



Consumer Study on Fixed WiFi Operator

KPI report

Data ending: Mar'24

Apr'24

Research design: Consumer study 2024



General Respondent Criteria

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



City Coverage

- **Offline City Coverage**
28 URBAN CITIES
29 RURAL CITIES
3 PUMA CITIES
- **Online City Coverage**
Telkomsel region boundary, including all cities within each respective region



Interview Method

Main Sample - Mixed survey method (Online & Offline)

- **Online**
Survey method: Self-completion
Recruitment method: Online survey panel

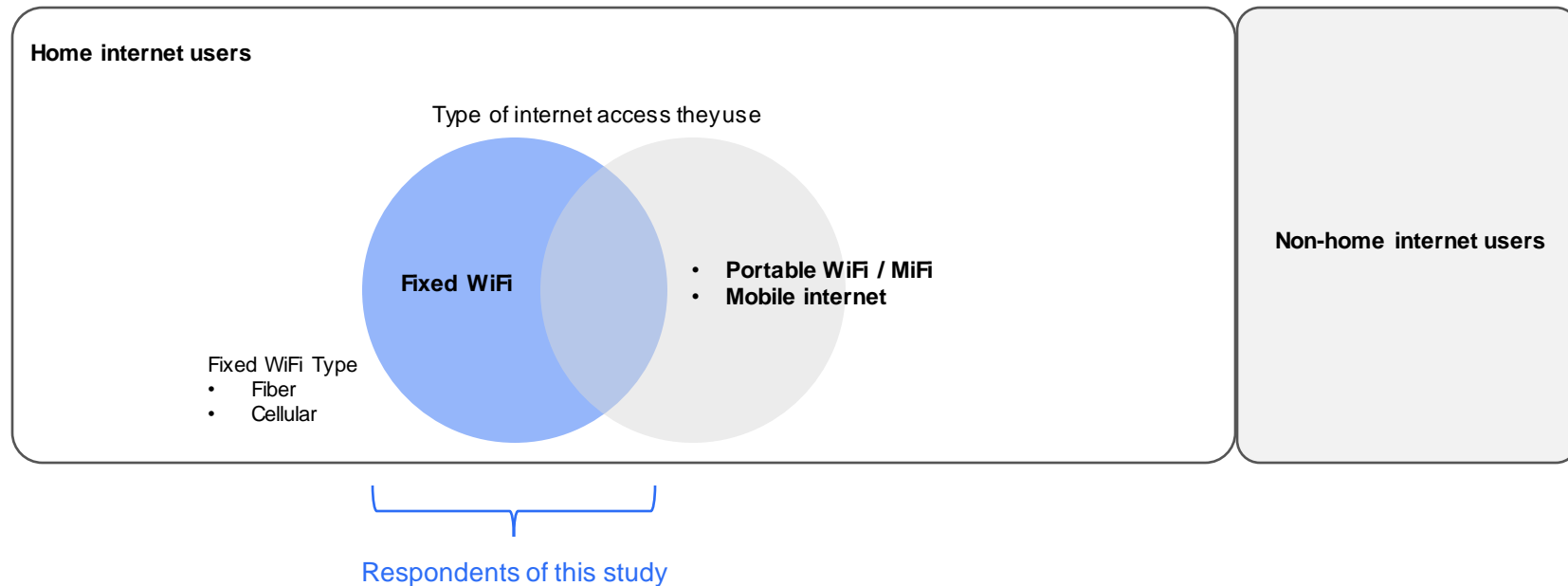
- **Offline**
Survey method: Face-to-face interview using CAPI (Computer Assisted Personal Interview)
Recruitment method: Random (general respondent) and convenience (booster respondent) sampling

Booster Sample – Competitor users

- **Offline**
Survey method: Face-to-face interview using CAPI (Computer Assisted Personal Interview)
Recruitment method: Convenience (booster respondent) sampling

The respondents of this study

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



Research design: Consumer study fixed

Dec 2023

Feb 2024

Mar 2024



Fieldwork Period

Oct-Dec 2023

Dec 2023-Feb 2024

Mar 2024-Apr 2024



Coverage

Urban + Rural, 13 TSEL regions
PUMA urban only



General Respondent
Criteria

Male or Female
All SES
18 – 55 Y.O
Fixed WiFi users (any type – fiber or cellular)
Owned house or minimum 12 months rent
Fixed WiFi Provider Decision Maker in Household

1

Main Sample

- Offline: 5,673 resp
- Online: 5,468 resp

- Offline: 5,654 resp
- Online: 5,490 resp

- Offline: 5,581 resp
- Online: 5,482 resp

2

Booster Sample

550 resp

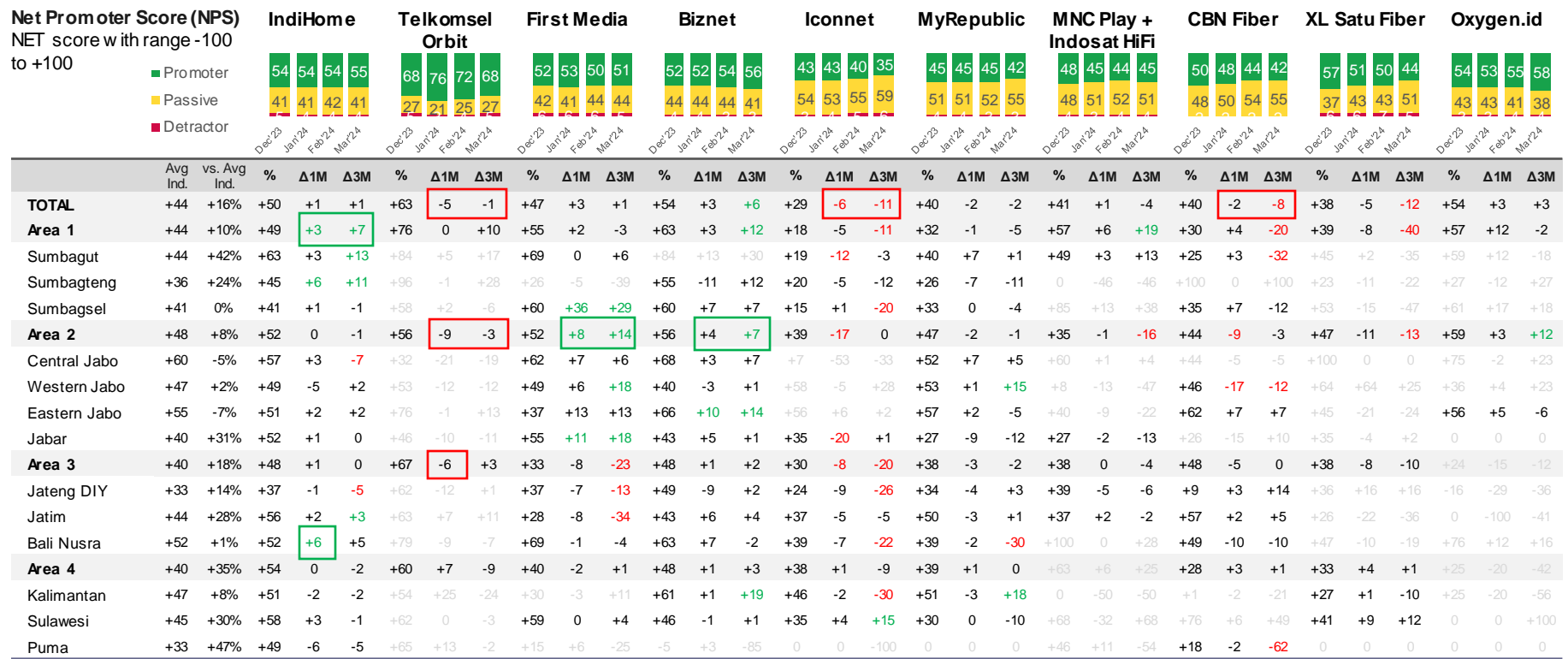
569 resp

536 resp

Net Promoter Score (NPS)

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

IndiHome manage a relative stable performance with a slight inclining number that mostly derived from Area 1, in compare across period which contrast with Iconnet and CBN Fiber that continue a negative trend. Meanwhile, Telkomsel Orbit shows quite a declining performance in Total and mostly derived from Area 2 & 3. On the other hand, Biznet performs a quite positive number, similar with First Media, especially in Area 2.



Base: Respective Fixed WiFi users | Avg Ind: Exclude Telkomsel Orbit | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

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

IndiHome performance among premium speed internet users is continue to show positive trend. On the other hand, Telkomsel Orbit NPS among consumers with 15-30 Mbps speed internet is keep declining. For competitor such CBN Fiber and XL Satu Fiber performs negative trends in compared to 3 months before while Iconnet performs negative trend in compared to previous month and 3 months before.

Net Promoter Score (NPS) NET score with range -100 to +100	IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																															
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Base: Respective Fixed WiFi users | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

IndiHome: Positive reasons for being passives

41% (-1%) of IndiHome users are **passives**

	REASON	%	Δ1M	Δ3M
CONNECTIVITY	Stable and fast connection	60		
PRICE & PROMO	Affordable price	13	▲	▲
CONNECTIVITY	Wide network coverage	12	▼	▼
BRAND	Widely used brand	4		
BRAND	Famous brand	4	▲	▲
AFTER-SALES SERVICE	Fast response service	4	▲	▲

Base: IndiHome users who are passives | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 |
 ▲: improve rank, ▼: decline rank | Others Residential Type: Shophouse (Ruko), Villagers House

	IndiHome Users	IndiHome Users – Passives
	%	Index %
Gender		
Male	51	50
Female	49	50
SES		
Upper	29	25
Middle	55	56
Lower	16	19
Age group		
18 – 24 YO	26	27
25 – 34 YO	30	29
35 – 44 YO	24	23
45 – 55 YO	20	21
Avg. age (YO)	33.59	33.04
Area		
Area 1	20	21
Area 2	35	34
Area 3	33	34
Area 4	13	12
Residential Type		
Residential	25	21
Apartment	1	1
Ordinary Housing	69	74
*Others	5	5
LOS (months)	31.57	31.12
Speed of Internet		
< 15 Mbps	17	21
15-30 Mbps	44	47
31-40 Mbps	7	7
41-50 Mbps	9	8
51-100 Mbps	9	6
> 100 Mbps	5	2

JABAR, Male, 35-44 YO, Middle SES, <15 Mbps.

Bila ada complain cepat tanggap , mudah cara pembayaran dan memberi nitif info tagihan bulanan melalui email

Takeouts:

- *Fast response service*
- *Convenient payment*

JATENG DIY, Female, 18-24 YO, Middle SES, 15-30 Mbps.

Mudah, murah dan terkenal

Takeouts:

- *Affordable price*
- *Famous brand*

JATENG DIY, Female, 25-34 YO, Middle SES, <15 Mbps.

Karena harga terjangkau dan merk terkenal.

Takeouts:

- *Affordable price*
- *Famous brand*

IndiHome: Negative reasons for being passives

41% (-1%) of IndiHome users are **passives**

REASON		%	Δ1M	Δ3M
CONNECTIVITY	Unstable and slow connection	46		
PRICE & PROMO	Unaffordable price	24		
AFTER-SALES SERVICES	Slow response technician	1		
PRICE & PROMO	Unstable price	1	▲	▲
AFTER-SALES SERVICES	Slow service	0	▼	▲
PURCHASE & PAYMENT	There is a penalty for late payment	0	▲	▲

Base: IndiHome users who are passives | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 |
 ▲: improve rank, ▼: decline rank | Others Residential Type: Shophouse (Ruko), Villagers House

	IndiHome Users	IndiHome Users – Passives
	%	Index %
Gender		
Male	51	50
Female	49	50
SES		
Upper	29	25
Middle	55	56
Lower	16	19
Age group		
18 – 24 YO	26	27
25 – 34 YO	30	29
35 – 44 YO	24	23
45 – 55 YO	20	21
Avg. age (YO)	33.59	33.04
Area		
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Area 2	35	34
Area 3	33	34
Area 4	13	12
Residential Type		
Residential	25	21
Apartment	1	1
Ordinary Housing	69	74
*Others	5	5
LOS (months)	31.57	31.12
Speed of Internet		
< 15 Mbps	17	21
15-30 Mbps	44	47
31-40 Mbps	7	7
41-50 Mbps	9	8
51-100 Mbps	9	6
> 100 Mbps	5	2

JABAR, Female, 35-44 YO, Middle SES, <15 Mbps.

pembayaran suka ada kenaikan tanpa ada pemberitahuan terlebih dahulu

Takeouts:

- *Unstable price*

JATIM, Male, 25-34 YO, Upper SES, <15 Mbps.

keterlambatan pembayaran ada denda berjalan.

Takeouts:

- *Penalty for late payment*

BALI NUSRA, Male, 18-24 YO, Upper SES, <15 Mbps.

call center susah di hubungi

Takeouts:

- *Slow customer service*

Telkomsel Orbit: Positive reasons for being passives

27% (+2%) of Telkomsel Orbit users are **passives**

	REASON	%	Δ1M	Δ3M
CONNECTIVITY	Stable and fast connection	72		
PRICE & PROMO	Affordable price	16		▲
CONNECTIVITY	Wide network coverage	10		▼
PRODUCT & PACKAGE	Easy to use	6	▲	▼
AFTER-SALES SERVICES	Great service	3	▼	
BRAND	Trusted brand	2	▲	▲

Base: Telkomsel Orbit users who are passives | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 |
 ▲: improve rank, ▼: decline rank | Others Residential Type: Shophouse (Ruko), Villagers House

	Telkomsel Orbit Users	Telkomsel Orbit Users - Passives
	%	Index
Gender		
Male	49	51
Female	51	49
SES		
Upper	33	22
Middle	55	61
Lower	11	17
Age group		
18 – 24 YO	20	33
25 – 34 YO	33	29
35 – 44 YO	34	21
45 – 55 YO	13	16
Avg. age (YO)	33.65	32.48
Area		
Area 1	18	11
Area 2	45	45
Area 3	25	29
Area 4	13	15
Residential Type		
Residential	51	28
Apartment	1	3
Ordinary Housing	44	65
*Others	4	5
LOS (months)	39.18	19.98
Speed of Internet		
< 15 Mbps	5	8
15-30 Mbps	20	37
31-40 Mbps	14	10
41-50 Mbps	12	11
51-100 Mbps	23	17
> 100 Mbps	18	7

JABAR, Male, 25-34 YO, Middle SES, <15 Mbps.

Sinyal stabil

Takeouts:

- *Stable connection*

BALI NUSRA, Female, 25-34 YO, Middle SES, 15-30 Mbps.

Jaringan cepat

Takeouts:

- *Fast connection*

Telkomsel Orbit: Negative reasons for being passives

27% (+2%) of Telkomsel Orbit users are **passives**

REASON		%	Δ1M	Δ3M
CONNECTIVITY	Unstable and slow connection	49		
PRICE & PROMO	Unaffordable price	28		
PURCHASE & PAYMENT	There is a penalty for late payment	0	▲	▲

	Telkomsel Orbit Users		Telkomsel Orbit Users - Passives	
	%		Index	%
Gender				
Male	49			51
Female	51			49
SES				
Upper	33			22
Middle	55			61
Lower	11			17
Age group				
18 – 24 YO	20			33
25 – 34 YO	33			29
35 – 44 YO	34			21
45 – 55 YO	13			16
Avg. age (YO)	33.65			32.48
Area				
Area 1	18			11
Area 2	45			45
Area 3	25			29
Area 4	13			15
Residential Type				
Residential	51			28
Apartment	1			3
Ordinary Housing	44			65
*Others	4			5
LOS (months)	39.18			19.98
Speed of Internet				
< 15 Mbps	5			8
15-30 Mbps	20			37
31-40 Mbps	14			10
41-50 Mbps	12			11
51-100 Mbps	23			17
> 100 Mbps	18			7

JABAR, Male, 25-34 YO, Middle SES, 15-30 Mbps.

Dengan menggunakan sistem kuota menjadi mahal.

Takeouts:

- Unaffordable price

JATENG DIY, Male, 18-24 YO, Lower SES, 15-30 Mbps.

Harga tergolong lumayan bagi kalangan penghasilan rendah

Takeouts:

- Unaffordable price

CENTRAL JABOTABEK, Female, 25-34 YO, Middle SES, <15 Mbps.

Musim hujan kadang-kadang sinyal jelek/hilang timbul

Takeouts:

- Unaffordable price

Base: Telkomsel Orbit users who are passives | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 |
▲: improve rank, ▼: decline rank | Others Residential Type: Shophouse (Ruko), Villagers House

User **positive** feedback on IndiHome

BALI NUSRA, Female, 25-34 YO, Upper SES, 41-50 Mbps.

Indihome adalah layanan WiFi terpercaya terpopuler mudah digunakan

- Takeouts:
- *Trusted brand*
 - *Popular brand*

JABAR, Male, 18-24 YO, Middle SES,<15 Mbps.

Layanan pelanggan cepat tanggap menangani keluhan begitu juga tindakan yang diambil. Kualitas jaringan sangat bagus.

- Takeouts:
- *Fast response customer service*
 - *Good network connection*

SULAWESI, Male, 18-24 YO, Middle SES, 31-40 Mbps.

Jaringannya sangat bagus dan pelayanan dari kantornya cepat kalau ada masalah

- Takeouts:
- *Good connection*
 - *Fast response customer service*

PUMA, Female, 25-34 YO, Upper SES, >100 Mbps.

layanan bagus, sinyal stabil bahkan dalam cuaca buruk

- Takeouts:
- *Stable connection even in bad weather*

SUMBAGUT, Male, 25-34 YO, Upper SES, 51-100 Mbps.

Karena memiliki layanan pelanggan dan jaringan yang cukup bagus.

- Takeouts:
- *Good customer service*
 - *Good connection*

KALIMANTAN, Male, 18-24 YO, Upper SES, 15-30 Mbps.

Karena beragam kecepatan internet sehingga bisa di sesuaikan dengan keinginan

- Takeouts:
- *Various plan offers*

Base: Indihome users

User **negative** feedback on IndiHome

SULAWESI, Female, 25-34 YO, Upper SES, 51-100 Mbps.

Ada denda yang harus dibayarkan ketika terlambat membayar.

- Takeouts:
- Late payment penalty

WESTERN JABOTABEK, Male, 35-44 YO, Middle SES, 15-30 Mbps.

Masih ada lokasi tertentu yang belum bisa menggunakannya.

- Takeouts:
- Limited network coverage

EASTERN JABOTABEK, Male, 35-44 YO, Upper SES, 51-100 Mbps.

Sinyal sering terganggu, tak sesuai dgn kecepatan yg di janjikan.

- Takeouts:
- Network interruption
 - Actual speed differences with the offers

JATIM, Female, 25-34 YO, Upper SES, 15-30 Mbps.

tagihannya sering naik dan sering mengalami gangguan ketika malam hari di jam 23.00.

- Takeouts:
- Slow connection approaching midnight
 - Unstable connection

JATENG DIY, Male, 35-44 YO, Middle SES, 15-30 Mbps.

Setiap tanggal 20 entah kenapa jaringan jadi lambat.

- Takeouts:
- Slow speed approaching at the end of the month

JATENG DIY, Male, 35-44 YO, Middle SES, >100 Mbps.

Kurangnya transparansi terkait biaya instalasi dan hasil instalasi.

- Takeouts:
- Installation price and installation result

Base: Indihome users

User **positive** feedback on Telkomsel Orbit

JATIM, Male, 18-24 YO, Lower SES, 41-50 Mbps. Sinyalnya stabil, merek terpercaya. <i>Takeouts:</i> <ul style="list-style-type: none">• <i>Stable connection</i>• <i>Trusted brand</i>	JATENG DIY, Male, 18-24 YO, Lower SES, 51-100 Mbps. Karena kecepatan jaringan yang sangat lancar dan stabil. <i>Takeouts:</i> <ul style="list-style-type: none">• <i>Fast internet speed</i>• <i>Stable connection</i>	SULAWESI, Female, 25-34 YO, Middle SES, 51-100 Mbps. Harga tagihannya lumayan terjangkau. <i>Takeouts:</i> <ul style="list-style-type: none">• <i>Affordable price</i>
PUMA, Male, 35-44 YO, Upper SES, 51-100 Mbps. Pilihan paket menarik dan jaringan kuat. <i>Takeouts:</i> <ul style="list-style-type: none">• <i>Interesting plan offers</i>• <i>Strong connection</i>	CENTRAL JABOTABEK, Female, 35-44 YO, Middle SES, 15-30 Mbps. Pemasangan mudah, bisa dibawa keluar kota. <i>Takeouts:</i> <ul style="list-style-type: none">• <i>Easy installation</i>• <i>Device portability</i>	SUMBAGTENG, Male, 45-55 YO, Upper SES, 41-50 Mbps. jaringan terluas dan terbaik milik telkomsel <i>Takeouts:</i> <ul style="list-style-type: none">• <i>Wide coverage</i>

User **negative** feedback on Telkomsel Orbit

EASTERN JABOTABEK, Male, 25-34 YO, Upper SES, 15-30 Mbps.

Customer service yang kurang responsif karena pakai bot.

- Takeouts:
- *Unresponsive customer service*

SULAWESI, Female, 18-24 YO, Upper SES, 15-30 Mbps.

Agak mahal karena tidak unlimited.

- Takeouts:
- *Unaffordable price*
 - *No unlimited internet plans available*

BALI NUSRA, Female, 25-34 YO, Middle SES, 15-30 Mbps.

Biayanya agak mahal.

- Takeouts:
- *Unaffordable price*

SUMBAGSEL, Female, 18-24 YO, Middle SES, >100 Mbps.

Kalau mati lampu tidak ada sinyal.

- Takeouts:
- *Network interruption during blackout*

EASTERN JABOTABEK, Female, 45-55 YO, Upper SES, 15-30 Mbps.

Jika turun hujan kecepatan internet melambat.

- Takeouts:
- *Slow connection during heavy weather*

SUMBAGUT, Female, 35-44 YO, Middle SES, 15-30 Mbps.

Harga yang lebih mahal dari yang lain

- Takeouts:
- *Higher price compared to other brands*

Base: Telkomsel Orbit users

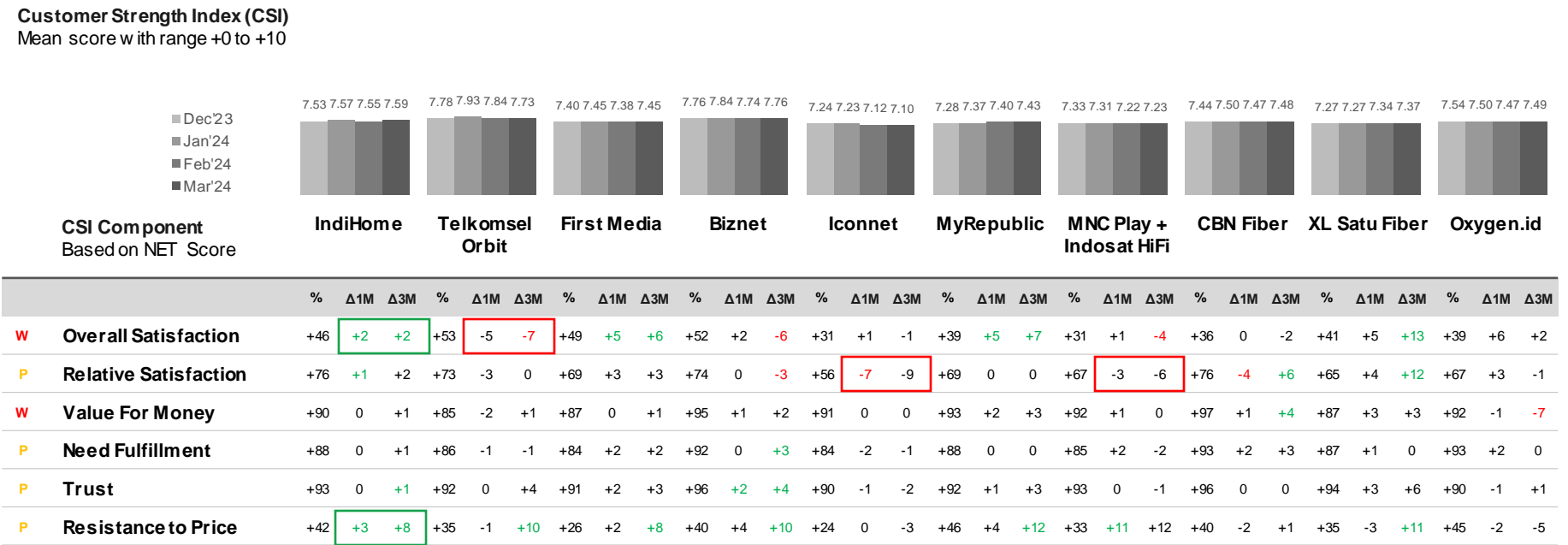
Customer Satisfaction

Experience with the main home internet
brand

Customer Strength Index (CSI)

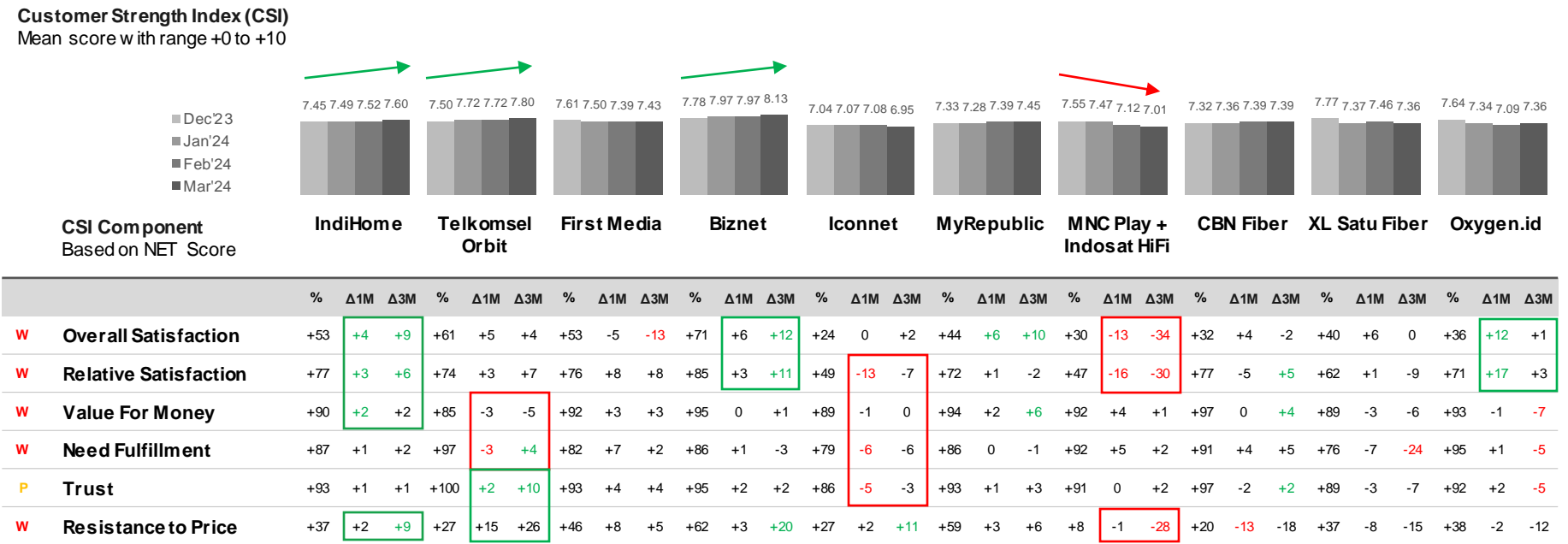
CSI and components' overall assessment: National level

IndiHome consumers continue the positive trend in terms of Resistance to Price & Overall Satisfaction, while Telkomsel Orbit consumers' Overall Satisfaction is still on a declining trend. On the other hand, Iconnet and MNC Play Indosat HiFi consumers show a lower assessment in terms of their Relative Satisfaction.



CSI and components' overall assessment: Area 1

IndiHome continues to show positive assessment in most aspects, while Telkomsel Orbit's performance remains stable in this period despite positive and negative performance in respective aspects. On the other hand, negative performance at National level for Iconnet and MNC Play Indosat HiFi is highly contributed by consumers in Area 1, whereas Biznet and Oxygen.id given a positive assessment by consumers in terms of Overall an Relative Satisfaction

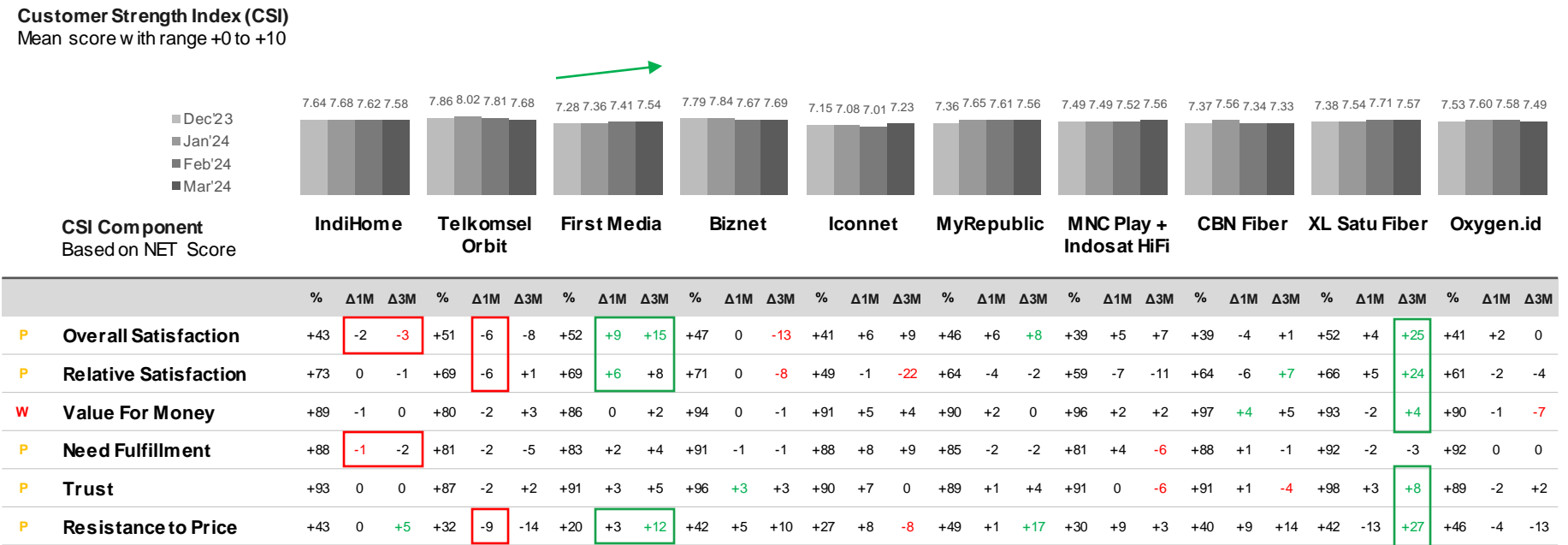


Base: Respective Fixed WiFi users | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

S: IndiHome is significantly strong vs closest competitor (exclude Telkomsel Orbit) P: IndiHome is parity vs closest competitor (exclude Telkomsel Orbit) W: IndiHome is significantly weak vs closest competitor (exclude Telkomsel Orbit)

CSI and components' overall assessment: Area 2

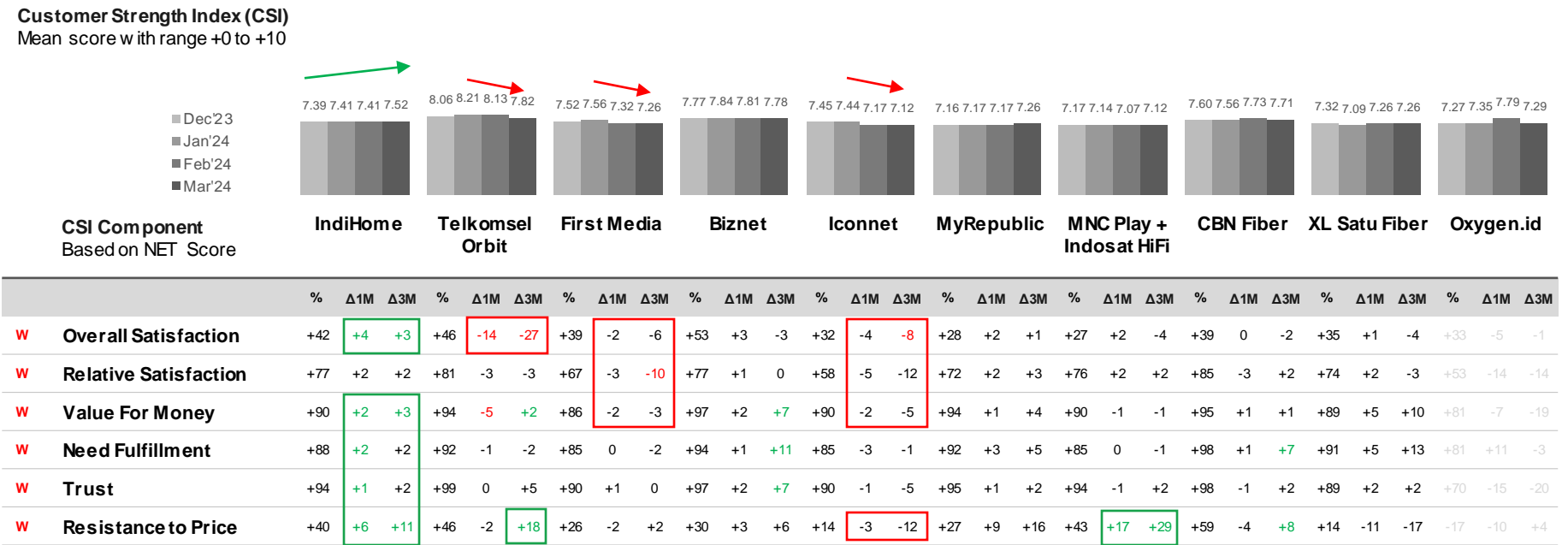
Despite performing lower in Overall Satisfaction and Need Fulfillment than the previous period, IndiHome still managed to compete with other brands in terms of other CSI components. Telkomsel Orbit also performed slightly lower in most aspects compared to the previous period. Positive performance was shown in FirstMedia on some aspects, also with XL Satu Fiber in comparison to the previous 3 months.



Base: Respective Fixed WiFi users | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base
S: IndiHome is significantly strong vs closest competitor (exclude Telkomsel Orbit) P: IndiHome is parity vs closest competitor (exclude Telkomsel Orbit) W: IndiHome is significantly weak vs closest competitor (exclude Telkomsel Orbit)

CSI and components' overall assessment: Area 3

IndiHome managed to show a positive assessment result in most aspects, while Telkomsel Orbit's declining CSI mostly contributed by its Overall Satisfaction level, but still show improve performance in Resistance to Price compared to the previous 3 months, similar to MNC play Indosat HiFi. On the other hand, First Media and Iconnet show negative performance in comparison to the previous period, especially in Overall Satisfaction, Relative Satisfaction, and Resistance to Price.

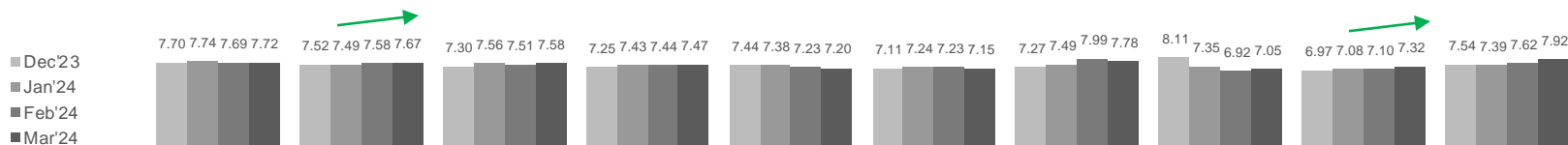


CSI and components' overall assessment: Area 4

Both IndiHome and Telkomsel Orbit's performance in Area 4 are relatively stable with a slight inclining number across periods, in addition, Telkomsel Orbit has shown quite a positive trend this period. Competitor like XL Satu Fiber manage to show a positive performance, whereas CBN Fiber has low performance in comparison to the previous 3 months.

Customer Strength Index (CSI)

Mean score with range +0 to +10



CSI Component
Based on NET Score

		%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M
W	Overall Satisfaction	+53	+1	+1	+62	+5	+16	+61	+8	+23	+54	+1	+7	+34	+5	-8	+22	-10	+9	+87	+5	+26	+24	0	-20	+38	+9	+18	+35	+20	+16
P	Relative Satisfaction	+78	+1	+3	+68	-3	-4	+61	-1	+15	+64	-1	+4	+71	-1	+2	+70	+1	+1	+87	+5	+26	+79	+1	-18	+61	+7	+14	+100	0	0
W	Value For Money	+90	-1	-2	+90	+2	+12	+93	+1	-1	+87	-2	-1	+98	+1	+3	+96	0	+8	+100	0	0	+97	+1	-3	+82	+8	+3	+100	0	0
P	Need Fulfillment	+88	0	0	+81	+6	+9	+85	-3	-5	+92	+1	+7	+89	+1	+1	+92	+2	0	+89	-11	+28	+79	+4	-12	+85	+3	+5	+100	+5	+7
P	Trust	+94	0	+1	+87	+5	+4	+90	-1	-3	+89	0	+3	+97	+3	+4	+91	0	-2	+87	+5	+26	+96	-1	-4	+95	+5	+11	+100	+5	+16
W	Resistance to Price	+48	+4	+6	+35	+5	+24	+45	0	+11	+40	+6	+17	+33	-5	-21	+62	+3	0	+17	-58	-22	+53	+8	-28	+43	+10	+18	+87	+8	+35

Base: Respective Fixed WiFi users | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | **GREEN**: significantly improve **RED**: significantly decline | Grey font: small base

S: IndiHome is significantly **strong** vs closest competitor (exclude Telkomsel Orbit) **P**: IndiHome is **parity** vs closest competitor (exclude Telkomsel Orbit) **W**: IndiHome is significantly **weak** vs closest competitor (exclude Telkomsel Orbit)

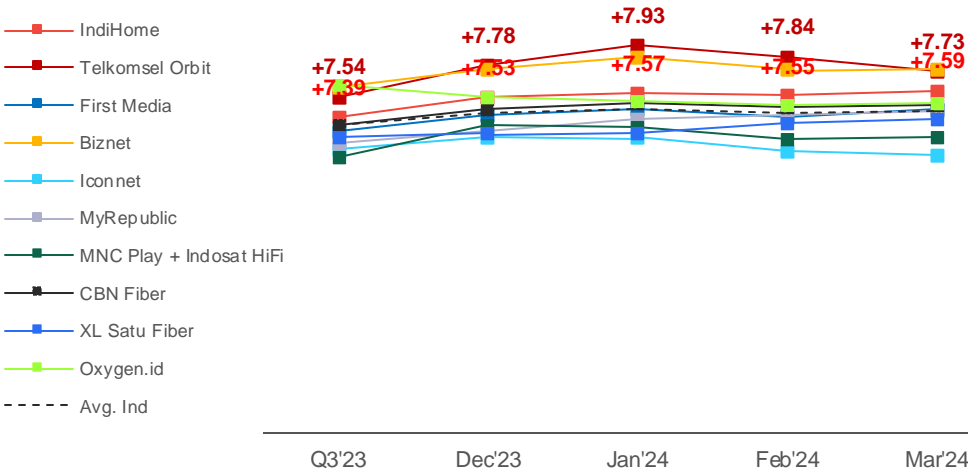
Customer Strength Index (CSI): National level tracking

IndiHome CSI begin to back on their inclining trend in Mar'24 which meets the target above average industry after a slight decline in Feb'24, while Telkomsel Orbit CSI declining continuously in Mar'24 since its peakest performance on Jan'24.

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

★ Met IndiHome target (+2% above average industry *)

IndiHome VS Avg. Industry.*					★					
	0.9%	+1.5%	+1.6%	+1.8%	+2.1%					



Base: Respective Fixed WiFi users | Avg Ind: Exclude Telkomsel Orbit

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

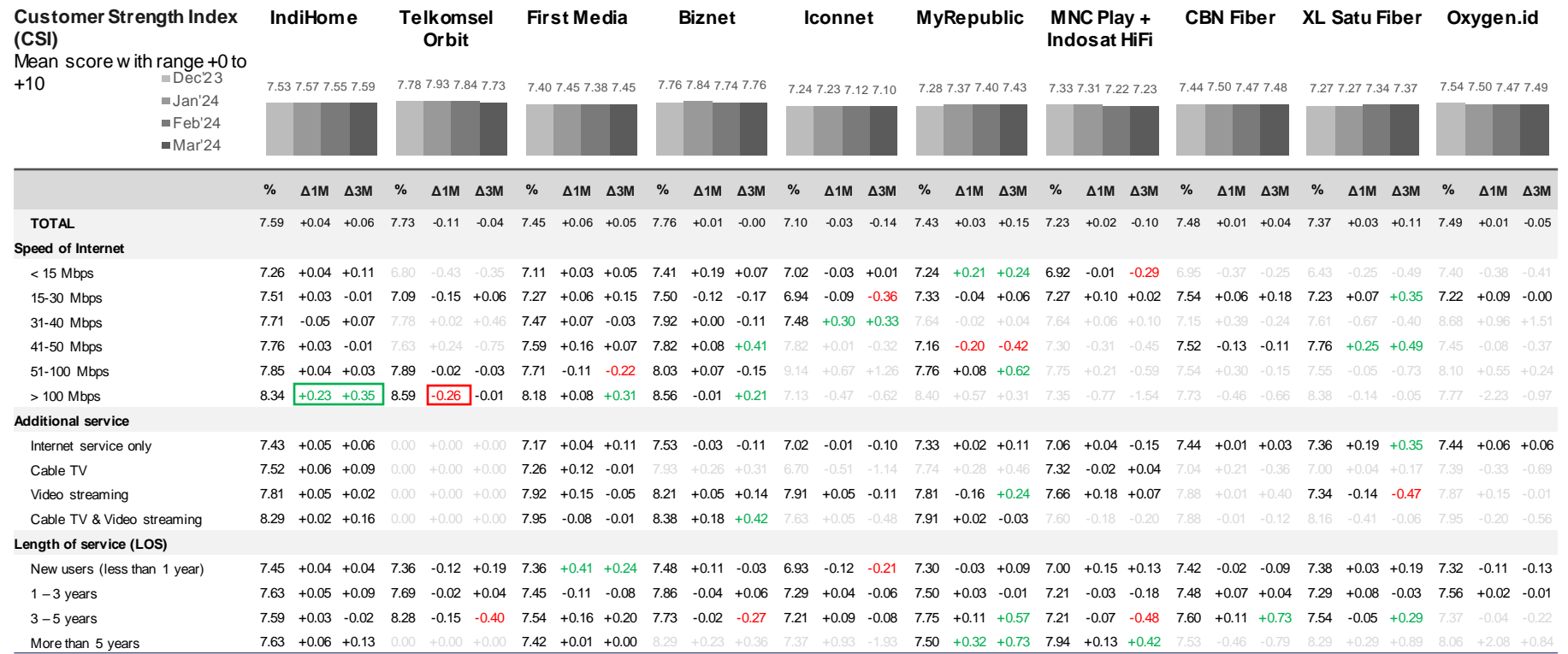
IndiHome performs relatively stable in Total although still have notable decline performance in Central Jabo compared to previous 3 months number. On the other hand, a notable declining number from Area 3, could be biggest contribution on slight decline performance in Total for Telkomsel Orbit. For competitor such Iconnet is struggling on mostly Area 3 & 4 for their CSI performance compared to 3 months before, while First Media managed positive performance in Area 2 and XL Satu Fiber with Area 4.

Customer Strength Index (CSI)		IndiHome				Telkomsel Orbit				First Media				Biznet				Iconnet				MyRepublic				MNC Play + Indosat HiFi				CBN Fiber				XL Satu Fiber				Oxygen.id			
Mean score with range +0 to +10		■ Dec'23				■ Jan'24				■ Feb'24				■ Mar'24																											
		7.53	7.57	7.55	7.59	7.78	7.93	7.84	7.73	7.40	7.45	7.38	7.45	7.76	7.84	7.74	7.76	7.24	7.23	7.12	7.10	7.28	7.37	7.40	7.43	7.33	7.31	7.22	7.23	7.44	7.50	7.47	7.48	7.27	7.27	7.34	7.37	7.54	7.50	7.47	7.49
	Avg Ind.	vs. Avg Ind.	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M
TOTAL	7.43	+2.10%	7.59	+0.04	+0.06	7.73	-0.11	-0.04	7.45	+0.06	+0.05	7.76	+0.01	-0.00	7.10	-0.03	-0.14	7.43	+0.03	+0.15	7.23	+0.02	-0.10	7.48	+0.01	+0.04	7.37	+0.03	+0.11	7.49	+0.01	-0.05									
Area 1	7.41	+2.61%	7.60	+0.08	+0.16	7.80	+0.08	+0.30	7.43	+0.04	-0.19	8.13	+0.17	+0.35	6.95	-0.13	-0.08	7.45	+0.06	+0.12	7.01	-0.12	-0.55	7.39	+0.00	+0.07	7.36	-0.10	-0.41	7.36	+0.27	-0.27									
Sumbagut	7.40	+4.41%	7.73	+0.01	+0.15	8.03	+0.15	+0.54	7.68	-0.12	-0.32	7.54	+0.33	-0.10	7.22	-0.28	-0.04	7.62	+0.47	+0.40	6.88	-0.20	-0.72	7.27	-0.04	+0.24	7.96	+0.24	+0.18	7.19	+0.32	-0.49									
Sumbagteng	7.29	+2.93%	7.50	+0.15	+0.22	8.23	+0.31	+0.02	6.98	+0.28	-0.02	8.14	+0.13	+0.65	6.53	-0.28	-0.37	6.98	-0.11	-0.21	0.00	-8.51	-8.51	7.30	+0.00	-0.04	6.30	-0.06	-0.45	7.24	-0.06	+7.24									
Sumbagsel	7.41	+1.98%	7.56	+0.10	+0.13	7.33	-0.02	+0.43	7.38	+0.52	+0.26	8.39	+0.17	+0.49	6.98	+0.11	+0.06	7.53	+0.06	+0.16	7.37	+0.48	+1.12	7.61	+0.10	-0.06	8.06	-0.20	-0.17	7.66	+0.37	+0.05									
Area 2	7.51	+1.02%	7.58	-0.04	-0.05	7.68	-0.14	-0.18	7.54	+0.13	+0.26	7.69	-0.01	-0.11	7.23	+0.22	+0.09	7.56	-0.05	+0.20	7.56	+0.04	+0.07	7.33	-0.01	-0.03	7.57	-0.14	+0.20	7.49	-0.09	-0.03									
Central Jabotabek	7.73	-0.39%	7.70	-0.08	-0.25	7.38	-0.13	-0.49	8.00	+0.19	+0.29	7.86	-0.08	-0.05	7.79	+0.43	+0.31	7.38	-0.09	+0.05	7.67	-0.00	-0.51	7.24	-0.12	-0.83	8.79	-0.30	-0.92	6.89	-0.06	+0.43									
Western Jabotabek	7.31	+1.60%	7.43	-0.14	-0.11	7.06	-0.28	-1.22	7.41	+0.13	+0.35	7.13	-0.16	-0.30	7.60	+0.57	+0.67	7.30	+0.03	+0.39	7.52	+0.11	+0.17	7.28	-0.02	+0.01	6.68	+0.59	-0.85	7.98	-0.20	-0.33									
Eastern Jabotabek	7.71	-0.77%	7.65	+0.05	+0.02	8.44	+0.00	+0.48	7.28	+0.19	+0.27	7.85	+0.10	-0.33	7.36	+0.61	+0.19	7.76	-0.08	-0.00	7.27	+0.15	+0.11	7.98	+0.30	+0.58	7.34	-0.03	+0.46	7.73	-0.07	-0.19									
Jabar	7.44	+1.59%	7.56	+0.01	+0.09	7.26	-0.25	+0.28	7.25	+0.06	+0.00	7.68	+0.07	+0.21	6.72	-0.25	-0.10	7.83	+0.05	+0.25	7.59	-0.01	+0.30	6.86	-0.05	-0.07	7.88	-0.19	+0.31	0.00	-8.13	-7.88									
Area 3	7.38	+1.88%	7.52	+0.10	+0.12	7.82	-0.31	-0.24	7.26	-0.06	-0.26	7.78	-0.03	+0.01	7.12	-0.05	-0.34	7.26	+0.09	+0.10	7.12	+0.04	-0.05	7.71	-0.02	+0.11	7.26	+0.00	-0.06	7.29	-0.50	+0.02									
Jateng DIY	7.18	+1.24%	7.27	+0.06	-0.01	7.44	-0.58	-0.59	6.97	-0.10	-0.30	7.57	-0.05	+0.22	6.87	-0.09	-0.34	7.13	+0.16	+0.13	7.25	+0.06	+0.05	6.60	-0.07	+0.15	7.10	+0.37	+0.32	7.24	-0.32	+0.37									
Jatim	7.40	+3.44%	7.66	+0.14	+0.21	7.30	+0.12	-0.33	7.42	-0.04	-0.28	7.80	-0.05	-0.11	7.20	+0.06	-0.29	7.38	-0.21	+0.08	6.99	-0.02	-0.15	7.37	-0.04	-0.30	7.34	-0.08	-0.11	0.00	-7.65	-7.65									
Bali Nusra	8.02	-3.01%	7.78	+0.10	+0.24	8.87	-0.30	+0.16	8.25	+0.21	+0.18	8.22	+0.06	-0.03	7.70	-0.01	-0.26	7.86	+0.10	-0.03	9.05	+0.98	+1.75	8.30	+0.11	+0.49	7.29	-0.10	-0.36	7.34	-0.61	-0.28									
Area 4	7.35	+4.93%	7.72	+0.02	+0.02	7.67	+0.09	+0.15	7.58	+0.07	+0.28	7.47	+0.03	+0.22	7.20	-0.03	-0.24	7.15	-0.08	+0.03	7.78	-0.20	+0.51	7.05	+0.13	-1.07	7.32	+0.22	+0.36	7.92	+0.30	+0.39									
Kalimantan	7.40	+4.13%	7.71	-0.01	-0.06	7.29	-0.07	+0.69	7.25	+0.10	-0.20	7.59	+0.08	+0.04	7.45	+0.01	-0.21	7.22	-0.02	-0.81	0.00	-8.33	-8.33	6.91	+0.28	-1.49	7.05	+0.34	+0.25	7.92	+0.30	+0.23									
Sulawesi	7.43	+3.75%	7.71	+0.07	+0.09	7.85	+0.29	+0.10	7.71	-0.07	+0.06	7.30	-0.02	+0.31	7.09	-0.01	-0.14	7.11	-0.00	+0.11	8.14	-0.52	+2.61	6.96	+0.03	-0.42	7.65	+0.15	+0.54	0.00	+0.00	-5.86									
Puma	7.55	+3.53%	7.82	-0.06	+0.00	7.50	-0.39	-0.99	7.54	+0.36	+0.53	7.69	+0.13	+0.29	0.00	+0.00	-8.69	0.00	-7.88	-7.88	6.63	-0.15	-1.93	7.29	+0.07	+0.17	0.00	+0.00	+0.00	0.00	+0.00	+0.00									

Base: Respective Fixed WiFi users | Avg Ind: Exclude Telkomsel Orbit | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

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

Same condition with NPS performance, IndiHome CSI still performs relatively stabel with a notable slight increase among their premium speed (above 100 Mbps) internet user, contrast with Telkomsel Orbit in compared to previous period

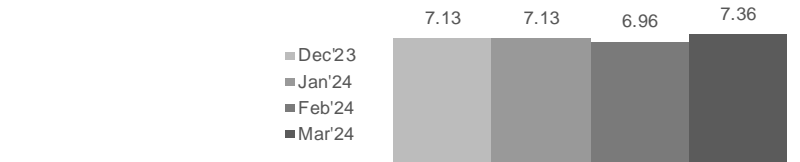


Base: Respective Fixed WiFi users | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

First Media – LOS less than 1 year – TOTAL

First Media’s new user CSI score increased significantly in most all CSI components, especially when compared to previous month. That significant CSI component must be derived from a significant increase in connectivity and after-sales service factors among First Media’s new users.

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



CSI Component
Based on NET Score

	%	Δ1M	Δ3M
Overall Satisfaction	+54	+12	+9
Relative Satisfaction	+73	+12	+14
Value For Money	+89	+7	+6
Need Fulfillment	+79	+11	+6
Trust	+92	+11	+11
Resistance to Price	+37	+15	+16

Factor Satisfaction Based on NET score		First Media		
		%	Δ1M	Δ3M
COMMUNICATION	Clarity of information	+26	+6	-2
	Ease of activation/installation	+37	+10	+1
	Ease of activating through platforms	+35	+5	-5
	Neatness of equipment installation	+39	+4	-6
	Availability of various platforms for activation	+30	+2	-7
INSTALLATION & ACTIVATION PROCESS	Suitability of offered package prices	+23	+1	-17
	Suitability of activation/installation fee	+35	+4	-8
	Suitability of offered package promotions	+27	+1	-10
	Ease of getting promotions	+19	+0	-16
	Modem device quality	+25	-2	-15
PRICE & PROMO	Suitability of offered package specifications	+24	+5	-9
	Ease of changing internet packages	+18	-2	-30
	Completeness of channel options in cable TV	+15	-3	-29
PRODUCT & PACKAGE	Overall internet network quality	+48	+11	+6
	Ease of purchasing packages	+27	+2	-15
CONNECTIVITY	Availability of various payment methods	+27	-3	-20
	Availability of various platforms for purchasing packages	+27	-1	-16
PURCHASE & PAYMENT	Ease of obtaining rewards through loyalty programs	+12	-6	-33
	Clarity of loyalty program mechanisms	+29	+1	-18
LOYALTY PROGRAM	Speed in handling requests/complaints	+15	+9	-28
	Ease of access in submitting requests/complaints	+34	+3	-9
AFTER-SALES SERVICES	Quality of solutions provided	+22	+9	-17
	Overall agent or technician service	+41	+8	+1
	Ease of login process to self-care apps	-	-	-
SELF-CARE APPS	Ease of using self-care apps	-	-	-

Base: Respective Fixed WiFi users | Δ1M = gap vs Feb'24 | Δ3M = gap vs Dec'23 | GREEN: significantly improve | RED: significantly decline | Grey font: small base
S: IndiHome is significantly strong vs closest competitor (exclude Telkomsel Orbit) | P: IndiHome is parity vs closest competitor (exclude Telkomsel Orbit) | W: IndiHome is significantly weak vs closest competitor (exclude Telkomsel Orbit)

Factor Satisfaction

List of factor satisfaction

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

Factor Satisfaction: National Level

IndiHome manage to provide better experience in terms of installation & activation process, product & package and also its after-sales services. On the other hand, Telkomsel Orbit perform a notable decline in terms ease of activation/installation, suitability of activation/installation fee, suitability of offeredpackage specifications and speed in handling request/complaints. Competitor like Iconnet and MNC Play Indosat HiFi performs low er performance in most of factors especially in compared to Dec'23.

Factor Satisfaction Based on NET score		IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			My Republic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			vs. closest comp
		%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M				
COMMUNICATION	Clarity of information	+35	+1	0	+44	-4	-4	+35	-1	0	+39	0	-3	+22	-2	-6	+35	+4	+9	+22	-1	-13	+27	+4	+2	+32	+1	+8	+33	0	-1	W
	Ease of activation/installation	+39	0	+3	+37	-8	-12	+35	+2	-3	+41	+1	+5	+25	-2	-8	+38	0	+10	+28	-2	-3	+36	+1	-2	+38	-2	+6	+40	-5	-15	P
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+36	-1	+2	+34	+2	-5	+34	+1	-6	+37	0	-2	+26	+2	0	+35	+1	+11	+25	+1	+1	+32	-1	-3	+35	+2	+10	+38	-10	-8	P
	Neatness of equipment installation	+35	0	+3	+34	+3	-10	+38	0	-4	+39	0	+3	+24	-2	-3	+30	-2	+5	+21	+1	+1	+36	+1	-3	+33	-2	+7	+39	-9	-8	P
	Availability of various platforms for activation	+36	+1	+4	+26	-4	-16	+31	-2	-7	+35	-2	0	+21	0	-3	+30	+3	+5	+19	+2	0	+28	-1	-6	+30	-1	+7	+32	-4	-16	P
	Suitability of offered package prices	+32	+1	+2	+37	-5	-5	+34	+1	0	+37	0	-1	+26	-1	-4	+34	+1	+8	+27	+1	-4	+27	0	-1	+38	+4	+16	+42	-1	+1	W
PRICE & PROMO	Suitability of activation/installation fee	+32	+1	+1	+23	-13	-14	+34	-1	-7	+35	-1	+1	+30	-1	-2	+36	0	+8	+17	-5	-11	+36	0	-1	+34	+2	+8	+36	-7	-13	P
	Suitability of offered package promotions	+30	+1	0	+34	-6	-10	+32	-1	-2	+31	-2	-4	+25	+1	+2	+31	+3	+8	+27	+2	-2	+22	-3	-4	+34	+1	+11	+40	-1	0	W
	Ease of getting promotions	+24	+1	+1	+26	-7	-12	+27	0	0	+30	+3	+3	+18	+4	+3	+26	+6	+11	+18	+3	-2	+25	0	+4	+28	0	+15	+36	+1	+3	W
	Modem device quality	+39	+1	+1	+46	-4	-4	+36	+1	0	+39	0	-1	+26	0	-3	+33	+1	+5	+24	0	-8	+33	-3	+2	+36	-3	+7	+43	-3	-2	P
PRODUCT & PACKAGE	Suitability of offered package specifications	+34	+1	+2	+35	-9	-10	+33	+2	-1	+36	-1	-2	+23	0	-2	+32	+1	+8	+26	-1	-6	+27	-1	0	+34	0	+9	+45	0	+11	W
	Ease of changing internet packages	+42	+5	+5	+37	-5	+11	+26	+1	-6	+51	+7	+13	+39	-4	+5	+31	+11	-2	+27	-11	-15	+59	-1	-1	+48	-7	-5	0	-13	-40	P
CONNECTIVITY	Completeness of channel options in cable TV	+44	+2	+5	0	0	0	+33	+3	+4	+62	+4	+19	+30	+4	-19	+48	+1	+17	+21	-8	-10	+18	-6	-9	+29	-3	-2	+60	-1	+6	W
	Overall internet network quality	+43	+1	+2	+51	-4	-5	+43	+3	+1	+49	-2	+1	+24	-1	-8	+38	0	+10	+23	-4	-17	+42	-2	+7	+42	+3	+16	+38	-1	-8	W
PURCHASE & PAYMENT	Ease of purchasing packages	+40	0	0	+47	-7	-10	+38	+2	-1	+44	0	+4	+27	-2	-6	+36	+2	+2	+26	-2	-13	+38	+2	+4	+35	-1	+2	+44	+5	+3	W
	Availability of various payment methods	+41	0	0	+46	-4	-9	+41	-2	-3	+42	-1	+3	+25	0	-3	+36	-1	+5	+29	0	-8	+34	+1	0	+35	-3	+4	+42	+2	+3	P
	Availability of various platforms for purchasing packages	+39	0	0	+46	-6	-11	+40	0	-4	+40	0	+4	+24	+1	-1	+34	+2	+5	+28	+1	-7	+32	-2	-1	+37	-2	+10	+42	-1	0	P
LOYALTY PROGRAM	Ease of obtaining rewards through loyalty programs	+41	+1	+1	+41	0	-1	+33	-2	-7	0	0	0	0	0	0	+34	+5	+4	+35	+10	+5	0	0	0	0	0	0	0	0	0	P
	Clarity of loyalty program mechanisms	+43	+1	0	+43	-3	-5	+41	-2	-1	0	0	0	0	0	0	+44	+5	+11	+26	+5	-13	0	0	0	0	0	0	0	0	0	P
AFTER-SALES SERVICES	Speed in handling requests/complaints	+37	+3	+3	+40	-13	-17	+29	+5	+4	+48	+1	0	+18	-1	-5	+37	+11	+19	+28	-2	-5	+31	+4	+5	+29	+6	+5	+56	+13	+23	W
	Ease of access in submitting requests/complaints	+40	+4	+2	+43	-4	-2	+34	0	0	+46	+2	0	+23	+3	-6	+44	+5	+21	+43	-2	0	+38	+8	+19	+42	+1	+21	+50	+12	+24	P
	Quality of solutions provided	+36	+3	+2	+34	-11	-9	+32	+2	+3	+47	-2	-4	+17	-3	-8	+39	+12	+21	+32	-3	0	+25	-1	-7	+22	+1	-2	+48	+12	+17	P
	Overall agent or technician service	+38	+1	+1	+38	-5	-9	+41	+1	+3	+40	-1	-3	+26	-2	-5	+33	+3	+5	+25	+1	-6	+30	+2	-3	+34	-3	+1	+46	-3	-4	W
SELF CARE APPS	Ease of login process to self-care apps	+44	+1	+2	+49	-1	-2	-	-	-	0	0	0	+27	-3	-16	+46	+4	+10	+35	+2	-10	+38	-10	-7	+38	-4	-3	+41	-10	-8	P
	Ease of using self-care apps	+45	+1	+3	+53	+1	-3	-	-	-	0	0	0	+31	0	-7	+46	+2	+9	+30	-3	-14	+30	-8	-15	+42	-5	-3	+43	-3	+5	P

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base
S: IndiHome is significantly strong vs closest competitor (exclude Telkomsel Orbit) P: IndiHome is parity vs closest competitor (exclude Telkomsel Orbit) W: IndiHome is significantly weak vs closest competitor (exclude Telkomsel Orbit)

Factor Satisfaction: Area 1

Positive trend show n among Indihome consumers for Price & Promo and After-sales services experience across period, whereas for Telkomsel Orbit, satisfaction level is relatively stable this period. On the other hand, both MNC Play Indosat HiFi performed relatively low er on connectivity and purchase & payment factor, contrast with Biznet that performa good experience in terms of ease of getting promo also with various purchasing platform. First Media consumers satisfaction level in Area 1 relatively low er in compared to Dec'23 in most of aspects

Factor Satisfaction Based on NET score		IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			My Republic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			vs. closest comp
		%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	
COMMUNICATION	Clarity of information	+36	+1	+4	+55	+4	+17	+19	-2	-14	+47	+3	+8	+21	-3	-3	+32	+2	+7	+23	-1	-12	+22	+3	0	+38	-1	-7	+26	+7	0	W
	Ease of activation/installation	+36	+1	+2	+23	-8	-30	+35	+1	-20	+36	+2	+3	+21	-1	-7	+36	+2	+12	+6	-5	-20	+29	+1	-15	+23	-6	-3	+34	-3	-19	P
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+36	-2	+1	+23	+6	-19	+36	0	-13	+30	-2	-7	+21	+1	+2	+29	0	+11	+1	-8	-23	+23	0	-7	+37	+2	0	+20	-4	-17	P
	Neatness of equipment installation	+32	+1	+3	+21	+6	-37	+37	-11	-29	+46	-1	0	+22	-2	-2	+30	+1	+7	+17	-2	-14	+35	+5	-2	+35	+5	+15	+20	-8	-6	W
	Availability of various platforms for activation	+35	+2	+4	+19	+6	-23	+24	-10	-31	+48	+1	+14	+18	-1	-1	+23	-1	-7	+16	+11	+2	+22	+6	-2	+32	+1	-2	+17	+6	-26	W
	Suitability of offered package prices	+32	+4	+7	+45	-3	+5	+30	-6	-20	+44	-3	+5	+22	0	-1	+27	0	+3	+20	-3	-10	+29	-2	+1	+34	+3	+1	+38	-2	-7	W
PRICE & PROMO	Suitability of activation/installation fee	+30	+2	+2	+19	-6	-9	+21	-6	-22	+43	+5	+9	+25	+2	+2	+34	-2	+3	+16	+5	+8	+33	+2	-3	+40	+7	+13	+21	-12	-30	W
	Suitability of offered package promotions	+31	+4	+6	+39	-1	+5	+23	-19	-31	+40	+3	+4	+22	+1	+7	+26	+4	+8	+27	-2	-11	+20	0	-2	+31	-2	+1	+23	-2	-22	W
	Ease of getting promotions	+24	+4	+7	+29	-2	-10	+23	-15	-20	+44	+10	+18	+16	+7	+4	+21	+3	+11	+21	+1	+2	+17	0	-12	+31	-1	0	+19	+3	-2	W
	Modem device quality	+39	+2	+4	+49	+5	+13	+27	-3	-13	+41	+4	+2	+22	-4	0	+25	-4	+1	+17	-3	-14	+38	-1	+9	+38	+3	+1	+38	+5	+4	P
PRODUCT & PACKAGE	Suitability of offered package specifications	+33	+3	+5	+36	-3	-2	+21	-11	-29	+48	+7	+12	+16	-3	0	+27	-2	+2	+19	-6	-18	+19	+1	-6	+28	-6	-12	+37	+4	+9	W
	Ease of changing internet packages	+46	+7	+10	+46	-3	+21	+38	-17	-17	+73	+16	+38	+34	-4	-7	+18	+8	-18	+18	-26	-47	+58	+9	+48	0	-100	-100	0	0	-33	P
	Completeness of channel options in cable TV	+46	+3	+10	0	0	0	+32	-2	-13	+74	+10	+24	+31	+2	-24	+77	+29	+53	+30	-9	+3	+63	+6	+35	+100	0	+23	+63	+10	+63	P
	Overall internet network quality	+44	+1	+5	+49	-1	-3	+47	+5	-9	+56	0	+9	+16	-9	-10	+33	-2	+6	+26	-8	-21	+46	+2	+13	+42	+8	+11	+29	-3	-26	W
CONNECTIVITY	Ease of purchasing packages	+42	+4	+6	+56	+3	+8	+32	-2	-17	+48	+3	+9	+22	-2	-3	+31	+5	+5	+22	-8	-25	+28	+4	+8	+33	+3	+6	+25	-1	-13	P
	Availability of various payment methods	+41	+2	+5	+63	+8	+10	+30	-6	-22	+51	+2	+10	+23	+3	+4	+31	0	+11	+19	-8	-28	+33	-1	0	+34	0	-3	+29	-3	-5	W
PURCHASE & PAYMENT	Availability of various platforms for purchasing packages	+42	+3	+7	+51	-3	-6	+34	-4	-13	+55	+9	+17	+21	0	+3	+25	+2	+2	+17	-2	-16	+27	-3	-6	+26	-2	-10	+27	+7	-4	W
	Ease of obtaining rewards through loyalty programs	+45	-1	+2	+53	+7	+14	+30	-30	-42	0	0	0	0	0	0	+28	-6	-8	+49	+21	+30	0	0	0	0	0	0	0	0	0	S
LOYALTY PROGRAM	Clarity of loyalty program mechanisms	+45	+1	0	+49	+3	-5	+40	0	-17	0	0	0	0	0	0	+38	-4	-10	+59	+14	+41	0	0	0	0	0	0	0	0	0	P
	Speed in handling requests/complaints	+39	+5	+5	+53	-2	-10	+28	-8	-21	+51	+6	+10	+5	-10	-11	+39	+9	+15	+52	+11	+27	+34	+2	+7	+71	-15	-2	+66	-5	-17	P
AFTER-SALES SERVICES	Ease of access in submitting requests/complaints	+46	+6	+10	+51	-2	+7	+46	-14	-14	+51	+9	+26	+16	+1	-9	+49	+4	+21	+46	+5	+23	+58	+22	+46	+71	-15	+28	+56	+19	+21	P
	Quality of solutions provided	+39	+6	+9	+44	-2	-14	+42	+3	-4	+47	+1	+3	+5	-7	-14	+49	+15	+30	+49	-11	+12	+46	+20	+20	+58	-14	-15	+48	+8	-2	P
	Overall agent or technician service	+39	+4	+5	+37	-4	-10	+41	-7	-7	+42	-2	-8	+17	-5	-8	+28	0	+2	+26	-1	-10	+19	+1	-12	+41	-3	+6	+41	+2	-3	P
	Ease of login process to self-care apps	+51	+3	+11	+50	+6	+7	-	-	-	0	0	0	+21	-5	-22	+45	-4	0	+31	+2	-3	+32	-9	-25	+54	-9	-8	+31	-3	-24	P
SELF CARE APPS	Ease of using self-care apps	+49	-1	+6	+52	+4	-3	-	-	-	0	0	0	+26	+2	-13	+47	0	+5	+24	-5	-9	+30	+9	-11	+66	-9	+13	+52	-2	+11	P

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base
S: IndiHome is significantly strong vs closest competitor (exclude Telkomsel Orbit) P: IndiHome is parity vs closest competitor (exclude Telkomsel Orbit) W: IndiHome is significantly weak vs closest competitor (exclude Telkomsel Orbit)

Factor Satisfaction: Area 2

As in CSI performance, IndiHome low performance could be derived from connectivity and purchase & payment factor, quite similar with Telkomsel Orbit with additional some price & promo and product & package factor. On the other hand, positive assessment for First Media across period in product & package and connectivity may cause its positive CSI performance, similar with MyRepublic and XL Satu Fiber in compared to previous 3 months.

Factor Satisfaction Based on NET score		IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			My Republic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			vs. closest comp
		%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	
COMMUNICATION	Clarity of information	+37	-1	-4	+44	-4	-12	+40	-1	+5	+38	0	-7	+34	-3	+11	+46	+2	+9	+31	-2	-18	+26	+6	-2	+36	+2	+12	+42	+1	+1	W
	Ease of activation/installation	+46	-1	+4	+38	-6	-13	+40	0	+1	+44	-2	+1	+40	-5	-15	+54	-1	+13	+52	0	+9	+36	+7	+10	+30	-2	-3	+42	-9	-22	P
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+39	-1	+2	+34	+4	-4	+36	+2	-11	+39	-3	-4	+49	+10	+18	+55	+1	+14	+44	+1	+12	+37	-2	-1	+30	-8	+7	+60	-6	+10	W
	Neatness of equipment installation	+37	0	+1	+29	+2	+1	+45	+3	+2	+41	0	+1	+38	+9	+14	+39	-5	0	+32	+3	+8	+35	-6	-11	+29	-6	+2	+53	-14	-13	W
PRICE & PROMO	Availability of various platforms for activation	+38	-1	+2	+15	-5	-28	+38	-1	+1	+33	-7	-8	+39	-2	+7	+43	+5	+11	+26	-1	+7	+22	-4	-16	+27	-1	-2	+47	-7	-11	P
	Suitability of offered package prices	+31	-2	-4	+33	-6	-18	+38	+3	+8	+39	0	-4	+32	+7	+5	+45	0	+16	+48	+5	+3	+21	+3	-13	+43	-2	+16	+45	+2	+4	W
PRODUCT & PACKAGE	Suitability of activation/installation fee	+35	0	0	+11	-12	-35	+41	+3	-6	+36	-4	-4	+54	-6	+6	+48	-1	+9	+26	-9	-18	+36	+2	-8	+35	-5	+4	+49	+1	-8	W
	Suitability of offered package promotions	+30	-4	-5	+36	-6	-15	+40	+2	+7	+29	-4	-9	+35	+6	+9	+42	+2	+7	+45	+6	+2	+15	-1	-10	+35	-3	+7	+51	+1	+9	W
CONNECTIVITY	Ease of getting promotions	+26	-2	-2	+25	-5	-22	+31	+3	+5	+30	+1	-1	+31	+4	+15	+37	+7	+14	+30	+10	-4	+25	0	+2	+33	+2	+17	+45	+2	+9	W
	Modem device quality	+41	-2	-3	+44	-4	-8	+42	+3	+7	+41	0	-4	+40	+5	+15	+48	+2	+9	+45	+2	-5	+25	-1	-11	+37	-12	+2	+45	-4	-7	W
PURCHASE & PAYMENT	Suitability of offered package specifications	+37	-2	+1	+36	-10	-12	+41	+7	+10	+34	-4	-7	+39	+3	+11	+41	-1	+8	+45	+1	0	+22	0	-4	+39	-5	+14	+47	+2	+13	W
	Ease of changing internet packages	+44	-5	-4	+55	+14	+50	+28	+5	0	+56	+8	+9	+52	-1	+29	+47	+32	+3	+24	-27	-68	+45	+4	-24	+36	-10	+4	0	-100	-100	P
LOYALTY PROGRAM	Completeness of channel options in cable TV	+42	+1	0	0	0	0	+43	+12	+22	+54	0	+15	+37	+8	-12	+42	0	+12	+27	-16	-26	+8	+3	-17	+37	-13	+2	+62	-2	-23	P
	Overall internet network quality	+44	-2	-2	+51	-6	-10	+47	+6	+8	+49	-4	-4	+31	+9	-2	+50	-3	+12	+36	0	-9	+37	-3	0	+45	0	+14	+42	0	-2	P
AFTER-SALES SERVICES	Ease of purchasing packages	+44	-3	-2	+48	-4	-14	+47	+7	+8	+45	+1	+4	+36	-1	+6	+47	-1	+1	+38	0	-12	+37	0	-10	+43	-5	+8	+55	+8	+10	W
	Availability of various payment methods	+45	-1	-2	+42	-3	-17	+49	0	+5	+43	-3	+1	+33	0	+1	+49	-3	+6	+51	+7	+1	+37	+9	+1	+46	-1	+14	+50	+6	+6	P
SELF CARE APPS	Availability of various platforms for purchasing packages	+42	-3	-3	+49	-5	-14	+46	+3	+3	+38	-1	-1	+29	+6	+4	+47	+4	+9	+49	+11	-1	+28	-2	-8	+40	-6	+9	+51	-1	+2	W
	Ease of obtaining rewards through loyalty programs	+42	0	-1	+50	+6	+10	+35	+1	-1	0	0	0	0	0	0	+41	+23	+15	+46	+17	+26	0	0	0	0	0	0	0	0	0	P
LOYALTY PROGRAM	Clarity of loyalty program mechanisms	+44	-1	-3	+44	-4	-11	+43	-4	+2	0	0	0	0	0	0	+52	+18	+29	+28	+11	-5	0	0	0	0	0	0	0	0	0	P
	Speed in handling requests/complaints	+36	+1	0	+49	-13	+2	+33	+8	+18	+45	-2	-6	+29	+7	+11	+31	+19	+19	+28	-6	-18	+22	+7	-7	+23	-2	-11	+47	+25	+34	P
AFTER-SALES SERVICES	Ease of access in submitting requests/complaints	+40	+2	-3	+50	-3	+11	+37	+2	+8	+46	+3	-4	+26	+7	-3	+32	+3	+16	+56	-3	+7	+24	+4	+2	+23	-2	-8	+52	+19	+44	P
	Quality of solutions provided	+38	+1	-3	+41	-15	+1	+31	+2	+5	+46	-7	-12	+28	-6	+6	+35	+22	+21	+43	+2	+7	+16	-9	-23	+15	-4	-12	+60	+22	+52	P
SELF CARE APPS	Overall agent or technician service	+41	-3	-1	+37	-6	-12	+46	+5	+13	+44	-1	-2	+40	-2	+7	+37	+1	+1	+39	+6	-2	+29	-2	-9	+30	-7	-5	+49	-4	-5	P
	Ease of login process to self-care apps	+45	-1	-1	+51	-1	-3	-	-	-	0	0	0	+46	-13	-1	+50	+7	+17	+44	+4	-11	+35	-2	-7	+38	-9	-14	+46	-10	+3	P
SELF CARE APPS	Ease of using self-care apps	+45	0	+2	+59	0	-8	-	-	-	0	0	0	+52	-13	+2	+50	0	+11	+31	-4	-25	+22	-13	-32	+40	-7	-16	+41	+1	+3	P

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base
S: IndiHome is significantly strong vs closest competitor (exclude Telkomsel Orbit) P: IndiHome is parity vs closest competitor (exclude Telkomsel Orbit) W: IndiHome is significantly weak vs closest competitor (exclude Telkomsel Orbit)

Factor Satisfaction: Area 3

IndiHome positive assessment in CSI may be derived from most of factor from price & promo, product & package, connectivity and after-sales services, in contrast with Telkomsel Orbit performance in those factor that may cause its low er assessment in CSI component Overall Satisfaction. A slight low er performance on CSI for First Media could derived from completeness of channel and connectivity also purchase & payment aspects, with Iconnet derived from most of attributes in compared to Dec'23, although the performance is better in compared to Feb'24

Factor Satisfaction Based on NET score		IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			My Republic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			vs. closest comp
		%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M				
COMMUNICATION	Clarity of information	+31	+2	+1	+38	-9	-18	+29	0	-4	+37	-2	-2	+18	-4	-17	+26	+7	+8	+16	-2	-8	+33	0	+9	+31	-1	-2	+31	-32	-7	W
	Ease of activation/installation	+36	0	+3	+39	-12	0	+24	+2	-7	+37	+5	+8	+20	-4	-8	+21	-1	-1	+19	-4	-5	+43	-10	+2	+48	-1	+13	+33	-18	+7	P
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+34	+2	+3	+40	+2	+3	+28	0	-3	+35	+7	0	+21	-2	-9	+19	+3	+1	+20	+2	+1	+40	-5	+1	+24	+2	+6	+11	-31	-27	P
	Neatness of equipment installation	+36	+3	+5	+31	+4	-4	+27	+2	-2	+33	+1	+5	+20	-6	-9	+17	-1	+1	+14	-1	-2	+38	-2	+3	+37	-4	+15	+21	-6	+19	P
	Availability of various platforms for activation	+34	+2	+6	+24	-6	-20	+26	+1	-7	+34	+4	+5	+16	-1	-9	+21	+4	+5	+14	-2	-7	+36	-14	-4	+27	+3	+20	+21	-6	-1	P
	Suitability of offered package prices	+29	+3	+3	+45	-2	+4	+27	-1	-7	+31	0	-1	+26	-5	-12	+28	+4	+3	+18	+2	-1	+31	-1	+7	+38	+9	+32	+29	-40	-23	P
PRICE & PROMO	Suitability of activation/installation fee	+31	+2	+3	+24	-16	-15	+30	-2	-2	+33	+1	+6	+23	-3	-16	+23	+5	+5	+12	-6	-13	+38	-7	+9	+22	0	+1	+21	-21	-4	P
	Suitability of offered package promotions	+26	+3	+2	+27	-12	-22	+19	-2	-8	+30	-1	-3	+25	-1	-7	+24	+5	+8	+18	+2	+2	+28	-10	-1	+34	+3	+4	+31	-26	-7	P
	Ease of getting promotions	+20	+3	+1	+31	-15	-5	+16	-1	-5	+25	+3	+4	+15	0	-6	+17	+9	+9	+11	+1	+2	+33	-3	+21	+26	+6	+27	-10	-44	-31	W
	Modem device quality	+34	+3	+2	+48	-6	-11	+27	0	-8	+35	-1	0	+20	0	-14	+24	+4	+1	+15	+1	-5	+34	-9	+6	+38	-1	+10	+61	-7	+37	P
PRODUCT & PACKAGE	Suitability of offered package specifications	+28	+4	+1	+38	-12	-12	+21	-2	-10	+35	+1	+2	+22	-3	-12	+27	+6	+10	+18	+1	-5	+39	-6	+11	+40	+11	+16	+31	-34	-9	W
	Ease of changing internet packages	+41	+7	+9	-3	-22	-25	+19	0	-4	+38	+3	+6	+28	-14	-2	+30	+1	+4	+31	+2	+19	+78	-16	-10	+76	+16	+30	0	0	0	P
CONNECTIVITY	Completeness of channel options in cable TV	+41	+5	+9	0	0	0	+3	-18	-45	+70	+5	+19	+24	+7	-9	+47	-10	+4	+15	+4	+11	-12	-8	-41	+42	+28	+27	0	0	+100	S
	Overall internet network quality	+38	+4	+4	+50	-5	-9	+31	-4	-13	+48	0	+5	+29	-1	-10	+29	+8	+10	+15	-4	-19	+40	-6	+7	+36	+6	+24	+24	-28	-20	W
PURCHASE & PAYMENT	Ease of purchasing packages	+34	+1	-2	+46	-16	-15	+25	-4	-8	+43	-1	+1	+26	-6	-15	+29	+3	-1	+20	0	-7	+49	+1	+16	+28	+2	-6	+32	+1	+10	W
	Availability of various payment methods	+37	+1	0	+41	-11	-11	+30	-3	-11	+39	-1	+2	+25	-3	-8	+28	+1	-6	+20	-2	-7	+33	-4	0	+25	-4	-9	+21	-23	-5	P
	Availability of various platforms for purchasing packages	+34	+1	-1	+37	-9	-13	+32	-3	-11	+40	0	+8	+25	-2	-7	+28	0	0	+20	-3	-4	+41	-4	+10	+34	-1	+4	+21	-30	-12	P
LOYALTY PROGRAM	Ease of obtaining rewards through loyalty programs	+35	+2	0	+21	-20	-32	+27	-3	-7	0	0	0	0	0	0	+40	+2	-1	+20	+1	-22	0	0	0	0	0	0	0	0	0	P
	Clarity of loyalty program mechanisms	+36	0	-1	+45	+1	+17	+32	-1	-3	0	0	0	0	0	0	+46	+2	+9	+12	+2	-39	0	0	0	0	0	0	0	0	0	P
AFTER-SALES SERVICES	Speed in handling requests/complaints	+37	+5	+6	+11	-16	-50	+18	+2	-13	+49	+3	+2	+26	+6	-3	+44	+1	+23	+26	+2	-2	+48	-14	+28	+21	+4	-1	+34	-32	+34	W
	Ease of access in submitting requests/complaints	+37	+5	+2	+28	-9	-21	+22	+1	-11	+42	-1	-8	+30	+4	-3	+56	+7	+28	+32	-2	-1	+55	-6	+34	+45	-1	+35	+34	-32	+34	W
	Quality of solutions provided	+34	+6	+5	-1	-8	-29	+29	+1	+1	+48	+2	+1	+19	+5	-11	+34	-5	+6	+21	0	-7	+27	+1	+3	+11	-2	-6	0	0	0	W
	Overall agent or technician service	+34	+2	+1	+40	-6	-10	+29	-4	-11	+35	0	-6	+28	-4	-11	+32	+8	+12	+17	0	-6	+44	+3	+13	+48	0	+6	+43	-30	-17	W
SELF CARE APPS	Ease of login process to self-care apps	+39	+1	0	+52	-6	-7	-	-	-	0	0	0	+24	+2	-16	+42	+6	+9	+28	+2	-10	+48	-20	+11	+43	+16	+24	+43	-39	-23	P
	Ease of using self-care apps	+40	+2	+1	+54	+6	+14	-	-	-	0	0	0	+23	+3	-12	+42	+4	+9	+31	0	-5	+45	-9	+9	+50	+13	+20	+43	-39	-23	P

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base
S: IndiHome is significantly strong vs closest competitor (exclude Telkomsel Orbit) P: IndiHome is parity vs closest competitor (exclude Telkomsel Orbit) W: IndiHome is significantly weak vs closest competitor (exclude Telkomsel Orbit)

Factor Satisfaction: Area 4

Indihome positive trend in ease of changing internet packages and clarity of loyalty resemblance to its CSI performance. Telkomsel Orbit on the other hand, performed positive in connectivity, similar with First Media and XL Satu Fiber, in addition of improvement in most of attributes for First Media compared to Dec'23, while XL Satu Fiber positive performance also reflected in other attributes. While CBN Fiber perform a lower trends in compared to previous 3 months.

Factor Satisfaction		IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			My Republic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			vs. closest comp
Based on NET score		%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	
COMMUNICATION	Clarity of information	+36	+1	-1	+41	-8	+10	+55	+6	+15	+35	-3	+5	+23	0	-10	+17	-2	+9	+87	+40	+17	+27	0	-22	+28	+5	+15	0	0	-6	W
	Ease of activation/installation	+37	-3	-2	+46	-9	-5	+62	+9	+42	+39	0	+19	+29	0	-9	+18	-1	+10	+77	-23	-23	+37	-3	-7	+46	+1	+12	+58	+18	+14	W
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+36	-2	+2	+38	-11	-5	+49	+8	+27	+34	0	+8	+21	-2	-11	+13	-2	+7	+77	+3	-12	+22	-5	-17	+44	+7	+16	+15	-20	-36	W
	Neatness of equipment installation	+33	-5	-3	+60	-5	-5	+50	+6	+24	+31	0	+5	+24	-5	-17	+21	-1	+8	+77	+77	+77	+51	-5	-1	+33	-1	+3	+51	+17	+6	W
PRICE & PROMO	Availability of various platforms for activation	+36	-3	+1	+56	-9	+26	+45	+4	+18	+33	0	+12	+16	+1	-16	+26	-3	+21	+77	+77	+77	+48	-2	+33	+32	-3	+7	+15	-4	-2	P
	Suitability of offered package prices	+39	+1	+4	+23	-9	-3	+43	+1	+3	+39	+3	+13	+26	-2	-8	+19	-2	+9	+51	-32	-49	+27	-5	-28	+36	+4	+14	+43	+4	+13	P
PRODUCT & PACKAGE	Suitability of activation/installation fee	+34	-2	-2	+51	-18	+12	+55	+8	+20	+21	+2	-7	+29	-6	+3	+23	-1	+15	+23	+23	+23	+40	-1	-7	+34	+2	+11	+34	-7	+10	W
	Suitability of offered package promotions	+37	+1	+1	+32	0	-1	+49	+6	+17	+39	0	+11	+24	+2	+4	+16	-3	+6	+16	-41	-54	+31	0	+4	+34	+5	+23	+29	+12	+19	W
CONNECTIVITY	Ease of getting promotions	+28	+1	0	+18	-4	-2	+58	+10	+16	+32	-1	+8	+16	+5	+6	+22	-4	+6	+40	-33	-44	+30	+1	-4	+27	-4	+11	+48	+11	0	W
	Modem device quality	+42	+2	+2	+40	-12	-13	+49	+2	+10	+37	+6	+12	+27	+1	-15	+16	-2	+7	+65	-9	+66	+43	-2	-26	+35	0	+14	+35	-6	-3	P
PURCHASE & PAYMENT	Suitability of offered package specifications	+38	+1	+1	+26	-11	-15	+51	+7	+8	+32	0	+3	+24	+4	-3	+21	-3	+15	+29	-36	+46	+27	-4	-26	+31	-2	+7	+61	+3	+13	W
	Ease of changing internet packages	+31	+13	+7	+65	-13	-2	0	-16	-72	+27	-13	-14	+46	-5	+19	0	0	0	0	0	0	0	0	0	+30	-12	-21	0	0	-29	P
LOYALTY PROGRAM	Completeness of channel options in cable TV	+50	-1	+1	0	0	0	+45	-8	+12	+61	+20	+45	0	-64	-75	0	0	0	0	-59	-100	0	0	0	+19	+3	-1	+43	-38	-38	P
	Overall internet network quality	+46	-1	0	+59	+2	+12	+60	+9	+23	+40	-4	+10	+26	+3	-11	+15	-11	-1	+47	-14	-5	+61	-2	-15	+43	+2	+17	+52	+15	+14	W
AFTER-SALES SERVICES	Ease of purchasing packages	+44	0	-1	+38	-17	-22	+50	+1	-5	+33	-7	+9	+27	+1	-15	+16	-11	+4	+63	-19	+2	+35	-1	-22	+34	-1	+2	+38	+9	-1	P
	Availability of various payment methods	+45	0	0	+43	-9	-7	+53	0	+1	+38	+2	+8	+23	-2	-20	+22	-4	+9	+65	-9	+74	+41	-3	+1	+35	-5	+7	+39	+14	+7	P
SELF CARE APPS	Availability of various platforms for purchasing packages	+42	0	-1	+44	-9	-14	+44	-5	-11	+37	-1	+6	+24	+2	-5	+23	-4	+13	+52	+5	+22	+37	-2	+4	+41	0	+20	+39	+2	+5	P
	Ease of obtaining rewards through loyalty programs	+44	+2	+3	+20	0	-10	+31	+1	-11	0	0	0	0	0	0	+9	+1	+11	0	-27	-71	0	0	0	0	0	0	0	0	0	P
INDIHOME	Clarity of loyalty program mechanisms	+47	+6	+6	+21	-12	-27	+52	0	-20	0	0	0	0	0	0	+17	+2	+9	0	-73	-90	0	0	0	0	0	0	0	0	0	P
	Speed in handling requests/complaints	+35	+2	+2	+39	-18	-28	+21	+9	-3	+68	+5	+34	+32	+8	-7	+29	-54	+5	0	-100	-17	0	0	0	+12	+18	+19	+100	+55	+82	P
TELCOMSEL ORBIT	Ease of access in submitting requests/complaints	+41	+3	+1	+36	-2	-21	+41	+16	+25	+63	+6	+46	+26	+6	-7	+28	+12	-10	+66	-34	+132	0	0	0	+30	+8	+24	+31	-20	-48	P
	Quality of solutions provided	+32	0	-5	+49	-8	+5	+31	+18	+21	+67	+5	+41	+37	+8	-4	+29	+7	+32	+51	-49	+34	0	0	0	+12	+12	+7	+31	0	-48	P
FIRST MEDIA	Overall agent or technician service	+40	+1	+1	+38	-5	+3	+49	+4	+9	+37	+2	+16	+28	+4	+1	+19	-9	-2	+76	+3	+24	+41	-1	-28	+27	0	+2	+42	+13	+13	W
	Ease of login process to self-care apps	+43	+3	+1	+38	-1	-7	-	-	-	0	0	0	+27	-4	-22	+6	-2	-11	+40	-33	-13	+1	0	-99	+30	-10	-7	+25	-15	-34	W
XL SATU FIBER	Ease of using self-care apps	+49	+1	+8	+30	-8	-30	-	-	-	0	0	0	+36	0	+1	-3	-21	-19	+40	-43	+19	+19	-15	-81	+28	-13	-8	+29	-4	+12	P

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base
S: IndiHome is significantly strong vs closest competitor (exclude Telkomsel Orbit) P: IndiHome is parity vs closest competitor (exclude Telkomsel Orbit) W: IndiHome is significantly weak vs closest competitor (exclude Telkomsel Orbit)

Brand Performance

Evaluation of the Fixed WiFi brand in the market

Brand Equity Index (BEI)

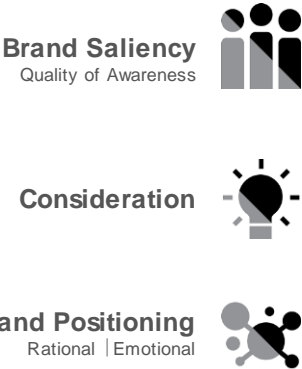
Deconstruct the “Brand Equity”

Determine where you should focus your marketing attention to strengthen equity

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

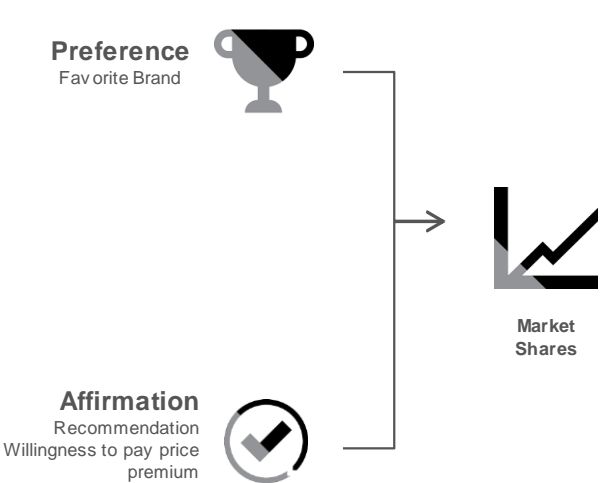
SOURCES
Understand the building blocks of equity

MIND / LOGIC ASPECT



OUTCOMES
What people are willing to do

HEART / EMOTIONAL ASPECT



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

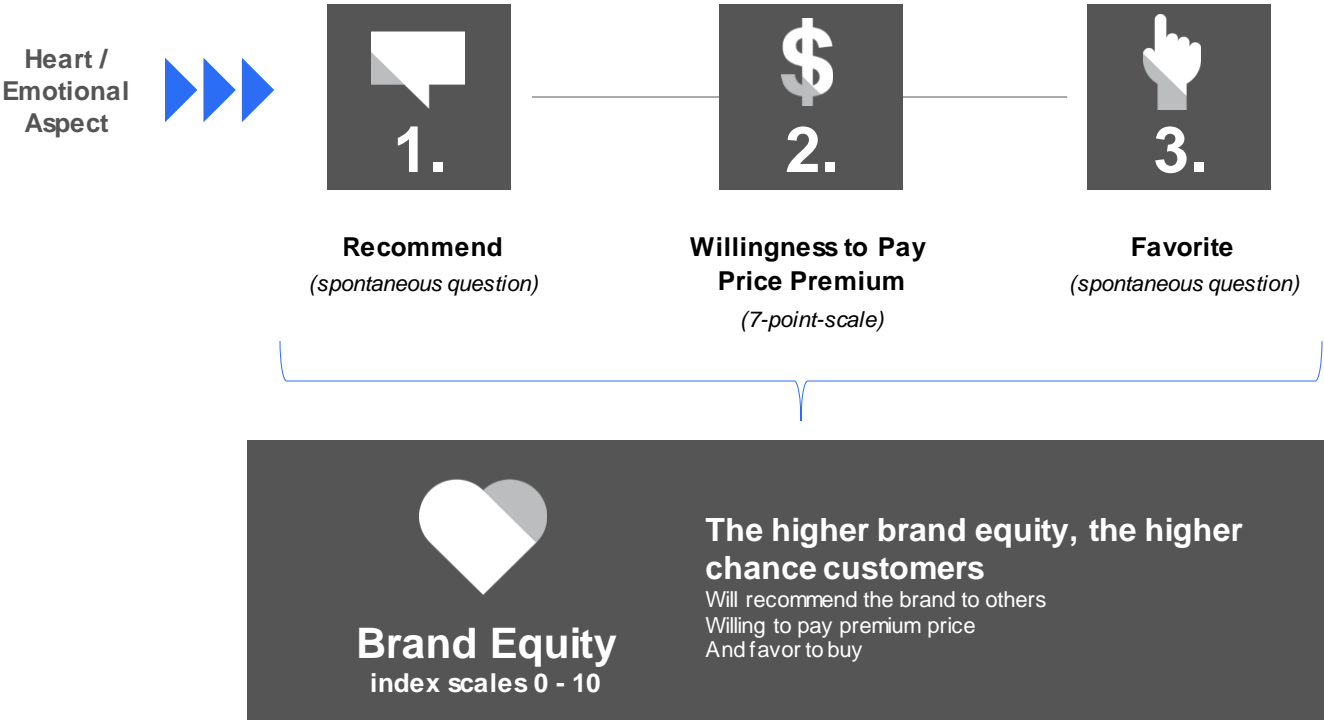
Improve logic aspects to drive higher BEI



Source: Winning Brands Health Check

Brand Equity Index (BEI) measurement

Calculation modelling is based on Prof. Dr. Keller theory Strong Brand Equity will be resulting 3 real world outcomes :



Source: Winning Brands Health Check

BEI: Summary – by area & region

Overall, Indihome's and Telkomsel Orbit's BEI are relatively stable. For IndiHome, Western Jabo and Eastern Jabo showed a significant increase compared to Dec'23, while Sumbagut, Sumbagsel, Jabar, Kalimantan, and Sulawesi decreased significantly. Telkomsel Orbit encountered the same issue in Sumbagut and Sumbagteng.

Brand Equity Index (BEI)

Mean score with range +0 to +10

■ Dec'23 ■ Jan'24
■ Feb'24 ■ Mar'24

	IndiHome			Biznet			First Media			MyRepublic			Iconnet			MNC Play + Indosat HiFi			Telkomsel Orbit			XL Satu Fiber			CBN Fiber			Oxygen.id						
	<div><div>Dec'23</div><div>Jan'24</div><div>Feb'24</div><div>Mar'24</div></div>			6.2	6.1	6.1	6.1	<div><div>1.5</div><div>1.5</div><div>1.5</div><div>1.5</div></div>			<div><div>1.1</div><div>1.1</div><div>1.1</div><div>1.1</div></div>			<div><div>0.8</div><div>0.8</div><div>0.8</div><div>0.8</div></div>			<div><div>0.8</div><div>0.8</div><div>0.8</div><div>0.8</div></div>			<div><div>0.6</div><div>0.6</div><div>0.6</div><div>0.6</div></div>			<div><div>0.7</div><div>0.6</div><div>0.6</div><div>0.6</div></div>			<div><div>0.5</div><div>0.5</div><div>0.5</div><div>0.4</div></div>			<div><div>0.4</div><div>0.4</div><div>0.4</div><div>0.4</div></div>			<div><div>0.3</div><div>0.3</div><div>0.3</div><div>0.3</div></div>		
	<div><div>20% strong</div><div>BEI > 3.0</div></div>			<div><div>36% moderate</div><div>1.0 <= BEI <= 3.0</div></div>			<div><div>44% weak</div><div>BEI < 1.0</div></div>																											
	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M				
Total	6.1	0.0	-0.1	1.5	0.0	0.0	1.1	0.0	0.0	0.8	0.0	0.0	0.8	0.0	0.0	0.6	0.0	0.0	0.6	0.0	-0.1	0.4	0.0	-0.1	0.4	0.0	0.0	0.3	0.0	0.0				
Area 1	5.7	-0.1	-0.4	1.0	-0.1	-0.1	0.7	0.0	-0.1	1.1	+0.1	+0.1	1.3	-0.1	0.0	0.5	-0.1	-0.1	0.6	-0.1	-0.1	0.3	0.0	0.0	0.5	0.0	0.0	0.4	0.0	+0.1				
Sumbagut	6.0	-0.3	-0.5	0.8	-0.1	0.0	1.1	-0.1	-0.1	0.6	0.0	+0.1	1.5	+0.1	0.0	1.0	-0.1	-0.1	0.7	-0.1	-0.2	0.4	0.0	0.0	0.8	0.0	+0.1	0.5	+0.1	+0.1				
Sumbagteng	5.5	0.0	-0.2	1.1	0.0	0.0	0.7	0.0	0.0	0.7	0.0	+0.1	1.3	-0.1	-0.3	0.2	-0.1	-0.2	0.7	-0.1	-0.2	0.4	-0.1	0.0	0.1	0.0	-0.1	0.2	+0.1	+0.1				
Sumbagsel	5.7	-0.1	-0.4	1.1	-0.1	-0.3	0.4	0.0	-0.1	1.7	+0.1	0.0	1.1	-0.1	+0.1	0.3	0.0	0.0	0.5	-0.1	-0.1	0.2	0.0	-0.1	0.4	-0.1	0.0	0.4	0.0	0.0				
Area 2	6.0	+0.1	+0.1	1.9	0.0	0.0	1.5	0.0	0.0	1.0	+0.1	+0.1	0.5	0.0	0.0	0.7	0.0	-0.1	0.6	0.0	0.0	0.4	0.0	-0.1	0.5	0.0	0.0	0.5	0.0	0.0				
Central Jabo	6.0	+0.2	-0.2	2.2	+0.1	+0.3	1.9	-0.2	-0.2	1.0	+0.1	0.0	0.4	0.0	-0.2	0.8	+0.1	+0.1	0.5	0.0	-0.1	0.3	0.0	-0.1	0.5	0.0	0.0	0.7	-0.1	0.0				
Western Jabo	6.0	+0.2	+0.7	1.6	0.0	0.0	2.0	+0.1	+0.3	1.1	+0.1	+0.1	0.6	+0.1	+0.2	0.5	-0.1	-0.1	0.6	0.0	-0.1	0.3	0.0	-0.2	0.6	+0.1	+0.1	0.3	-0.1	0.0				
Eastern Jabo	5.8	+0.2	+0.3	2.0	0.0	0.0	1.2	0.0	-0.1	1.1	-0.1	0.0	0.5	0.0	-0.1	0.5	0.0	-0.1	0.7	0.0	0.0	0.6	0.0	-0.2	0.5	0.0	+0.1	0.7	0.0	0.0				
Jabar	6.1	-0.1	-0.3	1.7	+0.1	0.0	1.2	-0.1	-0.1	0.8	+0.1	+0.1	0.6	0.0	+0.2	0.8	0.0	-0.1	0.6	0.0	0.0	0.4	0.0	+0.1	0.3	0.0	0.0	0.1	0.0	-0.1				
Area 3	6.0	0.0	0.0	1.5	0.0	0.0	1.0	-0.1	-0.1	0.8	0.0	0.0	0.8	0.0	0.0	0.9	0.0	+0.1	0.5	0.0	-0.1	0.3	-0.1	-0.1	0.3	0.0	0.0	0.1	0.0	0.0				
Jateng DIY	5.8	-0.1	-0.1	1.5	0.0	-0.1	0.9	-0.1	-0.2	0.9	0.0	+0.1	0.9	0.0	0.0	0.7	+0.1	0.0	0.6	0.0	-0.1	0.3	-0.1	-0.1	0.1	0.0	0.0	0.1	0.0	-0.1				
Jatim	6.1	+0.1	0.0	1.6	-0.1	0.0	1.2	0.0	0.0	0.7	0.0	-0.2	0.6	0.0	0.0	1.2	-0.1	+0.2	0.4	0.0	0.0	0.2	0.0	0.0	0.3	0.0	-0.1	0.1	0.0	0.0				
Bali Nusra	6.5	0.0	0.0	1.5	+0.1	+0.1	0.5	0.0	-0.2	0.6	+0.1	+0.1	1.0	0.0	-0.1	0.2	0.0	-0.1	0.6	-0.1	-0.1	0.6	-0.2	-0.1	0.8	0.0	0.0	0.2	0.0	0.0				
Area 4	7.3	-0.1	-0.4	0.9	0.0	+0.1	0.5	0.0	+0.1	0.2	0.0	-0.1	1.0	0.0	+0.3	0.2	0.0	0.0	0.8	0.0	0.0	1.1	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.0				
Kalimantan	7.3	0.0	-0.5	1.0	+0.1	+0.1	0.5	+0.1	+0.2	0.3	0.0	0.0	1.0	0.0	0.0	0.2	0.0	0.0	0.7	0.0	-0.1	1.2	+0.1	+0.2	0.2	0.0	0.0	0.4	0.0	+0.1				
Sulawesi	7.2	-0.1	-0.4	0.9	0.0	0.0	0.4	-0.1	0.0	0.2	0.0	-0.1	1.2	+0.1	+0.5	0.2	0.0	0.0	0.8	0.0	0.0	1.1	-0.1	-0.1	0.1	0.0	0.0	0.1	0.0	0.0				
Puma	8.3	0.0	+0.1	0.8	+0.1	+0.3	1.1	+0.3	0.0	0.1	0.0	0.0	0.2	-0.1	0.0	0.2	-0.1	-0.1	0.8	-0.1	-0.1	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0				

Base: Fixed WiFi users | sort by largest BEI | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 (significant if +/- 0.3 points) | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand Leverage

Brand leverage: National level

No major difference in most of brands performance in compared to previous period. Indihome funnel performance is relatively lower in compared to Dec'23, similar for Telkomsel Orbit for awareness and consideration. While most of competitors also has the similar pattern such as FistMedia, CBN Fiber and Oxygen.id. On the other hand, Biznet and Iconnet performed higher on consideration and trialist

Brand Leverage In percentage (%)

	Fixed WiFi Fiber																														Fixed WiFi Cellular											
	IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Isat Home Wireless			XL Satu Lite								
	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M									
Recommender	57	0	-1	5	0	0	8	0	0	5	0	0	5	0	0	3	0	0	2	0	0	2	0	0	2	0	0	2	0	0	0	0	0	0	0							
Preferer	58	0	-2	5	0	0	7	0	0	5	0	+1	5	0	0	3	0	0	2	0	0	2	0	0	2	0	0	2	0	0	0	0	0	0	0							
BUMO user	58	0	-2	5	0	0	6	0	0	5	0	0	5	0	0	3	0	0	2	0	0	2	0	0	2	0	0	2	0	0	0	0	0	0	0							
Current user	58	0	-3	6	0	0	7	0	0	5	0	0	5	0	0	3	0	0	2	0	0	2	0	0	2	0	0	3	0	0	0	0	0	0	0							
Trial P3M	59	0	-2	6	0	0	7	0	0	5	0	0	5	0	0	4	0	0	2	0	0	2	0	0	2	0	0	3	0	0	1	0	0	0	0							
Trial P1Y	61	-1	-2	8	0	0	8	0	0	6	0	+1	6	0	+1	4	0	0	2	0	0	3	0	0	2	0	0	4	0	0	1	0	0	0	0							
Considerer	66	-1	-2	16	-1	-1	22	0	0	12	0	+1	12	+1	+1	10	0	0	5	0	0	8	0	-1	4	0	0	10	-1	-1	4	0	-1	3	0	0						
Aware	96	0	-1	47	-1	-2	56	-1	-2	35	0	+1	41	0	+1	40	0	0	21	0	0	24	-1	-2	19	0	0	30	0	-2	15	0	-1	11	0	-1						
Rejecter	64	0	0	5	53	0	0	5	44	0	0	5	65	0	0	4	59	0	0	8	60	0	0	4	79	0	0	4	76	-1	-1	5	81	0	0	4	70	0	0			
Not Consider Not Aware	99	0	0	94	0	-1	93	+1	+2	96	0	+1	96	+1	+1	95	+1	0	97	+3	+3	97	+2	+3	95	-1	0	89	+3	+4	90	+13	+15	70	+17	+14						
Conversion	61	0	-2	13	0	0	12	0	+1	15	0	+1	11	+1	+1	8	0	0	9	0	0	10	0	0	9	0	+1	9	0	+1	3	0	0	2	0	0						

Base: Fixed WiFi users | Retention: Current user / Trial P3M Conversion: Current user / Aware | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand leverage: Area 1

Indihome lower performance in national level is impacted from its performance in Area 1, also similar for Telkomsel Orbit awareness level. On the other hand Iconnet performed positive trend on consideration, trialist and recommendation level. As for declining trend on awareness level for First Media, CBN Fiber and Oxygen.id also contributed by its performance in this area

Brand Leverage In percentage (%)

	Fixed WiFi Fiber																														Fixed WiFi Cellular																
	IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Isat Home Wireless			XL Satu Lite													
	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M														
Recommender	53	-2	-4	3	0	0	5	0	0	8	0	0	8	+1	+2	2	0	0	3	0	+1	2	0	0	2	0	0	2	0	-1	0	0	0	0	0												
Preferer	54	-2	-4	3	0	0	4	0	0	9	0	0	7	+1	+1	2	0	0	3	0	+1	1	0	0	2	0	+1	2	0	-1	0	0	0	0	0												
BUMO user	54	-2	-5	4	0	0	3	0	0	9	0	0	7	+1	+1	2	0	0	3	0	+1	1	0	0	2	0	+1	2	0	-1	0	0	0	0	0												
Current user	55	-2	-5	4	0	0	4	0	0	9	0	0	7	+1	+1	3	0	+1	3	0	+1	2	0	0	2	0	+1	3	0	0	0	0	0	0	0												
Trial P3M	55	-2	-5	5	0	0	4	0	0	10	0	0	8	+1	+1	3	0	0	3	0	+1	2	0	0	3	0	+1	3	0	0	0	0	0	0	0												
Trial P1Y	59	-2	-4	6	+1	+1	5	0	-1	10	0	0	9	+1	+2	4	0	0	4	0	+1	2	0	0	3	0	+1	4	0	0	1	0	0	1	0	0											
Considerer	60	-2	-6	11	0	-1	16	-1	-1	16	-1	+1	14	+1	+2	8	0	0	7	-1	0	5	0	0	5	0	+1	10	-1	-2	3	-1	-1	2	0	0											
Aware	94	-1	-2	32	-2	-5	43	-3	-7	44	-2	-2	39	-1	-2	34	-2	-2	20	-2	-1	21	-2	-3	20	+1	+2	33	-3	-3	13	-1	-3	11	0	+1											
Rejecter	56	0	-1	3	68	0	-1	5	57	+1	0	5	56	-1	-1	4	61	-1	-2	7	66	0	0	4	80	0	0	5	79	0	+1	5	80	0	-1	4	67	0	1	4	87	0	0	4	89	0	0
Not Consider Not Aware Retention	99	0	0	90	0	-7	91	-1	0	97	-1	-2	97	-1	+2	95	+2	+3	100	+1	+3	91	+4	+5	90	-1	-4	79	-5	-13	100	+7	+5	57	+14	-16											
Conversion	58	-1	-4	13	+2	+2	9	0	0	21	0	+1	19	+3	+5	8	+1	+2	16	+2	+4	8	+1	+2	12	+2	+2	8	+1	0	4	0	-1	2	+1	0											

Base: Fixed WiFi users | Retention: Current user / Trial P3M Conversion: Current user / Aware | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand leverage: Area 2

Despite being relatively stable, for Indihome there are slightly inclining performance of funnel which contrast with Telkomsel Orbit's slight declining performance.

Brand Leverage In percentage (%)

	Fixed WiFi Fiber																		Fixed WiFi Cellular																		
	IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Isat Home Wireless			XL Satu Lite			
	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M				
Recommender	56	+1	+2	8	-1	0	10	0	-1	2	0	0	5	+1	+1	3	0	-1	2	0	0	2	0	-1	3	0	0	2	0	0	0	0	0	0	0		
Preferer	56	+1	+2	7	-1	-1	10	0	0	2	0	0	5	+1	0	2	0	-1	1	0	0	1	0	-1	3	0	0	2	0	0	0	0	0	0	0		
BUMO user	55	+1	0	8	-1	-1	8	0	+1	2	0	0	5	0	+1	2	0	-1	1	0	0	1	0	-1	3	0	0	2	0	+1	0	0	0	0	0		
Current user	55	+1	0	9	0	0	9	0	+1	3	0	0	5	0	+1	3	0	-1	2	0	0	2	0	-1	3	0	0	4	0	+1	0	0	0	0	0		
Trial P3M	56	+1	0	9	0	0	10	0	0	3	0	0	5	0	+1	3	0	-1	2	0	0	2	0	-1	3	0	0	4	0	0	1	0	0	0	0		
Trial P1Y	58	0	0	11	-1	-1	12	0	0	3	0	0	6	0	+1	4	-1	-1	2	0	-1	2	0	-1	3	0	0	5	0	0	1	0	0	0	0		
Considerer	68	+1	+2	23	-1	-1	29	+1	+2	9	0	-1	16	+1	+2	12	0	-1	7	0	0	9	0	-1	7	-1	0	11	0	0	6	0	0	3	0	0	
Aware	97	0	0	66	-1	-2	69	+1	+2	30	+1	+2	54	+1	+4	51	+1	+2	29	+1	+2	25	-1	-1	28	0	0	29	0	-1	17	0	0	11	0	-2	
Rejecter	63	-1	-1	53	4	0	-2	43	1	0	-1	57	0	0	0	84	9	0	-1	37	1	0	-1	47	-1	-1	57	2	0	0	47	1	0	0	48	3	-1
Not Consider Not Aware Retention	99	0	0	96	0	1	95	2	5	93	-1	3	93	3	2	93	3	-1	97	7	7	97	2	2	98	-1	1	95	7	15	89	14	21	47	26	11	
Conversion	57	1	-1	14	0	0	14	0	1	9	1	0	9	1	0	5	0	-2	5	0	-1	7	-1	-4	10	-1	1	13	0	3	3	0	0	1	0	0	

Base: Fixed WiFi users | Retention: Current user / Trial P3M Conversion: Current user / Aware | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand leverage: Area 3

Indihome declining in Total also contributed by its performance in Area 3 for certain funnels, also for Telkomsel Orbit consideration level. Also similar for awareness level of CBN Fiber and Oxygen.id, in addition for its Consideration level

Brand Leverage In percentage (%)

	Fixed WiFi Fiber																														Fixed WiFi Cellular									
	IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Isat Home Wireless			XL Satu Lite						
	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M							
Recommender	56	0	0	5	-1	-1	9	0	0	5	0	0	4	0	0	5	0	+1	2	0	0	1	0	0	0	0	0	2	0	0	0	0	0	0	0	0				
Preferer	57	0	-2	5	0	-1	8	0	0	5	0	0	4	0	0	5	0	+1	2	0	0	1	0	0	0	0	0	2	0	0	0	0	0	0	0	0				
BUMO user	56	0	-2	5	-1	0	6	0	0	5	0	0	4	0	0	5	0	+1	2	0	0	1	0	0	0	0	0	1	0	0	0	0	0	0	0	0				
Current user	57	0	-2	5	0	0	7	0	0	5	0	0	4	0	0	6	0	+1	2	0	0	2	0	0	0	0	0	2	0	0	0	0	0	0	0	0				
Trial P3M	58	0	-2	6	-1	0	7	0	0	5	0	0	5	0	0	6	0	+1	2	0	0	2	0	0	0	0	0	2	0	0	1	0	0	0	0	0				
Trial P1Y	60	0	-2	7	-1	0	9	0	0	6	0	+1	5	0	+1	7	0	+1	2	0	0	2	0	0	0	0	0	3	0	0	1	0	0	0	0	0				
Considerer	62	-1	-4	14	-1	-2	21	-1	-2	11	0	+1	10	0	0	11	0	0	4	0	-1	5	-1	-1	2	-1	-1	7	-1	-2	2	-1	-2	2	-1	-1				
Aware	96	0	0	46	0	0	57	-1	-1	34	+1	+3	38	0	+1	41	0	+1	17	0	-1	18	-1	-3	11	-1	-1	27	0	-2	15	0	-1	10	0	0				
Rejecter	84	0	1	5	54	0	1	6	43	0	1	5	66	0	0	5	62	0	0	8	59	-1	0	4	83	0	0	4	82	0	0	6	89	0	0	4	73	0	0	
Not Consider Not Aware Retention	98	0	-1	95	0	-1	94	0	0	97	0	1	98	-2	0	96	-1	-2	96	4	0	96	3	7	91	2	-1	85	2	-3	87	17	17	77	-4	11				
Conversion	59	-1	-3	12	-1	0	12	0	1	15	0	0	12	1	1	14	0	2	12	2	0	9	-1	2	2	-1	-2	7	0	0	3	1	0	2	1	0				

Base: Fixed WiFi users | Retention: Current user / Trial P3M Conversion: Current user / Aware | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Brand leverage: Area 4

Telkomsel Orbit performed relatively stable compared to previous month. IndiHome, on the other hand performed negatively in compared to previous 3 months. First Media declining awareness level in national level also contributed by this area performance.

Brand Leverage

In percentage (%)

	Fixed WiFi Fiber																														Fixed WiFi Cellular																
	IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Isat Home Wireless			XL Satu Lite													
	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M														
Recommender	72	-1	-5	2	0	0	5	0	+1	6	0	+3	1	0	-1	0	0	0	0	0	7	0	0	1	0	0	2	0	0	0	0	0	1	0	0												
Preferer	74	-1	-5	3	0	+1	4	+1	+1	6	0	+3	1	0	-1	0	0	0	0	0	7	0	+1	1	0	0	2	0	-1	0	0	0	0	0	0												
BUMO user	75	-1	-5	2	0	0	2	0	0	6	0	+3	0	0	-1	0	0	0	0	0	7	0	+1	1	0	0	2	0	0	0	0	0	0	0	0												
Current user	75	-1	-5	3	0	0	3	0	0	6	0	+2	0	0	-1	1	0	0	0	0	7	0	+1	1	0	0	3	0	0	0	0	0	0	0	0												
Trial P3M	76	-1	-6	3	0	0	3	0	0	7	0	+2	1	0	-1	1	0	0	0	0	7	0	+1	1	0	0	3	0	0	1	0	0	0	0	0												
Trial P1Y	77	-1	-5	4	0	0	4	0	0	7	0	+2	1	0	-1	1	0	0	0	0	8	0	+1	1	0	0	5	0	-1	1	0	0	1	0	0												
Considerer	76	-1	-5	9	0	+1	14	0	+1	13	0	+3	5	0	0	4	0	0	3	0	0	14	0	0	3	0	+1	12	0	0	3	0	-1	3	0	0											
Aware	95	-1	-4	24	0	-1	41	-2	-3	40	-1	-1	19	-1	-2	20	-1	-2	11	-1	0	42	-3	-3	12	0	-1	36	+1	0	16	0	+1	15	+1	0											
Rejecter	45	0	0	4	76	0	0	4	59	-1	-2	5	60	-1	-2	4	81	-1	-1	7	80	-1	0	3	89	-1	-1	5	58	-1	-2	5	88	-1	0	4	64	0	-1	5	84	0	1	4	85	0	0
Not Consider Not Aware Retention	100	0	0	88	4	0	80	-2	-8	97	2	2	89	14	0	87	7	21	85	-3	-3	99	0	2	100	5	8	90	5	5	87	13	8	100	19	41											
Conversion	79	-1	-3	12	0	1	6	0	0	16	1	6	2	0	-4	3	0	1	3	-1	-1	17	2	4	9	-1	1	8	1	1	3	1	1	3	0	0											

Base: Fixed WiFi users | Retention: Current user / Trial P3M Conversion: Current user / Aware | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base



Top brands dominating the Fixed WiFi market

In overall, no major changes on brand shares for this period in compared to previous period, but Indihome share its lower in compared to Dec'23 in most of area except Area 2. On the other hand, Telkomsel Orbit's share is improved in contributed by Area 2 performance, even though declined in Sumbagut.

Brand Used Most Often In percentage (%)

	Total	By Area												By Region																																									
		Area 1				Area 2				Area 3				Area 4				Sum bagut	Sum bagteng			Sum bagsel			Central Jabo	Western Jabo			Eastern Jabo			Jabar	Jateng DIY	Jatim	Bali Nusra	Kali mantan	Sula wesi	Puma																	
		%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M															
IndiHome	58	0	-2	54	-2	-5	55	+1	0	56	0	-2	75	-1	-5	56	-2	-6	51	-2	-2	55	-2	-5	57	+2	-2	56	+2	+5	52	+2	+3	55	-2	-6	54	-1	-4	56	0	-1	63	0	-2	76	+1	-4	71	-3	-7	85	-1	+1	
Telkomsel Orbit	2	0	0	2	0	-1	2	0	+1	1	0	0	2	0	0	2	0	-2	1	0	-1	2	0	0	2	0	0	2	0	0	3	0	+2	2	0	+1	1	0	0	1	0	0	3	0	+1	1	0	0	2	0	0	3	-1	0	
Biznet	6	0	0	3	0	0	8	0	+1	6	0	0	2	0	0	2	0	+1	4	0	+1	4	-1	-2	10	+1	+3	6	-1	+1	9	0	-1	9	+1	0	5	0	+1	7	0	0	6	0	0	3	0	+1	2	0	0	3	0	+1	
First Media	5	0	0	4	0	0	8	-1	-1	5	-1	0	2	0	0	6	0	-1	4	+1	+1	2	+1	0	11	-2	-1	12	0	0	4	-1	-2	6	-1	-1	5	-1	-1	6	-1	0	1	0	-1	1	0	0	2	0	+1	8	+2	-2	
Iconnet	5	0	0	9	0	0	2	0	0	5	0	0	6	0	+3	11	0	+1	9	-1	-3	7	-1	0	2	0	-1	3	+1	0	2	0	0	3	0	+2	6	0	+1	3	0	0	7	0	0	5	-1	+1	9	+1	+5	0	0	0	
My Republic	5	0	0	7	+1	+1	5	0	+1	4	0	0	0	0	-1	2	+1	+1	5	+1	+2	13	+1	+2	4	+1	+1	6	+1	0	4	-1	-1	5	+1	+3	6	0	+1	2	0	-1	3	+1	+1	0	0	0	1	0	-2	0	0	0	
MNC Play + Indosat HiFi	3	0	0	2	0	0	2	0	-1	5	0	+1	0	0	0	5	0	0	0	0	0	0	1	0	+1	3	0	+1	2	-1	-3	1	0	0	3	0	0	5	+1	+1	7	-1	+1	0	0	0	0	0	0	0	0	1	0	0	
XL Satu Fiber	2	0	0	1	0	0	1	0	-1	1	0	0	7	0	+1	2	0	+1	2	0	+1	1	0	0	1	0	0	1	0	-2	3	-1	-2	2	0	+1	1	0	0	1	0	0	5	-2	+1	9	+1	+3	7	0	0	0	0	0	0
CBN Fiber	2	0	0	3	0	+1	1	0	0	2	0	0	0	0	0	6	+1	+3	0	0	-1	3	0	0	1	0	0	2	0	-1	1	0	0	1	0	0	0	0	0	2	0	0	6	+1	-1	0	0	0	0	0	1	0	+1		
Oxygen.Id	2	0	0	2	0	+1	3	0	0	0	0	0	1	0	0	4	+1	+2	1	0	+1	2	0	0	4	0	+1	2	0	0	5	0	+1	0	0	-1	0	0	0	0	0	0	1	0	0	3	0	+1	0	0	0	0	0	0	
Faznet	1	0	0	4	0	+2	0	0	0	0	0	0	1	0	+1	0	0	0	7	+1	+2	5	0	+3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Mega Vision	1	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	-2	4	-1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Bnetfit	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	0	+1	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Life Media	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	0	-1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Others	9	0	+1	8	+1	+1	9	0	0	12	+1	+1	3	0	+1	4	0	+2	15	0	-1	6	+1	+1	5	-2	-1	9	-1	0	11	+1	+1	11	+1	+1	11	+1	+1	14	+1	+1	5	+1	+2	1	0	-1	5	0	+3	1	0	0	

Base: Fixed WiFi users | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Summary

Summary: Customer satisfaction

Overall, neither NPS nor CSI performance differed significantly from the previous month. IndiHome’s NPS in Area 1 has increased for three consecutive months, while Telkomsel Orbit’s CSI has decreased in Area 3.

Summary NPS & CSI		IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id		
		%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M
TOTAL	NPS	+50	↓	↓	+63	↓	↓	+47	↓	↓	+54	↓	▲	+29	▼	▼	+40	↓	↓	+41	↓	↓	+40	↓	▼	+38	↓	▼	+54	↓	↓
	CSI	7.59	↓	↓	7.73	↓	↓	7.45	↓	↓	7.76	↓	↓	7.10	↓	↓	7.43	↓	↓	7.23	↓	↓	7.48	↓	↓	7.37	↓	↓	7.49	↓	↓
Area 1	NPS	+49	▲	▲	+76	↓	↓	+55	↓	↓	+63	↓	▲	+18	↓	▼	+32	↓	↓	+57	↓	▲	+30	↓	▼	+39	↓	▼	+57	↓	↓
	CSI	7.60	↓	↓	7.80	↓	▲	7.43	↓	↓	8.13	↓	▲	6.95	↓	↓	7.45	↓	↓	7.01	↓	▼	7.39	↓	↓	7.36	↓	▼	7.36	▲	▼
Area 2	NPS	+52	↓	↓	+56	↓	↓	+52	▲	▲	+56	↓	▲	+39	▼	↓	+47	↓	↓	+35	↓	▼	+44	▼	↓	+47	↓	▼	+59	↓	▲
	CSI	7.58	↓	↓	7.68	↓	↓	7.54	↓	▲	7.69	↓	↓	7.23	▲	↓	7.56	↓	▲	7.56	↓	↓	7.33	↓	↓	7.57	↓	↓	7.49	↓	↓
Area 3	NPS	+48	↓	↓	+67	↓	↓	+33	↓	▼	+48	↓	↓	+30	▼	▼	+38	↓	↓	+38	↓	↓	+48	↓	↓	+38	↓	↓	+24	↓	↓
	CSI	7.52	↓	↓	7.82	▼	▼	7.26	↓	▼	7.78	↓	↓	7.12	↓	▼	7.26	↓	↓	7.12	↓	↓	7.71	↓	↓	7.26	↓	↓	7.29	▼	↓
Area 4	NPS	+54	↓	↓	+60	↓	↓	+40	↓	↓	+48	↓	↓	+38	↓	↓	+39	↓	↓	+63	↓	↓	+28	↓	↓	+33	↓	↓	+25	▼	▼
	CSI	7.72	↓	↓	7.67	↓	↓	7.58	↓	▲	7.47	↓	▲	7.20	↓	▼	7.15	↓	↓	7.78	▼	▲	7.05	↓	▼	7.32	▲	▲	7.92	▲	▲

Base: Respective Fixed WiFi users | CSI is significant if +/- 0.2 points | NPS significance based on NET score Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | ▲: significantly improve ▼: significantly decline

Summary: Brand Performance

Compared to previous period, BEI and Share for Indihome and Telkomsel Orbit are stable. However, Area 1 and 4 contributed a lower score for Indihome's BEI and Share. Meanwhile, Telkomsel Orbit's BEI is significantly improved in Area 2.

Summary NPS & CSI		IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id		
		%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M
TOTAL	BEI	6.1	↓	↓	0.6	↓	↓	1.1	↓	↓	1.5	↓	↓	0.8	↓	↓	0.8	↓	↓	0.6	↓	↓	0.4	↓	↓	0.4	↓	↓	0.3	↓	↓
	Share	58	↓	▼	2	↓	↓	5	↓	↓	6	↓	↓	5	↓	↓	5	↓	↓	3	↓	↓	2	↓	↓	2	↓	↓	2	↓	↓
Area 1	BEI	5.7	↓	▼	0.6	↓	↓	0.7	↓	↓	1.0	↓	↓	1.3	↓	↓	1.1	↓	↓	0.5	↓	↓	0.5	↓	↓	0.3	↓	↓	0.4	↓	↓
	Share	54	↓	▼	2	↓	↓	4	↓	↓	3	↓	↓	9	↓	↓	7	↓	↓	2	↓	↓	1	↓	↓	1	↓	↓	2	↓	↓
Area 2	BEI	6.0	↓	↓	0.6	↓	↓	1.5	↓	↓	1.9	↓	↓	0.5	↓	↓	1.0	↓	↓	0.7	↓	↓	0.5	↓	↓	0.4	↓	↓	0.5	↓	↓
	Share	55	↓	↓	2	↓	▲	8	↓	↓	8	↓	↓	2	↓	↓	5	↓	↓	2	↓	↓	1	↓	↓	1	↓	▼	3	↓	↓
Area 3	BEI	6.0	↓	↓	0.5	↓	↓	1.0	↓	↓	1.5	↓	↓	0.8	↓	↓	0.8	↓	↓	0.9	↓	↓	0.3	↓	↓	0.3	↓	↓	0.1	↓	↓
	Share	56	↓	▼	1	↓	↓	5	↓	↓	6	↓	↓	5	↓	↓	4	↓	↓	5	↓	↓	1	↓	↓	1	↓	↓	0	↓	↓
Area 4	BEI	7.3	↓	▼	0.8	↓	↓	0.5	↓	↓	0.9	↓	↓	1.0	↓	▲	0.2	↓	↓	0.2	↓	↓	0.1	↓	↓	1.1	↓	↓	0.2	↓	↓
	Share	75	↓	▼	2	↓	↓	2	↓	↓	2	↓	↓	6	↓	▲	0	↓	▼	0	↓	↓	7	↓	↓	7	↓	↓	1	↓	↓

Base: Fixed WiFi users | BEI is significant if +/- 0.3 points | Brand Share significance based on % | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | ▲: significantly improve ▼: significantly decline

IndiHome: CSI vs. NPS Summary (Mar'24 vs. Feb'24)

CSI increase			
CSI stable		All region except Bali Nusra & Sumbagteng	Bali Nusra & Sumbagteng
CSI decrease			
	NPS decrease	NPS stable	NPS increase

IndiHome: Summary of issue(s) and improvement(s) (Mar'24 vs. Feb'24)

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

CSI increase			
CSI stable			(+) Wide Coverage Network (+) Packages variant according to needs (+) Good product quality
CSI decrease			
	NPS decrease	NPS stable	NPS increase

Telkomsel Orbit: CSI vs. NPS Summary (Mar'24 vs. Feb'24)



Telkomsel Orbit: Summary of issue(s) and improvement(s) (Mar'24 vs. Feb'24)

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

CSI increase			
CSI stable			
CSI decrease		<div><div></div> Overall internet quality</div> <div><div></div> Ease of getting promotions</div> <div><div></div> Suitability of offered package specifications</div> <div><div></div> Ease of purchasing packages</div> <div><div></div> Availability of various payment methods</div>	
	NPS decrease	NPS stable	NPS increase

Additional

Installation Up to Activation Service Time: Summary – by area & region

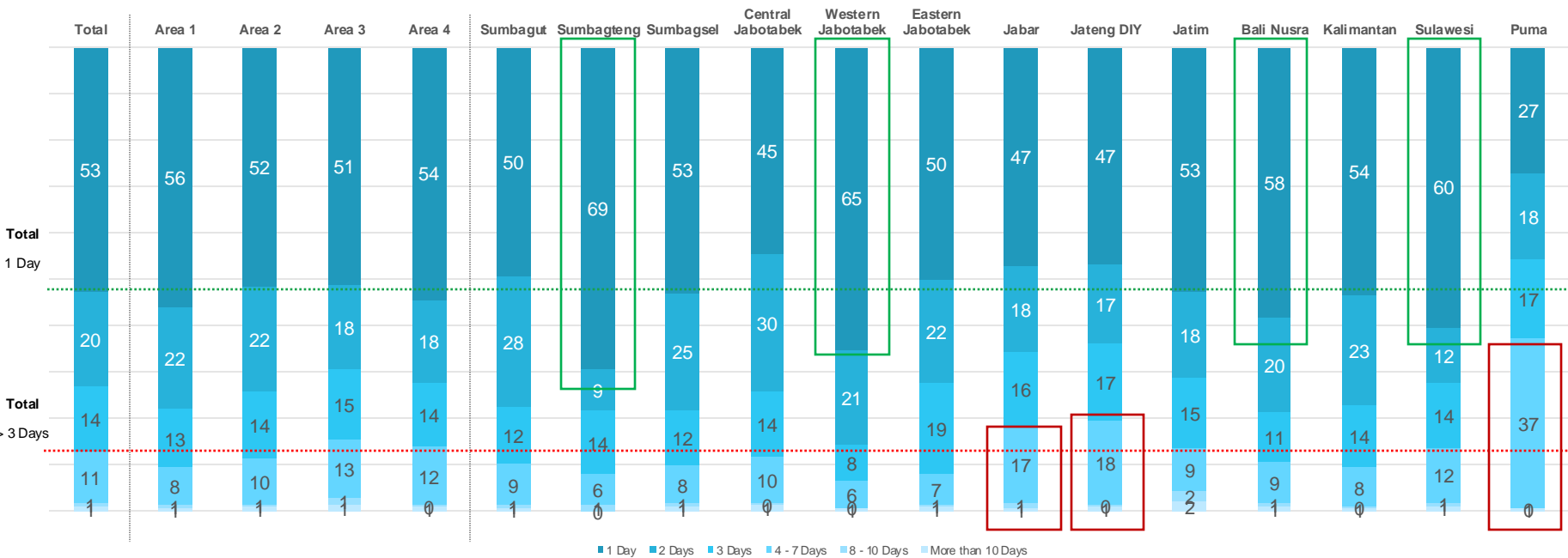
In overall, Indihome able to fulfill consumer expectation for installation in most of area, except for notable gap between expectation & actual time in Western Jabo, while Puma managed to perform faster than consumer expectation.

Waiting time in day(s)	IndiHome			Telkomsel Orbit			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id		
	Exp	Actual	Gap	Exp	Actual	Gap	Exp	Actual	Gap	Exp	Actual	Gap	Exp	Actual	Gap	Exp	Actual	Gap	Exp	Actual	Gap	Exp	Actual	Gap	Exp	Actual	Gap	Exp	Actual	Gap
TOTAL	2	2	0	2	2	0	2	2	0	2	2	0	2	2	0	2	2	0	2	2	0	2	2	0	2	2	0	2	2	0
Area 1	2	2	0	1	1	0	2	2	0	2	2	0	2	2	0	2	2	0	1	1	0	2	2	0	2	2	0	2	2	0
Sumbagut	2	2	0	1	1	0	2	3	-1	3	3	0	2	2	0	2	3	-1	1	1	0	2	2	0	1	2	0	1	2	-1
Sumbagteng	2	2	0	1	1	0	2	2	0	2	2	0	2	2	0	1	1	0	1	2	-1	2	1	1	3	1	1	1	1	0
Sumbagsel	2	2	0	1	1	0	2	2	0	2	3	-1	2	2	0	2	2	0	1	2	-1	2	2	0	2	2	0	2	2	0
Area 2	2	2	0	2	2	0	2	2	0	2	2	0	2	3	0	2	3	-1	2	2	0	2	2	0	2	2	-1	2	3	-1
Central Jabo	2	3	0	2	2	0	2	3	0	2	2	-1	4	2	2	2	3	-1	2	2	0	2	3	-1	0	0	0	1	4	-2
Western Jabo	2	2	-1	2	2	0	2	2	0	2	2	0	2	3	-1	2	2	-1	2	1	1	2	2	0	2	3	-1	3	2	0
Eastern Jabo	2	2	0	2	3	-1	2	3	-1	2	2	0	2	3	-1	2	3	-1	2	3	0	2	2	1	2	2	-1	2	3	0
Jabar	2	2	0	2	1	0	4	3	1	2	2	0	2	3	-1	3	2	0	2	2	0	2	2	0	2	2	0	0	0	0
Area 3	2	3	0	3	4	-1	2	2	0	3	3	0	3	3	0	2	2	0	2	2	0	2	2	0	3	3	-1	3	3	0
Jateng DIY	3	3	0	3	4	-1	2	2	0	3	3	0	3	4	0	2	2	0	2	2	0	2	2	0	1	2	0	4	4	0
Jatim	2	3	0	4	4	0	2	2	0	2	2	0	2	1	0	2	2	0	2	2	0	2	2	0	4	4	-1	0	0	0
Bali Nusra	2	2	0	1	2	-1	2	2	0	3	4	-1	2	3	-1	1	2	-1	1	1	0	2	2	0	3	3	-1	2	2	0
Area 4	2	2	0	1	1	0	3	2	0	2	2	0	2	2	0	2	2	0	4	4	-1	3	2	1	2	2	0	2	1	0
Kalimantan	2	2	0	1	2	0	2	3	-1	2	2	0	2	2	0	2	2	-1	0	0	0	3	2	1	2	2	0	2	1	0
Sulawesi	2	2	0	1	1	0	2	2	0	3	2	0	2	2	0	2	1	0	2	3	-1	1	1	0	2	2	0	0	0	0
Puma	3	3	1	1	1	0	3	2	1	4	4	0	0	0	0	0	0	0	9	8	1	3	3	0	0	0	0	0	0	0

Base: Respective Fixed WiFi users in Feb'24 - Mar'24 | Exp = Expected Service Time | Actual = Total Service Time |
GREEN: Actual service time faster than Expected service time RED: Actual service time slower than Expected service time | Grey font: small base

Actual Installation Up to Activation Service Time: Indihome

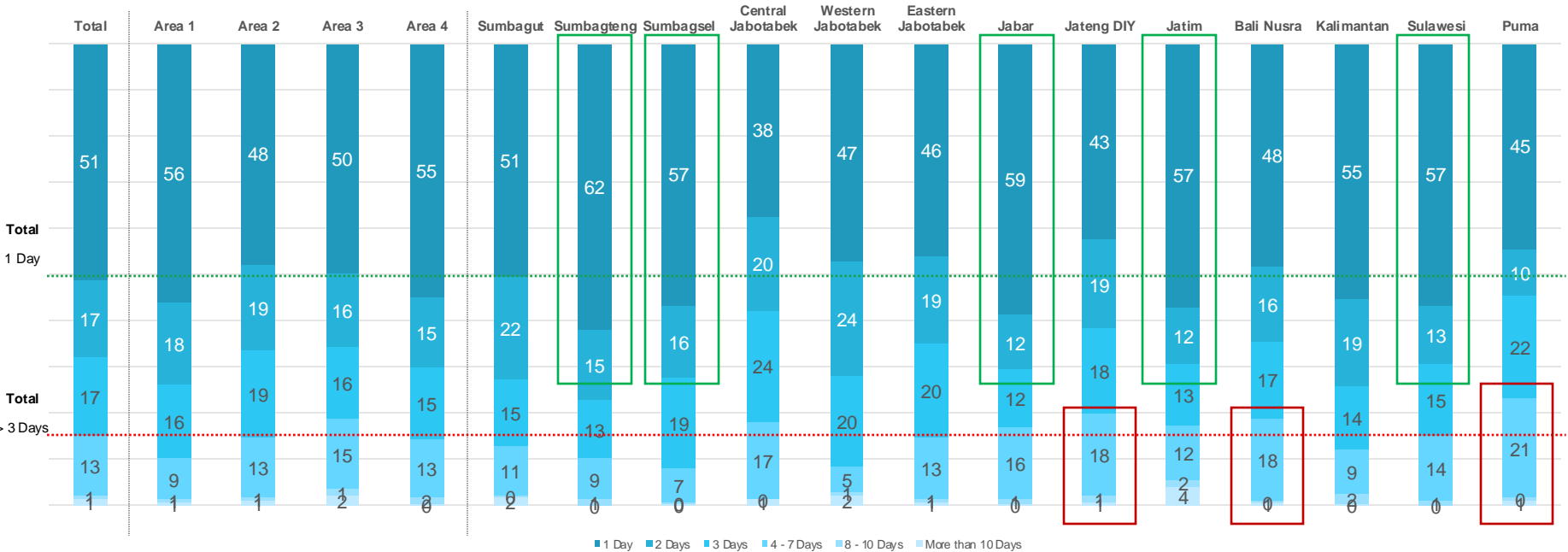
Majority of Indihome's consumers are experienced 1 day installation services, especially in Sumbagteng, Western Jabo, Bali Nusra and Sulawesi. On the other hand, consumers who experienced more than 3 days for installation mostly come from Jabar, Jateng DIY, and Puma.



Base: Respective Fixed WiFi users in Feb'24 – Mar'24

Expectation Installation Up to Activation Service Time: Indihome

Consumers in Sumbagteng, Sumabgsel, Jabar, Jatim, and Sulawesi are more likely to expect a one-day installation. However, some regions, especially Jateng DIY, Bali Nusra, and Puma have lower expectations for fast installation services.



Base: Respective Fixed WiFi users in Feb'24 – Mar'24

NET Score Installation Up to Activation Service Time: Indihome

Except for Puma, IndiHome's installation time was effective in accommodating consumer expectations across all areas.

Net Score =
Actual – Expectation

	Total	Area 1	Area 2	Area 3	Area 4	Sumbag ut	Sumbagt eng	Sumbag sel	Central Jabo	Western Jabo	Eastern Jabo	Jabar	Jateng DIY	Jatim	Bali Nusra	Kalimant an	Sulawesi	Puma
1 Day	+2	0	+4	+1	-1	-1	+7	-4	+7	+18	+4	-12	+4	-4	+10	-2	+4	-17
2 Days	+3	+4	+4	+2	+3	+6	-6	+9	+9	-4	+4	+7	-2	+6	+4	+5	0	+8
3 Days	-3	-3	-4	-1	-1	-2	+1	-7	-10	-12	-1	+4	-1	+2	-6	0	-2	-5
4 – 7 Days	-2	-1	-3	-3	0	-2	-2	+1	-7	+1	-7	+1	0	-3	-9	-1	-2	+15
8 – 10 Days	0	0	0	0	-1	0	0	0	0	-1	0	0	-1	+1	0	-2	0	0
More than 10 Days	0	0	0	-1	+1	-1	0	+1	0	-1	0	0	0	-2	0	0	+1	-1
Less than (equal to) 3 Days	+2	+1	+3	+3	+1	+3	+2	-2	+6	+2	+7	-1	0	+4	+8	+3	+1	-14
More than 3 Days	-2	-1	-3	-3	-1	-3	-2	+2	-6	-2	-7	+1	-1	-4	-8	-3	-1	+14

Base: Respective Fixed WiFi users in Feb'24 – Mar'24

Fixed Convergence Mobile (FMC): Indihome

The majority of IndiHome users use Telkomsel as their primary mobile card and skewed towards Area 1 and 4.

Mobile Card Share in %

	TELKOMSEL			INDOSAT			XL			3 TRI			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
TOTAL	53	0	+1	17	+1	0	9	0	-2	12	0	+1	6	0	0	3	0	0
Area 1	68	+2	+1	7	+1	+1	4	0	-1	12	-1	0	7	-1	0	1	0	0
Sumbagut	71	+3	-1	7	+1	+2	3	0	-1	11	0	+1	7	-3	-2	1	0	0
Sumbagteng	80	0	+4	3	0	-2	2	-1	-2	7	+1	+2	7	-1	-1	1	0	-1
Sumbagsel	59	+3	+1	10	+1	+2	6	0	-1	16	-2	-3	7	0	+1	2	0	-1
Area 2	45	0	+1	21	0	0	11	0	-3	14	+1	+2	6	0	0	4	-1	0
Central Jabo	45	0	-1	24	+3	+4	12	-1	-6	12	+1	+4	6	0	+2	2	-2	-3
Western Jabo	42	+2	+4	21	0	-3	13	-2	-5	12	0	+2	6	0	0	6	0	+2
Eastern Jabo	40	-2	-2	24	-1	-2	11	+2	0	16	0	+2	6	+1	0	4	+1	+2
Jabar	52	+2	+4	15	-1	-2	7	-1	-3	14	+1	+1	8	0	-1	4	-1	0
Area 3	44	0	0	22	+1	0	12	-1	-2	10	+1	+1	6	0	0	5	0	+1
Jateng DIY	38	-1	-4	24	-1	-3	9	0	-1	14	+3	+4	6	0	+1	9	0	+3
Jatim	48	-1	+2	25	+3	+3	9	-1	-1	9	-1	-1	5	-1	-1	3	0	0
Bali Nusra	49	+1	+4	8	0	-2	31	-3	-6	5	0	0	6	+1	+3	1	0	0
Area 4	67	+1	+2	13	0	0	5	0	-1	12	-1	0	3	-1	-1	1	0	-1
Kalimantan	56	-2	-1	17	+1	+1	6	0	+1	15	+1	+2	5	-1	-1	1	-1	-2
Sulawesi	70	+4	+5	11	0	0	5	0	-2	11	-3	-1	1	-1	-1	1	0	-1
Puma	95	+3	+2	2	-3	-3	1	0	+1	2	0	0	0	-1	-1	0	0	0

Base: IndiHome users | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Fixed Convergence Mobile (FMC): Telkomsel Orbit

Similar to IndiHome, Telkomsel Orbit users are mostly Telkomsel users.

Mobile Card Share in %

	TELKOMSEL			INDOSAT			XL			3 TRI			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
TOTAL	78	-5	-5	10	+1	+3	4	+1	0	4	+1	+2	2	+1	-1	1	0	0
Area 1	93	-1	+1	0	0	0	5	+3	+4	3	0	+3	0	-2	-6	0	0	-2
Sumbagut	100	+3	+2	0	0	0	0	-3	-2	0	0	0	0	0	0	0	0	0
Sumbagteng	100	+10	+35	0	0	0	0	0	0	0	0	0	0	-10	-26	0	0	-9
Sumbagsel	81	-11	-19	0	0	0	12	+12	+12	7	-1	+7	0	0	0	0	0	0
Area 2	76	-4	+2	14	+2	+3	1	0	-5	2	0	-2	4	+2	+2	2	0	+1
Central Jabo	75	-25	-14	11	+11	0	0	0	0	0	0	0	14	+14	+14	0	0	0
Western Jabo	87	-2	+1	13	+2	-1	0	0	0	0	0	0	0	0	0	0	0	0
Eastern Jabo	72	0	+4	18	0	+7	4	0	-8	0	0	-6	3	0	+3	4	0	-2
Jabar	76	+3	+26	12	-2	+2	0	0	-17	6	-1	-5	2	0	-9	4	-1	+4
Area 3	70	-7	-16	12	+1	+4	8	+4	+8	9	+2	+8	0	0	-3	1	0	0
Jateng DIY	67	-12	-26	8	0	+4	4	+4	+4	18	+9	+18	0	0	-3	3	0	+3
Jatim	50	+1	-10	26	-3	+3	20	+7	+20	5	-5	0	0	0	-6	0	0	-7
Bali Nusra	96	-4	-4	4	+4	+4	0	0	0	0	0	0	0	0	0	0	0	0
Area 4	82	-6	-1	8	0	+1	3	-1	-4	4	+4	0	3	+3	+3	0	0	0
Kalimantan	100	0	+24	0	0	-24	0	0	0	0	0	0	0	0	0	0	0	0
Sulawesi	70	-9	-11	13	-1	+13	5	-1	-8	6	+6	0	5	+5	+5	0	0	0
Puma	100	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

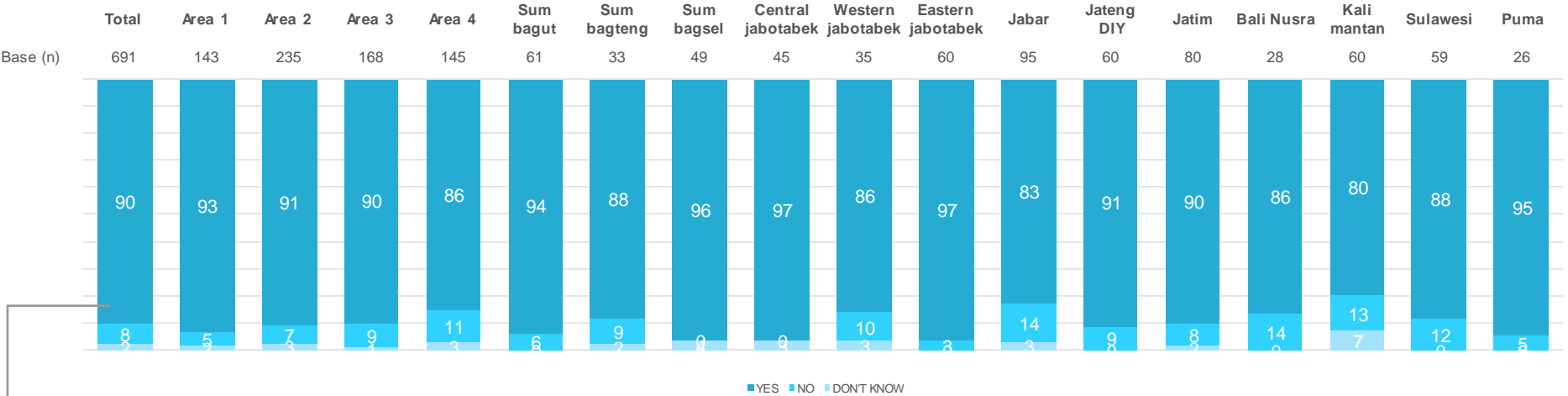
Base: Telkomsel Orbit users | Δ1M = gap vs Feb'24 Δ3M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base



IPTV: Direct OTT Access

The majority of subscribers chose IndiHome's bundled package, which include internet, cable TV, and video streaming services.

Q123: Apakah Anda menggunakan atau berlangganan paket IndiHome untuk internet + Pay TV / Cable TV + Video Streaming?



Q124: Apakah Anda bisa mengakses video streaming (Netflix, Maxstream, Disney Hotstar, Viu, Amazon Prime Video, dsb) melalui Cable TV IndiHome secara langsung (Tidak perlu log in)?

Consumers who aware to directly watch Netflix on TV Cable without login

	Total	Area 1	Area 2	Area 3	Area 4	Sum bagut	Sum bagteng	Sum bagsel	Central jabotabek	Western jabotabek	Eastern jabotabek	Jabar	Jateng DIY	Jatim	Bali Nusra	Kali mantan	Sulawesi	Puma
In %	86	87	87	83	89	86	82	92	88	94	85	83	82	81	91	87	93	81

Base: IndiHome users

OTT Accessed in P3M

Among IndiHome subscribers accessing film streaming services, Netflix hold the highest usage rate, followed closely by YouTube Premium.

Q125: Layanan streaming film / video apa saja yang Anda akses atau gunakan dengan Fixed WiFi dari IndiHome dalam 3 (tiga) bulan terakhir?

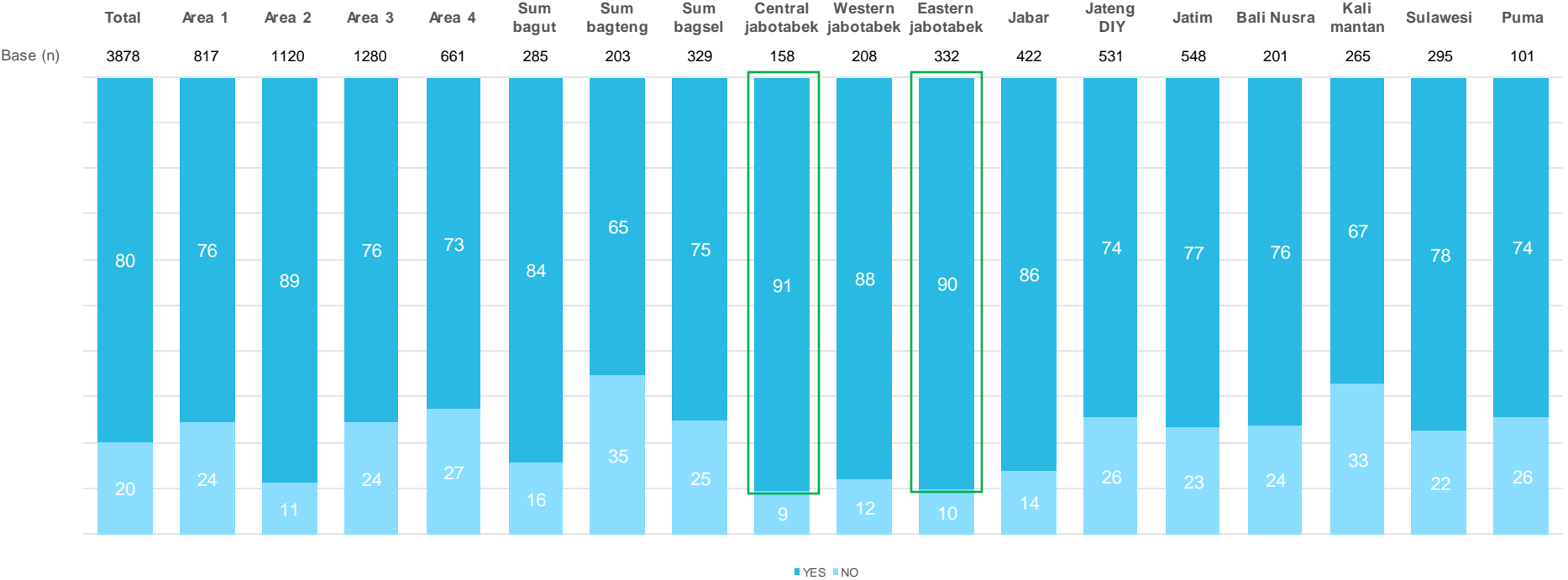
TOTAL		Area 1	Area 2	Area 3	Area 4	Sum bagut	Sum bagteng	Sum bagsel	Central jabotabek	Western jabotabek	Eastern jabotabek	Jabar	Jateng	DIY	Jatim	Bali Nusra	Kali mantan	Sulawesi	Puma
Netflix	<div></div> 53	49	61	50	48	62	47	38	81	57	48	59	51	48	55	46	50	46	
YouTube Premium	<div></div> 47	45	45	48	49	42	32	54	47	39	46	48	41	57	42	43	58	44	
Vidio	<div></div> 28	24	34	27	25	29	30	15	27	34	39	34	31	23	28	25	24	23	
Disney+ Hotstar	<div></div> 26	30	30	23	24	31	32	27	30	29	30	30	22	21	28	19	31	15	
Viu	<div></div> 19	19	19	20	20	15	23	20	18	18	21	18	23	19	16	17	25	9	
WeTV	<div></div> 17	16	17	18	15	20	26	7	15	22	13	18	20	16	16	15	15	18	
Amazon Prime Video	<div></div> 11	11	12	10	12	10	16	8	16	13	10	10	10	8	16	10	17	5	
Iflix	<div></div> 11	6	15	8	11	5	8	6	22	25	10	7	6	7	14	12	13	4	
Hbo Go	<div></div> 10	10	12	9	9	12	9	8	23	13	9	4	6	8	19	9	9	7	
Maxstream	<div></div> 9	6	11	8	10	9	6	4	12	14	7	11	9	5	16	6	15	8	

Base: IndiHome users

Local TV Access Behavior in P3M

Despite the availability and popularity of streaming services, local TV broadcasts maintain a significant viewership across all surveyed areas. Particularly in Central Jabotabek and Eastern Jabotabek, where 90% of viewers continue to engage with local TV programming.

Q128: Apakah Anda masih menonton siaran TV lokal / tidak berbayar (Contoh: SCTV, RCTI, Trans Tv, Indosiar, NET TV, Kompas TV, dsb) dalam 3 (tiga) bulan terakhir?

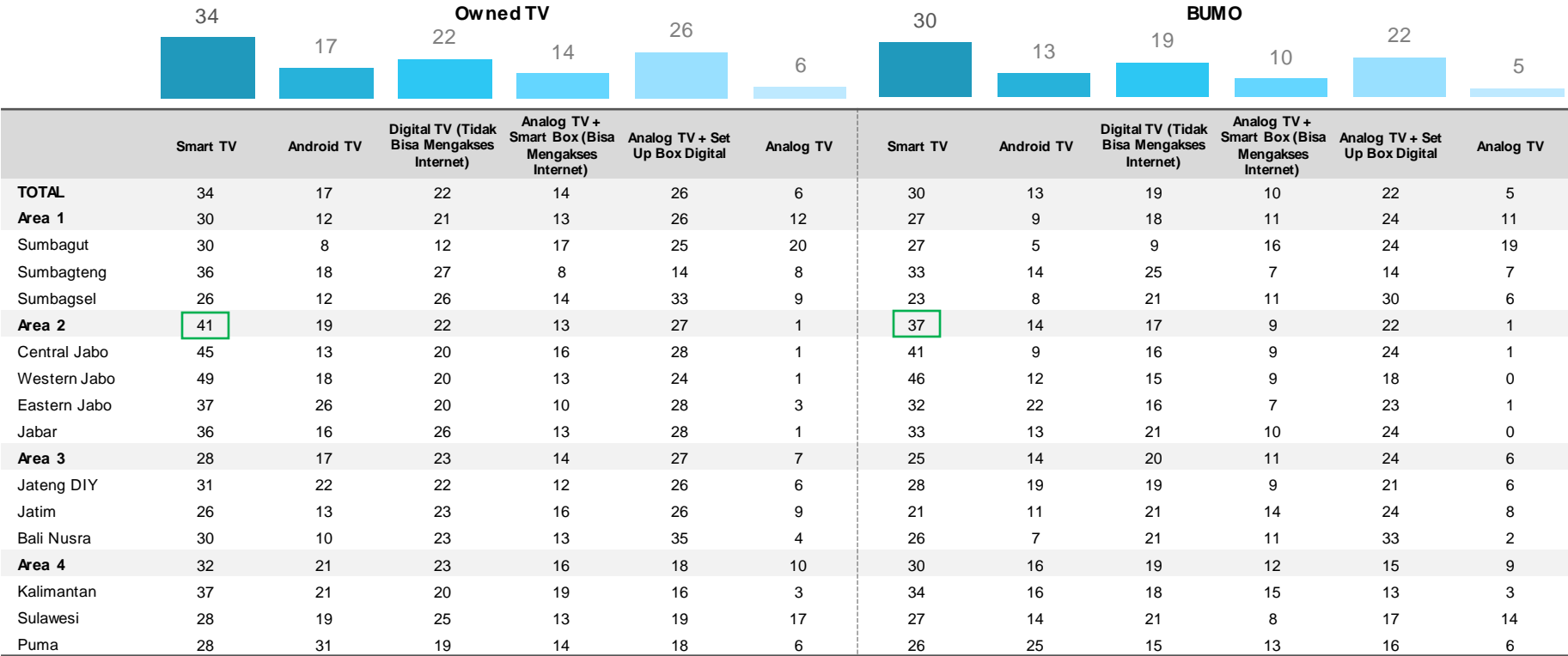


Base: All Respondents in March'24

TV Ownership

Overall, Smart TVs are the most common type especially in Area 2, followed by Analog TV + Set Up Box Digital and Digital TV.

Q129 & Q130: Jenis TV apa sajakah yang Anda miliki saat ini di rumah Anda?



Base: Fixed WiFi users

High Value Customer (HVC): IndiHome

Breakdown	REGULAR									GOLD									PLATINUM									DIAMOND								
	PROPORTION			NPS			CSI			PROPORTION			NPS			CSI			PROPORTION			NPS			CSI			PROPORTION			NPS			CSI		
	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M
TOTAL	11	+1	+0	+41	+2	-1	7.38	0.05	0.03	80	-1	-1	+50	+1	+1	7.58	0.04	0.05	8	+0	+0	+63	+1	+1	7.89	0.08	0.11	2	+0	+0	+60	-2	-7	7.98	-0.06	0.31
Area 1	14	-0	+1	+39	+4	+4	7.52	0.03	0.10	77	-1	-4	+49	+2	+7	7.58	0.09	0.14	8	+0	+2	+60	+2	+6	7.84	-0.04	0.21	1	+1	+1	+79	+22	+26	8.69	0.54	1.51
Sumbagut	11	-1	-2	+57	+16	+26	7.56	0.04	0.13	79	+0	-2	+62	+2	+12	7.69	0.00	0.09	9	+0	+3	+76	+1	-3	8.12	0.06	0.42	1	+1	+0	+83	-17	-17	8.79	-0.08	2.15
Sumbagteng	13	+1	-1	+39	+7	+14	7.93	0.25	0.99	77	-2	-1	+45	+6	+11	7.42	0.12	0.11	8	+1	+2	+42	+5	-4	7.41	-0.13	-0.37	1	+1	+0	+100	+116	+109	9.03	2.39	2.02
Sumbagsel	16	-1	+4	+29	-4	-16	7.30	-0.09	-0.45	76	-0	-6	+41	+1	-0	7.56	0.14	0.19	7	+0	+1	+55	+3	+18	7.83	-0.03	0.37	1	+1	+1	+66	+0	-8	8.47	0.07	0.47
Area 2	10	+3	+2	+41	+16	+1	7.27	0.16	-0.21	80	-4	-4	+53	-1	-0	7.59	-0.04	-0.04	9	+1	+2	+60	-1	-11	7.82	-0.03	-0.04	2	+0	+0	+54	-8	+7	8.04	-0.48	0.13
Central Jabo	8	+4	-0	+73	+40	+11	7.49	0.37	-0.27	79	-6	-3	+53	-1	-8	7.63	-0.15	-0.33	11	+1	+2	+69	+7	-13	8.15	0.31	0.26	2	+0	+1	+72	+1	-28	8.96	-0.08	0.07
Western Jabo	8	+4	+0	+38	-20	-11	6.84	-0.17	-0.58	84	-5	-1	+49	-5	+2	7.46	-0.12	-0.10	8	+1	+2	+51	+5	+4	7.59	-0.12	0.03	1	+0	-1	+51	+51	+36	8.34	0.14	1.33
Eastern Jabo	11	+1	+3	+22	+8	-10	7.17	0.30	-0.13	78	-3	-4	+55	+3	+6	7.72	0.06	0.10	9	+0	+0	+60	-8	-12	7.66	-0.18	-0.24	2	+1	+1	+21	-35	+21	7.02	-1.30	-0.73
Jabar	11	+2	+3	+41	+20	+18	7.46	0.11	0.00	80	-4	-5	+53	-1	-1	7.54	0.02	0.12	7	+1	+2	+58	-6	-15	7.80	-0.23	-0.20	1	+0	-0	+69	+7	+17	7.75	-0.12	-0.37
Area 3	12	-1	-0	+42	-3	-3	7.34	0.01	0.17	80	+0	+0	+47	+2	+1	7.52	0.12	0.10	6	+0	-0	+62	+0	+9	7.86	0.16	0.32	2	+0	+0	+57	-3	-26	7.38	0.00	0.01
Jateng DIY	12	-1	-1	+31	-1	-5	7.26	0.25	0.25	83	+1	+4	+37	-1	-5	7.26	0.05	-0.02	4	-1	-3	+49	-4	+6	7.52	0.07	-0.16	1	+0	-0	+42	-19	-47	6.86	-0.68	-0.78
Jatim	13	-1	+2	+42	-7	-6	7.34	-0.10	0.23	78	+1	-3	+58	+4	+6	7.73	0.17	0.21	6	+0	+0	+57	-5	-0	7.63	0.23	0.32	3	-1	+1	+52	-4	-26	7.29	-0.01	-0.18
Bali Nusra	11	-2	-2	+67	+5	+9	7.54	-0.24	-0.17	75	-2	-3	+44	+4	+2	7.69	0.13	0.17	12	+3	+5	+81	+7	+8	8.46	-0.10	0.75	2	+2	-0	+91	-9	+9	8.29	0.24	1.80
Area 4	9	+1	-1	+41	-9	-9	7.48	0.07	0.01	81	+0	+3	+54	+0	-2	7.69	-0.01	0.01	8	-0	-2	+71	+8	+8	8.11	0.33	0.12	2	-0	+1	+64	-6	-9	8.55	-0.06	0.06
Kalimantan	7	-0	-2	+43	+2	-3	7.51	0.02	-0.03	85	+1	+3	+49	-3	-1	7.66	-0.04	-0.08	8	-1	-2	+76	+9	-4	8.23	0.39	0.11	1	-0	+0	+74	-1	+1	8.39	-0.12	0.82
Sulawesi	10	-0	-1	+45	-12	-9	7.38	0.00	-0.05	78	-0	+1	+58	+4	-2	7.68	0.04	0.09	9	+1	-1	+69	+9	+15	8.08	0.52	0.17	3	-0	+1	+61	-6	-14	8.59	-0.02	-0.20
Puma	16	+9	+2	+24	-17	-19	7.75	0.38	0.32	76	-3	+9	+53	-2	-5	7.85	-0.03	-0.01	8	-5	-10	+58	-0	+12	7.71	-0.43	-0.21	0	-0	-1	0	-100	-41	0.00	-10.00	-9.33

Regular: LOS less than 6 months or ARPU less than IDR 100K | Gold: LOS more than 5 months and ARPU between IDR 100K – IDR 499K | Platinum: LOS more than 5 months and ARPU between IDR 500K – IDR 999K |
Diamond: LOS more than 5 months and ARPU more than IDR 999K
Base: IndiHome users

High Value Customer (HVC): Telkomsel Orbit

Breakdown	REGULAR									GOLD									PLATINUM									DIAMOND								
	PROPORTION			NPS			CSI			PROPORTION			NPS			CSI			PROPORTION			NPS			CSI			PROPORTION			NPS			CSI		
	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M	%	Δ1M	Δ3M
TOTAL	20	+2	+20	+40	-3	+3	7.16	-0.18	0.16	68	+1	+68	+70	-6	+1	7.83	-0.11	-0.07	9	-4	+9	+71	+6	+7	8.31	0.26	0.25	3	+3	+3	+23	+3	-77	7.87	-0.06	-1.56
Area 1	18	+3	-4	+75	+4	+27	7.36	0.27	-0.17	68	+4	+1	+80	+2	+13	7.81	0.25	0.40	11	-7	+1	+51	-19	-49	8.02	-0.53	0.00	2	+0	+2	+100	0	+100	10.00	0.00	10.00
Sumbagut	20	+1	+3	+45	0	+44	7.01	0.00	0.02	69	+11	+1	+93	+10	+18	8.37	0.54	0.85	11	-11	-5	+100	0	0	7.76	-0.99	-0.16	0	0	0	0	0	0	0.00	0.00	0.00
Sumbagteng	11	+2	-21	+100	0	0	9.45	0.00	0.35	77	-4	+9	+95	-1	+42	7.79	0.28	0.11	0	0	0	0	0	0	0.00	0.00	0.00	12	+2	+12	+100	0	+100	10.00	0.00	10.00
Sumbagsel	20	+4	-8	+100	0	+36	7.14	0.92	0.65	63	+3	-3	+56	+2	-5	7.15	-0.09	0.25	17	-7	+11	+15	-17	-85	8.21	-0.11	-0.53	0	0	0	0	0	0	0.00	0.00	0.00
Area 2	11	-1	-5	+27	-20	+4	6.46	-0.51	0.61	78	+5	+13	+61	-13	-8	7.79	-0.21	-0.48	6	-5	-13	+100	+35	+48	8.51	0.87	0.57	5	+1	+5	-11	+47	-11	7.62	0.36	7.62
Central Jabo	0	0	0	0	0	0	0.00	0.00	0.00	91	+33	+51	+25	-39	-7	7.26	-0.72	-0.19	0	-42	-60	0	-39	-64	0.00	-6.86	-8.17	9	+9	+9	+100	+100	+100	8.46	8.46	8.46
Western Jabo	15	-4	-7	+56	+18	+56	6.75	0.40	0.56	78	+3	+6	+56	-19	-33	7.04	-0.50	-1.92	0	0	-6	0	0	0	0.00	0.00	-7.69	7	+1	+7	0	0	0	7.91	0.00	7.91
Eastern Jabo	7	-3	-5	+61	-12	+60	7.89	0.00	2.40	86	+0	-3	+75	-1	+4	8.46	0.00	0.19	7	+3	+7	+100	0	+100	8.73	-0.50	8.73	0	0	0	0	0	0	0.00	0.00	0.00
Jabar	21	+4	-14	-6	-41	-63	5.62	-1.25	-0.06	59	-2	+5	+73	-2	+5	7.69	0.09	-0.10	12	-2	+2	+100	0	+100	8.31	0.00	1.96	8	-1	+8	-100	0	-100	6.79	0.00	6.79
Area 3	27	+5	+11	+41	-6	+11	7.33	-0.33	-0.57	63	-6	-7	+78	-4	+8	7.98	-0.32	0.03	8	+2	-3	+56	+14	-6	8.73	0.39	0.19	2	-1	-1	+100	0	0	7.25	-0.54	-2.32
Jateng DIY	44	+16	+34	+45	-17	-55	7.18	-0.47	-2.21	45	-16	-30	+80	-3	+21	7.51	-0.62	-0.15	11	-0	-4	+55	+1	+9	8.57	0.02	-0.37	0	0	0	0	0	0	0.00	0.00	0.00
Jatim	13	-4	-29	+34	+6	+34	7.23	-0.15	-0.03	70	+0	+19	+65	+4	-23	7.09	0.01	-0.90	10	+5	+3	+57	+57	-43	8.91	1.12	1.68	7	-1	+7	+100	0	+100	7.25	0.00	7.25
Bali Nusra	18	+0	+18	+33	0	+33	7.95	0.00	7.95	82	+3	+3	+89	-11	+7	9.07	-0.39	0.48	0	0	-6	0	0	-100	0.00	0.00	-8.01	0	-4	-14	0	-100	-100	0.00	-8.86	-9.57
Area 4	39	+7	+23	+29	+20	-27	7.50	-0.11	1.06	45	-2	-27	+84	+13	+11	7.72	0.43	0.04	16	-3	+6	+70	-4	+12	7.98	-0.17	0.25	0	-2	-2	0	-100	-100	0.00	-8.99	-8.99
Kalimantan	38	+6	+4	+27	+80	-43	5.86	-0.13	-0.58	39	-1	-26	+55	+8	-28	7.95	0.36	1.25	23	-5	+23	+100	0	+100	10.00	0.00	10.00	0	0	0	0	0	0	0.00	0.00	0.00
Sulawesi	40	+3	+33	+15	-2	+15	8.07	-0.05	2.29	51	-2	-30	+92	+5	+19	7.57	0.57	-0.44	9	-1	-3	+100	0	+52	8.40	0.00	1.29	0	0	0	0	0	0	0.00	0.00	0.00
Puma	35	+21	+25	+100	0	0	8.20	0.55	0.11	28	-6	-26	+100	+65	+50	8.31	0.07	0.01	37	-4	+15	+4	-31	-70	6.50	-0.84	-2.37	0	-11	-13	0	-100	-100	0.00	-8.99	-8.99

Regular: LOS less than 6 months or ARPU less than IDR 100K | Gold: LOS more than 5 months and ARPU between IDR 100K – IDR 499K | Platinum: LOS more than 5 months and ARPU between IDR 500K – IDR 999K |
Diamond: LOS more than 5 months and ARPU more than IDR 999K
Base: Telkomsel Orbit users



Thank You