Consumer Study on Telco Operator

KPI report
Data ending: Mar’24

April 2024

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.

	Jan 2024 (Offline + Online)	Feb 2024 (Offline + Online)	Mar 2024 (Offline + Online)
Fieldwork Period	Jan 2024	Feb 2024	Mar 2024
Coverage	Urban + Rural, 13 TSEL regions *PUMA urban only*	Urban + Rural, 13 TSEL regions *PUMA urban only*	Urban + Rural, 13 TSEL regions *PUMA urban only*
Sampling Method	Random and Online survey panel	Random and Online survey panel	Random and Online survey panel
Interview Method	• Door to Door in respondent's house (Face to Face Interview) • and Self-completion	• Door to Door in respondent's house (Face to Face Interview) • and Self-completion	• Door to Door in respondent's house (Face to Face Interview) • and Self-completion
Target Respondents	• Offline: 5,651 resp • Online: 3,923 resp	• Offline: 5,628 resp • Online: 3,902 resp	• Offline: 5,807 resp • Online: 3,695 resp
Respondent Criteria	• HP users • Male or female • 12-55 YO, All SES	• HP users • Male or female • 12-55 YO, All SES	• HP users • Male or female • 12-55 YO, All SES

Sample size and coverage

Respondent Type	Achieved Sample
Offline Study	17,086
Online Study	11,520
Total	**29,561**

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	Area 2	Area 3	Area 4
Sumbagut, Sumbagteng, Sumbagsel: **22%**	Jabotabek, Jabar: **29%**	Jateng DIY, Jatim, Bali Nusra: **34%**	Kalimantan, Sulawesi, Puma: **15%**
n = 8,442 | N = 37,014,000	n = 6,023 | N = 47,846,000	n = 10,501 | N = 56,193,000	n = 4,595 | N = 24,387,000

Contents

Customer satisfaction

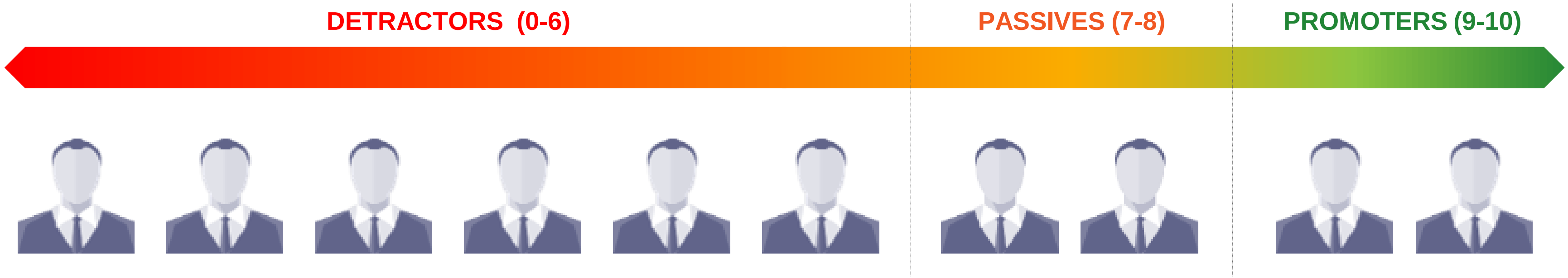
Identify, track, and review how to better meet your customers' expectations and secure their loyalty

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 has decreased, while ISAT has gained more promoters in the past month, leading to a narrowing gap between TSEL and the industry average.

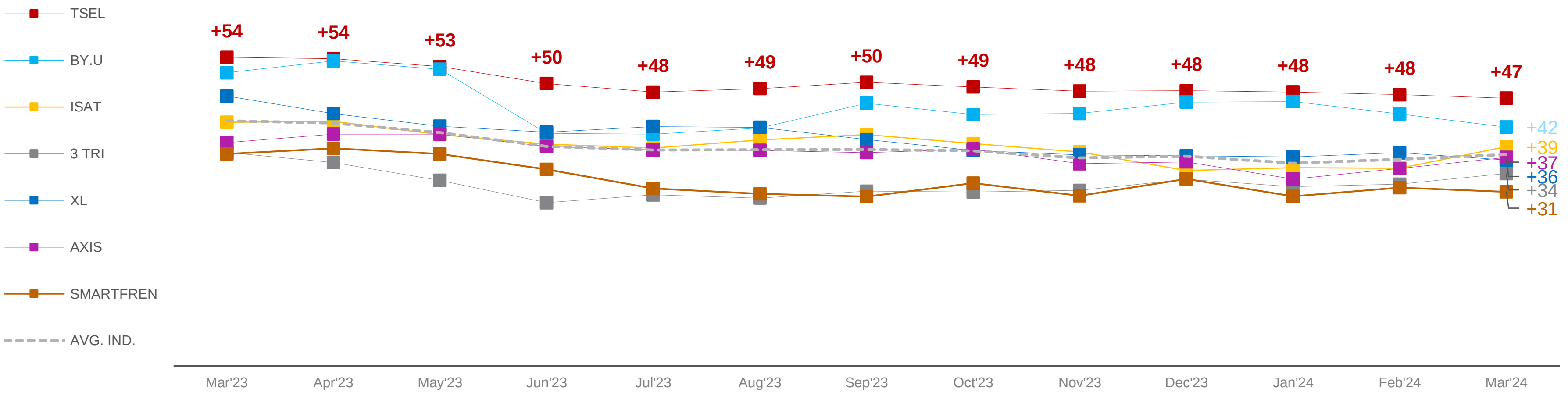
Net Promoter Score (NPS): P1Y Trend

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

	Mar'23	Apr'23	May'23	Jun'23	Jul'23	Aug'23	Sep'23	Oct'23	Nov'23	Dec'23	Jan'24	Feb'24	Mar'24
TSEL VS AVG. IND.	26%	27%	28%	29%	27%	28%	31%	30%	32%	31%	35%	31%	27%



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

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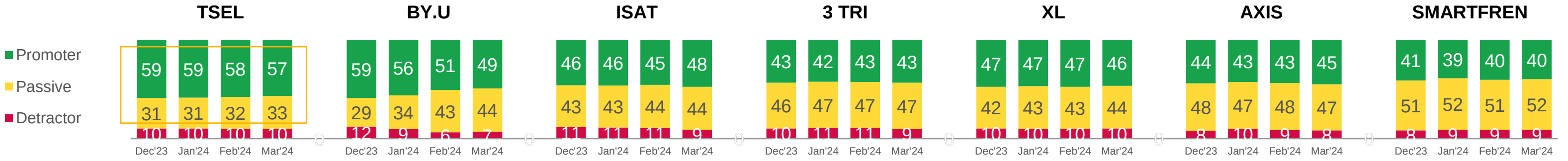
Net Promoter Score (NPS): Summary

TSEL's NPS has decreased noticeably as promoters shift to passive. This decline is evident in AREA 3 (Jatim) and AREA 4 (all regions), with BY.U also experiencing a significant decrease in AREA 4. However, TSEL has seen an increase in all regions of AREA 2, except in Central Jabo. Meanwhile, ISAT has gained higher advocacy across all areas, both in Java and non-Java regions.



			TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
	AVG. IND.*	TSEL VS AVG. IND.	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Total	**+37**	**27%**	**+47**	**-1**	**-1**	**+42**	**-2**	**-4**	**+39**	**+4**	**+4**	**+34**	**+2**	**+1**	**+36**	**-1**	**-1**	**+37**	**+2**	**+1**	**+31**	**-1**	**-2**
Java	**+38**	**34%**	**+51**	**-1**	**+0**	**+43**	**+2**	**+2**	**+39**	**+3**	**+2**	**+32**	**+2**	**+1**	**+38**	**-2**	**+0**	**+36**	**+3**	**+4**	**+31**	**+0**	**-2**
Non-Java	**+36**	**20%**	**+43**	**+0**	**-3**	**+38**	**-17**	**-18**	**+38**	**+5**	**+11**	**+38**	**+2**	**+1**	**+31**	**+2**	**-4**	**+37**	**+1**	**-3**	**+28**	**-2**	**-2**
Area 1	**+31**	**34%**	**+41**	**+0**	**-1**	**+38**	**-6**	**-7**	**+31**	**+8**	**+22**	**+34**	**-1**	**-3**	**+20**	**-1**	**-16**	**+37**	**+1**	**-1**	**+21**	**-3**	**-9**
Sumbagut	+33	36%	+46	+0	+2	+42	-7	-24	+42	-1	+9	+28	-7	-1	+13	+5	-24	+40	+6	+1	+33	+4	+24
Sumbagteng	+28	23%	+35	+4	+3	+31	-6	+14	+23	+1	+4	+36	+4	+10	+30	+5	+9	+16	+0	-5	+29	+5	+25
Sumbagsel	+31	33%	+41	-4	-9	+35	-10	-39	+28	+12	+30	+37	+0	-10	+17	-10	-27	+45	-5	+0	+17	-6	-23
Area 2	**+40**	**50%**	**+61**	**+2**	**+7**	**+46**	**+2**	**+5**	**+41**	**+3**	**+4**	**+38**	**+4**	**+10**	**+37**	**-4**	**-1**	**+35**	**+4**	**+5**	**+31**	**+5**	**+2**
Western Jabotabek	+37	72%	+63	+7	+14	+61	-1	+16	+37	+9	+7	+23	-4	-11	+31	+14	+1	+24	+4	-3	+42	+19	+8
Central Jabotabek	+51	26%	+64	-3	-4	+87	+17	+28	+55	+5	+3	+44	+2	+7	+43	-9	-12	+51	-1	-3	+48	+2	+13
Eastern Jabotabek	+41	40%	+57	+2	+6	+27	-5	-2	+34	+0	-4	+45	+0	+13	+32	-17	-14	+54	+7	+27	+23	-3	-10
Jabar	+40	51%	+60	+2	+9	+40	+5	+3	+48	+4	+13	+36	+11	+17	+41	+1	+12	+30	+3	+0	+24	+7	+6
Area 3	**+35**	**22%**	**+43**	**-3**	**-6**	**+41**	**+3**	**-1**	**+36**	**+4**	**+1**	**+23**	**+0**	**-11**	**+39**	**-1**	**+1**	**+37**	**+1**	**+2**	**+32**	**-3**	**-5**
Jateng DIY	+33	17%	+39	+1	+1	+25	-1	-3	+29	+4	+1	+26	+2	+2	+37	+4	+16	+34	+4	+3	+34	+0	-1
Jatim	+37	23%	+45	-8	-18	+47	+8	-15	+43	+3	+2	+18	-4	-28	+50	+1	-3	+38	-3	-2	+28	-12	-14
Bali Nusra	+33	30%	+43	+2	+6	+62	-19	-3	+31	+6	-4	+45	+8	+8	+32	-7	-6	+47	+0	+11	+2	-3	-14
Area 4	**+42**	**11%**	**+47**	**+0**	**-5**	**+37**	**-31**	**-24**	**+45**	**+3**	**+4**	**+42**	**+6**	**+6**	**+42**	**+5**	**+7**	**+38**	**+1**	**-11**	**+39**	**+3**	**+9**
Kalimantan	+45	8%	+49	+2	-4	+63	+15	+36	+39	+3	-3	+41	+10	+8	+50	+11	+10	+45	+6	-14	+49	+7	+5
Sulawesi	+40	17%	+47	-2	-5	+24	-52	-55	+52	+2	+12	+42	+1	+4	+38	+1	+7	+25	-10	-6	+37	+1	+12
Puma	+36	-4%	+34	+1	-10	+13	-4	-68	+76	+2	+15	+37	+18	+1	+60	+1	+33	-3	+0	-3	+10	-1	-35

*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

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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			
		Mar'24	Δ1M	Δ3M		Mar'24	Δ1M	Δ3M		Mar'24	Δ1M	Δ3M		Mar'24	Δ1M	Δ3M
Top 5 Cities	**Kota Palembang**	+82		▲	**Kota Jakarta Pusat**	+95		▲	**Kab. Trenggalek**	+83			**Kab. Bolaang Mongondow**	+86		
	Kab. Serdang Bedagai	+78			**Kota Tangerang**	+78	▲	▲	**Kab. Nganjuk**	+81			**Kota Ternate**	+74		
	Kab. Pringsewu	+70			**Kota Bogor**	+75		▲	**Kab. Bangkalan**	+78			**Kab. Morowali**	+74		
	Kab. Bungo	+68			**Kota Tangerang Selatan**	+73		▲	**Kab. Sidoarjo**	+73	▼		**Kab. Ketapang**	+72		
	Kota Pangkal Pinang	+66			**Kab. Garut**	+70			**Kab. Mojokerto**	+65	▼		**Kota Balikpapan**	+69		
Bottom 5 Cities	**Kab. Bengkalis**	-9		▼	**Kab. Lebak**	-28			**Kab. Pacitan**	-29			**Kab. Sanggau**	+6		
	Kab. Muara Enim	-4	▼	▼	**Kab. Kuningan**	+13			**Kab. Jepara**	-1	▲		**Kab. Pangkajene dan Kepulauan**	+7		
	Kab. Bireuen	+4			**Kab. Indramayu**	+14			**Kab. Pasuruan**	+2			**Kab. Pinrang**	+13		
	Kab. Tanah Datar	+9	▲	▲	**Kab. Serang**	+15	▲		**Kab. Banjarnegara**	+8			**Kota Kendari**	+21		
	Kota Binjai	+12			**Kab. Karawang**	+18			**Kab. Bantul**	+15		▼	**Kota Ambon**	+21		

*Cities with a minimum base of 10 respondents

▲: Improve rank ▼: Decline rank

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TSEL: Reason for promoting

The reasons for advocating TSEL have shown insignificant change in the past quarter. However, although the mention is still low, there has been an increase in endorsements related to numerous promotions and network reliability.

Reason for promoting

In percentage (%)

	Mar'24	Δ1M	Δ3M
Stable signal	61		
Broad network coverage	27		
Strong internet connection	18		
Affordable data tariff	7		
Easy top-up everywhere	6		
Various packages available	6		
Many promos	3	▲	▲
Cheap rates	3	▼	▼
Network disruption-free	3		▲
Many people use it	2	▲	▼

The internet network is good, and the data quota is affordable. There are also inexpensive promotions available.
AREA 1, MALE, 12-24 YO, MIDDLE SEC

Because the signal is available everywhere, there are many package options and bonuses to choose from.
AREA 2, MALE, 12-24 YO, LOWER SEC

I have been using it since I first started using a mobile phone, around 20 years ago, and have never switched. The signal is stable, and I often receive special prices when purchasing data packages.
AREA 3, FEMALE, 35-55 YO, LOWER SEC

There are many packages available, such as promotions for calls and SMS, and the network is smooth.
AREA 4, FEMALE, 12-24 YO, UPPER SEC

Base: TSEL primary card users who are promoters

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

p: Improve rank q: Decline rank

Internal

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TSEL: Understanding positive feedback (reasons for promoting)

There is an increase in mentions about numerous promotions observed in AREA 1 and 2, with an improvement in NPS noted specifically in AREA 2.

Reason for promoting
In percentage (%)

	Total			Area 1			Area 2			Area 3			Area 4		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Stable signal	61			55			67			64			53		
Broad network coverage	27			28			27			27			29		
Strong internet connection	18			19			18			18			16		▲
Affordable data tariff	7			7		▲	6			8			7		▼
Easy top-up everywhere	6			6		▼	7			5	▲	▲	6		
Various packages available	6			4			10			4	▼	▼	4	▼	
Many promos	3	▲	▲	3	▲	▲	3		▲	3		▼	3	▲	
Cheap rates	3	▼	▼	3	▼	▼	3	▼	▼	4		▲	2	▼	▼
Network disruption-free	3		▲	2		▲	3	▼		3	▲	▲	4	▲	▲
Many people use it	2	▲	▼	3	▲		2	▼	▼	2	▲	▼	3		

Base: TSEL primary card users who are promoters

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

p: Improve rank q: Decline rank

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TSEL: Understanding positive feedback (reasons for promoting)

The enhancement of numerous promotions is observed in Sumbagteng, Sumbagsel, Central Jabo, Eastern Jabo, and Jabar. Additionally, in AREA 2 regions, there are improvements noted in affordable data tariffs (Jabar), ease of top-up (Western & Eastern Jabo), and the availability of various packages (Western Jabo & Jabar).

Reason for promoting

In percentage (%)

	Sumbagut			Sumbagteng			Sumbagsel			Western Jabotabek			Central Jabotabek			Eastern Jabotabek			Jabar		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Stable signal	51			57			58			66			65			66			69		
Broad network coverage	30			26			25			28			28			21			29		
Strong internet connection	20		▲	19		▲	18			19			21			14			18		
Affordable data tariff	6		▲	6		▼	7		▲	6	▲	▼	7			4		▼	7		▲
Easy top-up everywhere	4	▼	▼	9			5	▲	▲	7		▲	8		▼	6		▲	8		
Various packages available	6	▲	▲	3	▼	▼	3	▼	▼	8		▲	11		▲	11			10		▲
Many promos	4		▲	3	▲	▲	2	▲	▲	2	▼	▼	3	▲	▼	5	▼	▲	3		▲
Cheap rates	4	▼	▼	2	▼	▼	3	▼	▼	4	▼		4			2	▼	▼	2	▼	▼
Network disruption-free	1	▲	▲	2		▲	3	▲	▲	3	▼		4		▲	1	▼	▼	3	▲	▲
Many people use it	4	▲	▼	4	▲	▲	1	▲	▲	3	▲	▲	3	▼	▼	3	▲	▲	1	▼	▼

	Jateng DIY			Jatim			Bali Nusra			Kalimantan			Sulawesi			Puma		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Stable signal	62			65			62			54			53			43		
Broad network coverage	28			26			27			32			28			13		
Strong internet connection	23			15			14		▲	16			17		▲	5	▲	▲
Affordable data tariff	7		▲	8			8		▼	5		▼	6	▼	▼	28		
Easy top-up everywhere	6		▼	3	▼	▼	6			6	▼	▼	6	▲	▲	3	▼	
Various packages available	4	▼	▼	5			3	▼	▼	3	▲	▼	5	▼	▼	1	▼	▼
Many promos	3	▲	▲	4	▼	▼	3	▼	▼	3	▲	▼	3	▲	▲	2	▲	▼
Cheap rates	4	▲		5		▲	2	▼	▼	2	▼	▼	3	▼	▼	0	▼	▼
Network disruption-free	3	▲	▲	4	▲	▲	0	▼	▼	8	▲	▲	1	▲	▲	2	▼	▼
Many people use it	1	▲	▼	2	▲	▼	5	▲	▲	3	▲	▲	3	▼	▼	1	▼	▼

Base: TSEL primary card users who are promoters

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

p: Improve rank q: Decline rank

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

While TSEL receives advocacy for its promotions and commitment to network reliability, ISAT, which has experienced an increasing NPS, benefits from mentions highlighting its strong internet connection, network coverage, and diverse package offerings.

Reason for promoting across operators

Sorted by percentage rank

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

Base: Respective primary card users who are promoters

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

p: Improve rank q: Decline rank

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Internal

TSEL: Reason for detracting

Meanwhile, TSEL's detractors are increasingly mentioning expensive data tariffs. Additionally, there are more mentions of narrow network coverage and network disruptions among these detractors.

Reason for detracting

In percentage (%)

	Mar'24	Δ1M	Δ3M
Expensive data tariff	27	▲	
Expensive rates	25	▼	
Unstable signal	24		
Slow data connection	4		
Narrow network coverage	3		▲
Network disruption	2		▲
Unexpected charges	2		▼
Unstable signal	1	▲	▲
Unclear package offerings	1	▲	▲
Splitted internet quota	1	▲	▲

The network or signal is unsatisfactory at certain times and in certain areas. I kindly request Telkomsel to improve their primary service, which is stable and strong network coverage in all places and at all times.

AREA 1, MALE, 25-34 YO, UPPER SEC

The internet prices are not affordable, and the signal is often slow.

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

Lately, there have been frequent issues with their system related to the active period scheme.

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

The marketing often lacks transparency when offering packages and frequently traps consumers into choosing or being forced to select unnecessary packages.

AREA 4, MALE, 35-55 YO, MIDDLE SEC

Base: TSEL primary card users who are detractors

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

p: Improve rank q: Decline rank

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TSEL: Understanding negative feedback (reasons for detracting)

The increased mentions about expensive data tariffs, narrow network coverage, and network disruptions are observed primarily in AREA 3 & 4, corresponding with the decrease in TSEL's NPS in these areas.

Reason for detracting

In percentage (%)

	Total			Area 1			Area 2			Area 3			Area 4		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Expensive data tariff	27	▲		23		▼	26		▼	27	▲	▲	32	▲	
Expensive rates	25	▼		20			33		▲	23	▼	▼	30	▼	
Unstable signal	24			36		▲	23			16			18		
Slow data connection	4			6			3	▲	▲	2		▼	4		
Narrow network coverage	3		▲	3			3	▼	▼	4	▲	▲	2	▲	▼
Network disruption	2		▲	1	▼		2	▼	▼	3		▲	1	▲	▲
Unexpected charges	2		▼	2	▼	▼	2	▲	▼	2	▼	▼	2	▲	▲
Unstable signal	1	▲	▲	2	▲	▲	0	▲	▲	2	▲	▲	1	▼	▲
Unclear package offerings	1	▲	▲	1	▲	▲	0	▲	▲	2	▲	▲	0	▼	▼
Splitted internet quota	1	▲	▲	1	▲	▲	1	▼	▲	2	▲	▲	0	▲	▲

Base: TSEL primary card users who are detractors

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

p: Improve rank q: Decline rank

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

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Internal

TSEL: Understanding negative feedback (reasons for detracting)

...and are also observed in Jatim, Kalimantan, and Sulawesi, where TSEL's NPS has decreased.

Reason for detracting
In percentage (%)

	Sumbagut			Sumbagteng			Sumbagsel			Western Jabotabek			Central Jabotabek		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Expensive data tariff	23		▼	18	▲		28			12	▼	▼	24	▼	▼
Expensive rates	27		▲	9	▲		23	▼	▼	45		▲	28	▲	▲
Unstable signal	35		▲	46			26	▲	▲	28	▲	▲	13	▼	▼
Slow data connection	4		▼	7	▼		6	▲		5	▲	▲	0	▲	▲
Narrow network coverage	4	▲	▲	5			2	▼	▼	0	▼	▼	0	▼	▼
Network disruption	1	▲		3	▲	▲	1	▼	▼	0	▼	▼	7		▲
Unexpected charges	1	▲	▼	2	▼	▼	3	▼	▲	0	▲	▲	5	▲	
Unstable signal	1	▼	▼	2	▲	▲	4	▲	▲	0	▲	▲	0	▲	▲
Unclear package offerings	0	▼	▼	2	▲	▲	0	▼	▼	2	▲	▲	0		▼
Splitted internet quota	0	▲	▲	0	▲	▼	1	▲	▲	0	▲	▲	0	▲	▲

	Eastern Jabotabek			Jabar			Jateng DIY			Jatim		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Expensive data tariff	36	▲	▲	27	▼	▼	17			31	▲	▲
Expensive rates	32	▼	▼	31	▲	▲	25			29	▼	▼
Unstable signal	17	▲	▼	26		▼	16		▲	16		
Slow data connection	5		▼	2	▼	▼	4	▼	▼	2	▼	▲
Narrow network coverage	11	▼		0	▼	▼	2	▲	▲	3	▲	▲
Network disruption	0	▲		3		▲	1	▲	▲	6		▲
Unexpected charges	0	▲		3	▲		2	▼	▼	2	▼	▼
Unstable signal	1		▲	0	▼		5	▲	▲	0		▼
Unclear package offerings	0			0			5	▲	▲	0	▲	▲
Splitted internet quota	0	▲	▲	3		▲	2	▼	▲	0	▲	▼

	Bali Nusra			Kalimantan			Sulawesi			Puma		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Expensive data tariff	39			22	▼	▼	36	▲		61		▲
Expensive rates	7			37	▲	▲	27		▲	8	▼	▼
Unstable signal	14			11			22	▼	▼	32	▲	
Slow data connection	1	▼	▼	5	▲	▲	4	▲		0	▼	▼
Narrow network coverage	6		▲	1	▼	▼	2	▲	▼	3	▲	▲
Network disruption	3	▲	▲	3	▲	▲	0	▲	▼	0	▼	▲
Unexpected charges	2	▲	▼	5	▲	▲	1	▲	▼	0	▲	▲
Unstable signal	0	▲	▼	1	▲	▲	0	▲	▼	0	▲	▲
Unclear package offerings	1	▲	▲	0	▲	▼	0		▼	0	▼	▼
Splitted internet quota	4	▲	▲	1	▲	▲	0		▲	0	▲	▼

Base: TSEL primary card users who are detractors

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

p: Improve rank q: Decline rank

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

Meanwhile, detractors of competitors are increasingly mentioning issues with their network.

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 data tariff	▲		Unstable signal			Unstable signal			Unstable signal			Unstable signal			Unstable signal			Unstable signal		
Expensive rates	▼		Narrow network coverage	▲	▲	Narrow network coverage	▲	▲	Narrow network coverage		▲	Expensive rates		▲	Slow data connection			Expensive rates	▲	▲
Unstable signal			Tough starter pack registration	▲	▲	Expensive data tariff	▲		Slow data connection		▼	Narrow network coverage		▲	Narrow network coverage	▲	▲	Slow data connection	▼	▼
Slow data connection			Expensive rates	▲		Slow data connection	▼	▼	Expensive data tariff			Slow data connection			Unexpected charges	▲	▲	Narrow network coverage		▲
Narrow network coverage		▲	Slow data connection		▲	Expensive rates		▼	Network disruption			Network disruption		▲	Expensive data tariff	▼	▼	Network disruption		▲
Network disruption		▲	Network disruption	▲	▲	Credits decrease/lost	▲	▲	Expensive rates	▲	▲	Short active period	▲		Network disruption	▲	▲	Unexpected charges	▲	▲
Unexpected charges		▼	Unfriendly service	▼	▲	Network disruption	▼	▼	Short active period	▼	▲	Expensive data tariff	▼	▼	Expensive rates	▼	▼	Expensive data tariff	▼	▼
Unstable signal	▲	▲	Expensive data tariff		▼	Unexpected charges	▼	▼	No bonus	▲	▲	Difficulty in top-ups and packages	▲	▲	Short active period		▲	Difficulty in top-ups and packages		▲
Unclear package offerings	▲	▲	Limited SIM card availability	▼	▼	Bad service		▲	Unexpected charges	▲	▼	No bonus	▼	▲	Expensive calls to others	▲		Not recommended	▲	▲
Splitted internet quota	▲	▲	Unexpected charges	▲	▲	Difficult activation	▲	▲	Unclear package offerings	▲	▲	Unexpected charges	▲	▲	Hard to receive the calls	▲	▲	Credits decrease/lost		▲

Base: Respective primary card users who are detractors

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

p: Improve rank q: Decline rank

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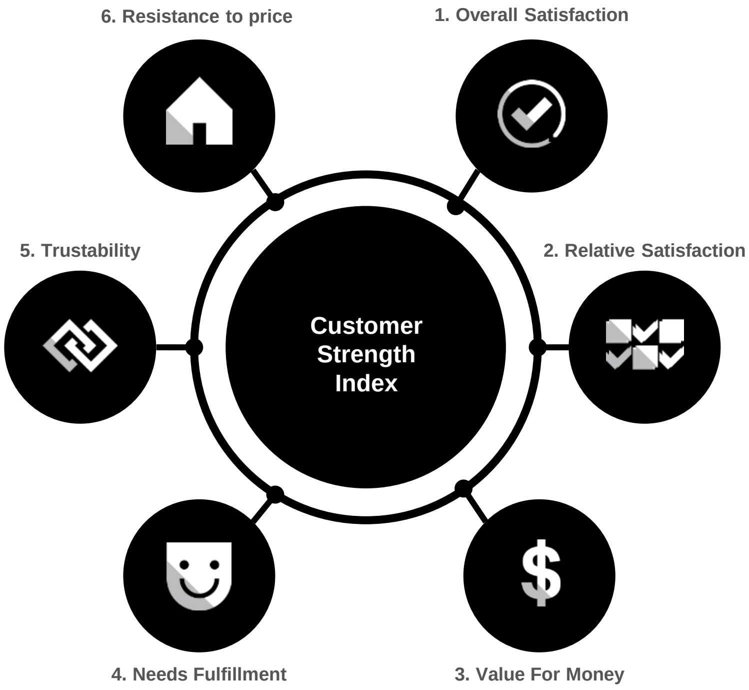
Internal

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

Despite a weakening in advocacy, TSEL's CSI continues to strengthen. However, with competitors leveraging their own CSI, the gap between TSEL and the average industry has remained unchanged. Meanwhile, BY.U, which previously improved its CSI significantly, has decreased in the past two months but remains more superior than other competitors.

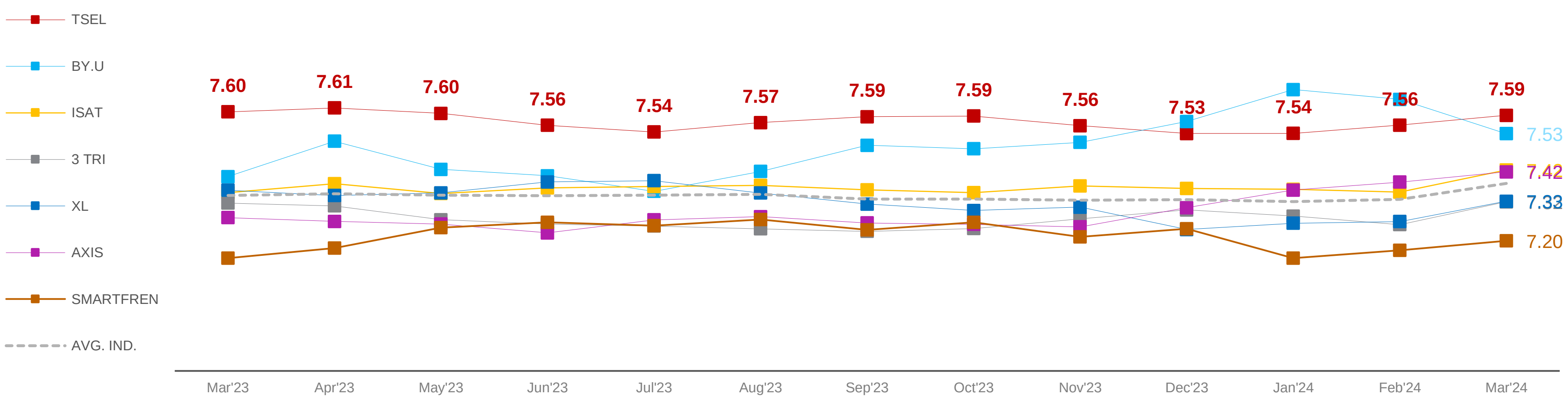
Customer Strength Index (CSI): P1Y Trend

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

TSEL VS AVG. IND.	3.53%	3.62%	3.45%	2.97%	2.66%	3.02%	3.48%	3.51%	3.15%	2.79%	2.89%	3.13%	2.86%



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

Customer Strength Index (CSI): Summary

The improvement in TSEL's CSI is driven by AREA 1 & 2. In AREA 3 & 4, where the NPS has previously decreased, TSEL's CSI remains relatively stable. Meanwhile, competitors like ISAT, XL, and AXIS are exhibiting a more positive trend across certain regions. Additionally, BY.U appears to have decreased in AREA 4.

	Dec'23	Jan'24	Feb'24	Mar'24
TSEL	7.53	7.54	7.56	7.59
BY.U	7.57	7.67	7.64	7.53
ISAT	7.36	7.36	7.35	7.42
3 TRI	7.30	7.28	7.25	7.32
XL	7.24	7.26	7.26	7.33
AXIS	7.30	7.36	7.38	7.42
SMARTFREN	7.24	7.15	7.17	7.20

			TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
	AVG. IND.*	TSEL VS AVG. IND.	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Total	**7.38**	**2.86%**	**7.59**	**+0.03**	**+0.06**	**7.53**	**-0.11**	**-0.04**	**7.42**	**+0.07**	**+0.06**	**7.32**	**+0.07**	**+0.03**	**7.33**	**+0.06**	**+0.09**	**7.42**	**+0.03**	**+0.11**	**7.20**	**+0.03**	**-0.04**
Java	**7.36**	**3.69%**	**7.63**	**+0.03**	**+0.02**	**7.57**	**+0.00**	**+0.06**	**7.44**	**+0.06**	**+0.03**	**7.24**	**+0.05**	**-0.07**	**7.34**	**+0.06**	**+0.09**	**7.35**	**+0.00**	**+0.04**	**7.14**	**-0.01**	**-0.15**
Non-Java	**7.43**	**1.63%**	**7.55**	**+0.04**	**+0.10**	**7.41**	**-0.47**	**-0.28**	**7.35**	**+0.09**	**+0.14**	**7.50**	**+0.12**	**+0.21**	**7.27**	**+0.06**	**+0.10**	**7.49**	**+0.06**	**+0.18**	**7.41**	**+0.17**	**+0.31**
Area 1	**7.36**	**2.36%**	**7.53**	**+0.07**	**+0.17**	**7.38**	**-0.01**	**+0.13**	**7.27**	**+0.11**	**+0.18**	**7.34**	**+0.06**	**-0.02**	**7.21**	**+0.05**	**+0.04**	**7.49**	**+0.06**	**+0.20**	**7.33**	**+0.14**	**+0.36**
Sumbagut	7.37	4.37%	7.69	+0.09	+0.26	7.55	+0.01	+0.13	7.46	+0.18	+0.20	7.24	-0.08	+0.05	7.29	-0.06	-0.17	7.46	-0.04	+0.00	7.07	+0.04	+0.48
Sumbagteng	7.20	1.45%	7.30	+0.02	+0.04	7.12	-0.03	+0.11	7.13	-0.01	+0.10	7.16	+0.11	+0.05	7.27	+0.04	+0.14	7.22	+0.21	+0.36	7.12	+0.02	+0.19
Sumbagsel	7.42	2.00%	7.56	+0.07	+0.17	7.21	-0.17	-0.26	7.24	+0.12	+0.19	7.48	+0.14	-0.10	7.13	+0.15	+0.10	7.66	+0.12	+0.36	7.43	+0.19	+0.36
Area 2	**7.52**	**3.38%**	**7.77**	**+0.04**	**+0.08**	**7.64**	**+0.03**	**+0.20**	**7.57**	**+0.04**	**+0.07**	**7.42**	**+0.13**	**+0.10**	**7.52**	**+0.02**	**+0.13**	**7.52**	**+0.04**	**+0.20**	**7.31**	**-0.05**	**-0.13**
Western Jabotabek	7.42	6.08%	7.87	+0.06	+0.18	7.25	-0.29	-0.52	7.55	+0.06	-0.03	7.12	+0.01	-0.27	7.14	+0.20	-0.03	7.26	+0.11	+0.12	7.58	+0.13	+0.01
Central Jabotabek	7.80	2.40%	7.99	+0.02	-0.03	8.19	+0.19	+0.28	7.69	+0.02	+0.00	7.53	+0.10	-0.01	7.85	+0.15	+0.08	7.92	+0.13	-0.01	7.83	+0.23	+0.36
Eastern Jabotabek	7.51	1.96%	7.66	+0.04	+0.11	7.29	-0.04	+0.36	7.47	+0.01	+0.09	7.52	-0.04	+0.13	7.70	-0.01	+0.33	7.45	-0.02	+0.26	7.29	-0.21	-0.08
Jabar	7.47	3.35%	7.72	+0.04	+0.08	7.78	+0.15	+0.35	7.68	+0.09	+0.19	7.43	+0.34	+0.26	7.33	-0.15	-0.02	7.58	+0.01	+0.20	7.07	-0.08	-0.37
Area 3	**7.21**	**4.25%**	**7.51**	**+0.02**	**-0.04**	**7.51**	**+0.00**	**-0.08**	**7.32**	**+0.08**	**+0.00**	**6.96**	**-0.07**	**-0.31**	**7.25**	**+0.08**	**+0.07**	**7.15**	**-0.03**	**-0.14**	**7.05**	**+0.00**	**-0.17**
Jateng DIY	7.16	6.26%	7.60	+0.19	+0.30	7.09	-0.19	-0.37	7.15	+0.09	+0.04	7.00	+0.00	-0.11	7.18	+0.13	+0.22	7.00	+0.03	-0.07	7.00	+0.00	-0.14
Jatim	7.29	2.85%	7.50	-0.16	-0.34	7.77	+0.04	-0.04	7.44	+0.07	-0.07	6.90	-0.17	-0.57	7.42	+0.02	-0.09	7.26	-0.13	-0.37	7.24	+0.06	-0.21
Bali Nusra	7.25	1.96%	7.39	+0.10	+0.02	6.91	-0.23	-0.73	7.72	+0.22	+0.56	7.11	+0.11	-0.06	7.18	+0.11	+0.09	7.30	-0.04	+0.20	6.79	-0.19	-0.14
Area 4	**7.50**	**0.85%**	**7.57**	**-0.01**	**-0.01**	**7.48**	**-1.00**	**-0.46**	**7.43**	**+0.08**	**+0.12**	**7.68**	**+0.17**	**+0.47**	**7.32**	**+0.07**	**+0.15**	**7.48**	**+0.03**	**+0.10**	**7.55**	**+0.25**	**+0.32**
Kalimantan	7.65	0.23%	7.67	+0.03	+0.08	7.25	-0.70	-0.13	7.46	+0.14	+0.16	7.72	+0.09	+0.48	7.49	+0.17	+0.27	7.58	+0.19	+0.17	8.00	+0.29	+0.38
Sulawesi	7.39	1.62%	7.51	-0.04	-0.04	7.62	-1.08	-0.61	7.33	+0.00	+0.06	7.62	+0.25	+0.44	7.23	+0.01	+0.10	7.30	-0.31	-0.03	7.34	+0.21	+0.26
Puma	7.50	-0.21%	7.48	-0.06	-0.25	7.19	-0.02	-0.75	8.55	-0.04	+0.08	7.59	+0.31	-0.46	7.29	+0.21	-0.12	5.94	+0.00	+0.29	8.13	+0.82	+1.54

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

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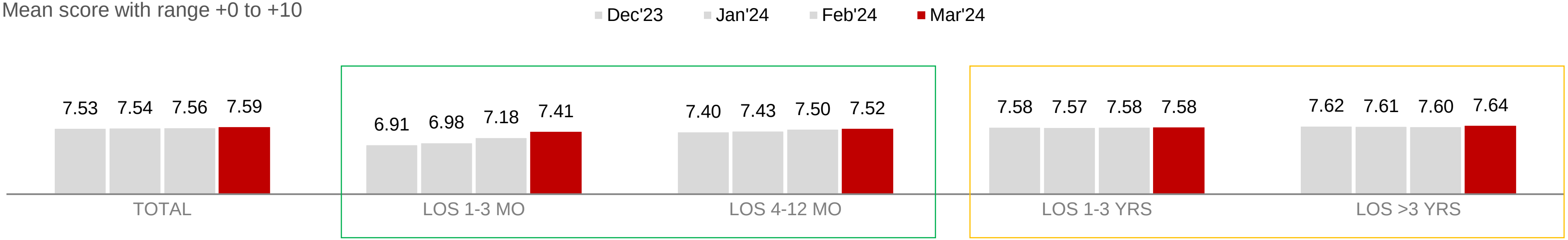
Internal

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

The improvement in TSEL's CSI is driven by users with a low length of service (LOS) of 1 year or below. Additionally, their NPS towards TSEL has also improved among this group.
Meanwhile, TSEL's CSI among mature users remains stable, but advocacy seems to have decreased, which may explain the overall trend in TSEL's NPS.

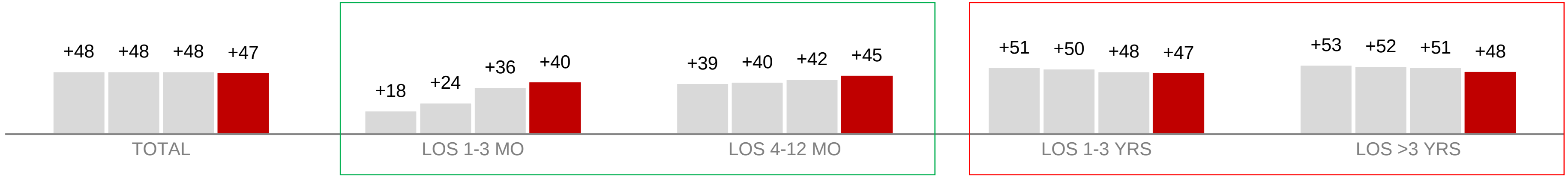
Customer Strength Index (CSI): By Length of Service (LOS)

Mean score with range +0 to +10



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

NET score with range -100 to +100



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

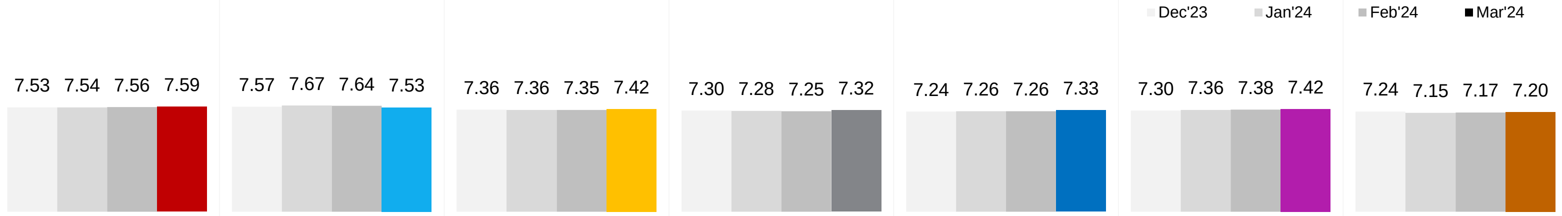
CSI components

CSI and components' overall assessment: National level

The improvement of TSEL's CSI is driven by enhancements across all components. Meanwhile, ISAT users have shown increased overall satisfaction and resistance to price, whereas XL AXIATA has improved on overall satisfaction (AXIS), value for money (both), need fulfilment (XL), and trust (both).

CSI Components

NET score with range -100 to +100



	TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Overall Satisfaction	+53	+1	+2	+49	-9	-10	+47	+3	+3	+46	+1	+5	+40	+1	-2	+45	+2	+6	+35	+0	-1
Relative Satisfaction	+79	+1	+2	+82	+0	+8	+72	+1	+1	+65	+0	-2	+72	+0	+0	+72	+0	+1	+68	+0	-1
Value For Money	+88	+1	+2	+93	+0	+4	+89	+1	+0	+89	+1	-2	+91	+1	+5	+92	+1	+3	+91	+3	+3
Need Fulfillment	+85	+1	+1	+87	-1	-2	+85	+0	+0	+83	+0	-3	+85	+2	+1	+85	-2	-1	+85	-2	-1
Trust	+91	+1	+1	+94	+1	+4	+91	+1	+1	+89	+1	-1	+93	+2	+4	+93	+2	+3	+90	+0	-2
Resistance to Price	+57	+1	+3	+52	+15	+37	+50	+2	+5	+44	+1	+0	+42	+1	-2	+50	+2	-2	+39	+2	-5

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

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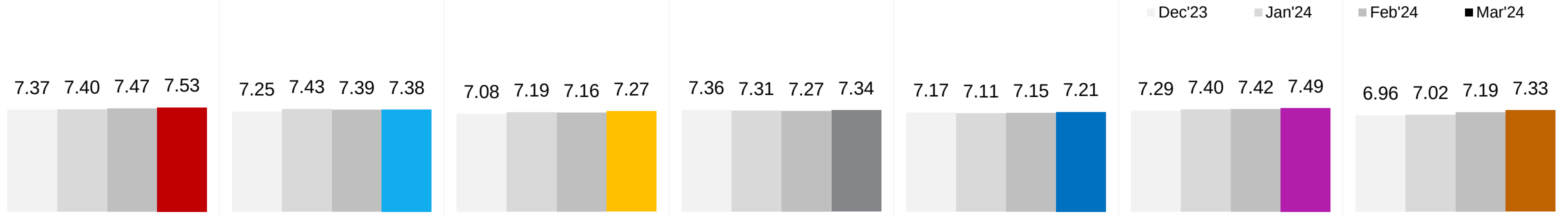
CSI and components' overall assessment: Area 1

In AREA 1, TSEL users have shown improved scores across all CSI components. Additionally, BY.U users have experienced improvements in overall satisfaction and resistance to price. Within this area, ISAT, AXIS, and SMARTFREN have also improved their CSI, specifically showing enhancements in overall and relative satisfaction. Furthermore, other components such as value for money (AXIS and SMARTFREN), trust (AXIS), and resistance to price (ISAT and SMARTFREN) have also shown improvement.

CSI Components

NET score with range -100 to +100



	TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Overall Satisfaction	+50	+2	+2	+59	-5	+11	+46	+5	+4	+48	+0	+2	+37	-4	-6	+50	+2	+10	+39	-3	+5
Relative Satisfaction	+77	+1	+2	+70	-5	+1	+62	+5	+5	+63	+0	-1	+63	-1	-9	+75	+2	+3	+64	+2	+9
Value For Money	+86	+1	+3	+93	-6	+2	+84	+0	-2	+91	+3	+1	+89	+1	+9	+92	+2	+3	+88	+13	+17
Need Fulfillment	+82	+2	+2	+89	-3	+3	+83	+0	+0	+82	+1	-3	+83	+3	+3	+87	-1	+0	+82	-1	+3
Trust	+89	+1	+2	+92	-1	+3	+86	+0	-4	+88	-1	-2	+89	-3	-2	+92	+1	+2	+85	+0	-6
Resistance to Price	+59	+1	+5	+37	+25	+28	+33	+4	+12	+34	+0	-8	+33	+1	+0	+51	+3	+2	+46	+4	+9

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 MAR 2024 (Δ1M: gap change to FEB 2024 | Δ3M: gap change to DEC 2023)

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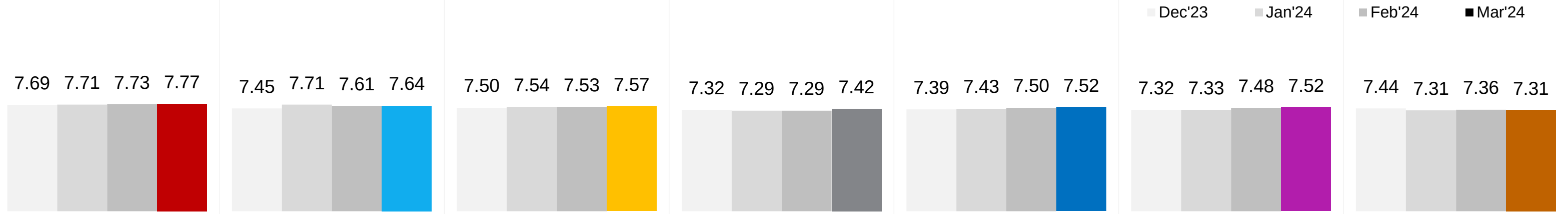
CSI and components' overall assessment: Area 2

In AREA 2, TSEL has seen increases in overall satisfaction, relative satisfaction, value for money, and need fulfilment. Similarly, BY.U has improved in relative satisfaction, value for money, trust, and resistance to price. XL AXIATA has shown improvements in relative satisfaction and value for money, while AXIS has also improved in overall satisfaction and trust.

CSI Components

NET score with range -100 to +100



	TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Overall Satisfaction	+64	+2	+8	+51	-5	-4	+50	-1	+0	+50	+3	+8	+51	+1	+2	+48	+2	+9	+40	-2	-6
Relative Satisfaction	+83	+2	+4	+88	+6	+21	+75	+1	+3	+63	+1	-1	+74	-1	+3	+77	+2	+10	+70	-2	+0
Value For Money	+89	+0	+2	+93	-1	+5	+90	+0	-1	+88	+0	-2	+93	+2	+5	+93	+2	+3	+90	+0	+2
Need Fulfillment	+87	+1	+2	+86	-3	-2	+85	+0	-1	+84	+1	-3	+85	+2	+1	+84	-1	-1	+76	-11	-11
Trust	+93	+0	+1	+96	+4	+11	+92	+1	+0	+90	+1	+1	+92	+1	+1	+95	+3	+5	+88	-4	-6
Resistance to Price	+54	+2	+0	+48	+8	+30	+56	+3	+6	+54	+3	+6	+37	-3	-7	+57	+2	+3	+42	-5	-8

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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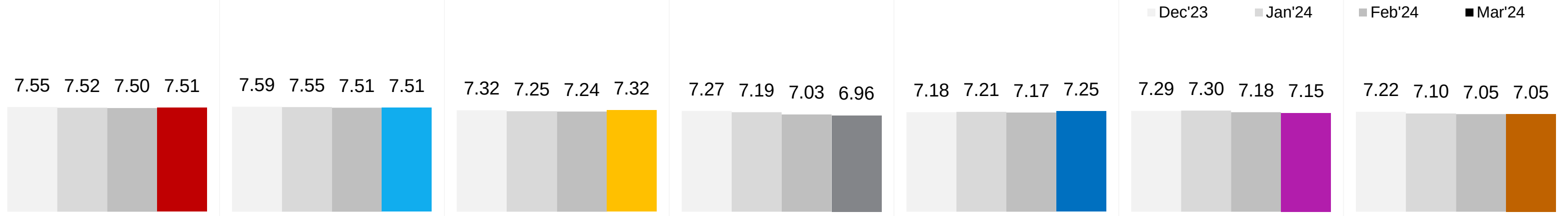
CSI and components' overall assessment: Area 3

In AREA 3, TSEL users have lower overall satisfaction, most probably influenced by BY.U users, although there are improvements in relative satisfaction, value for money, and resistance to price. Other competitors have not shown any positive movement in their CSI in this area.

CSI Components

NET score with range -100 to +100



	TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Overall Satisfaction	+48	-1	-3	+42	-11	-26	+44	+6	+4	+35	-2	-1	+35	+2	-1	+34	-1	-5	+30	+1	-2
Relative Satisfaction	+80	+1	+0	+82	+0	+2	+72	+2	-2	+62	-5	-13	+73	+2	+1	+64	-4	-8	+67	+2	-4
Value For Money	+88	+1	+1	+95	+5	+5	+89	+3	+2	+86	+2	-5	+91	+1	+3	+90	-2	+2	+91	+3	+0
Need Fulfillment	+85	+1	+0	+89	+5	-2	+84	+1	+2	+78	-1	-9	+84	+1	-1	+82	-3	-3	+88	+2	+3
Trust	+91	+0	+1	+95	+1	+0	+92	+3	+4	+83	+1	-7	+94	+3	+7	+93	+2	+4	+92	+2	+1
Resistance to Price	+59	+1	+6	+66	+26	+58	+49	+1	+2	+28	-3	-15	+49	+4	+1	+40	-3	-19	+36	+6	-10

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

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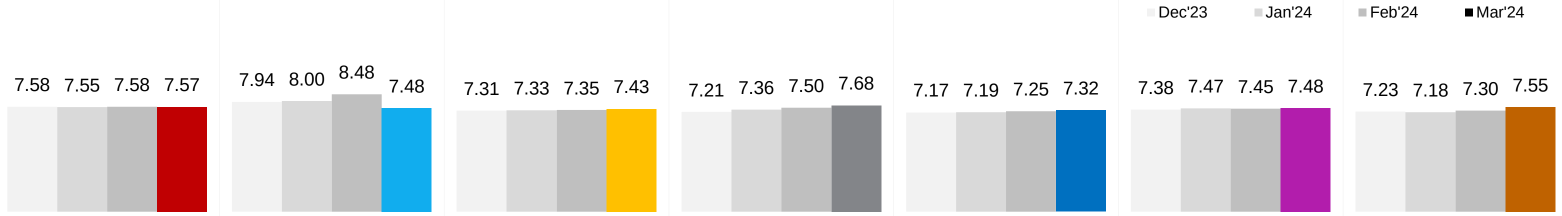
CSI and components' overall assessment: Area 4

In AREA 4, TSEL falls short in need fulfilment, which appears to be driven by BY.U experiencing significant decreases across all components in the past month. Conversely, all competitors, including ISAT and AXIS, are showing a more positive trend.

CSI Components

NET score with range -100 to +100



	TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Overall Satisfaction	+54	+0	+1	+52	-22	-5	+46	+4	+4	+52	+5	+12	+36	+1	-2	+48	+6	+9	+40	+3	+5
Relative Satisfaction	+78	+0	+0	+72	-16	-7	+72	+0	+0	+76	+3	+11	+68	-1	+1	+70	+0	-6	+71	-3	-5
Value For Money	+87	+0	+0	+84	-11	-1	+92	+0	+1	+94	+1	+4	+93	+2	+10	+95	+0	+5	+94	-1	+1
Need Fulfillment	+84	+1	-2	+80	-15	-9	+86	-2	-3	+92	+0	+3	+90	+5	+11	+89	-1	-2	+94	+1	+7
Trust	+92	+1	+2	+86	-11	-8	+93	-2	-2	+97	+2	+6	+95	+1	+8	+94	+1	+3	+95	-1	-1
Resistance to Price	+55	+1	+0	+29	-19	+4	+51	+1	+7	+53	+1	+13	+31	-1	-3	+51	+5	+9	+35	-3	-2

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

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Internal

Factor satisfaction

Customer satisfaction framework

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

1. Network

- Data network
- Network coverage
- Legacy network

2. Marketing – Offering

- Data tariff
- Data bonus & promotion
- Legacy bonus & promotion
- Legacy tariff
- Package spec
- Purchase method

3. Marketing – Customer Engagement

- Selfcare app
- Loyalty program

4. Sales

- Digital touchpoints
- Conventional touchpoints

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

TSEL shows improvement in all factors in the past quarter, lately it also still improves on network coverage, data & legacy tariff, and loyalty program. Similarly, ISAT and AXIS also show a significant increase in most of its factors.

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		
		Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
S	**Data Network**	+50	+0	+3	+50	-1	+5	+36	+1	+1	+30	+1	+3	+36	+5	+6	+36	+2	+8	+31	+4	+7
S	**Legacy Network**	+49	+1	+3	+48	+4	+13	+37	+1	+0	+29	-1	+0	+35	+2	+3	+31	+1	+5	+29	+1	+4
S	**Network Coverage**	+52	+2	+4	+50	-2	+7	+37	+2	+4	+28	+2	+6	+41	+6	+13	+33	+3	+8	+27	+4	+7
S	**Data Tariff**	+35	+3	+8	+46	+1	+7	+39	+2	+2	+42	+2	+4	+37	+3	+5	+38	+1	+4	+34	+1	+2
P	**Legacy Tariff**	+32	+3	+6	+37	+1	+12	+31	+2	+3	+35	+5	+9	+32	+1	+3	+31	+3	+3	+27	+0	+2
P	**Promo Attractiveness**	+28	NA	NA	+33	NA	NA	+28	NA	NA	+28	NA	NA	+26	NA	NA	+32	NA	NA	+24	NA	NA
W	**Loyalty Program**	+46	+4	+11	+49	-12	-6	+49	+3	+4	+48	+12	+22	+38	+12	+11	+65	+11	+22	+42	+6	+17
P	**Selfcare App**	+52	+1	+2	+52	+1	+0	+43	+4	+2	+46	+3	+5	+31	+1	+1	+36	-1	-2	+49	+8	+18
P	**Package Specification**	+35	+1	+2	+41	-5	-2	+38	+2	+3	+40	+4	+6	+34	+3	+1	+38	+1	+7	+30	+1	+1
S	**Purchase Channel**	+39	+1	+0	+31	-7	-10	+36	-1	-3	+35	+1	+1	+32	+1	+0	+33	+1	+1	+26	+0	-6
S	**Communication Media**	+37	NA	NA	+37	NA	NA	+34	NA	NA	+35	NA	NA	+31	NA	NA	+33	NA	NA	+28	NA	NA
S	**Starter Pack Channel**	+35	NA	NA	+34	NA	NA	+29	NA	NA	+29	NA	NA	+27	NA	NA	+29	NA	NA	+26	NA	NA
P	**Starter Pack Activation**	+38	NA	NA	+31	NA	NA	+31	NA	NA	+38	NA	NA	+31	NA	NA	+33	NA	NA	+28	NA	NA
W	**Postpaid Activation**	+28	NA	NA	NA	NA	NA	+10	NA	NA	+31	NA	NA	+37	NA	NA	+47	NA	NA	+27	NA	NA
W	**Postpaid Package Change**	+32	NA	NA	NA	NA	NA	+26	NA	NA	+26	NA	NA	+33	NA	NA	+49	NA	NA	+63	NA	NA
S	**Purchase Method**	+41	NA	NA	+37	NA	NA	+36	NA	NA	+37	NA	NA	+29	NA	NA	+34	NA	NA	+28	NA	NA
S	**Touchpoints Experience**	+47	NA	NA	+56	NA	NA	+43	NA	NA	+36	NA	NA	+36	NA	NA	+35	NA	NA	+30	NA	NA
S	**Touchpoints Solution**	+45	NA	NA	+51	NA	NA	+40	NA	NA	+28	NA	NA	+36	NA	NA	+31	NA	NA	+30	NA	NA
S	**Touchpoints Speed**	+45	NA	NA	+52	NA	NA	+39	NA	NA	+30	NA	NA	+34	NA	NA	+31	NA	NA	+33	NA	NA

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

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Factor satisfaction: Area 1

In AREA 1, TSEL, ISAT, AXIS, and SMARTFREN have shown significant improvement in most factors. Additionally, BY.U has also improved specifically on data 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		
		Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
S	Data Network	+45	+2	+9	+41	-3	-1	+36	+4	+9	+29	+0	-2	+35	+5	+8	+41	+3	+18	+36	+5	+16
S	Legacy Network	+44	+1	+5	+53	+5	+27	+34	+3	+8	+34	+1	-1	+41	+10	+17	+39	+8	+21	+39	-3	+6
S	Network Coverage	+47	+4	+10	+43	-2	+6	+37	+4	+18	+29	+0	-1	+39	+9	+12	+39	+6	+20	+36	+11	+21
W	Data Tariff	+36	+4	+12	+41	+7	+1	+41	+4	+9	+38	-2	-5	+32	+0	-3	+46	+3	+16	+41	-5	+9
S	Legacy Tariff	+32	+2	+7	+49	+7	+26	+34	+4	+9	+35	+11	+8	+32	+10	+15	+37	+5	+15	+34	-13	-3
P	Promo Attractiveness	+29	NA	NA	+34	NA	NA	+35	NA	NA	+30	NA	NA	+25	NA	NA	+36	NA	NA	+28	NA	NA
W	Loyalty Program	+57	+12	+25	+20	-40	-35	+34	+12	+17	+59	+24	+35	+50	+20	+26	+72	+1	+42	+21	+12	+9
P	Selfcare App	+54	+3	+10	+30	+4	-1	+40	-3	-1	+56	-1	+3	+38	-2	+5	+42	-1	+8	+41	-3	+10
P	Package Specification	+35	+2	+5	+39	-9	-8	+40	+4	+6	+38	+2	+3	+37	+3	+2	+43	+3	+15	+37	-2	+9
W	Purchase Channel	+38	+2	+1	+31	-1	+1	+43	+2	+11	+38	+2	+1	+38	+10	+15	+36	+2	+6	+36	-1	-1
P	Communication Media	+36	NA	NA	+36	NA	NA	+37	NA	NA	+38	NA	NA	+31	NA	NA	+39	NA	NA	+38	NA	NA
P	Starter Pack Channel	+35	NA	NA	+37	NA	NA	+39	NA	NA	+31	NA	NA	+27	NA	NA	+38	NA	NA	+38	NA	NA
P	Starter Pack Activation	+36	NA	NA	+31	NA	NA	+39	NA	NA	+37	NA	NA	+24	NA	NA	+36	NA	NA	+38	NA	NA
	Postpaid Activation	+29	NA	NA	NA	NA	NA	+0	NA	NA	+3	NA	NA	+24	NA	NA	+39	NA	NA	+0	NA	NA
	Postpaid Package Change	+18	NA	NA	NA	NA	NA	+54	NA	NA	+12	NA	NA	+21	NA	NA	+55	NA	NA	+80	NA	NA
P	Purchase Method	+39	NA	NA	+37	NA	NA	+40	NA	NA	+41	NA	NA	+33	NA	NA	+40	NA	NA	+36	NA	NA
P	Touchpoints Experience	+48	NA	NA	+42	NA	NA	+47	NA	NA	+45	NA	NA	+38	NA	NA	+49	NA	NA	+46	NA	NA
P	Touchpoints Solution	+44	NA	NA	+15	NA	NA	+42	NA	NA	+40	NA	NA	+38	NA	NA	+39	NA	NA	+34	NA	NA
P	Touchpoints Speed	+45	NA	NA	+8	NA	NA	+46	NA	NA	+33	NA	NA	+45	NA	NA	+44	NA	NA	+55	NA	NA

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

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Factor satisfaction: Area 2

Similarly, in AREA 2, TSEL has shown significant improvement in most factors, driven in part by improvements made by 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		
		Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
S	**Data Network**	+57	+1	+5	+49	+7	+10	+40	+1	+1	+35	+3	+7	+39	+5	+6	+33	+1	+3	+38	+3	+7
S	**Legacy Network**	+59	+1	+7	+43	+10	+20	+45	+5	+6	+32	+0	+0	+37	+2	+4	+23	-2	-7	+29	-1	-5
S	**Network Coverage**	+60	+3	+6	+53	+5	+20	+42	+2	+5	+32	+5	+12	+46	+10	+15	+29	+1	+2	+27	-3	-2
P	**Data Tariff**	+39	+5	+12	+51	+7	+20	+46	+3	+5	+49	+4	+8	+45	+7	+11	+31	-1	-4	+37	+4	-5
W	**Legacy Tariff**	+39	+5	+14	+37	+9	+20	+38	+5	+8	+43	+8	+11	+33	+1	+5	+20	+0	-6	+27	+3	-7
W	**Promo Attractiveness**	+31	NA	NA	+27	NA	NA	+33	NA	NA	+33	NA	NA	+29	NA	NA	+34	NA	NA	+29	NA	NA
W	**Loyalty Program**	+41	+2	+7	+64	+7	+21	+67	+7	+25	+44	+13	+20	+50	+5	+17	+51	+8	+5	+38	+2	+7
P	**Selfcare App**	+53	+1	+3	+53	-5	+3	+57	+7	+13	+49	+10	+13	+24	+0	-4	+29	+1	-8	+54	+16	+19
P	**Package Specification**	+42	+2	+6	+45	+4	+14	+44	+3	+4	+45	+7	+9	+38	+4	+3	+32	+0	-1	+34	+2	-2
S	**Purchase Channel**	+47	+1	+2	+34	-1	+0	+40	-1	-3	+39	+0	+2	+39	+1	+2	+30	+0	-2	+26	-5	-18
S	**Communication Media**	+44	NA	NA	+46	NA	NA	+37	NA	NA	+39	NA	NA	+38	NA	NA	+31	NA	NA	+25	NA	NA
P	**Starter Pack Channel**	+36	NA	NA	+38	NA	NA	+29	NA	NA	+34	NA	NA	+35	NA	NA	+18	NA	NA	+13	NA	NA
P	**Starter Pack Activation**	+49	NA	NA	+38	NA	NA	+24	NA	NA	+44	NA	NA	+52	NA	NA	+24	NA	NA	+17	NA	NA
P	**Postpaid Activation**	+35	NA	NA	NA	NA	NA	+12	NA	NA	+47	NA	NA	+26	NA	NA	+54	NA	NA	-15	NA	NA
S	**Postpaid Package Change**	+40	NA	NA	NA	NA	NA	+27	NA	NA	+13	NA	NA	+18	NA	NA	+56	NA	NA	+30	NA	NA
S	**Purchase Method**	+47	NA	NA	+45	NA	NA	+39	NA	NA	+40	NA	NA	+30	NA	NA	+28	NA	NA	+22	NA	NA
P	**Touchpoints Experience**	+50	NA	NA	+49	NA	NA	+52	NA	NA	+38	NA	NA	+45	NA	NA	+5	NA	NA	+9	NA	NA
P	**Touchpoints Solution**	+51	NA	NA	+54	NA	NA	+47	NA	NA	+30	NA	NA	+37	NA	NA	+7	NA	NA	+10	NA	NA
P	**Touchpoints Speed**	+48	NA	NA	+49	NA	NA	+47	NA	NA	+27	NA	NA	+35	NA	NA	+11	NA	NA	+13	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

Data above is based on data ending MAR 2024 (Δ1M: gap change to FEB 2024 | Δ3M: gap change to DEC 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.

Internal

Factor satisfaction: Area 3

In AREA 3, TSEL has seen improvements in tariff satisfaction, but its satisfaction with package specifications and purchase channels has declined, partly influenced by BY.U. Competitors in this area have not shown a more positive 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		
		Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
S	**Data Network**	+49	+0	-1	+57	-2	+3	+31	+0	-3	+20	-3	-5	+33	+5	+4	+28	+0	+2	+23	+1	+4
S	**Legacy Network**	+49	+1	+0	+45	+0	+5	+27	-4	-8	+19	-2	-5	+32	+0	-2	+24	-11	-10	+24	+2	+4
S	**Network Coverage**	+51	+1	+0	+53	-1	+4	+32	+1	+1	+20	+1	-2	+39	+4	+12	+25	-1	-3	+21	+5	+6
S	**Data Tariff**	+32	+2	+7	+47	+0	+9	+33	+2	-1	+35	+2	-1	+33	+1	+3	+32	+1	+0	+29	+1	+1
P	**Legacy Tariff**	+27	+3	+4	+30	-2	+11	+24	-1	-3	+23	-4	+0	+32	-1	-2	+31	+3	-1	+26	+0	+5
S	**Promo Attractiveness**	+25	NA	NA	+38	NA	NA	+21	NA	NA	+17	NA	NA	+23	NA	NA	+21	NA	NA	+18	NA	NA
P	**Loyalty Program**	+41	+0	+4	+29	-22	-37	+30	-3	-21	+54	+17	+25	+28	+17	+5	+44	+12	+2	+42	+8	+18
S	**Selfcare App**	+50	+0	-1	+59	+17	+6	+30	+1	-6	+36	-2	-2	+33	+1	+1	+26	-6	-17	+43	+1	+14
S	**Package Specification**	+31	-1	-1	+41	-6	-7	+31	-1	+0	+30	+0	-2	+29	+3	+0	+33	-2	+2	+25	+0	-3
S	**Purchase Channel**	+35	+1	-2	+29	-6	-14	+31	+0	-5	+26	+1	-4	+28	-1	-3	+27	+3	-2	+23	+1	-5
S	**Communication Media**	+32	NA	NA	+32	NA	NA	+31	NA	NA	+26	NA	NA	+27	NA	NA	+23	NA	NA	+26	NA	NA
S	**Starter Pack Channel**	+35	NA	NA	+33	NA	NA	+23	NA	NA	+17	NA	NA	+24	NA	NA	+19	NA	NA	+27	NA	NA
S	**Starter Pack Activation**	+35	NA	NA	+27	NA	NA	+30	NA	NA	+24	NA	NA	+24	NA	NA	+25	NA	NA	+26	NA	NA
P	**Postpaid Activation**	+37	NA	NA	NA	NA	NA	+8	NA	NA	+6	NA	NA	+38	NA	NA	+33	NA	NA	+30	NA	NA
P	**Postpaid Package Change**	+34	NA	NA	NA	NA	NA	+11	NA	NA	+38	NA	NA	+42	NA	NA	+27	NA	NA	+66	NA	NA
S	**Purchase Method**	+37	NA	NA	+32	NA	NA	+31	NA	NA	+30	NA	NA	+27	NA	NA	+27	NA	NA	+30	NA	NA
S	**Touchpoints Experience**	+43	NA	NA	+63	NA	NA	+35	NA	NA	+26	NA	NA	+30	NA	NA	+30	NA	NA	+38	NA	NA
S	**Touchpoints Solution**	+43	NA	NA	+56	NA	NA	+33	NA	NA	+19	NA	NA	+31	NA	NA	+31	NA	NA	+38	NA	NA
S	**Touchpoints Speed**	+42	NA	NA	+64	NA	NA	+30	NA	NA	+30	NA	NA	+29	NA	NA	+24	NA	NA	+37	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

Internal

Data above is based on data ending MAR 2024 (Δ1M: gap change to FEB 2024 | Δ3M: gap change to DEC 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 4

In AREA 4, BY.U has experienced a significant decrease in all factors. Conversely, all competitors have improved their network, tariff, and package specifications satisfaction.

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		
		Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
P	Data Network	+48	-3	-1	+37	-28	-10	+44	+5	+10	+38	+2	+12	+39	+4	+11	+43	+2	-3	+42	+15	+15
S	Legacy Network	+48	-3	-3	+64	+2	+17	+44	+5	+6	+38	+0	+9	+36	+5	+7	+47	+7	+20	+39	+10	+23
S	Network Coverage	+51	+0	+1	+34	-37	-21	+42	+2	+6	+33	+0	+11	+41	+7	+16	+45	+5	+2	+44	+9	+17
W	Data Tariff	+32	+0	-1	+23	-34	-28	+40	+0	-4	+45	+1	+9	+42	+2	+1	+42	+0	-12	+39	+6	+12
P	Legacy Tariff	+30	+0	-1	+43	-13	+1	+26	+3	+2	+35	+5	+16	+31	+5	+7	+39	-3	+1	+29	-2	+17
W	Promo Attractiveness	+27	NA	NA	+28	NA	NA	+28	NA	NA	+30	NA	NA	+31	NA	NA	+35	NA	NA	+34	NA	NA
	Loyalty Program	+51	+2	+12	+93	+13	+43	+20	-29	-39	+34	-10	+8	+11	-15	-20	+90	+8	+26	+73	-1	+50
P	Selfcare App	+50	+0	-3	+63	-15	-9	+46	+5	-4	+43	+2	-6	+35	+7	+7	+62	+3	+17	+65	+22	+35
W	Package Specification	+36	+0	+0	+26	-35	-25	+38	+4	+4	+45	+7	+18	+39	+1	+6	+48	+4	+7	+38	+10	+18
P	Purchase Channel	+38	+0	-2	+27	-39	-28	+29	-1	-10	+34	+1	+6	+31	-2	-5	+38	+2	-5	+33	+7	+9
P	Communication Media	+36	NA	NA	+31	NA	NA	+34	NA	NA	+36	NA	NA	+35	NA	NA	+37	NA	NA	+35	NA	NA
P	Starter Pack Channel	+32	NA	NA	+24	NA	NA	+30	NA	NA	+30	NA	NA	+26	NA	NA	+20	NA	NA	+37	NA	NA
W	Starter Pack Activation	+33	NA	NA	+29	NA	NA	+41	NA	NA	+45	NA	NA	+36	NA	NA	+46	NA	NA	+45	NA	NA
	Postpaid Activation	+3	NA	NA	NA	NA	NA	+100	NA	NA	+46	NA	NA	+65	NA	NA	+93	NA	NA	+100	NA	NA
	Postpaid Package Change	+41	NA	NA	NA	NA	NA	+100	NA	NA	+60	NA	NA	+47	NA	NA	+49	NA	NA	+86	NA	NA
P	Purchase Method	+40	NA	NA	+26	NA	NA	+37	NA	NA	+37	NA	NA	+30	NA	NA	+42	NA	NA	+27	NA	NA
P	Touchpoints Experience	+49	NA	NA	+61	NA	NA	+37	NA	NA	+39	NA	NA	+45	NA	NA	+58	NA	NA	+44	NA	NA
P	Touchpoints Solution	+43	NA	NA	+61	NA	NA	+39	NA	NA	+29	NA	NA	+52	NA	NA	+55	NA	NA	+49	NA	NA
S	Touchpoints Speed	+46	NA	NA	+61	NA	NA	+35	NA	NA	+38	NA	NA	+40	NA	NA	+48	NA	NA	+46	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

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

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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.

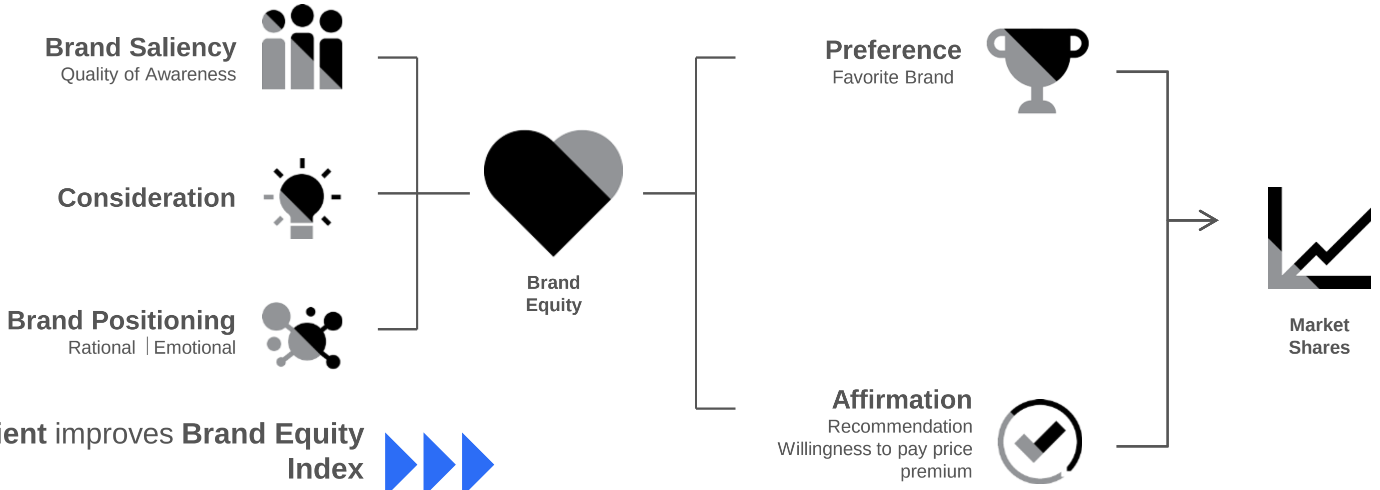
How **Nielsen** measures **Brand Equity Index**
Use 3 emotional aspects to calculate BEI

SOURCES
Understand the building blocks of equity

MIND / LOGIC ASPECT

OUTCOMES
What people are willing to do

HEART / EMOTIONAL ASPECT



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:

Heart / Emotional Aspect

1.

Recommend

(spontaneous question)

2.

Willingness to Pay Price Premium

(7-point-scale)

3.

Favorite

(spontaneous question)

Brand Equity

index scales 0 - 10

The higher brand equity, the higher chance customers

Will recommend the brand to others

Willing to pay premium price

And favor to buy

Source: Winning Brands Health Check

Brand Equity Index (BEI): National level tracking

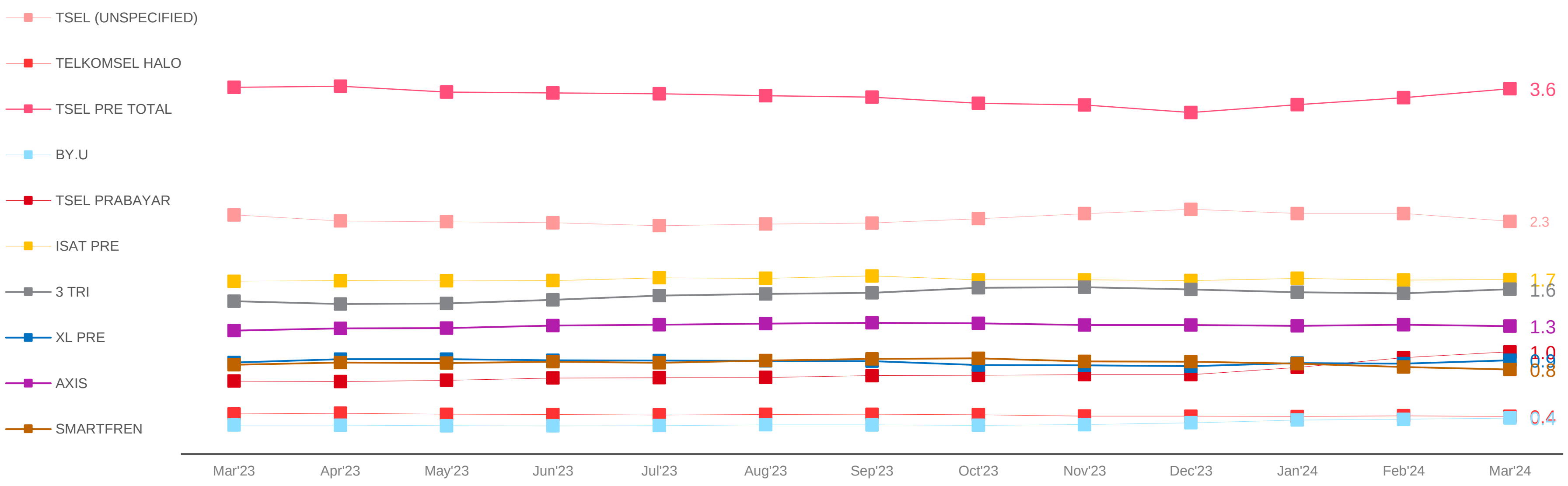
TSEL PRE TOTAL's Brand Equity Index (BEI) has improved, accompanied by an increase in TSEL PRABAYAR's brand equity. Meanwhile, other competitors have remained steady.

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

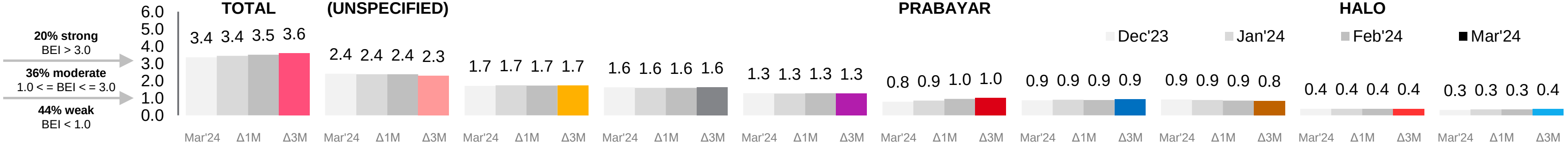
**TSEL PRABAYAR is Telkomsel PraBayar, a new branding launched in Jun'21 (just added into the study by Jul'21)



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

Brand Equity Index (BEI): Summary

TSEL PRE TOTAL's brand equity has strengthened in specific regions like Sumbagut, Western Jabo, Jabar, Jateng DIY, and Jatim, partly due to the performance of TSEL PRABAYAR. TSEL PRABAYAR has also shown improvement in AREA 4. Conversely, the equity of unspecified TSEL appears to have weakened as TSEL PRABAYAR has grown. Other competitors have remained relatively stable.



	TSEL PRE TOTAL Mar'24	Δ1M	Δ3M	TSEL (UNSPECIFIED) Mar'24	Δ1M	Δ3M	ISAT PRE Mar'24	Δ1M	Δ3M	3 TRI Mar'24	Δ1M	Δ3M	AXIS Mar'24	Δ1M	Δ3M
Total	**3.6**	**+0.1**	**+0.2**	**2.3**	**-0.1**	**-0.1**	**1.7**	**+0.0**	**+0.0**	**1.6**	**+0.0**	**+0.0**	**1.3**	**+0.0**	**+0.0**
Java	**3.2**	**+0.1**	**+0.3**	**2.0**	**-0.1**	**-0.1**	**2.0**	**+0.0**	**+0.0**	**1.7**	**+0.1**	**+0.0**	**1.1**	**+0.0**	**+0.0**
Non-Java	**4.3**	**+0.0**	**+0.1**	**2.7**	**+0.0**	**-0.1**	**1.2**	**+0.0**	**+0.0**	**1.5**	**+0.0**	**+0.0**	**1.5**	**+0.0**	**+0.0**
Area 1	**4.5**	**+0.0**	**+0.2**	**2.7**	**-0.1**	**-0.4**	**1.0**	**+0.0**	**+0.1**	**1.4**	**+0.0**	**-0.1**	**1.8**	**+0.0**	**+0.0**
Sumbagut	4.7	+0.2	+0.3	2.8	-0.2	-0.6	0.8	+0.1	+0.2	1.3	+0.0	+0.0	2.3	+0.0	+0.1
Sumbagteng	4.9	+0.0	+0.1	3.1	-0.1	-0.2	0.7	+0.0	+0.0	1.1	+0.0	-0.1	1.5	+0.0	+0.1
Sumbagsel	4.0	+0.0	+0.2	2.4	-0.1	-0.3	1.3	+0.0	+0.1	1.6	+0.0	-0.1	1.7	+0.1	-0.1
Area 2	**3.2**	**+0.1**	**+0.3**	**1.8**	**-0.1**	**-0.1**	**2.1**	**+0.0**	**+0.0**	**2.1**	**+0.1**	**+0.1**	**1.3**	**+0.0**	**+0.0**
Western Jabotabek	3.2	+0.1	+0.3	1.5	-0.1	-0.1	2.5	+0.0	+0.0	2.0	-0.1	-0.1	1.4	-0.2	-0.1
Central Jabotabek	3.2	+0.0	+0.2	2.1	-0.1	-0.4	2.3	+0.2	+0.0	2.0	+0.0	+0.3	1.0	+0.0	+0.1
Eastern Jabotabek	2.6	+0.1	+0.2	2.1	+0.0	+0.1	2.5	+0.0	+0.1	2.2	+0.0	+0.2	0.9	+0.0	-0.1
Jabar	3.6	+0.2	+0.5	1.7	-0.2	-0.1	1.6	+0.0	-0.2	2.2	+0.2	+0.1	1.6	+0.0	+0.1
Area 3	**3.2**	**+0.2**	**+0.3**	**2.2**	**-0.1**	**-0.1**	**2.0**	**+0.0**	**+0.0**	**1.3**	**+0.0**	**-0.1**	**1.0**	**+0.0**	**+0.0**
Jateng DIY	2.9	+0.1	+0.3	2.2	-0.1	-0.1	2.0	+0.0	+0.0	1.5	+0.1	+0.0	1.0	-0.1	-0.1
Jatim	3.5	+0.2	+0.3	2.2	-0.1	+0.0	2.4	+0.0	+0.1	1.3	+0.0	-0.2	1.1	+0.0	+0.0
Bali Nusra	3.3	+0.1	+0.0	2.1	-0.2	-0.3	0.8	+0.0	+0.0	0.6	+0.0	-0.1	0.8	+0.0	+0.0
Area 4	**4.1**	**+0.0**	**-0.1**	**2.8**	**+0.1**	**+0.2**	**1.4**	**-0.1**	**-0.1**	**1.7**	**+0.1**	**+0.1**	**0.9**	**+0.0**	**+0.0**
Kalimantan	3.8	+0.0	+0.0	2.1	+0.0	+0.1	1.9	-0.2	-0.4	2.1	+0.2	+0.6	1.3	+0.1	+0.1
Sulawesi	4.1	-0.1	-0.1	3.3	+0.2	+0.4	1.1	+0.0	+0.1	1.6	-0.1	-0.4	0.6	-0.1	-0.1
Puma	6.2	-0.2	-0.8	3.7	+0.1	+0.3	0.5	+0.0	+0.0	0.4	+0.0	+0.2	0.2	+0.0	+0.1

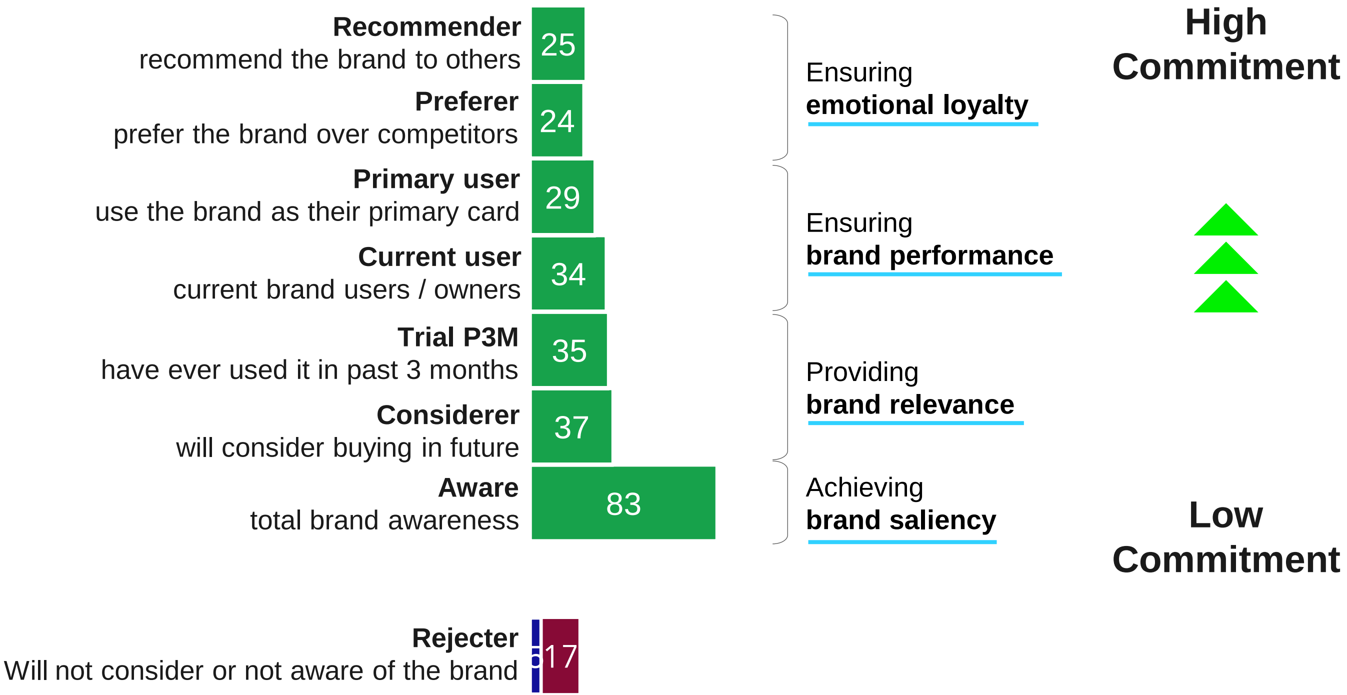
	TSEL PRABAYAR Mar'24	Δ1M	Δ3M	XL PRE Mar'24	Δ1M	Δ3M	SMARTFREN Mar'24	Δ1M	Δ3M	TELKOMSEL HALO Mar'24	Δ1M	Δ3M	BY.U Mar'24	Δ1M	Δ3M
Total	**1.0**	**+0.1**	**+0.2**	**0.9**	**+0.0**	**+0.1**	**0.8**	**+0.0**	**-0.1**	**0.4**	**+0.0**	**+0.0**	**0.4**	**+0.0**	**+0.0**
Java	**1.0**	**+0.1**	**+0.2**	**1.1**	**+0.0**	**+0.1**	**1.0**	**+0.0**	**-0.1**	**0.4**	**+0.0**	**+0.0**	**0.4**	**+0.0**	**+0.1**
Non-Java	**1.0**	**+0.1**	**+0.3**	**0.6**	**+0.0**	**+0.1**	**0.6**	**+0.0**	**-0.1**	**0.4**	**+0.0**	**+0.0**	**0.3**	**+0.0**	**+0.0**
Area 1	**1.0**	**+0.1**	**+0.3**	**0.6**	**+0.0**	**+0.1**	**0.6**	**+0.0**	**+0.0**	**0.4**	**+0.0**	**+0.0**	**0.3**	**+0.0**	**+0.0**
Sumbagut	1.3	+0.2	+0.6	0.5	+0.0	+0.0	0.5	+0.0	+0.0	0.5	+0.0	+0.1	0.3	+0.0	+0.1
Sumbagteng	0.7	+0.0	+0.1	0.6	+0.0	+0.0	0.4	+0.0	+0.1	0.4	+0.0	+0.0	0.2	+0.0	-0.1
Sumbagsel	0.9	+0.0	+0.2	0.6	+0.1	+0.2	0.9	+0.0	+0.0	0.3	+0.0	+0.0	0.2	+0.0	+0.0
Area 2	**1.0**	**+0.0**	**+0.2**	**0.9**	**+0.1**	**+0.0**	**0.8**	**+0.1**	**+0.0**	**0.4**	**+0.0**	**+0.0**	**0.5**	**+0.0**	**+0.1**
Western Jabotabek	1.1	-0.1	+0.2	1.0	+0.0	-0.1	0.9	+0.1	+0.0	0.4	+0.0	+0.0	0.4	+0.0	+0.1
Central Jabotabek	0.9	-0.1	+0.0	1.2	+0.2	+0.3	0.9	+0.0	+0.0	0.6	+0.0	+0.0	0.5	+0.0	+0.0
Eastern Jabotabek	0.8	+0.0	+0.1	1.0	+0.1	+0.1	0.6	+0.0	-0.3	0.5	+0.0	+0.1	0.5	+0.0	+0.1
Jabar	1.3	+0.1	+0.3	0.8	+0.0	-0.1	0.9	+0.2	+0.1	0.3	+0.0	+0.0	0.6	+0.0	+0.2
Area 3	**1.0**	**+0.1**	**+0.2**	**1.2**	**+0.0**	**+0.1**	**1.1**	**-0.1**	**-0.1**	**0.3**	**+0.0**	**+0.0**	**0.4**	**+0.0**	**+0.1**
Jateng DIY	0.9	+0.0	+0.0	1.0	+0.0	+0.1	1.7	+0.0	+0.0	0.3	+0.0	+0.0	0.3	+0.0	+0.0
Jatim	1.0	+0.2	+0.3	0.8	+0.0	+0.0	0.8	-0.1	-0.2	0.4	+0.0	+0.0	0.4	+0.1	+0.1
Bali Nusra	1.4	+0.1	+0.5	2.8	+0.1	+0.2	0.3	+0.0	-0.1	0.3	+0.0	+0.0	0.2	+0.0	+0.1
Area 4	**1.0**	**+0.1**	**+0.3**	**0.8**	**+0.0**	**+0.0**	**0.6**	**-0.1**	**-0.3**	**0.4**	**+0.0**	**-0.1**	**0.3**	**+0.0**	**-0.1**
Kalimantan	1.0	+0.1	+0.3	0.8	+0.0	+0.0	0.5	-0.1	-0.1	0.4	+0.0	-0.1	0.3	+0.0	-0.1
Sulawesi	1.0	+0.1	+0.3	0.7	+0.1	+0.0	0.7	-0.2	-0.4	0.3	+0.0	-0.1	0.3	+0.0	-0.1
Puma	0.8	-0.1	-0.4	0.2	+0.1	+0.0	0.2	+0.0	+0.0	0.4	+0.0	-0.1	0.1	+0.0	-0.1

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

TSEL PRABAYAR has not only improved its brand equity but also its brand funnel, which has positively impacted TSEL PRE TOTAL. Similarly, XL has shown improvements in the funnel, although it has not yet impacted the emotive level. On the other hand, ISAT, which previously had positive customer satisfaction, appears to have decreased in primary users, although its trialists and consideration have improved. This trend is also observed with its sub-brand, 3 TRI.

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		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Recommender	28	+1	+3	5	+0	+2	2	+0	+0	11	+0	+0	11	+0	+0	5	+0	+0	8	+0	+0	5	+0	-1
Preferer	28	+1	+3	5	+1	+2	1	+0	+0	12	+0	+0	11	+0	-1	5	+0	+0	8	+0	+0	5	+0	-1
Primary user	40	+0	+2	12	+0	+1	1	+0	+0	18	+0	-1	12	+0	-1	10	+0	+1	9	+0	+0	5	+0	-1
Current user	49	+1	+2	15	+1	+2	3	+0	+1	23	+0	+0	16	+0	+1	13	+1	+1	11	+0	+0	6	+0	-1
Trial P3M	51	+1	+2	16	+1	+2	3	+0	+1	25	+0	+1	17	+0	+0	14	+0	+1	12	+0	+0	7	+0	-1
Considerer	54	+1	+2	19	+1	+2	7	+0	+1	28	+1	+1	22	+1	+2	16	+1	+2	16	+0	+1	11	+0	+0
Aware	87	+0	+0	44	+1	+3	23	+1	+1	73	+0	+1	72	+0	+0	49	+1	+2	67	+0	+0	62	+0	+0
Rejecter (Not Consider | Not Aware)	9 | 13	+0	-1	3 | 56	-1	-4	4 | 77	-1	-1	8 | 27	+0	-1	12 | 28	+0	+0	4 | 51	-1	-2	11 | 33	+0	+1	17 | 38	+0	+1
Retention	96			92			84			92			93			91			93			85		
Conversion	56			34			13			32			22			26			17			10		

Base: Mobile phone users

GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending MAR 2024 (Δ1M: gap change to FEB 2024 | Δ3M: gap change to DEC 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.

Internal

Data card share

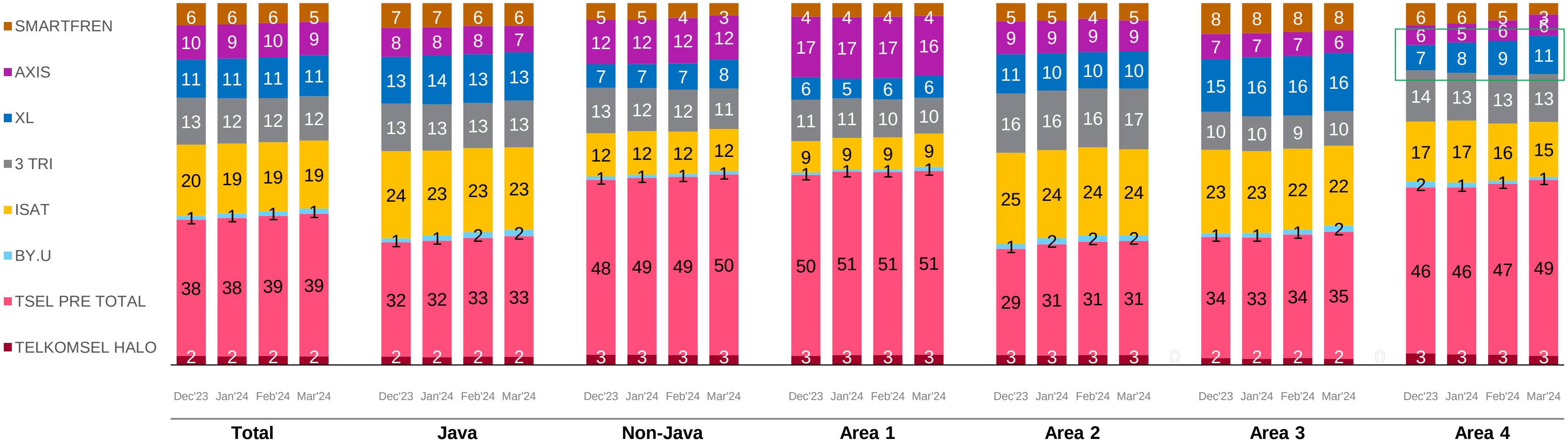
Data card share

TSEL consistently improves its market share across all areas. Additionally, XL has shown improvements in its share, particularly in AREA 4. These developments have negatively impacted the market share of IOH.

Data card share

In percentage (%)

	Total Dec'23	Total Jan'24	Total Feb'24	Total Mar'24	Java Dec'23	Java Jan'24	Java Feb'24	Java Mar'24	Non-Java Dec'23	Non-Java Jan'24	Non-Java Feb'24	Non-Java Mar'24	Area 1 Dec'23	Area 1 Jan'24	Area 1 Feb'24	Area 1 Mar'24	Area 2 Dec'23	Area 2 Jan'24	Area 2 Feb'24	Area 2 Mar'24	Area 3 Dec'23	Area 3 Jan'24	Area 3 Feb'24	Area 3 Mar'24	Area 4 Dec'23	Area 4 Jan'24	Area 4 Feb'24	Area 4 Mar'24
TSEL	41	42	42	43	35	36	37	37	52	53	53	54	53	54	54	55	33	35	36	36	36	37	37	39	51	50	51	52
IOH	33	32	31	31	37	36	36	36	24	24	23	23	20	20	19	19	42	41	41	40	34	32	32	32	31	30	29	28
XL AXIATA	20	20	21	21	21	21	21	21	19	19	20	20	23	22	23	23	20	19	19	19	22	23	23	22	13	14	15	16



Base: Mobile data users

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

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

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Internal

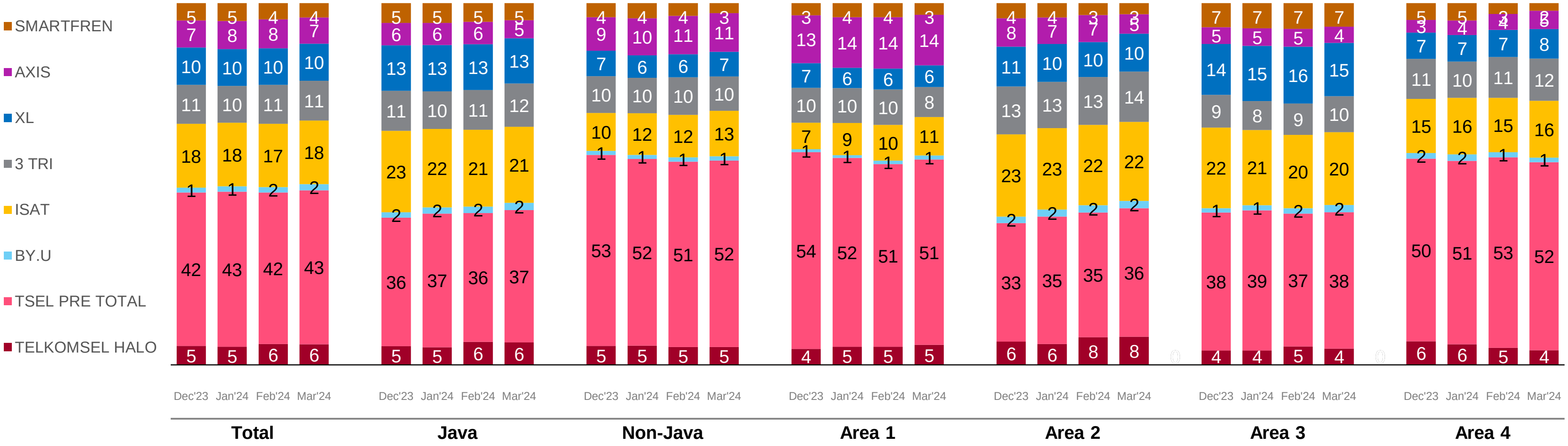
Revenue data card share

However, despite gaining higher market share, TSEL's revenue share has only increased in JAVA areas. Meanwhile, the revenue share in NON-JAVA areas weaken. This suggests that the acquired user base in these areas may not be able to compensate for the lower prices.

Revenue data card share

In percentage (%)

	Total Dec'23	Total Jan'24	Total Feb'24	Total Mar'24	Java Dec'23	Java Jan'24	Java Feb'24	Java Mar'24	Non-Java Dec'23	Non-Java Jan'24	Non-Java Feb'24	Non-Java Mar'24	Area 1 Dec'23	Area 1 Jan'24	Area 1 Feb'24	Area 1 Mar'24	Area 2 Dec'23	Area 2 Jan'24	Area 2 Feb'24	Area 2 Mar'24	Area 3 Dec'23	Area 3 Jan'24	Area 3 Feb'24	Area 3 Mar'24	Area 4 Dec'23	Area 4 Jan'24	Area 4 Feb'24	Area 4 Mar'24
TSEL	49	49	49	50	42	44	44	45	59	58	57	58	60	58	56	58	41	43	44	45	43	44	43	44	59	58	59	57
IOH	28	28	28	29	34	32	32	33	21	21	22	22	17	19	20	19	36	35	35	36	31	29	29	30	26	26	26	27
XL AXIATA	18	18	18	17	19	19	19	17	16	16	17	17	20	20	20	20	19	18	17	16	19	20	21	19	11	11	12	13



Base: Mobile data users

Revenue card: Spending per Card Claims

Data above is based on data ending MAR 2024 (Δ1M: gap change to FEB 2024 | Δ3M: gap change to DEC 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.

Internal

Brand imagery

Brand imagery: National level

Overall, all operators have shown improvement in their brand positioning related to network, offerings, communication, and branding.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Network	Best network coverage	45	+1	+1	24	-2	-6	24	-2	-6	17	-2	-7	25	-1	-5	19	-2	-6	17	-2	-8
	Best data / internet connection quality	43	+4	+11	26	+2	+4	25	+1	+3	19	+1	+2	28	+2	+4	22	+1	+2	18	+1	+1
	Best telephone quality	34	+2	+7	19	+1	+4	20	+1	+4	15	+1	+3	20	+1	+3	17	+2	+4	15	+1	+3
Offering	Packages that suit my needs	22	+1	+2	23	+2	+4	24	+1	+4	25	+3	+8	23	+2	+5	23	+3	+7	21	+2	+7
	Best bonus and promotion	22	+1	+2	29	+3	+7	28	+1	+4	31	+1	+4	27	+2	+4	28	+1	+1	27	+2	+4
	Best tariff for data package	25	+1	+3	32	+2	+8	35	+2	+5	38	+2	+5	31	+2	+4	33	+2	+5	29	+2	+3
	Best tariff for telephone and SMS	18	+0	+0	17	+1	+2	21	+2	+4	20	+1	+3	20	+1	+3	20	+1	+3	17	+1	+2
Cust. Engagement	Best selfcare application	17	-2	-6	16	-3	-9	15	-2	-7	14	-1	-3	16	-2	-7	13	-1	-2	13	-1	-3
	Appreciates customer loyalty with special programs	13	-1	-2	13	-1	-1	14	+0	+1	12	+0	+1	13	+0	+0	13	+1	+2	12	+1	+1
Sales	Best customer service experience	13	NA	NA	12	NA	NA	11	NA	NA	9	NA	NA	12	NA	NA	9	NA	NA	11	NA	NA
	Best touchpoint solutions	13	NA	NA	13	NA	NA	12	NA	NA	10	NA	NA	13	NA	NA	10	NA	NA	11	NA	NA
	Prompt touchpoint resolution	12	NA	NA	11	NA	NA	11	NA	NA	10	NA	NA	11	NA	NA	10	NA	NA	10	NA	NA
	Seamless primary subscription package changes	12	NA	NA	11	NA	NA	12	NA	NA	11	NA	NA	11	NA	NA	10	NA	NA	10	NA	NA
	Effortless SIM card activation process	18	NA	NA	19	NA	NA	18	NA	NA	20	NA	NA	18	NA	NA	19	NA	NA	17	NA	NA
	Most diverse purchase platforms	17	NA	NA	17	NA	NA	17	NA	NA	15	NA	NA	16	NA	NA	15	NA	NA	14	NA	NA
	Most diverse payment options	16	NA	NA	17	NA	NA	15	NA	NA	13	NA	NA	16	NA	NA	13	NA	NA	13	NA	NA
	Most diverse SIM card purchasing options	14	NA	NA	12	NA	NA	15	NA	NA	14	NA	NA	15	NA	NA	15	NA	NA	14	NA	NA
Com. & Branding	Clearest communication across various channels	15	NA	NA	14	NA	NA	14	NA	NA	13	NA	NA	15	NA	NA	13	NA	NA	13	NA	NA
	Cool brand	25	+2	+3	37	+3	+7	26	+2	+4	25	+1	+3	27	+1	+4	25	+2	+3	25	+2	+3
	Prestigious brand	28	+2	+3	22	+0	+3	20	+1	+3	17	+1	+2	23	+2	+3	19	+1	+3	19	+2	+4
	Innovative brand	20	+1	+1	25	+2	+3	22	+1	+2	21	+0	+1	22	+0	+2	22	+1	+1	21	+0	+2

Base: Mobile phone users aware of the respective brand

GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending MAR 2024 (Δ1M: gap change to FEB 2024 | Δ3M: gap change to DEC 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.

Brand imagery: Area 1

The national-level improvement in network and offerings is also reflected in AREA 1, although TSEL's offerings have not changed.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Network	Best network coverage	41	+1	+2	23	-2	-4	17	-1	-3	14	-2	-6	20	-2	-3	18	-1	-5	13	-2	-7
	Best data / internet connection quality	40	+5	+15	25	+1	+6	18	+1	+4	18	+3	+5	21	+2	+6	22	+3	+7	14	+1	+2
	Best telephone quality	34	+3	+10	19	+2	+6	16	+2	+5	13	+1	+4	19	+2	+7	16	+3	+5	12	+1	+1
Offering	Packages that suit my needs	19	+0	-1	16	+0	-1	17	+0	+2	19	+2	+6	20	+2	+5	20	+3	+7	16	+1	+4
	Best bonus and promotion	19	+0	+1	26	+0	+5	25	+3	+6	28	+2	+7	25	+2	+4	26	+1	+2	23	+3	+6
	Best tariff for data package	23	+1	+1	30	+0	+5	28	+3	+5	34	+4	+8	28	+3	+6	33	+3	+7	24	+2	+5
	Best tariff for telephone and SMS	18	-1	-2	16	+0	+1	19	+1	+3	17	+2	+4	19	+1	+4	18	+1	+3	16	+1	+3
Cust. Engagement	Best selfcare application	16	-1	-3	14	-3	-11	13	-2	-5	12	-2	-3	15	-2	-6	12	+0	-1	12	-1	-2
	Appreciates customer loyalty with special programs	10	-1	-3	13	-2	+0	12	+0	+1	11	+0	+0	11	+0	+0	11	+0	+1	9	+0	+0
Sales	Best customer service experience	10	NA	NA	12	NA	NA	10	NA	NA	8	NA	NA	11	NA	NA	9	NA	NA	9	NA	NA
	Best touchpoint solutions	10	NA	NA	10	NA	NA	10	NA	NA	7	NA	NA	12	NA	NA	9	NA	NA	9	NA	NA
	Prompt touchpoint resolution	10	NA	NA	10	NA	NA	9	NA	NA	8	NA	NA	11	NA	NA	9	NA	NA	8	NA	NA
	Seamless primary subscription package changes	10	NA	NA	11	NA	NA	9	NA	NA	9	NA	NA	10	NA	NA	9	NA	NA	8	NA	NA
	Effortless SIM card activation process	15	NA	NA	15	NA	NA	14	NA	NA	15	NA	NA	17	NA	NA	16	NA	NA	14	NA	NA
	Most diverse purchase platforms	15	NA	NA	13	NA	NA	14	NA	NA	12	NA	NA	14	NA	NA	12	NA	NA	10	NA	NA
	Most diverse payment options	14	NA	NA	16	NA	NA	13	NA	NA	10	NA	NA	14	NA	NA	12	NA	NA	10	NA	NA
	Most diverse SIM card purchasing options	12	NA	NA	11	NA	NA	11	NA	NA	10	NA	NA	13	NA	NA	12	NA	NA	11	NA	NA
Com. & Branding	Clearest communication across various channels	13	NA	NA	12	NA	NA	11	NA	NA	10	NA	NA	12	NA	NA	10	NA	NA	11	NA	NA
	Cool brand	22	+1	+0	32	+2	+3	22	+1	+0	24	+0	+2	25	+1	+0	22	+1	-2	24	+1	+3
	Prestigious brand	24	+1	+1	22	+1	+2	15	+0	-1	14	+0	-1	18	+0	+0	17	+0	-1	16	+0	+0
	Innovative brand	17	+0	-1	22	+1	+0	19	+1	+2	19	-1	+1	20	+0	+1	20	+1	+2	19	+0	+2

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

GREEN: Significantly improve RED: Significantly decline

Data above is based on data ending MAR 2024 (Δ1M: gap change to FEB 2024 | Δ3M: gap change to DEC 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.

Brand imagery: Area 2

In AREA 2, all operators consistently show improvements in network, offerings, communication, and branding.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Network	Best network coverage	50	+0	-2	28	+0	-3	31	-2	-5	21	-2	-7	31	+0	-6	26	-2	-4	22	-1	-5
	Best data / internet connection quality	48	+4	+8	31	+4	+8	30	+1	+3	23	+1	+3	34	+3	+5	29	+3	+7	24	+2	+5
	Best telephone quality	37	+2	+4	22	+2	+6	24	+2	+4	21	+3	+7	23	+1	+1	24	+2	+9	20	+3	+6
Offering	Packages that suit my needs	28	+2	+5	28	+5	+9	29	+3	+8	29	+5	+10	26	+4	+7	28	+4	+11	26	+3	+10
	Best bonus and promotion	28	+2	+4	35	+5	+10	35	+1	+4	35	+1	+1	31	+2	+4	32	+0	+0	31	+3	+2
	Best tariff for data package	30	+1	+4	36	+2	+10	42	+3	+6	42	+2	+4	32	+1	+1	37	+2	+2	32	+3	+3
	Best tariff for telephone and SMS	24	+1	+5	21	+2	+6	26	+3	+6	25	+2	+3	23	+3	+5	26	+2	+4	20	+1	+1
Cust. Engagement	Best selfcare application	23	-2	-6	22	-1	-5	21	-1	-5	18	+1	-1	22	-1	-6	20	+1	+2	18	+1	+0
	Appreciates customer loyalty with special programs	19	+0	+1	17	+0	+2	19	+2	+5	17	+2	+5	18	+1	+2	17	+2	+7	15	+1	+4
Sales	Best customer service experience	18	NA	NA	16	NA	NA	16	NA	NA	12	NA	NA	15	NA	NA	12	NA	NA	14	NA	NA
	Best touchpoint solutions	18	NA	NA	18	NA	NA	16	NA	NA	13	NA	NA	16	NA	NA	14	NA	NA	15	NA	NA
	Prompt touchpoint resolution	17	NA	NA	14	NA	NA	15	NA	NA	13	NA	NA	14	NA	NA	13	NA	NA	14	NA	NA
	Seamless primary subscription package changes	17	NA	NA	14	NA	NA	17	NA	NA	13	NA	NA	13	NA	NA	14	NA	NA	14	NA	NA
	Effortless SIM card activation process	24	NA	NA	27	NA	NA	24	NA	NA	26	NA	NA	22	NA	NA	26	NA	NA	22	NA	NA
	Most diverse purchase platforms	22	NA	NA	20	NA	NA	23	NA	NA	18	NA	NA	20	NA	NA	18	NA	NA	18	NA	NA
	Most diverse payment options	21	NA	NA	21	NA	NA	18	NA	NA	15	NA	NA	19	NA	NA	16	NA	NA	17	NA	NA
	Most diverse SIM card purchasing options	19	NA	NA	16	NA	NA	21	NA	NA	18	NA	NA	19	NA	NA	20	NA	NA	18	NA	NA
Com. & Branding	Clearest communication across various channels	21	NA	NA	18	NA	NA	18	NA	NA	17	NA	NA	20	NA	NA	18	NA	NA	18	NA	NA
	Cool brand	31	+3	+6	41	+4	+10	31	+3	+6	29	+3	+6	31	+2	+6	29	+3	+6	28	+3	+5
	Prestigious brand	35	+3	+7	26	+1	+7	24	+3	+6	20	+2	+6	30	+4	+9	22	+3	+8	22	+4	+9
	Innovative brand	27	+2	+5	29	+2	+5	27	+1	+3	26	+2	+5	26	+0	+2	27	+3	+5	26	+1	+3

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

GREEN: Significantly improve RED: Significantly decline

Internal

Data above is based on data ending MAR 2024 (Δ1M: gap change to FEB 2024 | Δ3M: gap change to DEC 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.

Brand imagery: Area 3

Similarly in AREA 3, improvements in network, offerings, communication, and branding are evident across all operators, although they may not be as substantial as in AREA 2.

Brand Imagery
In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Network	Best network coverage	44	+1	+1	20	-2	-8	22	-2	-8	15	-3	-8	25	-1	-5	14	-3	-10	16	-3	-10
	Best data / internet connection quality	41	+3	+9	21	+0	-2	25	+1	+4	15	+0	-1	26	+1	+5	16	-1	-3	17	+0	-2
	Best telephone quality	30	+2	+5	13	+0	-1	18	+1	+4	12	-1	-1	20	+1	+3	14	+0	+1	13	+1	+2
Offering	Packages that suit my needs	19	+0	+1	20	+0	+3	23	+0	+2	24	+3	+7	22	+1	+5	21	+2	+5	21	+3	+6
	Best bonus and promotion	18	+0	+2	25	+2	+8	25	+0	+3	29	+1	+4	24	+0	+2	26	+0	+2	26	+2	+4
	Best tariff for data package	23	+1	+4	30	+4	+7	34	+1	+6	37	+1	+5	30	+1	+6	31	+1	+6	29	+1	+3
	Best tariff for telephone and SMS	14	+0	-1	12	+1	+0	19	+1	+3	20	+1	+4	18	+0	+1	18	+1	+3	15	+1	+3
Cust. Engagement	Best selfcare application	14	-3	-7	12	-5	-12	13	-2	-8	11	-1	-5	13	-3	-9	10	-2	-6	10	-1	-5
	Appreciates customer loyalty with special programs	11	-1	-2	9	-2	-4	11	+0	-1	10	+0	-1	10	-1	-2	11	+0	+0	11	+1	+1
Sales	Best customer service experience	10	NA	NA	7	NA	NA	9	NA	NA	8	NA	NA	8	NA	NA	8	NA	NA	10	NA	NA
	Best touchpoint solutions	11	NA	NA	10	NA	NA	9	NA	NA	9	NA	NA	10	NA	NA	9	NA	NA	9	NA	NA
	Prompt touchpoint resolution	10	NA	NA	8	NA	NA	9	NA	NA	9	NA	NA	8	NA	NA	9	NA	NA	8	NA	NA
	Seamless primary subscription package changes	10	NA	NA	9	NA	NA	10	NA	NA	10	NA	NA	11	NA	NA	9	NA	NA	8	NA	NA
	Effortless SIM card activation process	15	NA	NA	12	NA	NA	15	NA	NA	15	NA	NA	15	NA	NA	15	NA	NA	15	NA	NA
	Most diverse purchase platforms	16	NA	NA	16	NA	NA	15	NA	NA	13	NA	NA	16	NA	NA	14	NA	NA	13	NA	NA
	Most diverse payment options	15	NA	NA	14	NA	NA	14	NA	NA	11	NA	NA	15	NA	NA	12	NA	NA	12	NA	NA
	Most diverse SIM card purchasing options	12	NA	NA	8	NA	NA	12	NA	NA	12	NA	NA	13	NA	NA	13	NA	NA	12	NA	NA
Com. & Branding	Clearest communication across various channels	12	NA	NA	11	NA	NA	11	NA	NA	10	NA	NA	12	NA	NA	12	NA	NA	11	NA	NA
	Cool brand	24	+1	+3	37	+2	+6	24	+1	+3	22	-1	+0	24	+1	+5	24	+1	+3	23	+1	+3
	Prestigious brand	27	+2	+4	17	-1	+0	18	+0	+2	15	+0	+0	20	+0	+1	16	+0	+0	16	+1	+1
	Innovative brand	17	+0	+0	22	+2	+2	18	+0	+1	17	-2	-4	19	+1	+2	18	-1	-2	18	+0	+0

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 MAR 2024 (Δ1M: gap change to FEB 2024 | Δ3M: gap change to DEC 2023)
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Internal

Brand imagery: Area 4

In AREA 4, improvements in TSEL's network are evident at the national level, but its offering and customer engagement are weakening. However, its communication and branding remain relatively stable compared to competitors.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Network	Best network coverage	48	+2	+6	23	-5	-10	21	-1	-5	17	-3	-6	19	-4	-8	16	-1	-3	14	-4	-11
	Best data / internet connection quality	43	+3	+10	24	+3	+3	23	+0	+2	23	+1	+4	24	+1	-1	19	+0	-2	16	-2	-4
	Best telephone quality	39	+2	+9	21	+2	+7	18	+1	+3	15	+1	+4	17	+0	+2	13	+0	+2	13	+0	+1
Offering	Packages that suit my needs	21	-1	-2	21	+1	-1	24	+2	+3	27	+3	+8	24	+2	+4	23	+3	+7	18	+2	+3
	Best bonus and promotion	20	+0	-1	26	+0	+0	27	+2	+2	30	+2	+4	28	+3	+6	27	+2	+3	27	+1	+4
	Best tariff for data package	23	+0	-1	30	+2	+5	33	+2	+3	38	+3	+5	33	+3	+6	29	+0	+2	25	-1	-1
	Best tariff for telephone and SMS	19	-1	-3	15	+1	-1	19	+1	+1	16	+0	-2	17	+0	-1	14	-1	-1	13	+0	-1
Cust. Engagement	Best selfcare application	16	-3	-8	14	-3	-11	12	-3	-11	13	-2	-6	13	-3	-9	11	-2	-6	9	-2	-9
	Appreciates customer loyalty with special programs	10	-1	-4	11	+0	-3	10	+0	-2	9	-1	-3	12	-1	+0	8	-1	-3	10	+0	+0
Sales	Best customer service experience	11	NA	NA	10	NA	NA	9	NA	NA	8	NA	NA	12	NA	NA	8	NA	NA	9	NA	NA
	Best touchpoint solutions	10	NA	NA	13	NA	NA	10	NA	NA	8	NA	NA	12	NA	NA	8	NA	NA	10	NA	NA
	Prompt touchpoint resolution	10	NA	NA	11	NA	NA	9	NA	NA	8	NA	NA	11	NA	NA	9	NA	NA	9	NA	NA
	Seamless primary subscription package changes	10	NA	NA	9	NA	NA	9	NA	NA	9	NA	NA	11	NA	NA	9	NA	NA	8	NA	NA
	Effortless SIM card activation process	18	NA	NA	18	NA	NA	18	NA	NA	21	NA	NA	16	NA	NA	17	NA	NA	16	NA	NA
	Most diverse purchase platforms	14	NA	NA	16	NA	NA	12	NA	NA	13	NA	NA	12	NA	NA	11	NA	NA	11	NA	NA
	Most diverse payment options	14	NA	NA	14	NA	NA	13	NA	NA	12	NA	NA	12	NA	NA	11	NA	NA	10	NA	NA
	Most diverse SIM card purchasing options	12	NA	NA	12	NA	NA	13	NA	NA	13	NA	NA	13	NA	NA	11	NA	NA	11	NA	NA
Com. & Branding	Clearest communication across various channels	14	NA	NA	13	NA	NA	12	NA	NA	13	NA	NA	13	NA	NA	10	NA	NA	11	NA	NA
	Cool brand	22	+0	+0	32	+3	+7	25	+1	+2	25	+0	+2	26	+1	+3	26	+2	+2	25	+1	+2
	Prestigious brand	26	+0	+1	23	+0	+4	20	+1	+3	20	+0	+2	23	+1	+2	22	+1	+4	21	+2	+3
	Innovative brand	20	+0	-1	25	+1	+4	22	+1	+1	25	+2	+4	24	+0	+2	24	+1	+1	24	+2	+3

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

GREEN: Significantly improve RED: Significantly decline

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Dual brand strategy assessment

Profiles breakdown of dual-brand operators

TSEL-BY.U differentiates mainly based on age group and occupation, while competitors like ISAT-3 TRI and XL-AXIS primarily differentiate on data pricing.

Profile

Based on distinct (skewness) to mobile phone users in general

	TSEL	BY.U	ISAT	3 TRI	XL	AXIS
	Mar'24	Mar'24	Mar'24	Mar'24	Mar'24	Mar'24
Distinct Age Group	35-55 Y.O (51%)	12-24 Y.O (37%)	12-24 Y.O (37%)	12-24 Y.O (39%)	25-34 Y.O (27%)	12-24 Y.O (53%)
Distinct SEC	Upper (21%)	Upper (28%)	Lower (21%)	Middle (66%)	Lower (28%)	Lower (27%)
Distinct Occupation	White Collar (59%)	Students (24%)	Students (22%)	Not Working (8%)	Students (20%)	Students (33%)
Quota consumption (GB)*	29	31	30	29	31	21
Data Spending (IDR'000)*	93	77	77	76	74	71
Distinct data pricing segment* Supreme: High usage, high ARPU Smart Saver: High usage, low ARPU Lavish Patron: Low usage, high ARPU Modest: Low usage, Low ARPU	Supreme (47%) Lavish Patron (10%)	Modest (43%)	Modest (37%)	Smart Saver (28%)	Smart Saver (28%)	Modest (45%)
Distinct data type segment*	Advanced (46%)	Moderate (47%)	Moderate (42%)	Moderate (44%)	Basic (19%)	Basic (23%)

Base: Respective primary card users

Distinct: Value that is more likely to exhibit skewness compared to users in general. It's important to note that this value may not always represent the majority.

*among mobile data users

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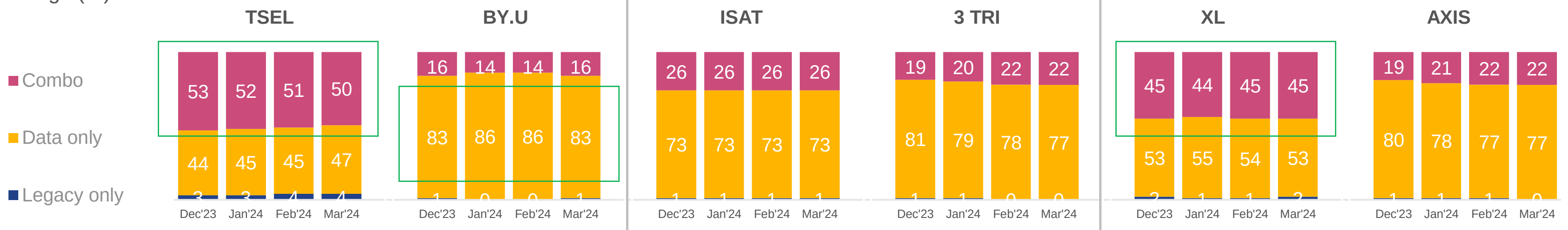
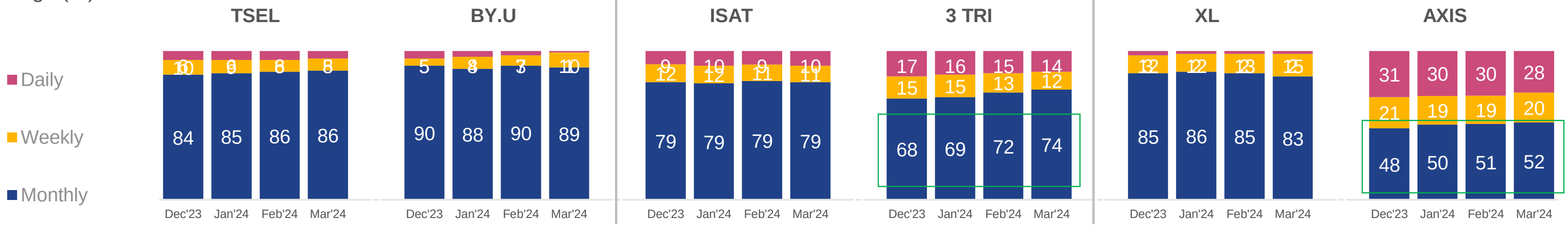
Exploring the distinct packages offered by dual-brand operators

The diminishing difference between dual-brand operators is evident in the package types used by TSEL-BY.U users, who are increasingly opting for data-only options. Additionally, sub-brands like 3 TRI and AXIS users continue to show a preference for monthly package purchases, similar to their parent brands.

Package type
In percentage (%)



Package duration
In percentage (%)



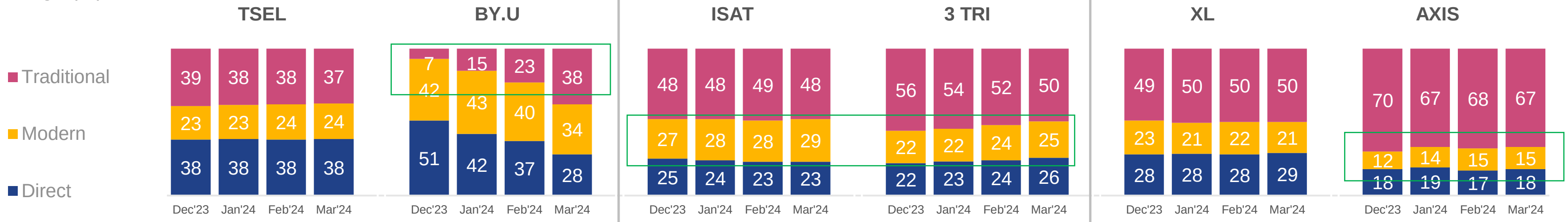
Base: Respective primary card users

Revealing the points of contact for dual-brand operators

BY.U users are shifting towards traditional channels, while IOH and AXIS users are gravitating towards modern channels. In terms of information sources, there has been a significant shift among BY.U users from digital to offline channels such as word-of-mouth (WOM), outlets, and events, whereas the other operators are using digital channels more.

Package purchase channel

In percentage (%)



Source of information

In percentage (%)

	TSEL			BY.U			ISAT			3 TRI			XL			AXIS		
	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
ATL	51	-4	-12	48	+0	-6	51	-5	-15	53	-4	-10	47	-4	-13	45	-4	-17
BTL	26	+0	+1	19	-2	+3	24	+1	+2	20	+0	+0	22	+1	+2	15	-1	+0
Digital	45	+2	+8	42	-13	-22	40	+3	+8	37	+5	+12	41	+4	+10	27	+1	+8
WOM	65	+2	+5	72	+8	+17	66	+2	+4	68	+2	-1	69	+0	+4	75	+2	+7
Outlet	25	+0	-1	30	+3	+12	30	-1	-2	31	+0	-4	28	-1	-1	30	-1	-3
Event	17	+0	+2	26	+2	+8	15	+1	-1	16	+1	+4	13	+1	+0	11	-1	+0

Base: Respective primary card users

ATL: TV, radio, printed media ads, billboard or posters, paint on the wall | BTL: SMS promotion, official store, call centre | Digital: Official digital channels, internet ads, e-commerce | WOM: Word-of-mouth from seller, family, or friends, online review | Outlet: point-of-sale materials, starter pack | Event: SPG, special events

Internal

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

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Summary

Summary: Customer satisfaction

TSEL's NPS has notably declined in AREA 3 & 4, with BY.U also experiencing a significant decrease in AREA 4. Conversely, ISAT has gained higher advocacy across all areas. Despite the decline in NPS, TSEL's CSI remained relatively stable in AREA 3 & 4, while BY.U has notably decreased in AREA 4. Competitors, including ISAT, show a more positive trend in CSI.

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Total	**CSI**	7.59			7.53	▼		7.42			7.32			7.33			7.42		▲	7.20		
	NPS	+47		▼	+42			+39	▲	▲	+34			+36			+37			+31		
Java	**CSI**	7.63			7.57			7.44			7.24			7.34			7.35			7.14		▼
	NPS	+51			+43			+39	▲	▲	+32			+38			+36		▲	+31		
Non-Java	**CSI**	7.55		▲	7.41	▼	▼	7.35		▲	7.50	▲	▲	7.27		▲	7.49		▲	7.41	▲	▲
	NPS	+43		▼	+38	▼	▼	+38	▲	▲	+38			+31			+37			+28		
Area 1	**CSI**	7.53		▲	7.38		▲	7.27	▲	▲	7.34			7.21			7.49		▲	7.33	▲	▲
	NPS	+41			+38			+31	▲	▲	+34			+20		▼	+37			+21		▼
Area 2	**CSI**	7.77			7.77		▲	7.77			7.77	▲	▲	7.77		▲	7.77		▲	7.77		▼
	NPS	+61	▲	▲	+61			+61	▲	▲	+61	▲	▲	+61			+61		▲	+61		
Area 3	**CSI**	7.51			7.51			7.51			7.51		▼	7.51			7.51		▼	7.51		▼
	NPS	+43	▼	▼	+43			+43	▲		+43		▼	+43			+43			+43		▼
Area 4	**CSI**	7.57			7.57	▼	▼	7.57		▲	7.57	▲	▲	7.57		▲	7.57		▲	7.57	▲	▲
	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

Internal

Summary: Brand performance

TSEL PRE TOTAL's brand equity index shows improvements, particularly in AREA 2 & 3. Concurrently, TSEL's market share has also increased across these areas, surpassing IOH's share in JAVA.

		TELKOMSEL HALO			TSEL PRE TOTAL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M	Mar'24	Δ1M	Δ3M
Total	**BEI**	0.4			3.6			0.4			1.7			1.6			0.9			1.3			0.8		
	Share	2			39		▲	1			19			12			11			9			5		
Java	**BEI**	0.4			3.2		▲	0.4			2.0			1.7			1.1			1.1			1.0		
	Share	2			33		▲	2			23			13			13			7			6		
Non-Java	**BEI**	0.4			4.3			0.3			1.2			1.5			0.6			1.5			0.6		
	Share	3			50		▲	1			12			11			8			12			3		
Area 1	**BEI**	0.4			4.5			0.3			1.0			1.4			0.6			1.8			0.6		
	Share	3			51			1			9			10		▼	6			16			4		
Area 2	**BEI**	0.4			3.2		▲	0.5			2.1			2.1			0.9			1.3			0.8		
	Share	3			31		▲	2			24			17			10			9			5		
Area 3	**BEI**	0.3			3.2		▲	0.4			2.0			1.3			1.2			1.0			1.1		
	Share	2			35		▲	2			22			10			16			6			8		
Area 4	**BEI**	0.4			4.1			0.3			1.4			1.7			0.8			0.9			0.6		▼
	Share	3			49		▲	1			15			13			11		▲	6			3	▼	▼

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

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

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

	NPS decrease	NPS stable	NPS increase
CSI increase	(+) Network, Tariff, Loyalty Program, Selfcare App *However, the network is not superior compared to other operators and still experiences glitches.*	(+) Network, Tariff	(+) Network, Tariff, Purchase Channel
CSI stable	(-) Network, Tariff		(+) Network, Tariff
CSI decrease	(-) Network, Tariff		

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