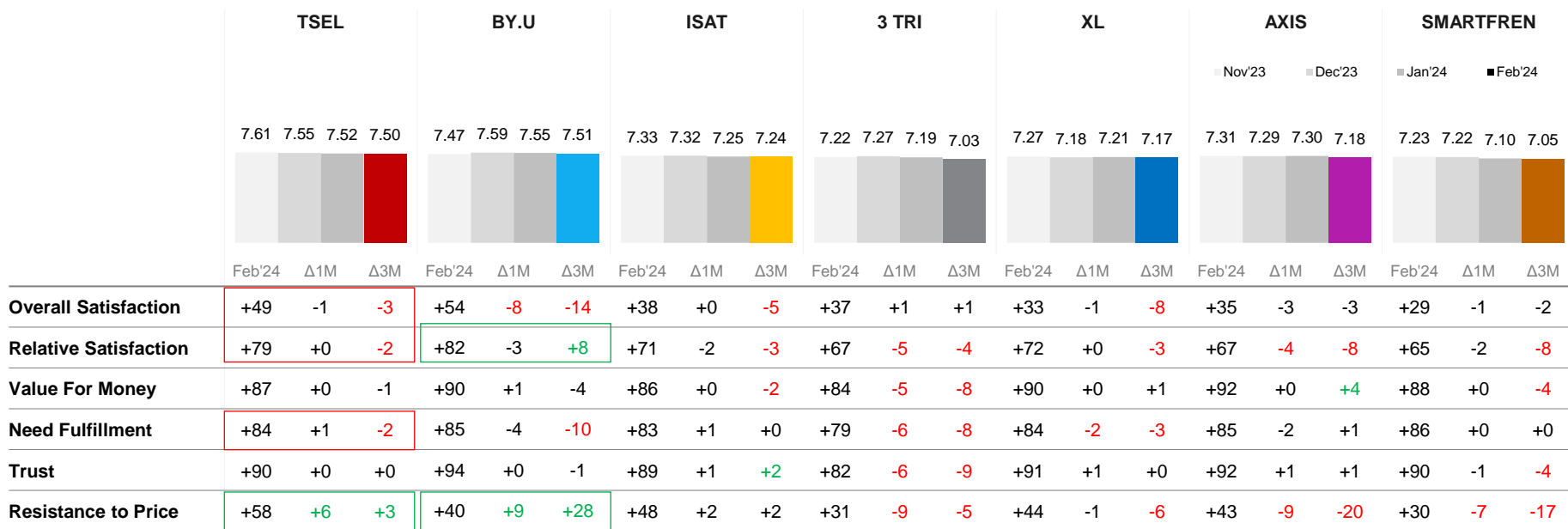
Gray font: Small base (number of respondents is fewer than 30) GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

In AREA 3, TSEL's overall satisfaction, relative satisfaction, need fulfilment decline significantly, resulting in a significant decline in CSI. However, BY.U seems to depict growth in relative satisfaction and resistance to price, which may be beneficial for TSEL. Other competitor users also depict a more negative experience.

NET score with range -100 to +100



Base: Respective primary card users in AREA 3 | NET Score: %T2B - %B2B

Gray font: Small base (number of respondents is fewer than 30) **GREEN**: Significantly improve **RED**: Significantly decline

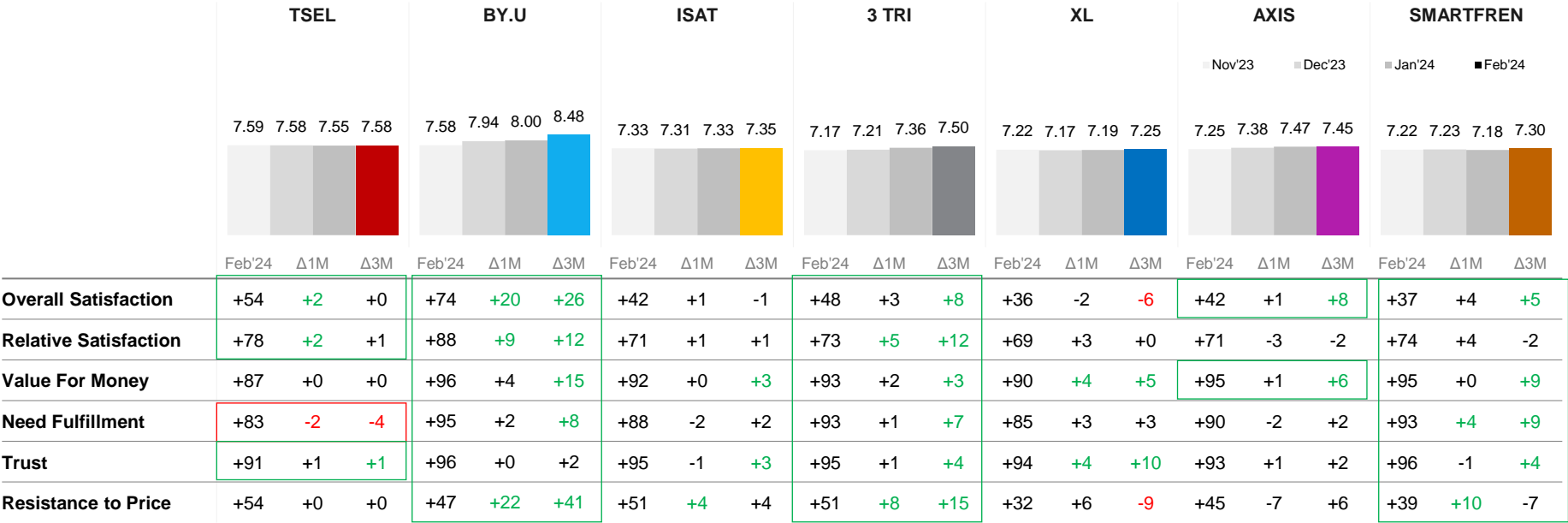
Data above is based on data ending FEB 2024 ($\Delta 1M$: gap change to JAN 2024 | $\Delta 3M$: gap change to NOV 2023)

CSI and components' overall assessment: Area 4

In AREA 4, TSEL has improved its overall satisfaction, relative satisfaction, and trust, but experienced a decline in need fulfillment. Meanwhile, sub-brands like BY.U, 3 TRI, and AXIS, as well as SMARTFREN, have shown higher increases in CSI due to improvements in various factors, including overall satisfaction and value for money.

CSI Components

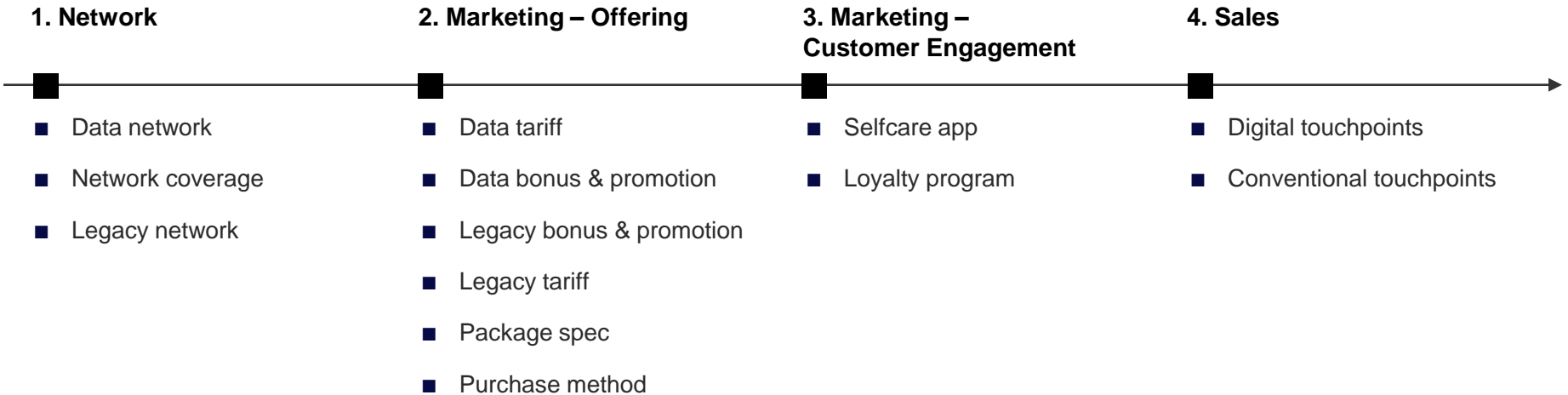
NET score with range -100 to +100



Factor satisfaction

Customer satisfaction framework

Inquiring about customer satisfaction based on their experience throughout the customer journey.



Question example

We employ the Likert scale to gather user assessments, subsequently grouping 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)



Factor satisfaction: National level

As its overall satisfaction component strengthens, TSEL shows improvement on all factors in the past quarter, except for stability in selfcare app usage and a decline in purchase method. This improvement is further strengthened by BY.U's enhancements on several factors. AXIS also sees an increase, emphasizing higher growth in network coverage, data tariff, loyalty programs, and package specifications.

Factor Satisfaction

NET score with range -100 to +100

S: TSEL / BY.U is stronger than closest competitor | P: TSEL / BY.U is par with closest competitor | W: TSEL / BY.U is weaker than closest competitor

	TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN			
	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	
	Data Network	+50	+2	+2	+51	+0	+5	+35	+0	+1	+30	+2	+3	+31	+0	-2	+34	+4	+8	+27	+4	+3
	Network Coverage	+50	+1	+1	+52	+2	+8	+36	+1	+2	+26	+2	+4	+35	+3	+5	+30	+3	+6	+23	+3	+1
	Legacy Network	+49	+2	+0	+43	+4	+3	+36	-2	+0	+30	-1	+3	+33	+0	-2	+31	+3	+5	+27	+1	+3
	Data Tariff	+32	+3	+4	+45	-1	+12	+37	-1	-3	+40	+1	+2	+34	+0	+0	+37	+1	+4	+32	+1	-1
	Data Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Legacy Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Legacy Tariff	+29	+2	+2	+35	+2	+4	+28	-1	+0	+30	+2	+4	+31	+0	+3	+28	+1	+0	+28	+6	+4
	Selfcare App	+51	+0	+0	+51	-2	+5	+39	-1	-1	+43	-3	+4	+30	-4	+0	+37	-2	+0	+41	+13	+9
	Loyalty Program	+42	+4	+6	+60	+7	+24	+46	+1	+1	+36	+6	+8	+27	-1	-8	+53	+4	+16	+36	+11	+8
	Digital Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Package Specification	+35	+1	+2	+46	+0	+8	+36	+0	+0	+36	+1	+1	+30	-2	-3	+37	+3	+7	+29	+1	-1
	Purchase Method	+38	-1	-2	+38	-6	+0	+36	-2	-3	+34	+0	+0	+32	-1	-2	+31	+0	-1	+26	-1	-6
	Conventional Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

Base: Respective primary card users | NET Score: %T2B - %B2B

Gray font: Small base (number of respondents is fewer than 30) GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

Factor satisfaction: Area 1

In AREA 1, TSEL has improved on all factors except for the purchase method. However, TSEL users' satisfaction with data tariff, selfcare app, loyalty program, and purchase method is still considered weak compared to competitors. Meanwhile, competitors like AXIS and SMARTFREN have shown higher increases. Additionally, BY.U has also improved satisfaction with legacy network and tariff.

Factor Satisfaction

NET score with range -100 to +100

S: TSEL / BY.U is stronger than closest competitor | P: TSEL / BY.U is par with closest competitor | W: TSEL / BY.U is weaker than closest competitor

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
S	Data Network	+43	+4	+5	+44	+0	-1	+32	+4	+2	+30	-2	-8	+30	+4	-1	+38	+9	+15	+31	+8	+9
S	Network Coverage	+43	+3	+3	+44	+4	+7	+33	+6	+11	+29	-1	-8	+30	+2	-5	+33	+8	+12	+25	+13	+6
P	Legacy Network	+42	+3	+1	+48	+17	+14	+31	+5	+3	+32	-3	-6	+30	+11	-1	+31	+8	+9	+42	+7	+23
W	Data Tariff	+32	+6	+8	+33	+6	-15	+38	+2	-2	+40	+0	-3	+32	-2	-13	+43	+4	+14	+45	+5	+17
	Data Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Legacy Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
P	Legacy Tariff	+30	+5	+2	+43	+19	+1	+30	+2	+2	+24	-2	-11	+23	+7	-5	+32	+6	+7	+46	+11	+14
W	Selfcare App	+51	+5	+4	+26	-6	-6	+43	+2	+2	+58	+1	+15	+40	+4	+17	+44	+2	+9	+44	+5	+5
W	Loyalty Program	+45	+9	+10	+60	+10	+38	+23	+6	-11	+35	-6	+5	+30	+3	-3	+71	+2	+40	+9	-15	-31
	Digital Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
S	Package Specification	+33	+2	+1	+48	+6	+6	+37	+2	-3	+36	+1	-1	+34	-1	-2	+40	+2	+12	+39	+2	+11
W	Purchase Method	+37	-1	-3	+32	+4	-1	+41	+3	+6	+36	+0	-5	+28	+6	-6	+34	+1	+5	+36	+2	+1
	Conventional Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

Base: Respective primary card users in AREA 1 | NET Score: %T2B - %B2B

Gray font: Small base (number of respondents is fewer than 30) GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

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Factor satisfaction: Area 2

In AREA 2, TSEL has managed to improve its network, tariff, and package specifications satisfaction, although its tariff and package specs satisfaction still lag behind competitors. Meanwhile, AXIS has shown improvement in network satisfaction. BY.U has also improved in several factors, but there has been a decrease in satisfaction with legacy network and the purchase method.

Factor Satisfaction

NET score with range -100 to +100

S: TSEL / BY.U is stronger than closest competitor | P: TSEL / BY.U is par with closest competitor | W: TSEL / BY.U is weaker than closest competitor

	TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN			
	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	
	Data Network	+56	+2	+5	+43	-3	-7	+39	-1	+2	+32	+5	+8	+35	+3	-1	+32	+3	+9	+34	+2	+8
	Network Coverage	+57	+1	+4	+48	+2	+12	+40	+0	+4	+27	+4	+10	+36	+5	+4	+28	+5	+7	+30	+3	+7
	Legacy Network	+58	+3	+6	+32	-6	-10	+40	-2	+1	+32	-1	+2	+35	+3	+3	+25	-1	+1	+30	-2	+3
	Data Tariff	+34	+2	+6	+44	-4	+19	+42	-1	+2	+45	+3	+5	+37	+4	+1	+31	+0	+1	+33	-3	-6
	Data Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Legacy Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Legacy Tariff	+34	+3	+9	+29	-1	+2	+33	+0	+3	+35	+1	+5	+33	+6	+5	+20	+1	-3	+24	-2	-4
	Selfcare App	+51	+0	+3	+58	-3	+23	+51	+0	+8	+39	-6	+8	+24	-8	-4	+28	-5	-5	+38	+6	+8
	Loyalty Program	+39	+1	+1	+57	+1	+29	+60	+9	+19	+31	+1	+7	+45	+9	+7	+43	+1	+13	+36	+7	+13
	Digital Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Package Specification	+39	+2	+4	+40	-3	+13	+41	-1	+2	+38	+2	+1	+34	-1	+0	+33	+4	+4	+32	-2	+0
	Purchase Method	+46	+1	+2	+36	-11	+8	+41	-2	+0	+39	+1	+1	+38	+2	+1	+31	+1	+0	+31	-5	-8
	Conventional Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

Base: Respective primary card users in AREA 2 | NET Score: %T2B - %B2B

Gray font: Small base (number of respondents is fewer than 30) GREEN: Significantly improve RED: Significantly decline

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Factor satisfaction: Area 3

In AREA 3, TSEL has seen significant decreases in network satisfaction, legacy tariff, selfcare app, and the purchase method. Despite this, BY.U has managed to improve its network and data tariff satisfaction. However, other competitors also show a negative trend.

Factor Satisfaction

NET score with range -100 to +100

S: TSEL / BY.U is stronger than closest competitor | P: TSEL / BY.U is par with closest competitor | W: TSEL / BY.U is weaker than closest competitor

	TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN			
	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	
	Data Network	+49	-1	-2	+59	+0	+12	+30	-2	-3	+23	-1	+0	+28	-4	-5	+28	-2	+2	+22	+4	+0
	Network Coverage	+50	-1	-2	+54	-1	+1	+31	+0	-1	+19	+1	-2	+35	+1	+8	+25	-4	-4	+16	+0	-5
	Legacy Network	+47	-1	-6	+45	+8	+6	+31	-5	-2	+21	+0	+1	+32	-4	-5	+34	+0	+4	+22	+0	-2
	Data Tariff	+30	+1	+3	+47	+1	+14	+32	-1	-7	+32	-1	-4	+32	-2	+2	+31	-1	-2	+28	+1	-3
	Data Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	
	Legacy Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	
	Legacy Tariff	+24	+0	-2	+32	+0	+0	+25	-4	-3	+28	+5	+9	+33	-5	+3	+28	-3	-7	+25	+8	+4
	Selfcare App	+49	-1	-4	+42	-2	-22	+28	-3	-9	+37	-4	-4	+32	-3	+0	+32	-5	-13	+42	+18	+15
	Loyalty Program	+41	+1	+3	+51	-3	-4	+33	-10	-15	+37	+14	+3	+11	-13	-21	+31	+2	-17	+34	+14	+6
	Digital Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	
	Package Specification	+32	-1	+1	+47	+1	-1	+32	+0	+0	+30	-2	-1	+26	-3	-6	+35	+2	+7	+25	+1	-4
	Purchase Method	+34	-3	-5	+35	-6	-12	+32	-2	-6	+26	-1	-3	+29	-3	-3	+25	-2	-9	+21	-1	-8
	Conventional Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	

Base: Respective primary card users in AREA 3 | NET Score: %T2B - %B2B

Gray font: Small base (number of respondents is fewer than 30) GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

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Factor satisfaction: Area 4

In AREA 4, TSEL has shown improvement in network and loyalty program satisfaction, although there has been a decrease in satisfaction with the data tariff and purchase method. Meanwhile, BY.U, 3 TRI, AXIS, and SMARTFREN have demonstrated more significant improvements in their network satisfaction, followed by tariff, selfcare app (AXIS), package specs (BY.U & SMARTFREN), and purchase method (BY.U).

Factor Satisfaction

NET score with range -100 to +100

S: TSEL / BY.U is stronger than closest competitor | P: TSEL / BY.U is par with closest competitor | W: TSEL / BY.U is weaker than closest competitor

	TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Data Network	+51	+3	+2	+65	+15	+26	+40	+1	+6	+36	+3	+10	+35	+7	+7	+41	-2	-4	+27	+2	-3
Network Coverage	+51	+2	+0	+71	+13	+23	+39	+3	+3	+33	+4	+13	+34	+7	+5	+40	-4	+4	+35	+5	+8
Legacy Network	+50	+1	+0	+62	+13	+22	+40	+1	+1	+38	-1	+17	+31	+5	+1	+40	+5	+11	+30	+10	+13
Data Tariff	+32	+2	-2	+58	+6	+14	+39	-3	-4	+44	+1	+7	+40	+0	-1	+43	-6	-11	+33	+5	+0
Data Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Legacy Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Legacy Tariff	+29	-2	-1	+56	+10	+22	+23	-1	-4	+31	+0	+9	+26	+3	+4	+42	-2	+6	+30	+12	+16
Selfcare App	+51	-1	-2	+79	+6	+19	+41	+0	-8	+42	+1	-4	+28	-2	-4	+59	-6	+24	+43	+10	-22
Loyalty Program	+49	+8	+12	+80	+26	+57	+49	-12	-7	+44	+13	+22	+26	+12	-3	+81	+11	+25	+74	+44	+47
Digital Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Package Specification	+36	+1	+1	+61	+7	+21	+34	+0	-3	+38	+3	+10	+38	+0	+0	+44	+3	+0	+28	+7	+2
Purchase Method	+38	+1	-2	+66	+11	+17	+31	-4	-10	+33	-3	+5	+34	-3	-2	+37	-5	-11	+26	+4	-3
Conventional Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

Base: Respective primary card users in AREA 4 | NET Score: %T2B - %B2B

Gray font: Small base (number of respondents is fewer than 30) GREEN: Significantly improve RED: Significantly decline

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Brand performance

Understand consumers and cultivate stronger brand equity for growth

Brand Equity Index (BEI)

Deconstruct the “Brand Equity”

Identify the areas where you should concentrate your marketing efforts to enhance brand equity.

How **Nielsen** measures **Brand Equity Index**
Use 3 emotional aspects to calculate BEI

SOURCES
Understand the building blocks of equity

MIND / LOGIC ASPECT

Brand Saliency
Quality of Awareness



Consideration



Brand Positioning
Rational | Emotional



Brand
Equity

OUTCOMES
What people are willing to do

HEART / EMOTIONAL ASPECT

Preference
Favorite Brand



Affirmation
Recommendation
Willingness to pay price premium



Market
Shares

How **Client** improves **Brand Equity Index**

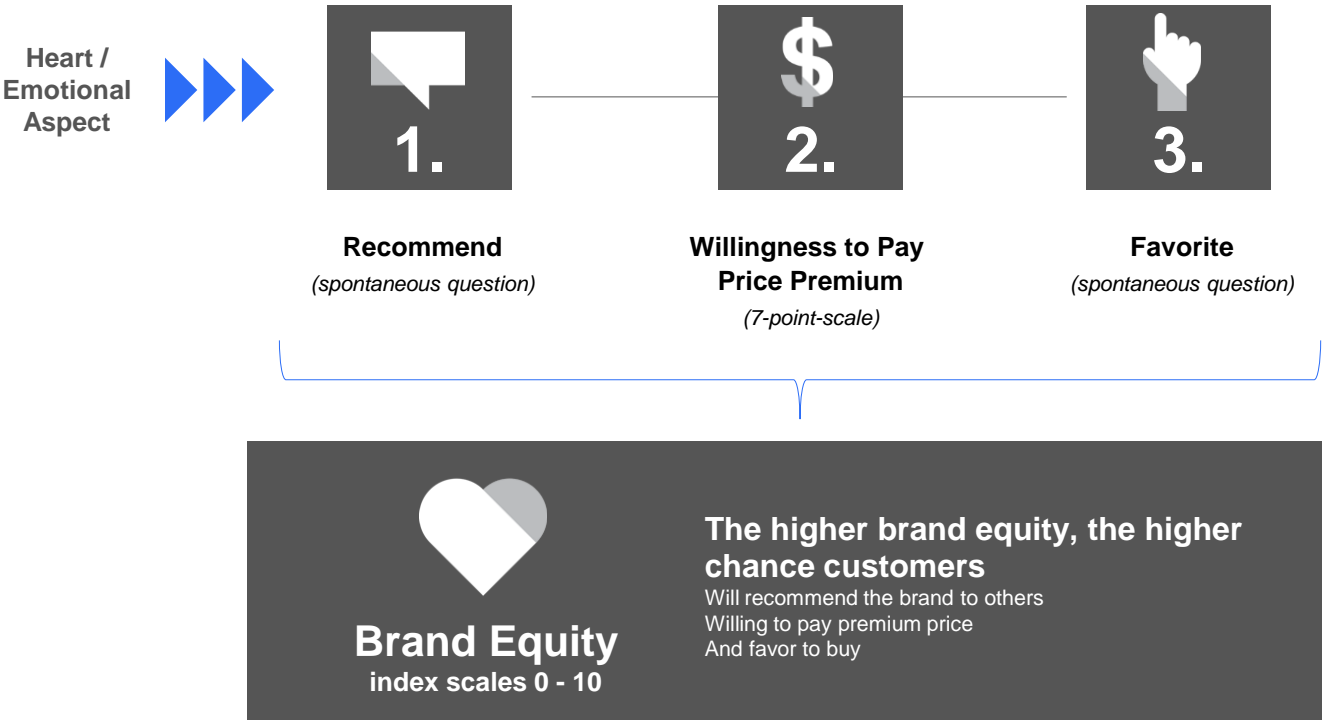
Improve logic aspects to drive higher BEI



Source: Winning Brands Health Check

Brand Equity Index (BEI) measurement

Based on Professor Dr. Keller's theory, the calculation modelling for Strong Brand Equity will yield three real-world outcomes:



Source: Winning Brands Health Check

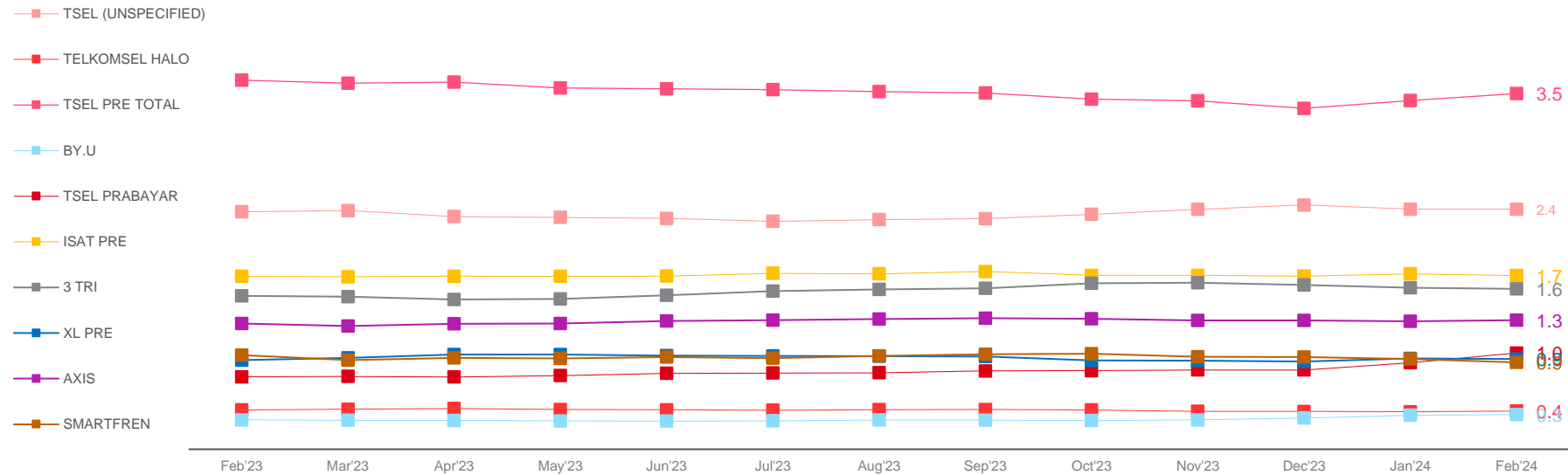
Brand Equity Index (BEI): National level tracking

The brand equity of TSEL PRE TOTAL has experienced a slight increase, primarily driven by TSEL PRABAYAR. Meanwhile, the equity of other brands has remained relatively stable.

Brand Equity Index (BEI): P1Y Trend

Mean score with range +0 to +10

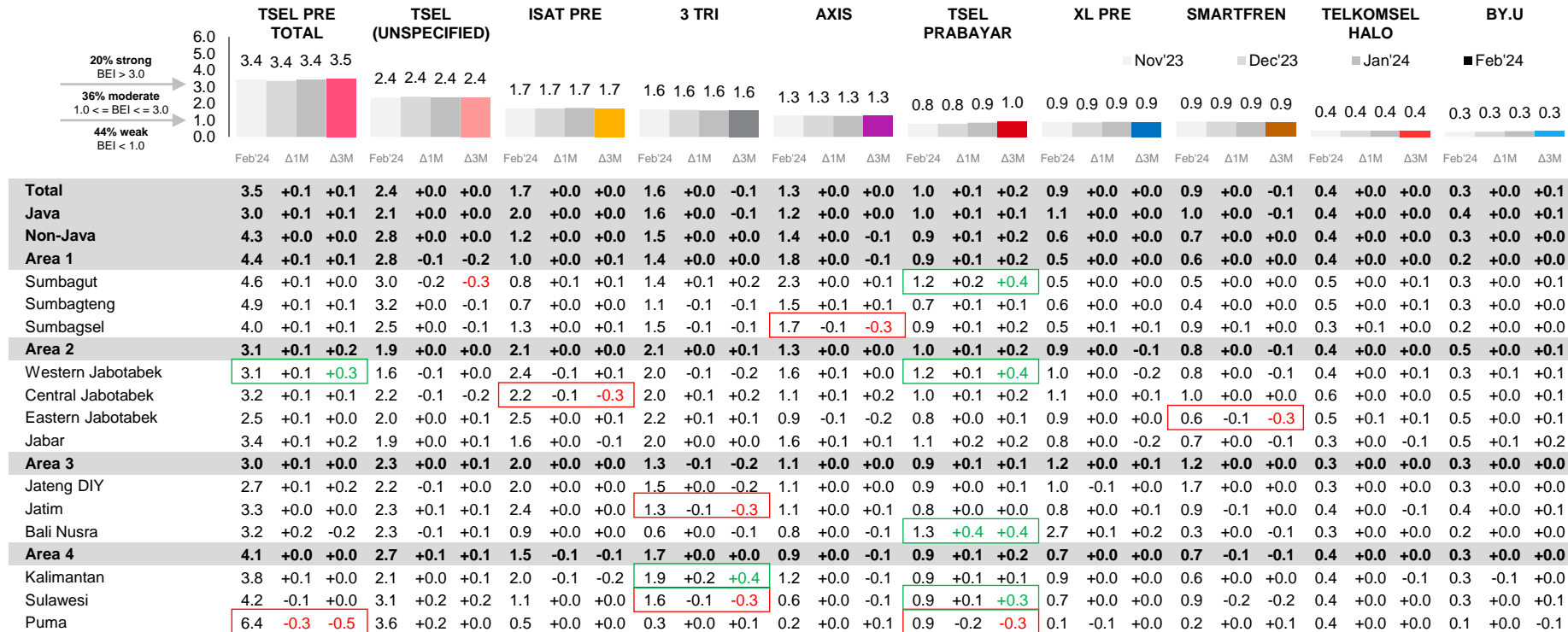
TSEL PRE TOTAL is a combination of simPATI, Kartu AS, LOOP, and Telkomsel PraBayar
**TSEL PRABAYAR is Telkomsel PraBayar, a new branding launched in Jun'21 (just added into the study by Jul'21)



Base: Mobile phone users (BEI is significant if +/- 0.3 points)

Brand Equity Index (BEI): Summary

TSEL PRABAYAR appears to strengthen its brand equity in SUMBAGUT, WESTERN JABO, BALI NUSRA, and SULAWESI, although it has decreased in PUMA. Meanwhile, competitors show movement in certain regions, mostly exhibiting a negative trend, with the exception of 3 TRI in KALIMANTAN.

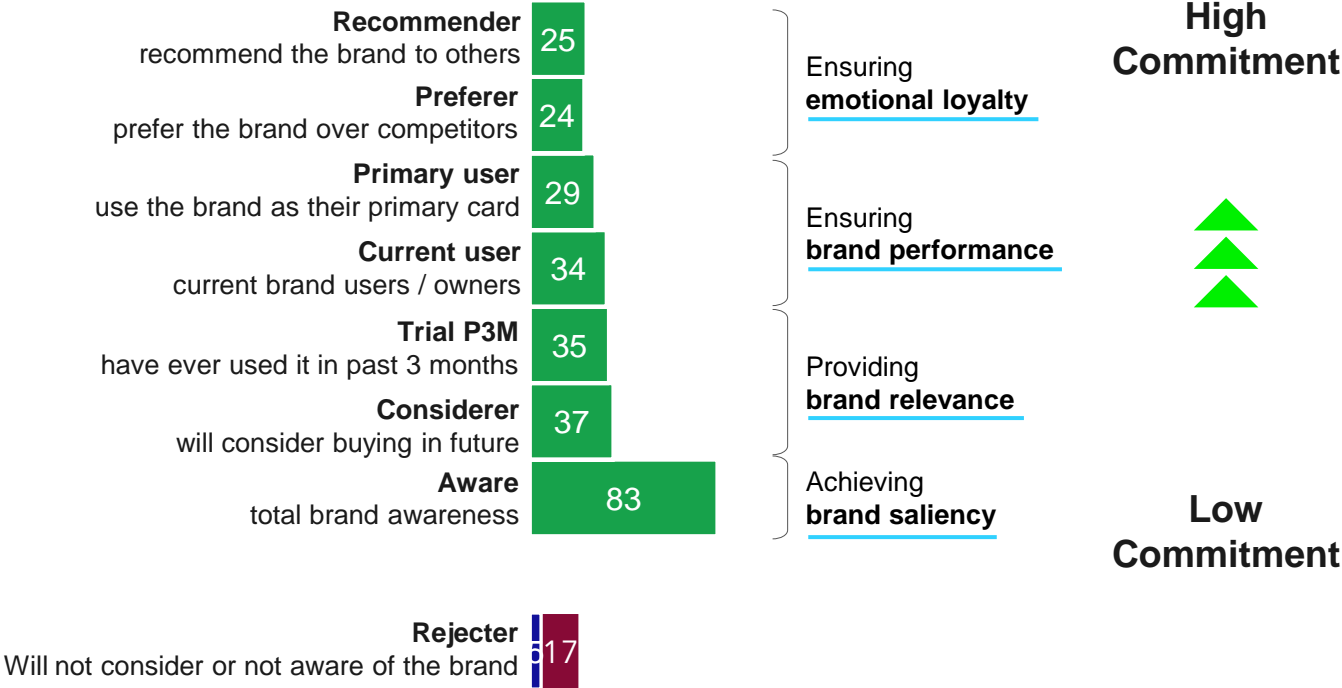


Base: Mobile phone users (BEI is significant if +/- 0.3 points)

GREEN: Significantly improve RED: Significantly decline

Brand leverage

Brand leverage: Where's your brand losing its franchise?



Brand leverage: Summary

In addition to strengthening its brand equity, TSEL PRABAYAR has also improved across all funnel components, up to the emotional level, which has positively impacted TSEL PRE TOTAL overall. Meanwhile, XL PRE has also improved its funnel, although the emotional level has not been impacted yet. On the other hand, ISAT and 3 TRI appear to have decreased in primary users, while SMARTFREN has lost a few trialists.

Brand Leverage

In percentage (%)

TSEL PRE TOTAL is a combination of simPATI, Kartu AS, LOOP, and Telkomsel PraBayar
**TSEL PRABAYAR is Telkomsel PraBayar, a new branding launched in Jun'21 (just added into the study by Jul'21)

	TSEL PRE TOTAL			TSEL PRABAYAR			BY.U			ISAT PRE			3 TRI			XL PRE			AXIS			SMARTFREN		
	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Recommender	27	+1	+0	4	+1	+1	2	+0	+0	11	+0	+0	11	+0	-1	5	+0	+0	8	+0	+0	5	+0	+0
Preferer	27	+1	+1	4	+1	+1	1	+0	+0	12	+0	+0	11	+0	-1	5	+0	+0	9	+0	+0	5	+0	-1
Primary user	40	+1	+1	11	+1	+1	1	+0	+0	18	+0	-1	12	+0	-1	10	+0	+1	9	+0	+0	5	+0	+0
Current user	48	+1	+1	14	+1	+1	2	+0	+0	23	+0	+0	15	+0	+0	12	+0	+1	11	+0	+0	7	+0	+0
Trial P3M	51	+1	+1	16	+1	+1	3	+0	+0	25	+0	+0	17	+0	+0	13	+0	+1	12	+0	+0	8	+0	-1
Considerer	54	+1	+1	18	+1	+2	6	+0	+1	28	+0	+0	21	+1	+0	15	+1	+1	15	+0	+0	11	+0	-1
Aware	87	+0	-1	43	+1	+3	22	+0	+1	72	+0	-1	72	+0	-1	48	+0	+0	67	+0	-2	62	+0	-2
Rejecter	913	-1	+0	37	-1	-3	48	+0	-1	828	+0	+0	328	+1	+1	52	+0	+0	133	+1	+2	138	+1	+3
Not Consider Not Aware																								
Retention	96			91			82			92			92			91			93			85		
Conversion	56			33			11			32			22			25			17			11		

Base: Mobile phone users

GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

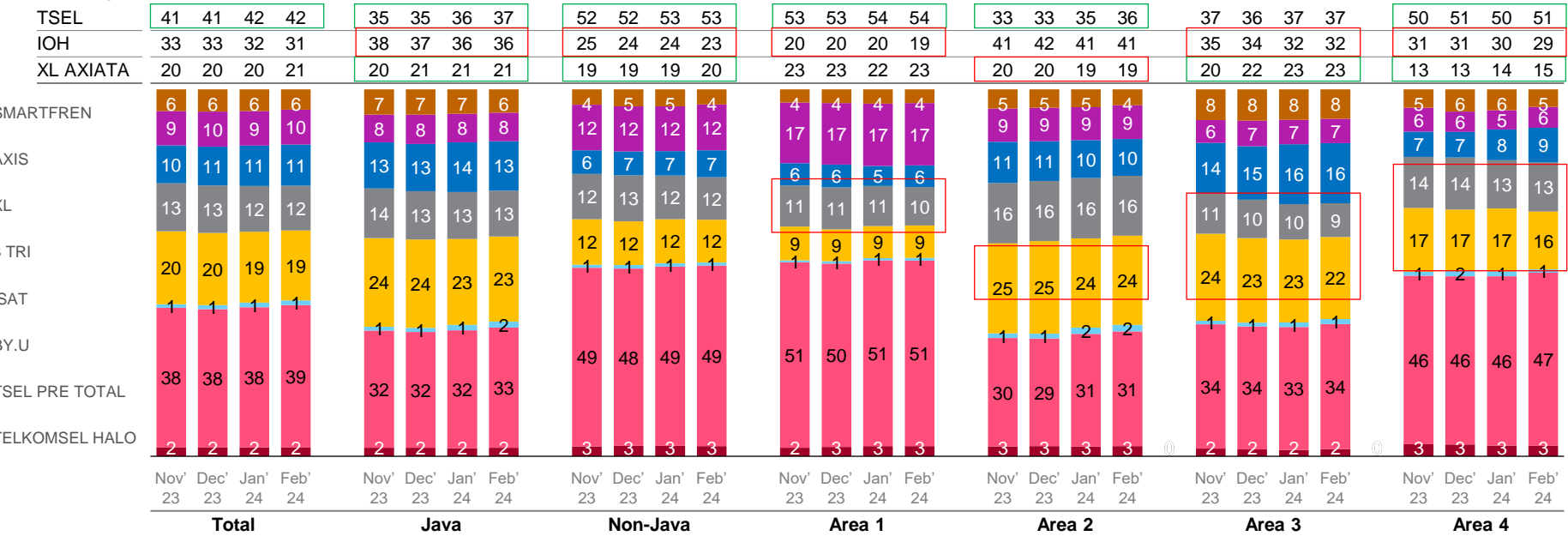
Data card share

Data card share

TSEL has boosted its market share across AREA 1, 2, and 4, surpassing IOH's share in JAVA with a particularly notable increase in AREA 2, coinciding with an uptick in customer satisfaction. Meanwhile, XL exhibits significant growth in AREA 3 and 4.

Data card share

In percentage (%)



Base: Mobile data users

Primary card: Most frequent used data card + legacy only main card

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

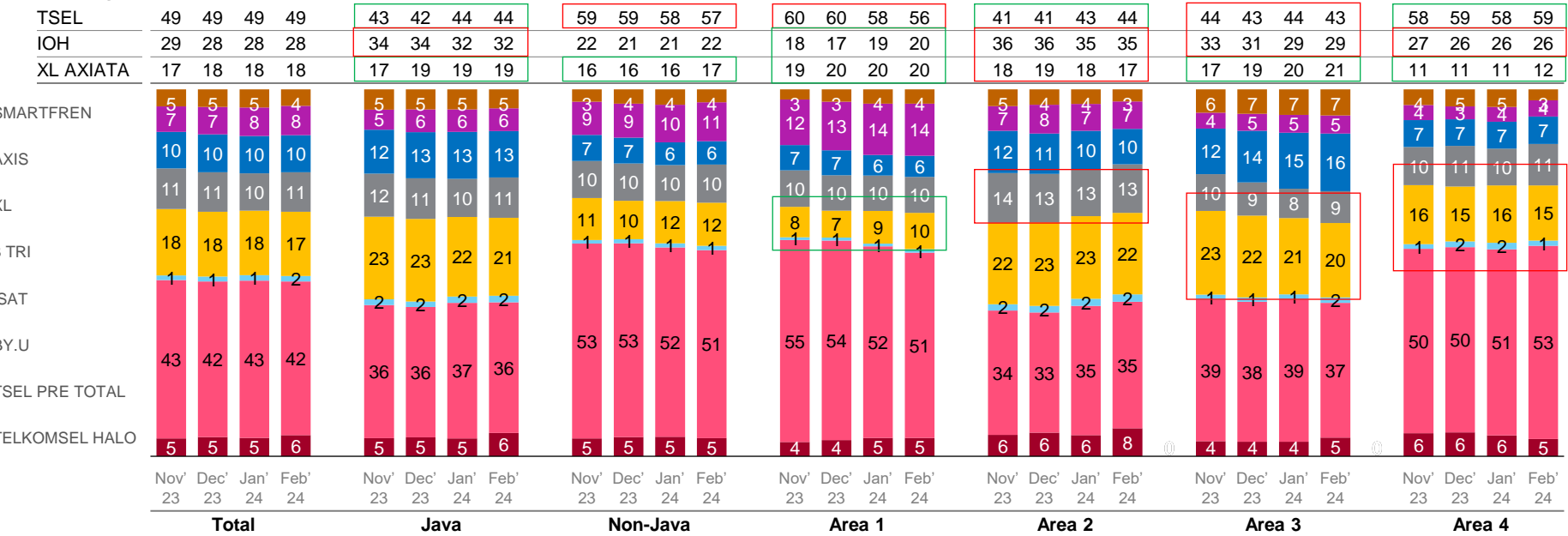
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Revenue data card share

The growth in revenue share highlights the expanding market presence of both TSEL and XL. However, in AREA 1, TSEL's revenue share contradicts its card share, indicating potential pricing discount.

Revenue data card share

In percentage (%)



Base: Mobile data users

Revenue card: Spending per Card Claims

Brand imagery

Brand imagery: National level

At the national level, all competitors, including BY.U, have seen a decline in perception regarding network coverage. Meanwhile, TSEL's position on this matter remains steady. In fact, TSEL has even strengthened perceptions of its legacy and data network quality, as well as perceptions of data tariff competitiveness.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Network	Best 4G coverage	45	+1	+0	26	-1	-2	25	-2	-5	20	-2	-4	27	-2	-5	21	-2	-4	19	-3	-6
	Strong signal outside the building	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Strong signal inside the building	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Best telephone quality	32	+3	+4	17	+2	+3	18	+1	+2	14	+1	+2	19	+1	+2	16	+1	+3	14	+1	+2
	Best data / internet connection quality	40	+4	+7	24	+1	+3	24	+1	+3	18	+1	+1	26	+1	+3	20	+1	+2	18	+0	+1
	Best streaming quality	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Offering	Value for money	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Packages that suit my needs	21	+1	+1	21	+2	+3	23	+2	+3	22	+3	+4	21	+2	+3	20	+2	+4	19	+2	+5
	Digital services that suit my needs	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Best tariff for telephone and SMS	18	+1	+0	15	+1	+2	20	+1	+2	19	+1	+1	18	+1	+1	19	+1	+2	16	+0	+1
	Best tariff for data package	24	+1	+2	30	+3	+6	33	+2	+3	36	+2	+4	29	+1	+3	31	+1	+3	27	+1	+2
	Best tariff for digital services package	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Cust. Engagement	Best bonus and promotion	21	+1	+1	26	+3	+6	27	+1	+2	30	+2	+3	25	+1	+2	28	+0	+1	25	+1	+2
	Best selfcare application	19	-1	-4	19	-3	-6	17	-2	-5	15	-1	-2	19	-2	-5	14	-1	-2	14	-1	-3
Sales	Appreciates customer loyalty with special programs	14	+0	-1	14	-1	+1	13	+0	+0	12	+0	+0	13	+0	+0	12	+0	+1	11	+0	+0
	Easiest top-up/purchases package	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Com. & Branding	Best customer service	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Brand often advertises on TV	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Brand often advertises and active on social media	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Cool brand	24	+1	+1	34	+2	+4	24	+1	+1	24	+1	+1	25	+1	+2	24	+0	+0	23	+1	+1
	Prestigious brand	27	+1	+1	22	+2	+4	19	+0	+1	16	+0	+1	22	+1	+2	18	+1	+1	17	+1	+1
	Innovative brand	20	+0	+0	23	+1	+1	21	+0	+1	21	+0	+1	22	+1	+1	21	+1	+0	21	+1	+1

Base: Mobile phone users aware of the respective brand

GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

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Brand imagery: Area 1

The decreasing positioning on network coverage among competitors is also apparent in AREA 1. Moreover, the enhancement of TSEL's legacy and data network quality is also noticeable within this area. However, TSEL may need to take note that perceptions of legacy tariff and customer engagement are declining.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Network	Best 4G coverage	40	+1	+1	24	-2	-3	18	-1	-3	16	-2	-6	22	-2	-1	19	-1	-4	16	-2	-5
	Strong signal outside the building	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	
	Strong signal inside the building	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	
	Best telephone quality	31	+4	+7	17	+3	+4	14	+2	+2	12	+2	+3	17	+3	+5	13	+1	+1	12	+0	+0
	Best data / internet connection quality	35	+5	+10	24	+1	+5	17	+2	+3	15	+2	+2	19	+2	+4	19	+2	+4	13	+0	+1
	Best streaming quality	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Offering	Value for money	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Packages that suit my needs	19	-1	-1	17	+0	-1	17	+2	+2	17	+2	+3	18	+2	+2	17	+2	+3	15	+2	+2
	Digital services that suit my needs	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Best tariff for telephone and SMS	18	+0	-2	16	+0	+2	17	+1	+2	16	+1	+2	17	+1	+2	16	+0	+1	14	+1	+2
	Best tariff for data package	22	+1	+0	30	+3	+7	25	+1	+0	30	+2	+4	25	+1	+3	29	+2	+2	23	+2	+3
	Best tariff for digital services package	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Cust. Engagement	Best bonus and promotion	19	+1	+0	26	+2	+8	22	+0	+2	26	+2	+5	23	+1	+2	25	-1	+1	20	+0	+1
	Best selfcare application	16	-2	-4	17	-5	-8	15	-2	-4	14	-1	+1	17	-3	-4	12	+0	-2	13	-1	-3
Sales	Appreciates customer loyalty with special programs	12	-1	-2	15	+0	+3	12	-1	+0	11	+0	+0	11	+0	-1	11	+0	+2	10	-1	+0
	Easiest top-up/purchases package	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Com. & Branding	Best customer service	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Brand often advertises on TV	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Brand often advertises and active on social media	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Cool brand	21	-1	+0	30	+2	+1	21	-1	+0	24	+1	+1	24	-2	-2	21	-1	-3	23	+1	+2
	Prestigious brand	23	+0	+0	21	+0	+4	15	-2	-2	15	+0	-2	18	-1	+0	17	-1	-1	16	+0	+1
	Innovative brand	17	+0	+0	21	-2	+0	18	+0	+0	19	+1	+2	20	+1	+2	19	+1	+1	19	+1	+2

Base: Mobile phone users aware of the respective brand in AREA 1

GREEN: Significantly improve RED: Significantly decline

Brand imagery: Area 2

In AREA 2, TSEL has improved its positioning in network, offerings, and branding, except for a decrease in network coverage and self-care app perception. Additionally, both TSEL and its competitors experience weaknesses in network coverage and selfcare app perception.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Network	Best 4G coverage	49	+0	-2	29	-1	-1	33	-1	-3	24	-2	-3	31	-2	-5	28	+0	-1	23	-2	-4
	Strong signal outside the building	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Strong signal inside the building	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Best telephone quality	34	+2	+3	20	+2	+5	22	+1	+4	17	+2	+4	22	+1	+1	21	+3	+8	17	+2	+3
	Best data / internet connection quality	44	+3	+5	27	+3	+4	29	+2	+2	23	+1	+3	31	+3	+2	26	+2	+4	22	+1	+3
	Best streaming quality	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Offering	Value for money	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Packages that suit my needs	26	+3	+4	23	+4	+5	26	+3	+4	25	+4	+5	22	+2	+2	24	+3	+7	23	+5	+8
	Digital services that suit my needs	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Best tariff for telephone and SMS	22	+2	+4	19	+3	+4	24	+2	+4	23	+2	+1	20	+2	+2	23	+1	+2	19	+0	+1
	Best tariff for data package	30	+2	+5	34	+3	+10	39	+3	+4	41	+2	+3	30	+0	+0	35	-1	+1	30	+0	+1
	Best tariff for digital services package	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Best bonus and promotion	26	+1	+3	30	+3	+5	34	+2	+2	35	+2	+0	29	+1	+3	32	+1	+1	28	+1	+0
Cust. Engagement	Best selfcare application	25	-1	-4	22	-1	-4	22	-2	-5	17	-1	-2	23	-2	-5	19	-1	+0	17	+0	-1
	Appreciates customer loyalty with special programs	19	+1	+1	17	-1	+1	17	+1	+2	15	+1	+3	17	+1	+1	15	+2	+3	14	+0	+3
Sales	Easiest top-up/purchases package	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Best customer service	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Com. & Branding	Brand often advertises on TV	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Brand often advertises and active on social media	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Cool brand	29	+2	+4	37	+4	+5	28	+2	+3	26	+1	+3	30	+1	+4	27	+1	+3	24	+0	+1
	Prestigious brand	32	+3	+4	25	+2	+7	21	+2	+3	18	+1	+4	26	+3	+4	20	+3	+4	18	+3	+4
	Innovative brand	25	+2	+4	27	+2	+2	25	+2	+3	24	+2	+4	26	+2	+2	25	+2	+3	25	+1	+3

Base: Mobile phone users aware of the respective brand in AREA 2

GREEN: Significantly improve RED: Significantly decline

Brand imagery: Area 3

In AREA 3, TSEL's network coverage and customer engagement have weakened, but there's a strengthening perception regarding network quality. Competitors in this area also show weaknesses in network coverage and selfcare app perception.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Network	Best 4G coverage	43	+0	-2	22	-3	-4	24	-4	-7	18	-3	-5	26	-3	-6	17	-4	-9	19	-3	-7
	Strong signal outside the building	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	
	Strong signal inside the building	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	
	Best telephone quality	28	+2	+3	13	+0	+1	17	+1	+2	13	-1	-1	19	+0	+2	13	-1	+0	12	+0	+1
	Best data / internet connection quality	38	+3	+7	22	-1	+0	24	+2	+4	15	-1	-2	25	+1	+5	16	-1	-1	17	-1	+0
	Best streaming quality	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Offering	Value for money	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Packages that suit my needs	19	+0	+0	20	+1	+3	23	+1	+2	21	+2	+4	21	+1	+3	19	+1	+3	19	+1	+4
	Digital services that suit my needs	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Best tariff for telephone and SMS	15	+0	+0	11	+0	+0	18	+1	+1	18	+1	+1	18	+0	+0	18	+0	+2	14	+0	+1
	Best tariff for data package	22	+1	+1	26	+3	+3	33	+2	+6	36	+2	+4	29	+2	+5	30	+2	+6	27	+1	+3
	Best tariff for digital services package	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Cust. Engagement	Best bonus and promotion	18	+1	+1	23	+3	+6	24	+1	+3	28	+1	+3	24	+1	+2	26	+0	+2	24	+2	+4
	Best selfcare application	17	-2	-4	17	-4	-8	15	-3	-5	12	-2	-4	16	-3	-5	11	-2	-3	12	-2	-3
Sales	Appreciates customer loyalty with special programs	11	-1	-2	11	-1	+0	12	-1	-1	10	-1	-1	11	-1	-1	11	+0	+0	10	+0	-1
	Easiest top-up/purchases package	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Com. & Branding	Best customer service	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Brand often advertises on TV	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Brand often advertises and active on social media	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Cool brand	22	+0	+0	35	+1	+6	23	+0	+1	22	+0	+0	23	+1	+1	23	+1	+0	22	+1	+1
	Prestigious brand	25	+0	+0	18	+1	+1	18	-1	+1	15	+0	+0	20	+0	+0	16	-1	-1	15	+0	-1
	Innovative brand	17	-1	-1	20	+0	+0	18	+0	+1	19	-2	-1	18	-1	-1	19	-1	-2	18	-1	-1

Base: Mobile phone users aware of the respective brand in AREA 3

GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

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Brand imagery: Area 4

In AREA 4, TSEL strengthens its network positioning, but there are declines in its offering, customer engagement, and innovative branding. Meanwhile, competitors also show weaknesses in network coverage within this area.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Network	Best 4G coverage	46	+2	+4	28	+0	-1	22	-2	-5	20	-1	-2	23	-3	-4	17	+0	-1	18	-4	-6
	Strong signal outside the building	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Strong signal inside the building	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Best telephone quality	36	+4	+6	19	+2	+5	17	+1	+1	14	+1	+3	17	+1	+1	13	+1	+2	13	+1	+2
	Best data / internet connection quality	40	+4	+7	21	+2	+1	23	-1	+1	21	+1	+3	22	+0	-2	19	+0	+0	18	-1	+0
	Best streaming quality	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Offering	Value for money	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Packages that suit my needs	22	+0	-1	20	-1	+1	22	+1	+1	24	+3	+6	22	+2	+3	20	+2	+3	16	+0	+1
	Digital services that suit my needs	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Best tariff for telephone and SMS	19	-1	-2	14	-1	-1	18	+0	-1	16	+0	-1	17	-1	-3	15	+1	+0	14	-1	+1
	Best tariff for data package	23	+0	+0	28	+4	+5	31	+0	+0	36	+2	+4	30	+2	+2	29	+2	+2	27	-1	+1
	Best tariff for digital services package	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Cust. Engagement	Best bonus and promotion	20	+0	-1	26	+2	+3	24	+1	-1	28	+1	+4	25	+2	+3	25	+1	+1	26	+1	+3
	Best selfcare application	18	-1	-4	17	-2	-8	15	-4	-7	15	-1	-3	16	-3	-5	13	-1	-2	11	-3	-5
Sales	Appreciates customer loyalty with special programs	11	-1	-4	12	-2	-3	11	+0	-2	9	+0	-2	13	+1	+1	9	-1	-2	10	+0	-1
	Easiest top-up/purchases package	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Com. & Branding	Best customer service	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Brand often advertises on TV	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Brand often advertises and active on social media	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Cool brand	22	+0	-1	29	+1	+3	24	+2	-2	25	+2	+1	25	+2	+1	25	+1	-2	24	+1	+0
	Prestigious brand	25	+1	+1	23	+2	+4	19	+1	+2	19	+2	+0	22	+1	+2	20	+1	+2	19	+1	+0
	Innovative brand	19	+0	-2	24	+1	+4	21	+1	-1	23	+1	+1	24	+2	+1	23	+1	-1	23	+2	-1

Base: Mobile phone users aware of the respective brand in AREA 4

GREEN: Significantly improve RED: Significantly decline

Omnichannel Evaluation

Consumers' experience on telco
transaction channel for packages

Where do people go to purchase packages?

TSEL users exhibit no significant change in their purchasing channels. However, there is a significant shift among BY.U users, moving from direct to modern or traditional channels. Likewise, AXIS and SMARTFREN users are also transitioning to modern channels, while XL users are moving towards traditional channels.

Package Purchase Channel

In percentage (%)

	TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M	Feb' 24	Δ1M	Δ3M
Direct	38	+0	+0	37	-5	-15	23	-1	-2	24	+1	+0	28	-1	-2	17	-1	+0	15	+2	+0
Modern	24	+0	+1	40	-3	+2	28	+0	+1	24	+2	+3	22	+1	+0	15	+0	+3	19	+0	+2
Traditional	38	+0	+0	23	+8	+13	49	+1	+1	52	-3	-3	50	+0	+2	68	+1	-2	66	-2	-2

Base: Respective primary card users

Direct: Service center, selfcare app, virtual assistant, UMB | Modern: Modern trade, banking, e-commerce, website, mobile wallet | Traditional: Counter

GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

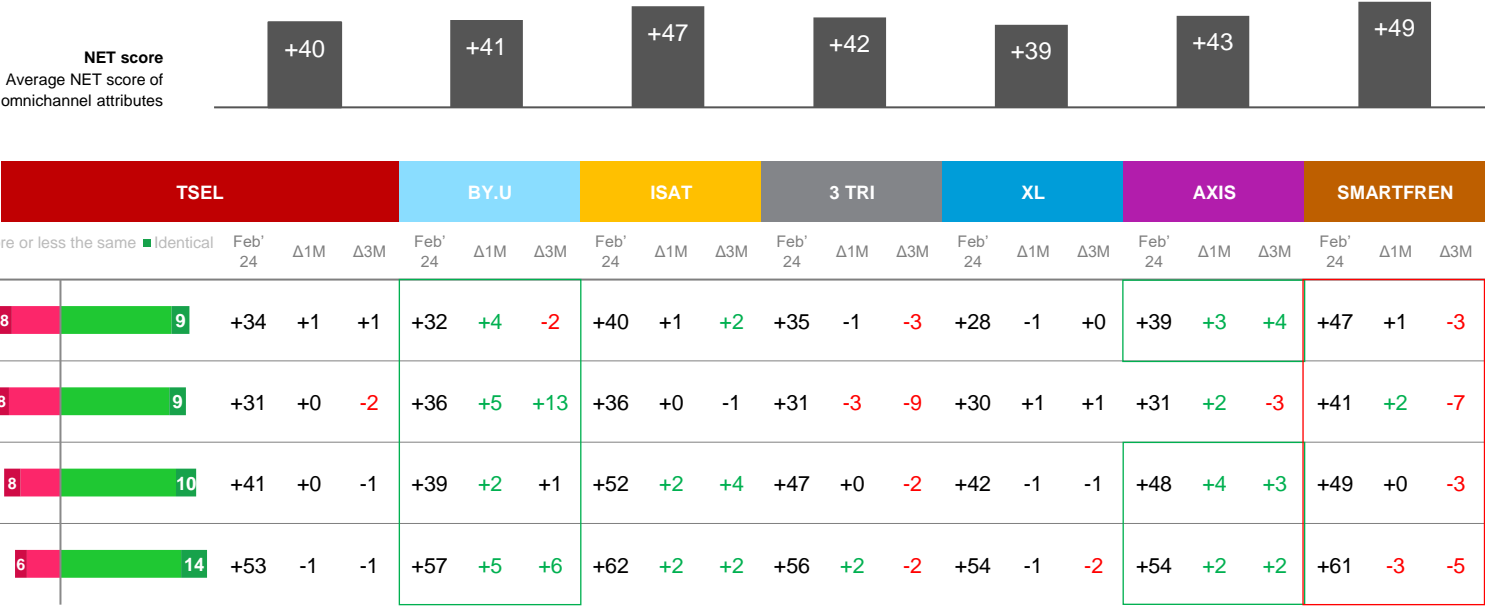
The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

The similarities or differences observed across various channels

BY.U demonstrated significant improvement in various omnichannel experiences, while XL's score remained relatively stable, with a slight decline in secure transactions. AXIS experienced enhancements across almost all experiences, except in package specifications, whereas SMARTFREN encountered decreases across all experiences.

Omnichannel Experience Score

NET score with range -100 to +100



Base: Respective primary card users

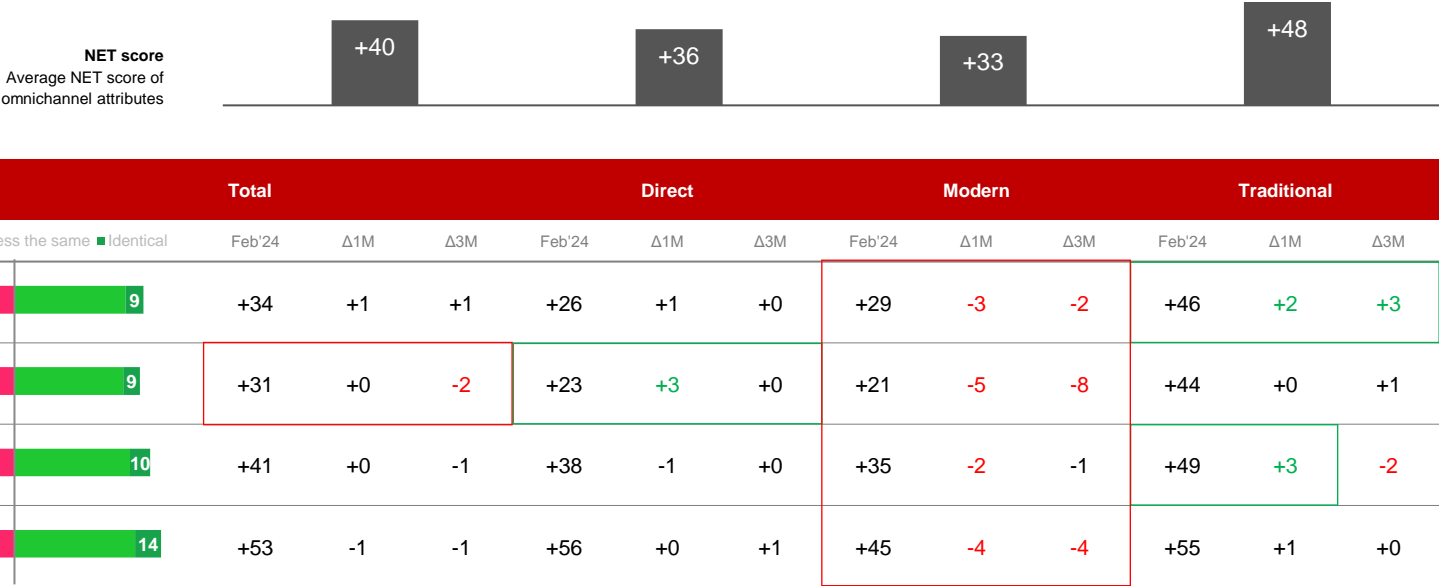
GREEN: Significantly improve RED: Significantly decline

TSEL: The similarities or differences observed across various channels

TSEL users experienced weaker performance in package specifications among modern channel users but saw an increase in the direct channel. Additionally, TSEL users utilizing the traditional channel had a better experience in package information and transaction experience.

Omnichannel Experience Score

NET score with range -100 to +100



Base: TSEL primary card users

Direct: Service center, selfcare app, virtual assistant, UMB | Modern: Modern trade, banking, e-commerce, website, mobile wallet | Traditional: Counter

GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending FEB 2024 (Δ1M: gap change to JAN 2024 | Δ3M: gap change to NOV 2023)

The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

Summary

Summary: Customer satisfaction

TSEL's NPS has notably decreased in NON-JAVA areas, alongside declines observed in XL AXIATA and SMARTFREN in AREA 1. On the contrary, TSEL, 3 TRI, and AXIS have seen an increase in advocacy in AREA 2, while ISAT has declined in the same area. The trend in TSEL's CSI reflects that of its NPS, although not entirely. Additionally, BY.U's CSI has demonstrated positive movement in AREA 1 and 4, albeit not impacting the NPS.

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Total	CSI	7.56			7.64		▲	7.35			7.25			7.26			7.38		▲	7.17		
	NPS	+48			+44			+35		▼	+32			+38			+35			+31		
Java	CSI	7.60			7.57			7.38			7.18			7.28			7.34			7.15		▼
	NPS	+51			+41			+35		▼	+30			+40		▲	+33		▲	+32		
Non-Java	CSI	7.51			7.88		▲	7.26			7.38			7.21			7.43		▲	7.24		▲
	NPS	+44		▼	+55			+33			+36			+29		▼	+37		▼	+30		
Area 1	CSI	7.47			7.39		▲	7.16			7.27		▼	7.15			7.42		▲	7.19		▲
	NPS	+41			+44			+23			+36			+21		▼	+36		▼	+24		▼
Area 2	CSI	7.73			7.73		▼	7.73			7.73			7.73			7.73		▲	7.73		
	NPS	+59		▲	+59			+59		▼	+59		▲	+59		▲	+59		▲	+59		
Area 3	CSI	7.50		▼	7.50			7.50			7.50		▼	7.50		▼	7.50		▼	7.50		▼
	NPS	+46		▼	+46			+46		▼	+46		▼	+46			+46			+46		
Area 4	CSI	7.58			7.58		▲	7.58			7.58		▲	7.58			7.58		▲	7.58		▲
	NPS	+47		▼	+47			+47			+47			+47			+47		▼	+47		▲

Base: Respective primary card users

CSI is significant if +/- 0.1 points

NPS significance based on NET score

▲ Significantly improve ▼ Significantly decline

Summary: Brand performance

TSEL PRABAYAR strengthens brand equity in various regions, although this is not reflected at the area level. Subsequently, TSEL PRE TOTAL's market share increases, particularly noticeable in AREA 2, where there was previously an improvement in customer satisfaction.

		TELKOMSEL HALO			TSEL PRE TOTAL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M	Feb'24	Δ1M	Δ3M
Total	BEI	0.4			3.5			0.3			1.7			1.6			0.9			1.3			0.9		
	Share	2			39			1			19			12			11			10			6		
Java	BEI	0.4			3.0			0.4			2.0			1.6			1.1			1.2			1.0		
	Share	2			33			2			23			13			13			8			6		
Non-Java	BEI	0.4			4.3			0.3			1.2			1.5			0.6			1.4			0.7		
	Share	3			49			1			12			12			7			12			4		
Area 1	BEI	0.4			4.4			0.2			1.0			1.4			0.5			1.8			0.6		
	Share	3			51			1			9			10			6			17			4		
Area 2	BEI	0.4			3.1			0.5			2.1			2.1			0.9			1.3			0.8		
	Share	3			31		▲	2			24			16			10			9			4		
Area 3	BEI	0.3			3.0			0.3			2.0			1.3			1.2			1.1			1.2		
	Share	2			34			1			22			9		▼	16		▲	7			8		
Area 4	BEI	0.4			4.1			0.3			1.5			1.7			0.7			0.9			0.7		
	Share	3			47			1			16		▼	13			9		▲	6			5		

Base: Mobile phone users

BEI is significant if +/- 0.3 points

Card share is significant if +/- 2%

▲: Significantly improve ▼: Significantly decline

Analysis by region: CSI vs. NPS trend

CSI increase		Sumbagut	Jabar
CSI stable	Sumbagteng Kalimantan	Sumbagsel Western Jabo Central Jabo	Eastern Jabo Jateng DIY Sulawesi
CSI decrease	Jatim Puma	Bali Nusra	
	NPS decrease	NPS stable	NPS increase

Analysis by region: Detail issue(s) or improvement(s)

CSI	increase		(+) Network, tariff, selfcare app, loyalty program	(+) Network, package specs
	stable	(-) Network		
	decrease	(-) Network	(-) Network, legacy tariff, loyalty program, package specs, purchase method	
		NPS decrease	NPS stable	NPS increase

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