



Consumer Study on Telco Operator

KPI report







Data ending: Jan '24

Feb '24



Research design: Consumer study 2024

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

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

	Nov 2023 (Offline + Online)	Dec 2023 (Offline + Online)	Jan 2024 (Offline + Online)
 Fieldwork Period	Nov 2023	Dec 2023	Jan 2024
 Coverage	Urban + Rural, 13 TSEL regions <i>PUMA urban only</i>	Urban + Rural, 13 TSEL regions <i>PUMA urban only</i>	Urban + Rural, 13 TSEL regions <i>PUMA urban only</i>
 Sampling Method	Random and Online survey panel	Random and Online survey panel	Random and Online survey panel
 Interview Method	<ul style="list-style-type: none">• Door to Door in respondent's house (Face to Face Interview)• and Self-completion	<ul style="list-style-type: none">• Door to Door in respondent's house (Face to Face Interview)• and Self-completion	<ul style="list-style-type: none">• Door to Door in respondent's house (Face to Face Interview)• and Self-completion
 Target Respondents	<ul style="list-style-type: none">• Offline: 5,077 resp• Online: 4,373 resp	<ul style="list-style-type: none">• Offline: 5,051 resp• Online: 4,361 resp	<ul style="list-style-type: none">• Offline: 5,651 resp• Online: 3,923 resp
 Respondent Criteria	<ul style="list-style-type: none">• HP users• Male or female• 12-55 YO, All SES	<ul style="list-style-type: none">• HP users• Male or female• 12-55 YO, All SES	<ul style="list-style-type: none">• HP users• Male or female• 12-55 YO, All SES

Sample size and coverage

Respondent Type	
	
Achieved Sample	
	
Offline Study	15,779
Online Study	12,657
Total	28,624



1

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

2

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

Area coverage

Area 1

Sumbagut,
Sumbagteng,
Sumbagsel:
22%

n = 7,222 |
N = 36,932,000

Area 2

Jabotabek,
Jabar:
29%

n = 7,676 |
N = 47,652,000

Area 3

Jateng DIY,
Jatim,
Bali Nusra:
34%

n = 8,509 |
N = 56,121,000

Area 4

Kalimantan,
Sulawesi,
Puma:
15%

n = 5,217 |
N = 24,286,000

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Customer satisfaction

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

Net Promoter Score (NPS)

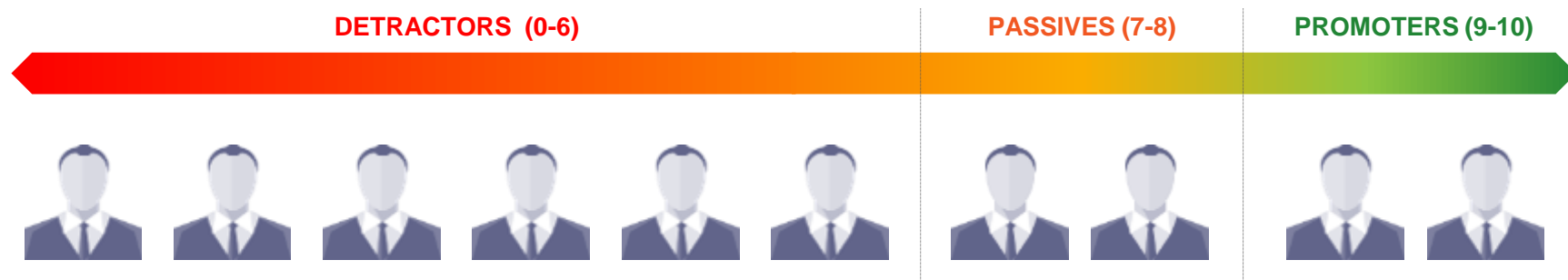
How to obtain Net Promoter Score (NPS)?

Question:

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

Response:

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



NPS:

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

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

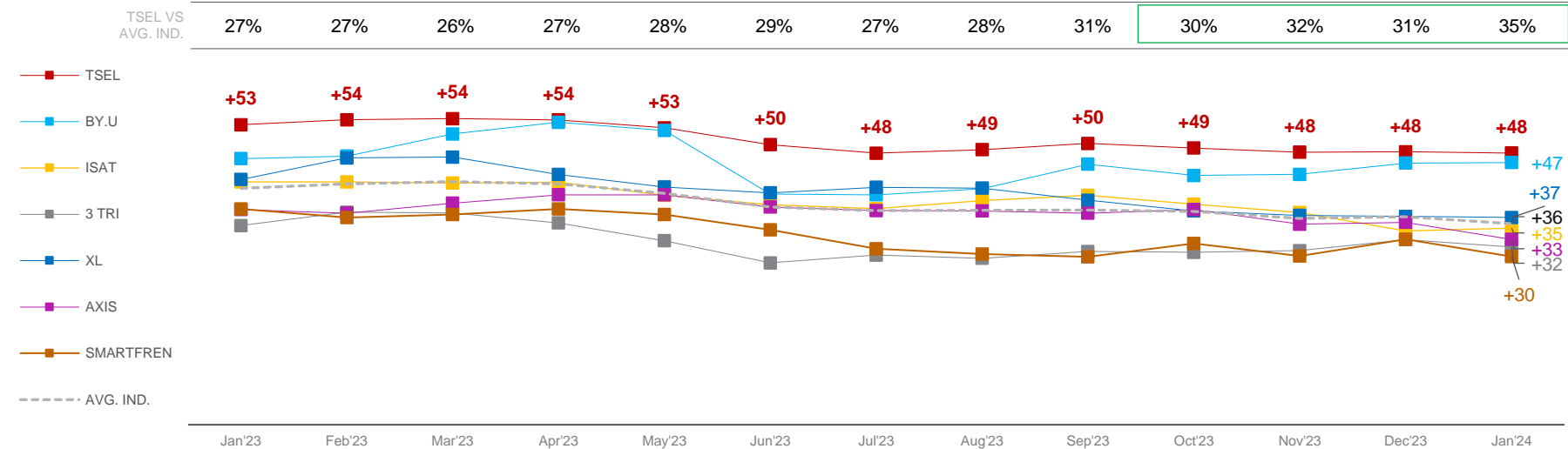
Net Promoter Score (NPS): National level tracking

TSEL's Net Promoter Score (NPS) remains relatively stable. However, it has managed to widen the gap with the industry average as competitors such as ISAT, AXIS, and SMARTFREN have experienced decreases in their scores.

Net Promoter Score (NPS): P1Y Trend

NET score with range -100 to +100

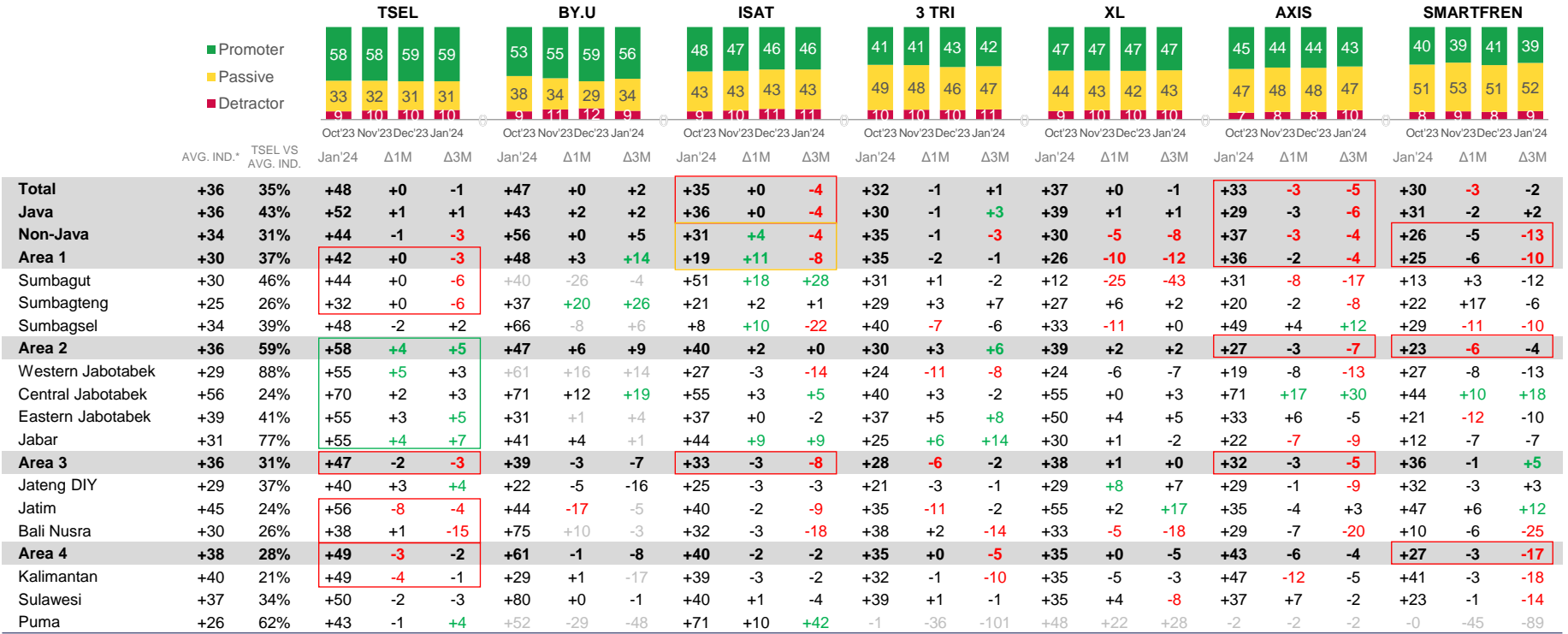
★ Met Telkomsel target (60% above average industry)
Average industry is calculated by averaging value from 6 telco operators: TSEL, ISAT, 3 TRI, XL, AXIS, SMARTFREN



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

Net Promoter Score (NPS): Summary

Despite managing to maintain its overall NPS, TSEL's NPS at the area level shows varying trends. It has decreased in AREA 1, 3, and 4, while increasing in AREA 2. Meanwhile, ISAT and AXIS show a decrease in both JAVA and NON-JAVA areas (although ISAT in AREA 1 has recovered in the past month), whereas SMARTFREN's decrease is mainly driven by NON-JAVA areas.



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

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

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

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

		Area 1			Area 2			Area 3			Area 4		
		Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
Top 5 Cities	Kab. Tapanuli Tengah	+80			Kota Jakarta Pusat	+86	▲	Kab. Nganjuk	+92		Kab. Bone	+85	
	Kab. Ogan Komering Ilir	+76		▲	Kota Bandung	+71	▲	Kab. Trenggalek	+83	▼	Kab. Gowa	+75	▲
	Kota Palembang	+75	▲	▲	Kota Jakarta Timur	+70	▲	Kab. Sidoarjo	+83		Kota Ternate	+68	
	Kab. Ogan Komering Ulu Timur	+74	▲	▲	Kota Tangerang	+66	▲	Kab. Mojokerto	+76	▲	Kota Manado	+64	▲
	Kab. Banyu Asin	+65	▼	▼	Kota Jakarta Selatan	+65		Kab. Gresik	+75		Kota Banjar Baru	+64	
Bottom 5 Cities	Kab. Tanah Datar	-7		▼	Kab. Serang	+3	▼	Kab. Pasuruan	-4		Kab. Sanggau	-16	
	Kab. Solok	+1	▼	▼	Kab. Kuningan	+11		Kab. Cilacap	-1		Kota Kendari	+17	
	Kab. Kampar	+9			Kab. Cirebon	+17		Kab. Pemalang	+8		Kota Ambon	+28	▲
	Kota Metro	+12			Kab. Indramayu	+17		Kab. Banyumas	+18		Kab. Minahasa	+40	
	Kab. Bengkalis	+13	▼	▼	Kab. Tasikmalaya	+28		Kab. Pati	+22		Kab. Kutai Kartanegara	+41	

*Cities with a minimum base of 30 respondents

▲: Improve rank ▼: Decline rank

TSEL: Reason for promoting

The reasons to promote Telkomsel have remained consistent over the past 3 months. Primarily, it revolves around its network, followed by data tariff affordability, ease of top-up, and availability of various packages. Furthermore, a few people have also recently mentioned that Telkomsel has had many promotions.

Reason for promoting

In percentage (%)

	Jan'24	Δ1M	Δ3M
Stable signal	62		
Broad network coverage	27		
Strong internet connection	11		
Affordable data tariff	7		
Easy top-up everywhere	6		
Various packages available	5		
Many promos	4	▲	
Cheap rates	4	▼	
Many people use it	2		▲
Network disruption-free	2		▲

Since I frequently navigate remote areas, I require a reliable network, which is why I opt for Telkomsel due to its extensive and stable coverage in every region.

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

Using a specific promotion frequently makes it more familiar, and I often see new exciting offers. However, when promotions are removed, it can be tricky to decide on other options, especially if we're used to a particular promotion.

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

Due to its easy top-up process, availability of various affordable packages, strong signal, and reliable app.

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

I recommend Telkomsel prepaid SIM card because of its extensive coverage across Indonesia and the wide range of packages available for selection.

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

Base: TSEL primary card users who are promoters

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

▲: Improve rank ▼: Decline rank

TSEL: Understanding positive feedback (reasons for promoting)

The recent increase in mentions regarding many promotions can be observed among TSEL users in AREA 2, where there was previously an increase in NPS.

Reason for promoting

In percentage (%)

	Total			Area 1			Area 2			Area 3			Area 4		
	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
Stable signal	62			59			68			65			56		
Broad network coverage	27			26			28			25			27		
Strong internet connection	11			10		▲	13			12			9	▲	▲
Affordable data tariff	7			6	▲	▼	5		▼	8			7	▼	▼
Easy top-up everywhere	6			6	▼		7	▲	▲	5		▼	6		▲
Various packages available	5			4		▲	6	▼		5		▲	4		▼
Many promos	4	▲		2		▼	4	▲	▲	5		▲	4		▼
Cheap rates	4	▼		4		▲	3	▼	▼	3		▲	4		▲
Many people use it	2		▲	3		▲	2	▼	▲	2	▼	▲	3		▲
Network disruption-free	2		▲	1	▲	▲	3	▲		2	▲	▼	2	▲	▲

Base: TSEL primary card users who are promoters

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

▲: Improve rank ▼: Decline rank



Data above is based on data ending JAN 2024 (Δ1M: gap change to DEC 2023 | Δ3M: gap change to OCT 2023)
The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

TSEL: Understanding positive feedback (reasons for promoting)

The mention of many promotions has specifically increased in CENTRAL JABOTABEK (in the past month) and JABAR.

Reason for promoting

In percentage (%)

	Sumbagut			Sumbagten g			Sumbagsel			Western Jabotabek			Central Jabotabek			Eastern Jabotabek			Jabar			Jateng DIY			Jatim			Bali Nusra			Kalimantan			Sulawesi			Puma		
	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M			
Stable signal	58			60			60			66			64			65			72			69			65			58			60			54			50		
Broad network coverage	31			24			23			35			24			28			28			29			22			27			31			27			13		
Strong internet connection	10	▲		11	▲	▲	8			17			15			10			12			13	▲		13			10	▲	11		▲	8	▲	3	▼	▼		
Affordable data tariff	7			7	▼	▼	5	▲		6		▼	7		▼	4	▼	▼	6	▲	▼	7	▲	▲	7			13		5		▼	7	▼	23				
Easy top-up everywhere	8	▼		8		▲	2	▼	▼	6	▲	▲	7	▼	▲	5	▲	▲	9	▲	▲	6	▼	▼	3	▲	▼	8		▼	8		▲	5	▲	5	▲		
Various packages available	3		▼	5		▲	4	▼	▲	4	▼	▼	9	▲	▲	7			6	▲	▲	6		▲	5		▲	4		▼	3	▼	▼	5	▼	1	▼	▼	
Many promos	4	▲		2	▲	▼	1		▼	6	▼		4	▲	▼	3		▼	4	▲	▲	3	▲	▼	6			4		▲	3	▼	▼	4	▲	▲	4	▼	▲
Cheap rates	4	▼	▼	3		▲	4	▼	▲	4	▼	▲	5		▲	3		▼	3	▼	▼	5	▼	▲	2			4		▲	4		▲	4	▼	2	▼		
Many people use it	4	▲	▲	4		▼	0	▲	▲	2	▼	▼	2	▼	▼	2	▼		3	▼		3	▼	▲	2	▼	▼	1	▼	▼	2	▲	▼	4		▲	1	▲	▲
Network disruption-free	1		▼	2	▲	▲	2	▲	▲	5	▲	▲	3	▲	▲	3		▲	1	▼	▼	3	▲	▲	3	▲		1	▼	▼	4	▲	▲	1	▼	▼	3	▲	▲

Base: TSEL primary card users who are promoters

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

▲: Improve rank ▼: Decline rank

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

Similar to the previous wave, unlike TSEL users who are highly driven by network quality, users of other operators have more balanced positive recommendations in terms of network and tariff. Furthermore, unlike TSEL, whose mention of many promotions increased in the past month, competitors seem to have weakened mentions regarding this attribute.

Reason for promoting across operators

Sorted by percentage rank

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

Base: Respective primary card users who are promoters

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

▲: Improve rank ▼: Decline rank

TSEL: Reason for detracting

Tariff remains the primary reason for Telkomsel users to detract. Moreover, there has been an increase in reasons regarding network issues. Additionally, a few users also mention concerns about short active periods and limited package options.

Reason for detracting

In percentage (%)

	Jan'24	Δ1M	Δ3M
Expensive data tariff	26		
Expensive rates	25		
Unstable signal	23		
Slow data connection	6		
Narrow network coverage	4	▲	▲
Unexpected charges	2	▼	
Network disruption	1	▲	▲
Expensive calls to others	1	▼	▼
Short active period	1	▲	
Limited package option	1	▲	▲

The internet connection is unreliable during rain and power outages, with no alternative brand options, high prices for poor quality, and a lack of internet promotions.

AREA 1, MALE, 12-24 YO, MIDDLE SEC

Telkomsel often experiences disruptions leading to signal loss, and the short active period of the card requires frequent top-ups for renewal.

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

The towers are everywhere, but signal reception remains challenging, particularly during adverse weather conditions, leading to slow connectivity.

AREA 3, FEMALE, 12-24 YO, LOWER SEC

The internet speed is subpar, often resulting in lag or interruptions while streaming videos online or playing online games.

AREA 4, MALE, 25-34 YO, MIDDLE SEC

Base: TSEL primary card users who are detractors

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

▲: Improve rank ▼: Decline rank

TSEL: Understanding negative feedback (reasons for detracting)

The increased mention regarding network issues appears to be conveyed by users across all areas, including AREA 1, 3, and 4, where there was previously a decrease in NPS.

Reason for detracting

In percentage (%)

	Total			Area 1			Area 2			Area 3			Area 4		
	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
Expensive data tariff	26			27	▼	▼	27		▲	24		▼	26		
Expensive rates	25			24			25	▼	▼	27		▲	21		
Unstable signal	23			27	▲	▲	26	▲		18			20		
Slow data connection	6			12			4		▼	3		▲	4		
Narrow network coverage	4	▲	▲	3		▲	9		▲	2	▲	▲	3	▲	▲
Unexpected charges	2	▼		2	▲	▲	2		▼	4			0	▼	▼
Network disruption	1	▲	▲	1	▲	▲	2		▲	2	▲	▲	1		▼
Expensive calls to others	1	▼	▼	2	▼	▼	0	▲	▼	1	▼	▼	3	▲	▼
Short active period	1	▲		1	▲		1	▲	▲	1	▼	▼	3	▲	▲
Limited package option	1	▲	▲	1	▲	▲	2		▲	0	▼	▼	2	▲	▲

Base: TSEL primary card users who are detractors

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

▲: Improve rank ▼: Decline rank



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

TSEL: Understanding negative feedback (reasons for detracting)

In SUMBAGUT, SUMBAGTENG, and KALIMANTAN, the NPS decrease is indicated by mentions regarding both tariff and network issues. Meanwhile, in AREA 3 regions (JATIM and BALI NUSRA), the issues are indicative solely due to network problems.

Reason for detracting

In percentage (%)

	Sumbagut			Sumbagten g			Sumbagsel			Western Jabotabek			Central Jabotabek			Eastern Jabotabek			Jabar			Jateng DIY			Jatim			Bali Nusra			Kalimantan			Sulawesi			Puma		
	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M
Expensive data tariff	32			17			31			29			28			30			24			22			25			24			29			25			16		
Expensive rates	24			16			31			23			23			31			22			30			39			9			22			20			21		
Unstable signal	23			38			20			23			13			26			28			11			20			24			12			26			11		
Slow data connection	15			14			7			0			0			7			5			4			1			4			4			3			4		
Narrow network coverage	0			7			3			6			8			25			1			0			1			6			4			3			4		
Unexpected charges	2			2			3			0			4			0			4			10			1			1			1			0			1		
Network disruption	1			1			2			6			7			0			1			0			4			1			1			0			5		
Expensive calls to others	3			2			0			0			0			0			0			1			0			2			2			3			0		
Short active period	0			2			0			3			0			0			0			1			2			0			3			3			0		
Limited package option	0			2			1			0			0			0			3			0			0			1			0			3			0		

Base: TSEL primary card users who are detractors

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

▲: Improve rank ▼: Decline rank

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

Network issues have also become a recent mention among detractors of ISAT and SMARTFREN. In contrast, AXIS users mention tariff more frequently.

Reason for detracting across operators

Sorted by percentage rank

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

Base: Respective primary card users who are detractors

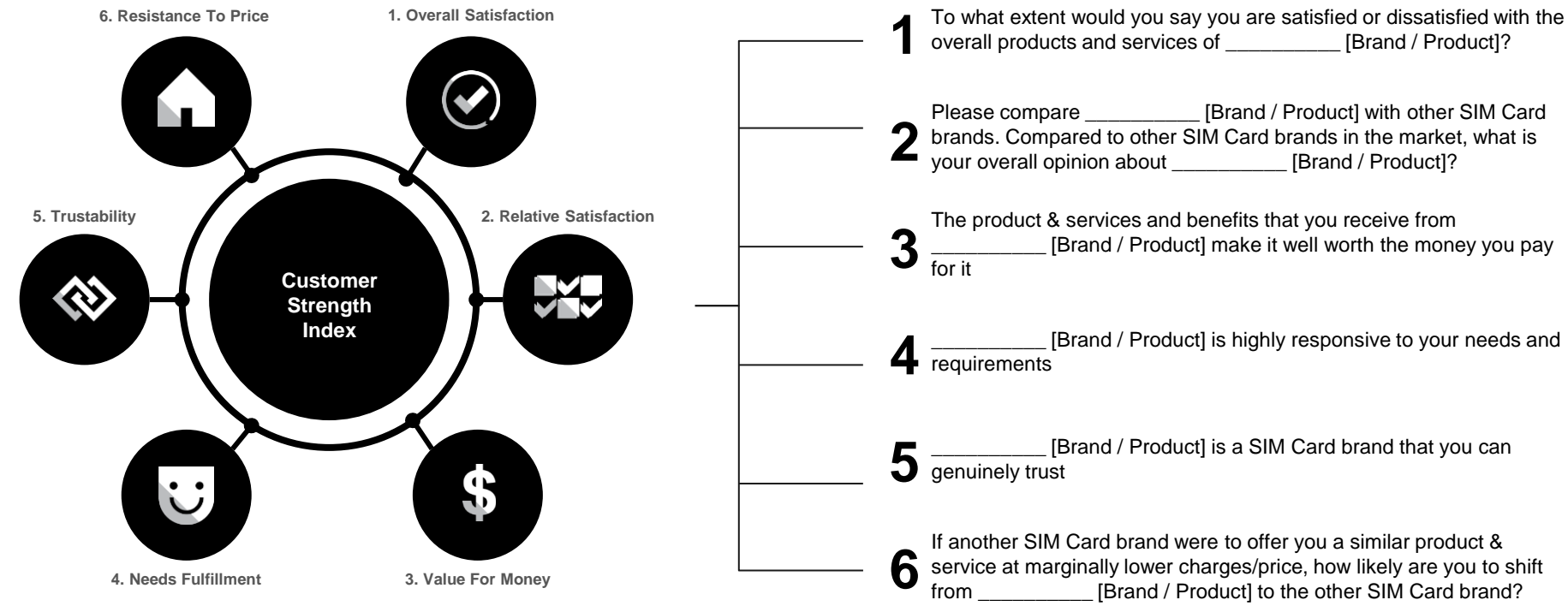
TARIFF | NETWORK | PRODUCT | CHANNEL | PROMO / BONUS | OTHERS

▲: Improve rank ▼: Decline rank

Customer Strength Index (CSI)

How to obtain Customer Strength Index (CSI)?

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



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

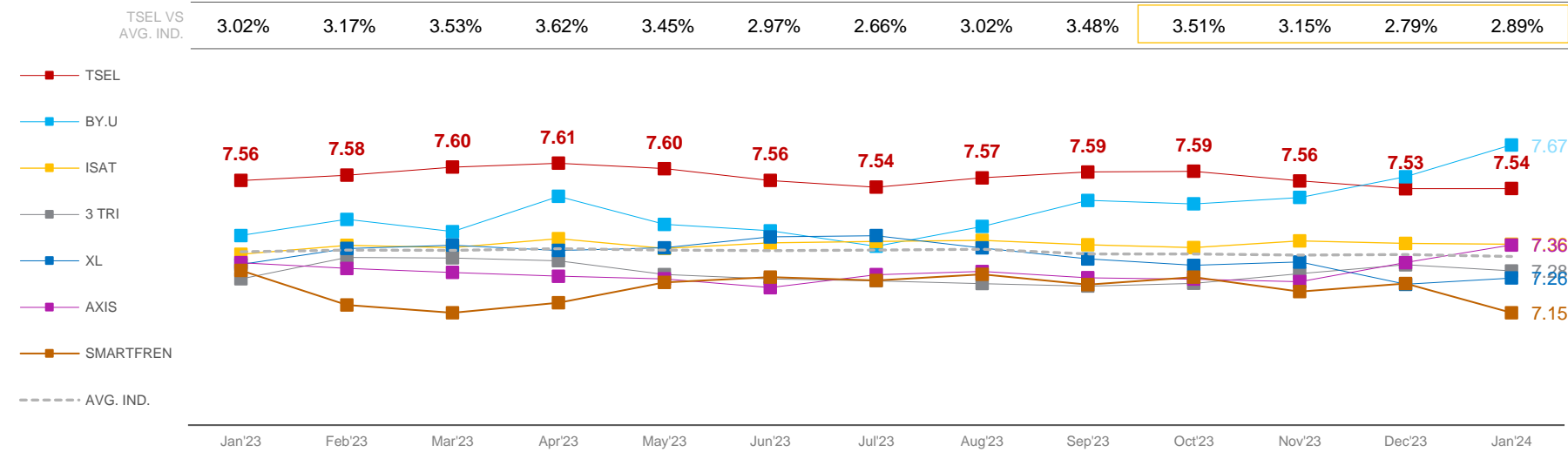
Customer Strength Index (CSI): National level tracking

TSEL’s Customer Satisfaction Index (CSI) remains relatively stable. However, unlike the Net Promoter Score (NPS), the gap between Telkomsel and the industry average is narrowing. This is because only SMARTFREN is experiencing a decrease, whereas ISAT is maintaining its CSI and AXIS are increasing their CSI despite a decrease in NPS.

Customer Strength Index (CSI): P1Y Trend

Mean score with range +0 to +10

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



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

Customer Strength Index (CSI): Summary

TSEL's CSI declines in regions where its NPS has dropped, such as in AREA 3 & 4. However, in AREA 1 & 2, the CSI remains unchanged, contrasting with the NPS trend. Similarly, ISAT and AXIS' CSI show a more positive trajectory than their NPS, whereas SMARTFREN's CSI trend aligns with its NPS. Additionally, BY.U demonstrates a significant improvement in its CSI across many regions.

			TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
			7.59 7.56 7.53 7.54			7.49 7.51 7.57 7.67			7.35 7.37 7.36 7.36			7.24 7.27 7.30 7.28			7.30 7.31 7.24 7.26			7.25 7.25 7.30 7.36			7.26 7.21 7.24 7.15		
			AVG. IND.* TSEL VS AVG. IND.															Oct'23 Nov'23 Dec'23 Jan'24					
			Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
Total	7.32	2.89%	7.54	+0.00	-0.05	7.67	+0.10	+0.18	7.36	+0.00	+0.01	7.28	-0.02	+0.04	7.26	+0.02	-0.04	7.36	+0.05	+0.11	7.15	-0.09	-0.11
Java	7.34	3.68%	7.61	-0.01	-0.05	7.63	+0.12	+0.18	7.39	-0.02	+0.01	7.25	-0.05	+0.02	7.29	+0.03	-0.02	7.31	+0.01	+0.00	7.17	-0.13	-0.09
Non-Java	7.29	2.32%	7.46	+0.01	-0.06	7.78	+0.09	+0.20	7.27	+0.06	+0.01	7.33	+0.04	+0.07	7.15	-0.02	-0.11	7.41	+0.10	+0.23	7.10	+0.00	-0.17
Area 1	7.24	2.20%	7.40	+0.03	-0.06	7.43	+0.18	+0.15	7.19	+0.11	-0.02	7.31	-0.05	-0.08	7.11	-0.06	-0.15	7.40	+0.11	+0.23	7.02	+0.05	-0.24
Sumbagut	7.28	3.19%	7.51	+0.08	+0.00	7.21	-0.22	-0.24	7.38	+0.12	+0.12	7.22	+0.03	-0.02	7.37	-0.10	-0.01	7.44	-0.01	+0.17	6.73	+0.14	-0.45
Sumbagteng	7.13	1.91%	7.26	+0.00	-0.05	7.34	+0.33	+0.41	7.01	-0.02	-0.25	7.08	-0.03	-0.10	7.23	+0.10	+0.05	6.98	+0.13	-0.21	7.20	+0.27	+0.03
Sumbagsel	7.26	1.94%	7.40	+0.01	-0.14	7.70	+0.23	+0.05	7.17	+0.13	-0.01	7.47	-0.11	-0.14	6.90	-0.13	-0.34	7.53	+0.23	+0.47	7.07	+0.00	-0.23
Area 2	7.44	3.71%	7.71	+0.02	+0.05	7.71	+0.26	+0.28	7.54	+0.04	+0.08	7.29	-0.03	+0.00	7.43	+0.05	+0.10	7.33	+0.01	+0.06	7.31	-0.13	+0.03
Western Jabotabek	7.38	5.11%	7.76	+0.07	+0.05	7.54	-0.23	-0.20	7.53	-0.04	+0.03	7.21	-0.18	-0.18	7.19	+0.02	+0.08	7.13	-0.01	+0.06	7.48	-0.09	+0.00
Central Jabotabek	7.82	2.80%	8.04	+0.03	+0.03	8.24	+0.33	+0.25	7.76	+0.06	+0.03	7.49	-0.05	-0.20	7.67	-0.09	-0.09	8.19	+0.26	+0.44	7.78	+0.32	+0.30
Eastern Jabotabek	7.43	2.37%	7.60	+0.05	+0.07	7.16	+0.23	+0.22	7.40	+0.02	+0.06	7.43	+0.04	+0.10	7.53	+0.16	+0.13	7.32	+0.13	-0.08	7.29	-0.08	+0.08
Jabar	7.34	3.84%	7.62	-0.01	+0.06	7.91	+0.47	+0.43	7.61	+0.12	+0.19	7.14	-0.03	+0.05	7.34	-0.01	+0.07	7.30	-0.07	+0.06	7.01	-0.42	-0.17
Area 3	7.26	3.56%	7.52	-0.03	-0.13	7.55	-0.04	+0.07	7.25	-0.07	-0.06	7.19	-0.08	+0.04	7.21	+0.03	-0.08	7.30	+0.01	-0.09	7.10	-0.13	-0.15
Jateng DIY	7.11	2.91%	7.32	+0.01	-0.07	7.37	-0.09	+0.11	7.05	-0.06	+0.13	7.12	+0.01	+0.18	7.08	+0.12	+0.05	7.04	-0.02	-0.23	7.05	-0.09	-0.01
Jatim	7.46	3.90%	7.75	-0.09	-0.14	7.81	+0.01	+0.13	7.43	-0.08	-0.16	7.28	-0.19	-0.11	7.50	-0.01	-0.03	7.55	-0.08	-0.05	7.25	-0.20	-0.42
Bali Nusra	7.20	1.85%	7.33	-0.03	-0.23	7.05	-0.60	-1.00	7.25	+0.09	-0.19	7.22	+0.06	-0.10	7.09	+0.00	-0.23	7.50	+0.40	+0.36	6.83	-0.10	-0.50
Area 4	7.35	2.77%	7.55	-0.03	-0.06	8.00	+0.06	+0.11	7.33	+0.02	+0.04	7.36	+0.16	+0.26	7.19	+0.02	-0.07	7.47	+0.09	+0.24	7.18	-0.05	-0.10
Kalimantan	7.42	1.51%	7.53	-0.06	-0.16	7.46	+0.08	+0.16	7.33	+0.03	+0.04	7.37	+0.13	+0.21	7.24	+0.03	+0.02	7.40	-0.02	+0.07	7.65	+0.03	+0.07
Sulawesi	7.34	2.74%	7.54	-0.01	-0.01	8.31	+0.08	+0.13	7.28	+0.01	+0.01	7.36	+0.18	+0.28	7.15	+0.01	-0.15	7.66	+0.33	+0.59	7.04	-0.04	-0.09
Puma	7.28	5.87%	7.70	-0.03	+0.04	7.44	-0.50	-0.96	8.38	-0.08	+0.58	7.22	-0.83	-1.72	7.36	-0.05	+0.26	5.91	+0.26	+5.91	7.09	+0.50	-0.81

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

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

Gray font: Small base (number of respondents is fewer than 30)

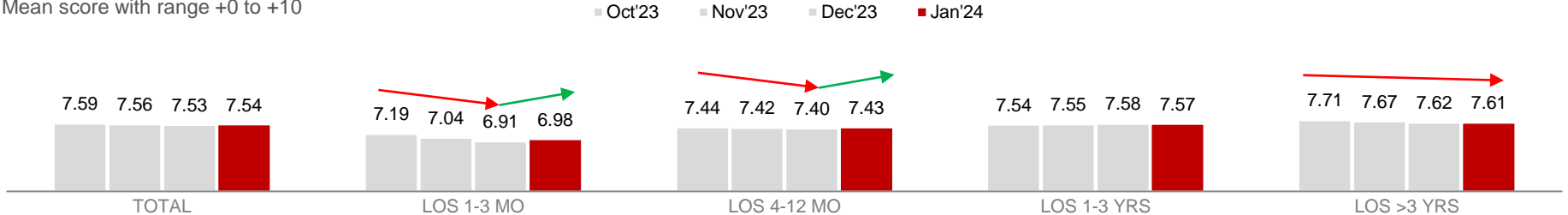
GREEN: Significantly improve RED: Significantly decline

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

In the last quarter, TSEL's CSI and NPS dropped, but there was a slight recovery in the past month for lower LOS users, while higher LOS users continue to decline.

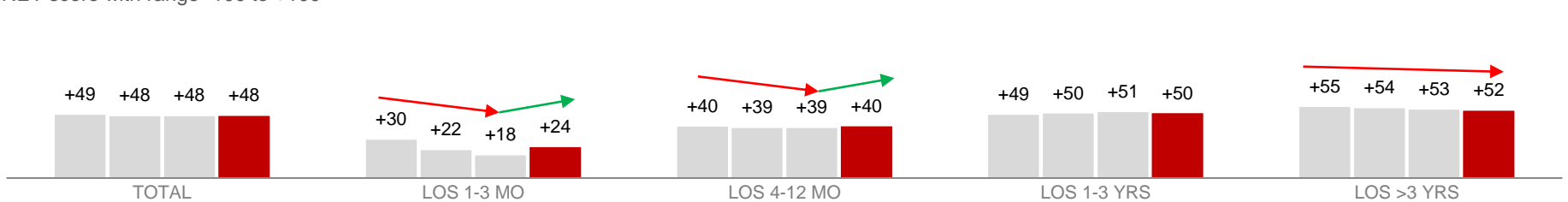
Customer Strength Index (CSI): By Length of Service (LOS)

Mean score with range +0 to +10



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

NET score with range -100 to +100



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

CSI components

In the last quarter, TSEL saw declines in overall satisfaction, value for money, and need fulfilment, which have since stabilized. SMARTFREN also experienced decreases in various CSI components. However, BY.U and AXIS improved their CSI by enhancing satisfaction and value for money, with BY.U also showing improvement in resistance to price.

NET score with range -100 to +100



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

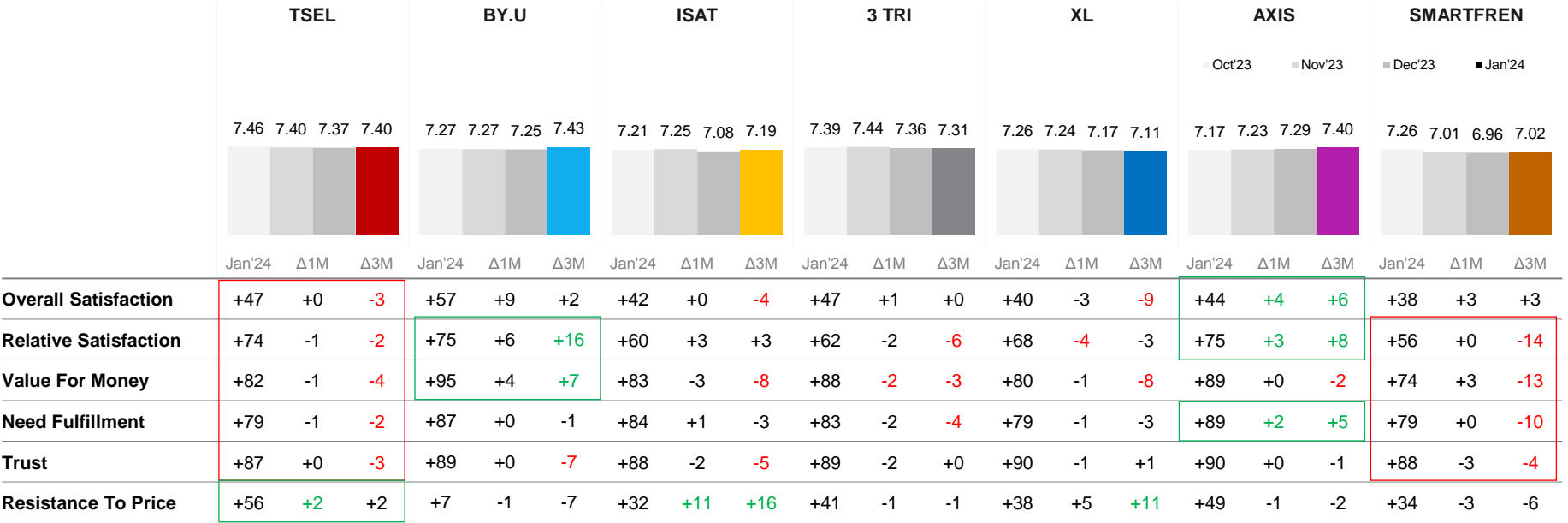
CSI and components' overall assessment: Area 1

While TSEL experienced a decline across all components except resistance to price, SMARTFREN also showed larger decreases in most components.

In contrast, BY.U improved its CSI in AREA 1 due to increased relative satisfaction and value for money, making it the highest in both parameters. Similarly, AXIS enhanced its CSI by improving overall satisfaction, relative satisfaction, and need fulfillment.

CSI Components

NET score with range -100 to +100



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

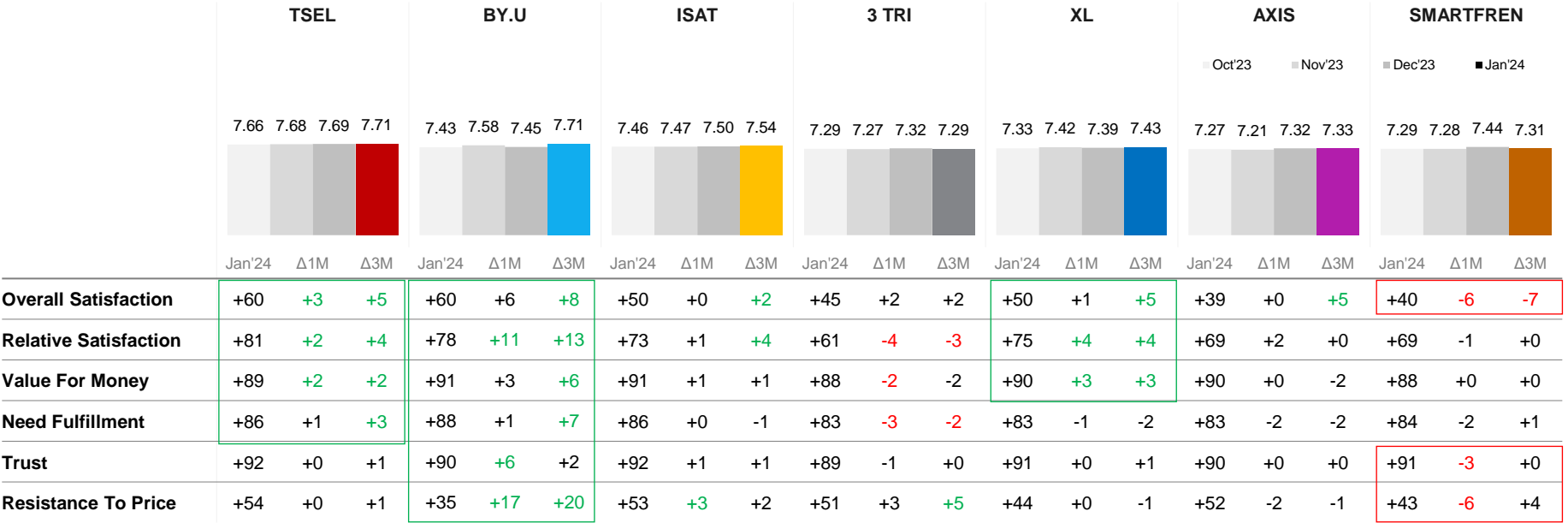
Gray font: Small base (number of respondents is fewer than 30) GREEN: Significantly improve RED: Significantly decline

CSI and components' overall assessment: Area 2

TSEL has demonstrated improvement in overall satisfaction, relative satisfaction, value for money, and need fulfilment, although its CSI remains stable. On the other hand, BY.U and XL have experienced higher growth and significant increases in CSI. In contrast, SMARTFREN recently depicted a decrease in overall satisfaction, trust, and resistance to price after increasing last month.

CSI Components

NET score with range -100 to +100

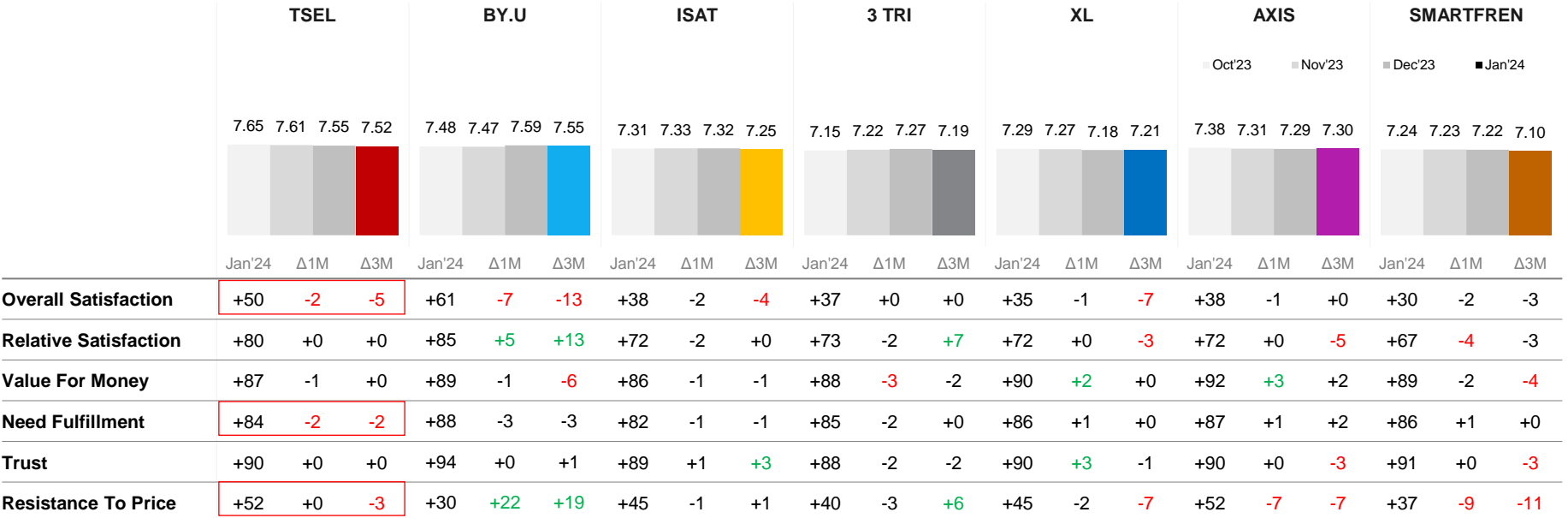


CSI and components' overall assessment: Area 3

TSEL experienced a notable decline in CSI in AREA 3, primarily due to decreases in overall satisfaction, need fulfillment, and resistance to price. Similarly, SMARTFREN also saw decreases in some components, including relative satisfaction, value for money, trust, and resistance to price. Meanwhile, other competitors have remained stable in their performance.

CSI Components

NET score with range -100 to +100



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

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



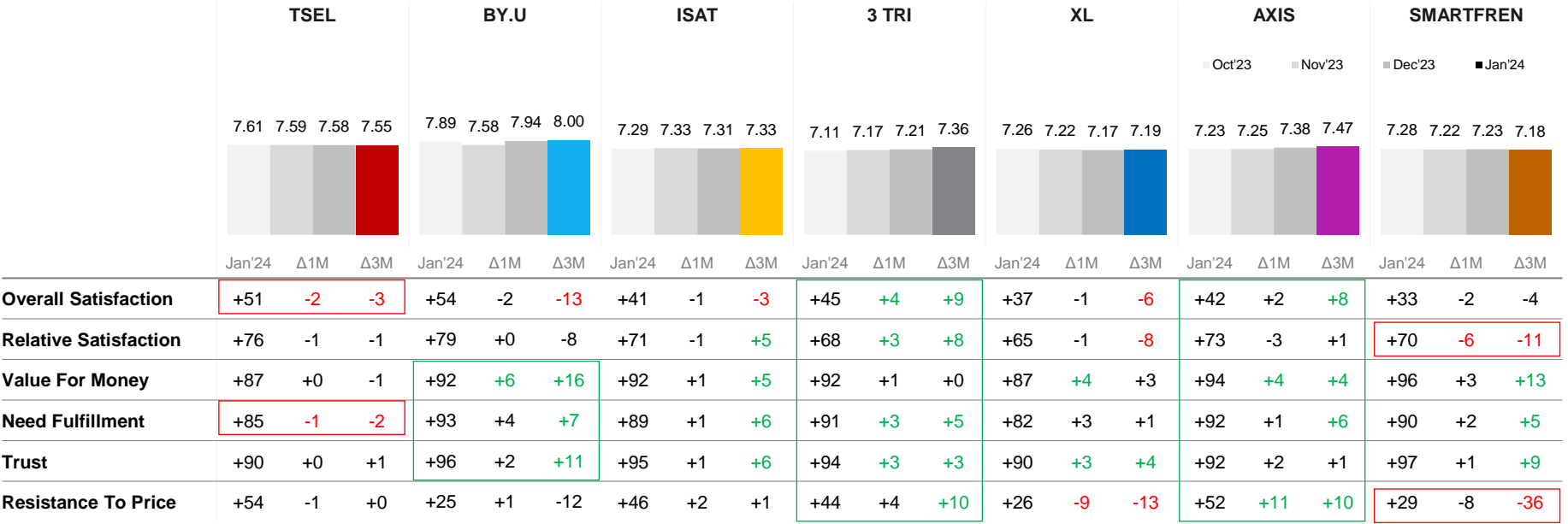
Data above is based on data ending JAN 2024 (Δ1M: gap change to DEC 2023 | Δ3M: gap change to OCT 2023)
The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

CSI and components' overall assessment: Area 4

TSEL experiences a significant decrease in overall satisfaction and need fulfillment in AREA 4, although it has not yet significantly impacted the CSI. Similarly, SMARTFREN also sees a significant decrease in relative satisfaction and resistance to price, affecting its CSI. In contrast, BY.U, 3 TRI, and AXIS demonstrate more positive growth in their components.

CSI Components

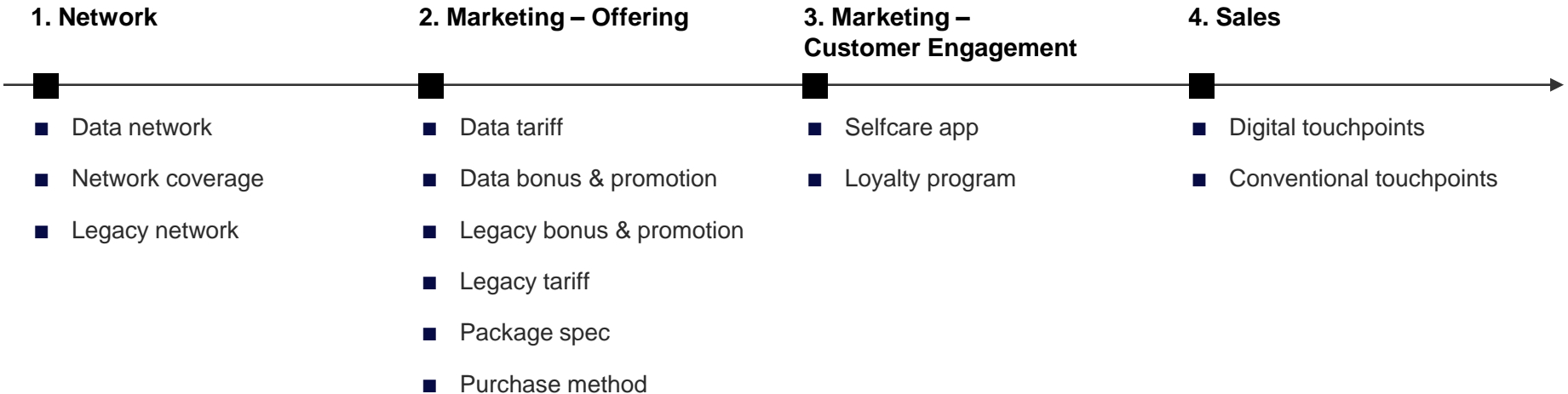
NET score with range -100 to +100



Factor satisfaction

Customer satisfaction framework

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



Question example

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

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

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

Very
dissatisfied

Dissatisfied

Satisfied

Very satisfied

Extremely
satisfied

Bottom 2 Box
(B2B)

Top 2 Box
(T2B)



Factor satisfaction: National level

In the past quarter, TSEL saw a decline in factor satisfaction, although there has been a recent rebound in some areas like network quality, tariff, and loyalty program. BY.U and AXIS also exhibit positive trends in these factors, whereas SMARTFREN experienced significant declines across various factors, including in network satisfaction and pricing.

Factor Satisfaction

NET score with range -100 to +100

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

			TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
			Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
S	Data Network		+48	+1	-1	+51	+6	+5	+35	+1	+1	+28	+1	+2	+31	+1	-3	+30	+2	+1	+23	+0	-6
S	Network Coverage		+49	+1	-1	+50	+7	+4	+34	+2	+2	+24	+1	+2	+32	+4	+2	+27	+1	+0	+20	+0	-6
S	Legacy Network		+47	+0	-3	+39	+4	-8	+38	+2	+4	+31	+1	+6	+33	+0	-2	+27	+1	-3	+26	+1	-1
S	Data Tariff		+29	+2	+0	+46	+7	+13	+38	+0	-2	+39	+0	+2	+34	+2	+0	+36	+2	+0	+31	+0	-3
	Data Bonus & Promo		NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Legacy Bonus & Promo		NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
P	Legacy Tariff		+27	+2	-2	+34	+9	+1	+30	+2	+3	+29	+3	+4	+31	+2	+3	+26	-1	-4	+22	-3	-6
S	Selfcare App		+50	+1	-2	+54	+1	+10	+40	-1	-1	+45	+4	+8	+34	+4	+5	+39	+1	+1	+28	-3	-5
P	Loyalty Program		+38	+3	-1	+54	+0	+16	+45	-1	-2	+30	+4	+1	+28	+1	-3	+49	+7	+13	+25	-1	-10
	Digital Touchpoints		NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
S	Package Specification		+34	+1	-1	+46	+3	+2	+36	+1	-1	+34	+1	+1	+32	+0	+0	+34	+3	+1	+28	-1	-3
S	Purchase Method		+39	+0	-4	+44	+3	+4	+38	-1	+0	+34	+0	+0	+32	+0	-1	+31	+0	-2	+28	-5	-7
	Conventional Touchpoints		NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

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

NA: Factor removed JAN'24, replacement shown in full data Q1'24.

Gray font: Small base (number of respondents is fewer than 30)

GREEN: Significantly improve RED: Significantly decline



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

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

Factor satisfaction: Area 1

In AREA 1, TSEL has seen a recovery in network and data tariff satisfaction in the past month, though it hasn't yet reached previous levels. However, there has been no improvement in other factors. BY.U has remained relatively stable, except for a notable decrease in satisfaction with data tariff and package specs. On the other hand, AXIS has shown the most growth in satisfaction across almost all factors compared to other operators.

Factor Satisfaction

NET score with range -100 to +100

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

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
S	Data Network	+39	+3	-4	+44	+2	-8	+28	+1	-4	+31	+0	-6	+26	-1	-8	+29	+5	+1	+23	+3	-6
S	Network Coverage	+40	+3	-4	+40	+4	-7	+27	+8	+4	+30	-1	-5	+27	+0	-3	+25	+5	+0	+12	-3	-16
P	Legacy Network	+39	+1	-6	+32	+6	-14	+25	+0	-5	+35	+0	+2	+19	-4	-19	+22	+5	-6	+35	+3	+10
W	Data Tariff	+25	+2	-5	+27	-12	-20	+36	+3	-6	+40	-2	-1	+33	-2	-11	+39	+9	+8	+40	+8	+15
	Data Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Legacy Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
P	Legacy Tariff	+25	+0	-9	+24	+1	-28	+28	+3	+8	+26	-1	-8	+16	-1	-17	+26	+4	+0	+36	-1	-6
W	Selfcare App	+46	+3	-5	+32	+1	+0	+40	+0	-7	+56	+3	+12	+36	+3	+4	+41	+7	+13	+39	+8	-3
W	Loyalty Program	+36	+4	-3	+50	-5	+38	+16	-1	-48	+41	+17	+25	+27	+3	-12	+70	+39	+40	+24	+12	-4
	Digital Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
P	Package Specification	+31	+1	-4	+42	-5	-12	+35	+1	-7	+34	-1	-4	+35	+0	-3	+37	+10	+8	+37	+9	+11
P	Purchase Method	+37	+1	-4	+28	-2	-5	+39	+7	+4	+36	-1	-6	+22	-1	-13	+34	+3	+6	+35	-2	+1
	Conventional Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

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

NA: Factor removed JAN'24, replacement shown in full data Q1'24.

Gray font: Small base (number of respondents is fewer than 30)

GREEN: Significantly improve RED: Significantly decline



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

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

Factor satisfaction: Area 2

In AREA 2, TSEL and BY.U have both made positive improvements in various factors, such as network quality, tariff satisfaction, selfcare app usability, and loyalty program satisfaction. Moreover, BY.U has also enhanced its package specifications and purchase methods. ISAT and 3 TRI also show improvements in these areas, following TSEL and BY.U.

Factor Satisfaction

NET score with range -100 to +100

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

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
S	Data Network	+54	+2	+3	+46	+7	+1	+40	+2	+3	+27	+0	+3	+31	-2	-5	+29	-1	+3	+32	+1	+4
S	Network Coverage	+57	+2	+4	+46	+13	+10	+40	+3	+5	+23	+3	+4	+32	+0	-2	+23	-4	+0	+27	-2	+3
S	Legacy Network	+55	+3	+2	+38	+15	-6	+42	+4	+4	+33	+1	+5	+33	+0	+0	+25	-5	-1	+32	-2	-1
P	Data Tariff	+32	+5	+5	+47	+17	+26	+43	+3	+2	+42	+1	+1	+34	+0	+1	+32	-3	-1	+36	-6	-2
	Data Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Legacy Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
P	Legacy Tariff	+31	+6	+6	+30	+13	+5	+33	+3	+4	+34	+2	+5	+26	-2	+1	+18	-7	-11	+26	-8	-2
S	Selfcare App	+52	+2	+0	+61	+11	+29	+51	+7	+10	+46	+9	+17	+32	+4	+8	+33	-4	-7	+32	-4	+6
W	Loyalty Program	+38	+4	+0	+56	+13	+29	+51	+9	+3	+30	+5	+3	+37	+4	+11	+42	-4	+19	+29	-2	-1
	Digital Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
P	Package Specification	+37	+2	+2	+43	+12	+14	+42	+2	+3	+36	-1	-3	+35	+0	+5	+29	-5	-4	+34	-2	+1
P	Purchase Method	+44	+0	-1	+46	+12	+18	+44	+1	+4	+38	+0	+0	+36	-1	+2	+30	-3	-5	+36	-8	-5
	Conventional Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

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

NA: Factor removed JAN'24, replacement shown in full data Q1'24.

Gray font: Small base (number of respondents is fewer than 30)

GREEN: Significantly improve RED: Significantly decline



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

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

Factor satisfaction: Area 3

In AREA 3, there are noticeable declines in network satisfaction, as well as decreases in legacy tariff, selfcare app, and purchase methods. Similarly, SMARTFREN also experiences a decline in network satisfaction, followed by decreases in data tariff, loyalty program, package specifications, and purchase methods. Other competitors generally remain stable, with some variations.

Factor Satisfaction

NET score with range -100 to +100

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

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
S	Data Network	+50	+0	-3	+60	+5	+17	+32	-1	+0	+24	-1	+1	+32	+3	+0	+30	+4	+1	+18	-1	-9
S	Network Coverage	+52	+0	-3	+55	+5	+2	+31	-1	+1	+18	-3	-1	+34	+7	+7	+29	+1	-2	+16	+1	-8
S	Legacy Network	+49	+0	-6	+37	-3	-16	+36	+0	+5	+21	-2	+1	+36	+2	+1	+34	+1	-2	+22	+2	-2
S	Data Tariff	+28	+3	+1	+46	+7	+10	+33	-2	-5	+33	-2	+0	+33	+4	+3	+32	+0	-8	+27	-1	-5
	Data Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Legacy Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
P	Legacy Tariff	+24	+1	-3	+32	+13	+0	+29	+1	+3	+23	-1	+4	+38	+4	+8	+31	-1	-5	+18	-3	-5
S	Selfcare App	+51	+0	-4	+44	-9	-20	+31	-5	-8	+42	+4	+0	+35	+3	+5	+38	-5	-14	+24	-6	-5
P	Loyalty Program	+40	+3	-2	+54	-11	+5	+43	-9	+1	+23	-6	-14	+24	+1	-5	+30	-12	-25	+21	-4	-21
	Digital Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
S	Package Specification	+33	+1	-1	+46	-2	-10	+32	+0	-2	+32	+0	+4	+30	+1	-4	+33	+2	-1	+24	-4	-5
S	Purchase Method	+37	+0	-6	+41	-2	-10	+33	-3	-4	+26	-3	-2	+32	+1	-1	+26	-3	-11	+23	-5	-7
	Conventional Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

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

NA: Factor removed JAN'24, replacement shown in full data Q1'24.

Gray font: Small base (number of respondents is fewer than 30)

GREEN: Significantly improve RED: Significantly decline

Factor satisfaction: Area 4

In AREA 4, TSEL sees a decline in satisfaction with data tariff and preferred purchase methods. SMARTFREN experiences more significant decreases across most factors. Conversely, among all operators, 3 TRI demonstrates the most favourable growth in factor satisfaction, with increases in network, tariff, package specifications, and purchase methods.

Factor Satisfaction

NET score with range -100 to +100

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

	TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN			
	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	
	Data Network	+49	+0	+0	+50	+3	-2	+38	+4	+6	+33	+7	+11	+28	+0	-2	+42	-4	-1	+25	-3	-14
	Network Coverage	+49	-1	-1	+58	+2	-3	+36	+0	-1	+29	+7	+12	+27	+1	-1	+44	+1	+9	+30	+3	-5
	Legacy Network	+49	-2	+1	+49	+1	-3	+39	+1	+2	+38	+9	+27	+26	-4	-6	+35	+8	-2	+20	+3	-13
	Data Tariff	+30	-3	-3	+52	+1	+4	+42	-2	+1	+43	+6	+9	+40	-1	-3	+48	-6	+0	+29	+2	-19
	Data Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Legacy Bonus & Promo	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Legacy Tariff	+31	+0	+4	+46	+4	+3	+24	+1	-3	+31	+12	+18	+23	-1	-2	+44	+6	+5	+18	+7	-15
	Selfcare App	+52	-1	-1	+73	+0	+18	+42	-8	-6	+41	-9	-5	+30	+2	+1	+66	+20	+41	+34	+3	-30
	Loyalty Program	+40	+2	+0	+54	+4	-17	+61	+2	+8	+31	+6	+9	+15	-16	-29	+70	+7	+19	+30	+7	+8
	Digital Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Package Specification	+35	-1	+2	+54	+3	+8	+34	+0	-3	+35	+8	+10	+38	+5	+2	+41	+0	-4	+21	+1	-19
	Purchase Method	+38	-2	-3	+56	+0	-3	+35	-4	-6	+36	+8	+10	+36	+0	+7	+42	-2	-1	+22	-3	-16
	Conventional Touchpoints	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

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

NA: Factor removed JAN'24, replacement shown in full data Q1'24.

Gray font: Small base (number of respondents is fewer than 30)

GREEN: Significantly improve

RED: Significantly decline

Brand performance

Understand consumers and cultivate stronger brand equity for growth

Brand Equity Index (BEI)

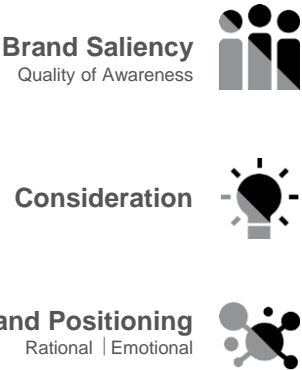
Deconstruct the “Brand Equity”

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

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

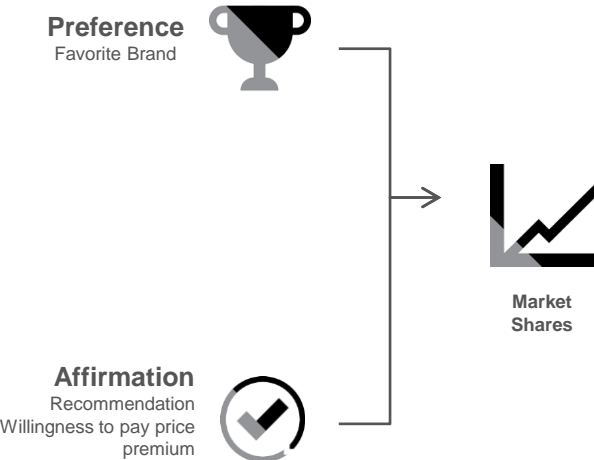
SOURCES
Understand the building blocks of equity

MIND / LOGIC ASPECT



OUTCOMES
What people are willing to do

HEART / EMOTIONAL ASPECT



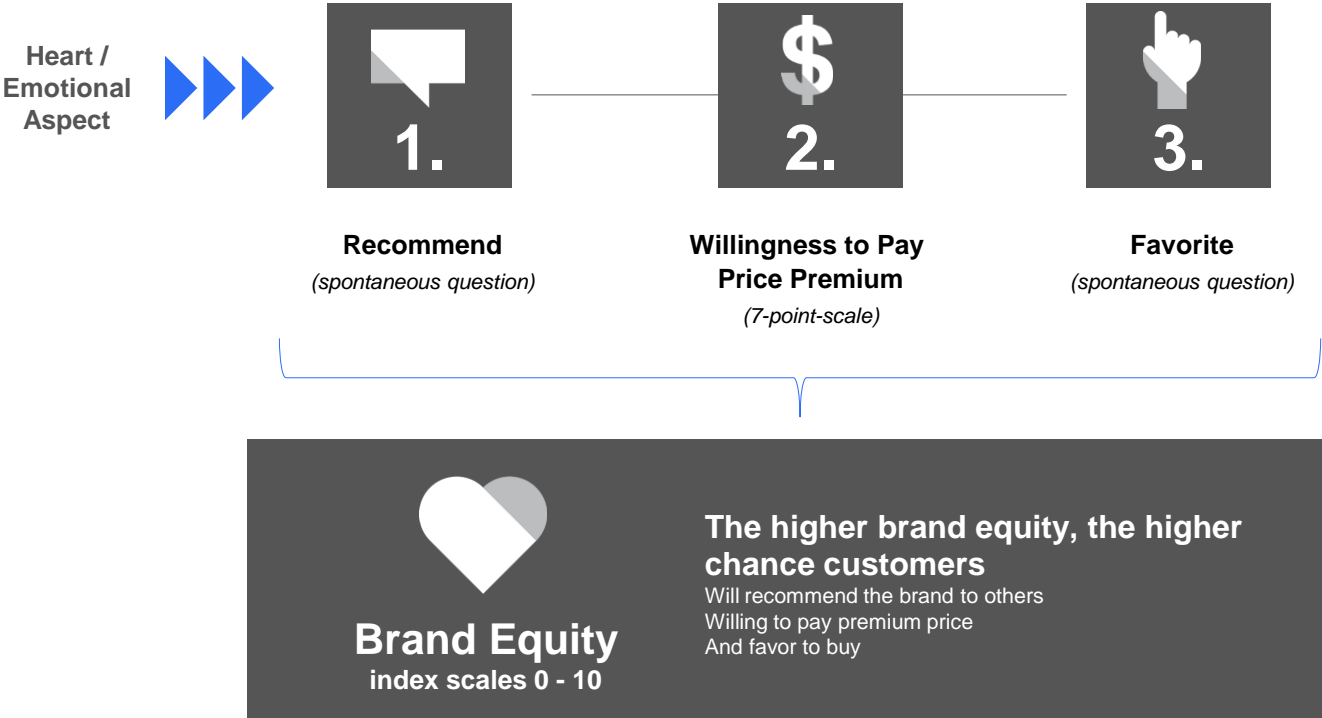
How **Client** improves **Brand Equity Index**
Improve logic aspects to drive higher BEI



Source: Winning Brands Health Check

Brand Equity Index (BEI) measurement

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



Source: Winning Brands Health Check

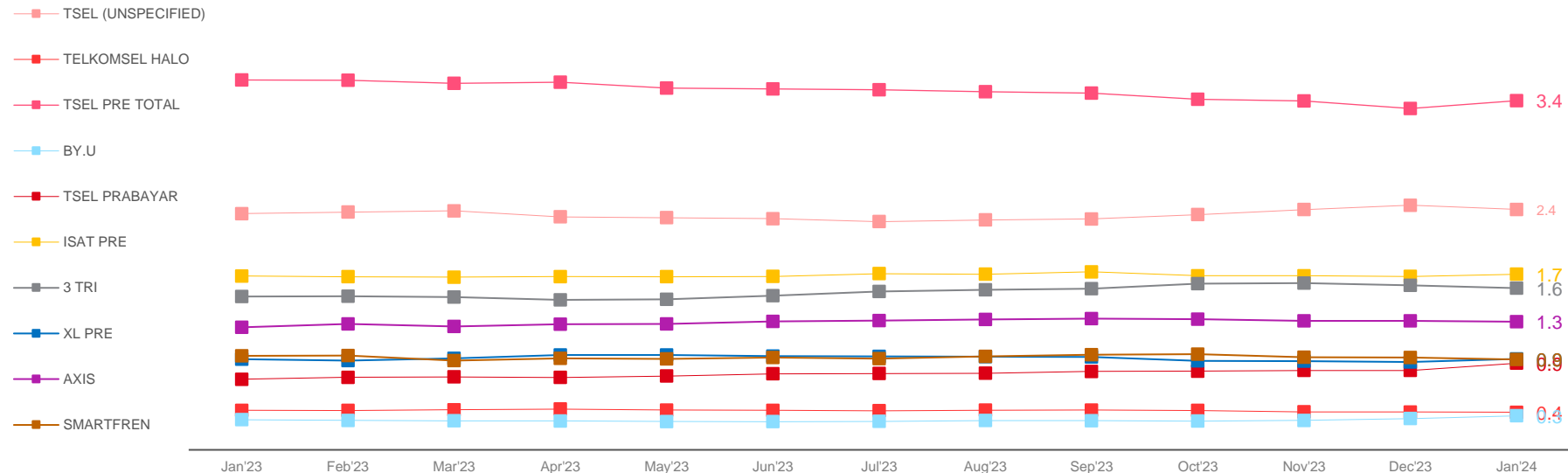
Brand Equity Index (BEI): National level tracking

TSEL's Brand Equity Index (BEI) is stabilizing, with competitors also showing minimal movement.

Brand Equity Index (BEI): P1Y Trend

Mean score with range +0 to +10

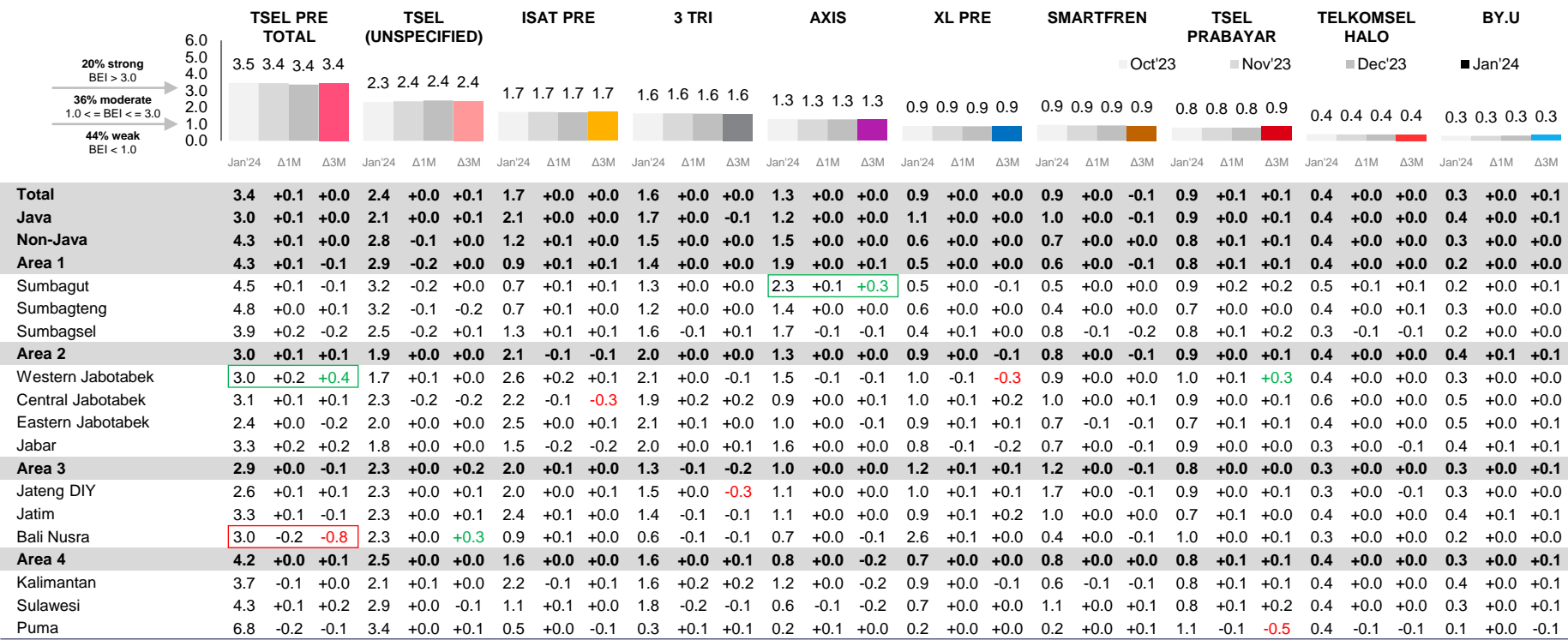
TSEL PRE TOTAL is a combination of simPATI, Kartu AS, LOOP, and Telkomsel PraBayar
**TSEL PRABAYAR is Telkomsel PraBayar, a new branding launched in Jun'21 (just added into the study by Jul'21)



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

Brand Equity Index (BEI): Summary

The movement at the regional level is also minimal. TSEL PRE TOTAL's brand equity has increased in WESTERN JABOTABEK but decreased in BALI NUSRA. Meanwhile, AXIS has strengthened its position in SUMBAGUT.

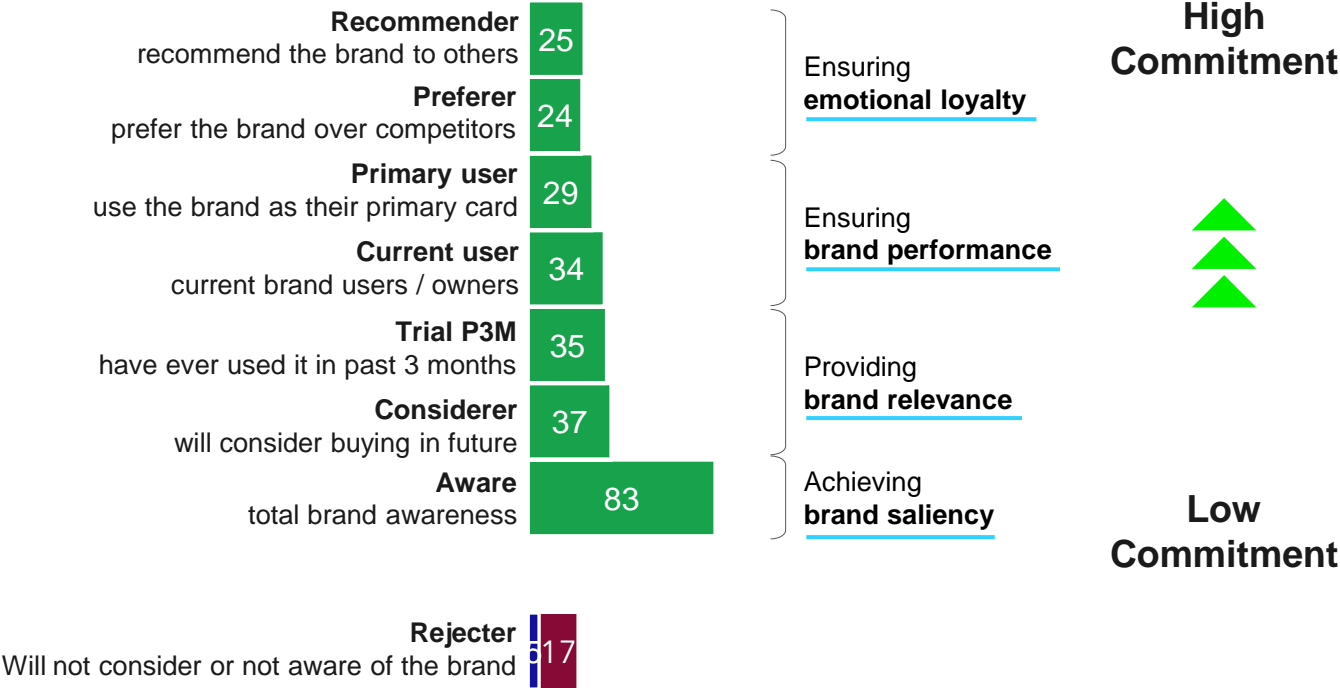


Base: Mobile phone users (BEI is significant if +/- 0.3 points)

GREEN: Significantly improve RED: Significantly decline

Brand leverage

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



Brand leverage: Summary

TSEL PRE TOTAL shows positive movement in its brand funnel across most parameters, notably driven by TSEL PRABAYAR. Meanwhile, BY.U and other competitors remain relatively stable, with minor variations.

Brand Leverage

In percentage (%)

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

	TSEL PRE TOTAL			TSEL PRABAYAR			BY.U			ISAT PRE			3 TRI			XL PRE			AXIS			SMARTFREN		
	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
Recommender	26	+1	-1	4	+1	+0	2	+0	+0	11	+0	+0	11	+0	+0	5	+0	+0	8	+0	+0	5	+0	+0
Preferer	26	+1	+0	3	+1	+0	1	+0	+1	12	+0	+1	12	+0	+0	5	+0	+0	8	+0	+0	5	+0	+0
Primary user	39	+1	+1	11	+0	+1	1	+0	+0	19	+0	+0	12	+0	+0	9	+0	+1	9	+0	+0	6	+0	+0
Current user	48	+1	+0	14	+0	+1	2	+0	+0	23	+0	+0	15	+0	+0	12	+0	+1	11	+0	+0	7	+0	+0
Trial P3M	50	+0	+0	15	+0	+1	3	+0	+0	25	+1	+0	17	+0	+0	13	+1	+0	12	+0	+0	8	+0	+0
Considerer	53	+1	+0	17	+1	+2	6	+0	+0	28	+1	+0	20	+0	+0	15	+1	+1	15	+0	+0	11	+0	-1
Aware	87	+0	-1	42	+1	+2	22	+0	+0	72	+0	-1	71	+0	-2	48	+1	-1	67	+0	-3	62	+0	-2
Rejecter	113	+0	+1	38	-1	-2	58	+0	+0	828	+0	+1	129	+0	+2	32	-1	+1	133	+0	+2	38	+0	+2
Not Consider Not Aware																								
Retention	96			90			81			92			92			90			93			84		
Conversion	55			32			11			32			21			24			17			11		

Base: Mobile phone users

GREEN: Significantly improve RED: Significantly decline

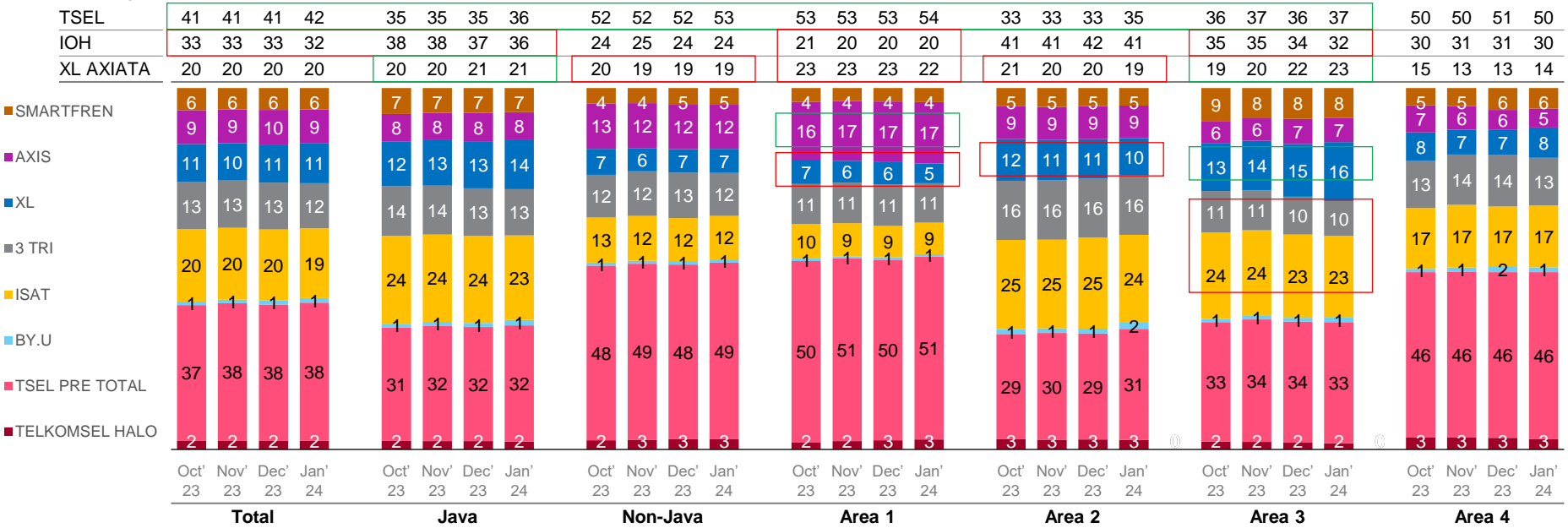
Data card share

Data card share

In AREA 1-3, TSEL has gained a higher market share, while remaining stable in AREA 4. Specifically, in AREA 1, it has gained share from XL, with AXIS still showing continued growth. In AREA 2, TSEL has seen the most significant increase, outperforming XL. In AREA 3, it has improved its share along with XL and taking over IOH's share.

Data card share

In percentage (%)



Base: Mobile data users

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



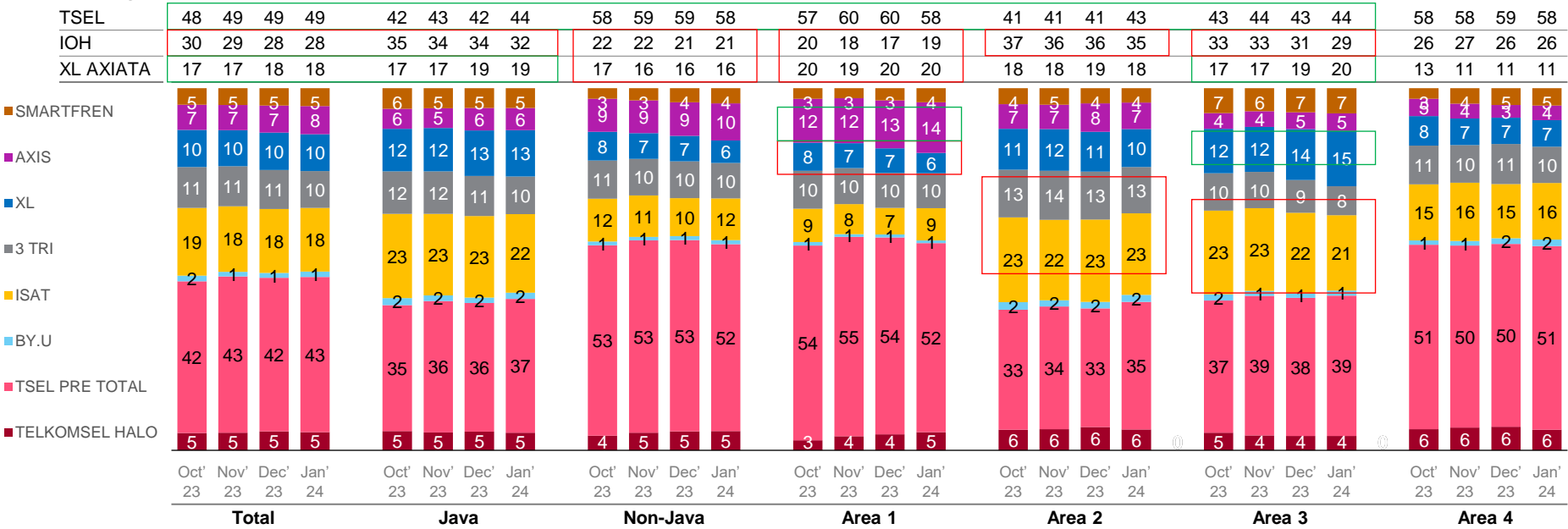
Data above is based on data ending JAN 2024 (Δ1M: gap change to DEC 2023 | Δ3M: gap change to OCT 2023)
The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

Revenue data card share

The trend in card share is also reflected in revenue card share.

Revenue data card share

In percentage (%)



Base: Mobile data users

Revenue card: Spending per Card Claims



Data above is based on data ending JAN 2024 (Δ1M: gap change to DEC 2023 | Δ3M: gap change to OCT 2023)
The figures presented in this report are rounded. Therefore, direct calculations using the figures in this report may yield values different from the actual ones.

Brand imagery

Brand imagery: National level

TSEL maintains its market positioning overall, although it experiences a decrease in selfcare application, likely influenced by BY.U. BY.U and other competitors show signs of weakening in network coverage. Meanwhile, youth-oriented brands like 3 TRI, AXIS, and SMARTFREN strengthen their positioning in package specifications and tariff offerings.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
Network	Best 4G coverage	44	+0	-1	27	-2	-2	28	-2	-2	22	-2	-3	29	-2	-2	23	-3	-3	22	-3	-3
	Best telephone quality	29	+2	+1	15	+1	+1	17	+1	+1	13	+1	+1	18	+1	+1	15	+2	+2	13	+1	+1
	Best data / internet connection quality	36	+3	+3	23	+1	+1	23	+1	+2	18	+1	+1	24	+1	+1	20	+0	+2	18	+0	+2
Offering	Packages that suit my needs	21	+0	+1	19	+0	+0	21	+1	+1	19	+2	+1	19	+1	+0	18	+2	+2	17	+2	+3
	Best tariff for telephone and SMS	18	+0	-1	14	+0	+0	19	+1	+1	18	+0	+0	17	+0	+0	18	+1	+1	15	+1	+2
	Best tariff for data package	23	+1	+0	27	+2	+2	31	+1	+2	34	+1	+2	28	+1	+1	30	+2	+2	26	+0	+2
	Best bonus and promotion	20	+0	+0	24	+2	+2	26	+1	+1	28	+1	+1	24	+1	+0	27	+0	+1	24	+1	+1
Cust. Engagement	Best selfcare application	21	-2	-2	22	-4	-4	20	-2	-2	16	-1	-1	21	-3	-3	15	-1	+0	15	-1	-1
	Appreciates customer loyalty with special programs	14	-1	-1	15	+1	+1	13	+1	+0	12	+1	+1	13	+0	+0	12	+1	+1	11	+1	+1
Com. & Branding	Cool brand	23	+1	+0	32	+2	+2	24	+1	+1	23	+1	+1	25	+2	+1	23	+1	+0	23	+1	+0
	Prestigious brand	26	+1	+1	20	+1	+2	18	+1	+1	16	+1	+1	21	+1	+1	17	+1	+1	16	+1	+0
	Innovative brand	20	+1	+1	23	+1	+1	21	+1	+1	21	+1	+2	21	+0	+0	21	+0	+0	20	+1	+0

Base: Mobile phone users aware of the respective brand

Only limited imagery are shown due to factor changes, full list will be showed in Mar '24

GREEN: Significantly improve RED: Significantly decline

Brand imagery: Area 1

In AREA 1, where TSEL's market share improves, it enhances its legacy and data network quality positioning, although its tariff strength diminishes. Meanwhile, AXIS, which also sees an increase in share, reinforces its position in data network quality and offers improvements in package specifications, data tariff, bonus & promo.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
Network	Best 4G coverage	39	+0	+0	27	+0	+0	19	-1	-4	18	-2	-3	24	+1	+0	21	-2	-2	18	-2	-2
	Best telephone quality	27	+3	+3	14	+1	-1	12	+1	+0	10	+1	+1	14	+2	+2	12	+1	+0	12	+0	+1
	Best data / internet connection quality	30	+5	+4	23	+4	+4	14	+1	+0	13	+1	+0	17	+2	+1	17	+2	+2	12	+1	+1
Offering	Packages that suit my needs	20	+0	+0	17	+0	-1	16	+1	+0	15	+2	+1	16	+1	+0	15	+2	+0	13	+1	+1
	Best tariff for telephone and SMS	19	-1	-2	16	+1	-1	17	+1	+2	15	+1	+2	16	+2	+1	16	+1	+1	14	+2	+2
	Best tariff for data package	21	-1	-2	27	+2	+4	24	+0	-1	28	+2	+3	24	+2	+1	28	+2	+1	21	+1	+1
	Best bonus and promotion	19	+0	-1	24	+3	+6	22	+3	+2	24	+3	+3	22	+1	+1	26	+2	+2	20	+3	+2
Cust. Engagement	Best selfcare application	18	-1	-1	23	-3	-1	17	-1	-2	15	+0	+1	20	-1	-2	12	-1	-4	14	+0	-1
	Appreciates customer loyalty with special programs	13	+0	+0	14	+2	+1	13	+2	+1	11	+1	+0	11	+0	-1	11	+1	+1	10	+1	+0
Com. & Branding	Cool brand	22	+0	+1	28	+0	-1	22	+1	+4	23	+1	+1	26	+1	+1	22	-1	-1	22	+2	+1
	Prestigious brand	23	+0	+1	21	+1	+4	17	+0	+1	15	+0	-1	18	+0	+0	17	+0	-1	16	+0	+1
	Innovative brand	17	+0	+0	23	+1	+2	18	+1	+2	19	+1	+2	19	+0	+0	18	+0	-1	18	+1	+1

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

Only limited imagery are shown due to factor changes, full list will be showed in Mar '24

GREEN: Significantly improve RED: Significantly decline

Brand imagery: Area 2

In AREA 2, TSEL enhances its positioning in data network quality, data tariff, bonuses, and promotions, while also improving its branding efforts. Conversely, XL, which experiences a decrease in share, appears to weaken its position in network coverage and selfcare application.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
Network	Best 4G coverage	50	-2	-1	30	-2	-1	34	-2	-1	26	-2	-2	33	-4	-3	28	-2	-1	25	-3	-2
	Best telephone quality	33	+1	+1	18	+2	+3	22	+2	+4	16	+2	+2	21	+0	+1	19	+4	+5	15	+1	+2
	Best data / internet connection quality	42	+2	+3	24	+1	+1	27	+0	+1	22	+1	+3	29	-1	+1	24	+2	+3	21	+2	+3
Offering	Packages that suit my needs	23	+1	+1	19	-1	+0	22	+1	+0	21	+1	+1	20	+0	-1	20	+3	+4	18	+3	+3
	Best tariff for telephone and SMS	20	+1	+1	16	+1	+1	22	+1	+3	21	+0	+0	18	+0	+0	22	+1	+2	19	+0	+2
	Best tariff for data package	28	+2	+3	31	+5	+6	36	+0	+2	39	+0	+0	30	-1	+1	35	+1	+3	29	+0	+1
	Best bonus and promotion	24	+1	+2	27	+2	+2	32	+1	+0	33	-2	-3	27	+0	+0	31	-1	-1	27	-2	-2
Cust. Engagement	Best selfcare application	26	-3	-3	23	-4	-6	23	-3	-3	18	+0	-1	25	-3	-4	19	+1	+2	17	-1	-1
	Appreciates customer loyalty with special programs	18	+0	+1	17	+2	+3	16	+1	+1	14	+3	+2	15	+0	+1	13	+3	+1	13	+2	+3
Com. & Branding	Cool brand	26	+1	+2	33	+2	+1	27	+2	+1	25	+2	+2	28	+3	+4	26	+2	+3	24	+2	+1
	Prestigious brand	29	+1	+1	23	+4	+4	20	+1	+1	17	+3	+4	23	+2	+1	17	+2	+2	16	+2	+2
	Innovative brand	24	+2	+2	25	+1	+0	24	+0	+1	23	+1	+2	24	+0	+0	23	+1	+2	24	+1	+1

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

Only limited imagery are shown due to factor changes, full list will be showed in Mar '24

GREEN: Significantly improve RED: Significantly decline

Brand imagery: Area 3

In AREA 3, TSEL enhances its positioning in data network quality. Similarly, XL also improves its data and legacy network quality, along with advancements in package specifications, data tariff, and branding.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
Network	Best 4G coverage	43	+0	-3	25	-4	-3	28	-2	-3	21	-3	-4	29	-1	-3	21	-3	-5	22	-4	-5
	Best telephone quality	26	+1	+0	13	-1	+0	15	+1	+0	13	+0	+1	19	+2	+1	14	+1	+1	12	+1	+1
	Best data / internet connection quality	35	+4	+3	22	-1	+1	23	+2	+3	16	+0	-1	25	+4	+3	17	-1	+1	18	-1	+1
Offering	Packages that suit my needs	19	+1	+0	19	+1	+1	22	+1	+2	19	+3	+1	20	+3	+1	18	+2	+3	18	+3	+4
	Best tariff for telephone and SMS	14	+0	-1	12	+0	+0	17	+1	+0	17	+1	+0	17	+0	-1	17	+1	+1	13	+1	+1
	Best tariff for data package	21	+1	-1	24	+1	-1	30	+2	+3	34	+1	+2	27	+2	+1	28	+3	+4	26	+1	+1
	Best bonus and promotion	17	+1	+1	20	+2	+0	23	+1	+2	27	+2	+2	23	+1	+1	26	+1	+1	22	+1	+2
Cust. Engagement	Best selfcare application	18	-3	-3	21	-4	-4	18	-2	-1	14	-2	-3	19	-2	-1	14	-2	+0	13	-2	-1
	Appreciates customer loyalty with special programs	12	-1	-1	12	-1	-1	13	+0	+0	11	+0	+0	12	+0	+0	11	+0	+1	10	+0	+0
Com. & Branding	Cool brand	22	+1	+0	34	+4	+7	22	+2	+1	22	+1	+0	22	+2	-1	22	+2	+0	21	+1	+0
	Prestigious brand	25	+1	+0	17	-1	+0	19	+2	+2	15	+1	+0	20	+1	+1	17	+1	+0	14	+0	-2
	Innovative brand	18	+1	+0	21	+0	+2	19	+2	+1	20	+0	+1	19	+2	+0	20	+0	-1	19	+1	+0

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

Only limited imagery are shown due to factor changes, full list will be showed in Mar '24

GREEN: Significantly improve RED: Significantly decline

Brand imagery: Area 4

In AREA 4, TSEL enhances its position in legacy and data network quality but experiences a decrease in customer engagement and branding. Some competitors follow a similar trend to TSEL, while others strengthen their position in package specifications, an area where TSEL remains relatively stable.

Brand Imagery

In percentage (%)

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
Network	Best 4G coverage	44	+2	+1	28	-5	-2	25	-1	-2	20	-2	-2	26	-1	-1	17	-1	-1	22	-3	+0
	Best telephone quality	32	+2	+2	17	+3	+3	16	+1	+0	13	+2	+2	16	+1	+1	12	+1	+3	12	-1	+1
	Best data / internet connection quality	36	+2	+2	19	-2	-1	24	+2	+2	20	+2	+3	22	-2	-1	19	-1	+2	19	-1	+2
Offering	Packages that suit my needs	22	-1	+1	21	+0	+2	22	+0	+2	21	+3	+5	21	+1	+1	18	+2	+3	16	+1	+2
	Best tariff for telephone and SMS	20	-1	-1	15	-1	+0	18	+0	-1	16	-1	-1	18	+0	-2	14	-1	-1	15	+0	+3
	Best tariff for data package	23	-1	-1	24	-1	+0	31	+2	+2	34	+1	+4	28	+1	-1	27	-1	-2	28	+1	+4
	Best bonus and promotion	20	-1	+0	24	-1	+2	24	-1	-1	27	+1	+4	23	+1	-1	24	+0	+2	25	+2	+3
Cust. Engagement	Best selfcare application	20	-4	-2	19	-5	-6	19	-4	-2	16	-3	-1	19	-3	-3	14	-2	+1	14	-4	-2
	Appreciates customer loyalty with special programs	13	-2	-2	14	-1	-1	11	-2	-2	10	-2	-2	12	+0	+0	10	-1	+0	10	-1	+0
Com. & Branding	Cool brand	22	-1	-2	28	+2	+1	22	-1	-4	24	+0	-2	23	+0	-2	23	-1	-5	23	+0	-4
	Prestigious brand	25	+0	+0	20	+2	+3	17	+1	+0	18	+0	+0	22	+1	+1	19	+2	+1	18	+0	-2
	Innovative brand	20	-1	-1	22	+2	+4	20	-1	-2	22	+1	+3	22	-1	-1	22	-1	-1	21	-1	-1

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

Only limited imagery are shown due to factor changes, full list will be showed in Mar '24

GREEN: Significantly improve RED: Significantly decline

Omnichannel Evaluation

Consumers' experience on telco
transaction channel for packages

Where do people go to purchase packages?

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

Package Purchase Channel

In percentage (%)

	TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M	Jan' 24	Δ1M	Δ3M
Direct	38	+0	+0	42	-9	-6	24	-1	-1	23	+1	+1	28	+0	-1	19	+1	+0	14	-1	-3
Modern	23	+0	+0	43	+1	+3	28	+1	+2	22	+0	+0	21	-1	-2	14	+2	+3	19	+1	+1
Traditional	38	+0	+0	15	+9	+3	48	+0	-1	54	-1	-1	50	+1	+4	67	-3	-3	68	+1	+1

Base: Respective primary card users

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

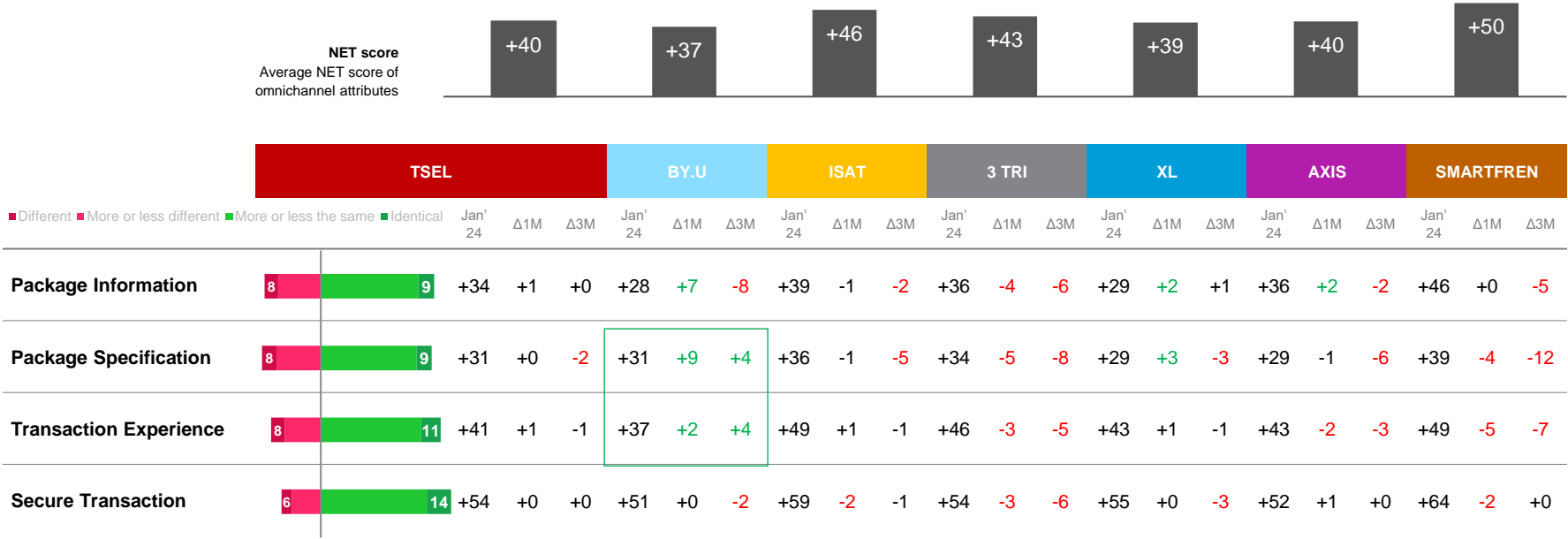
GREEN: Significantly improve RED: Significantly decline

The similarities or differences observed across various channels

While most of operators seem to have worsened omnichannel experiences, BY.U seems to improve on package specs and transaction experience.

Omnichannel Experience Score

NET score with range -100 to +100



Base: Respective primary card users

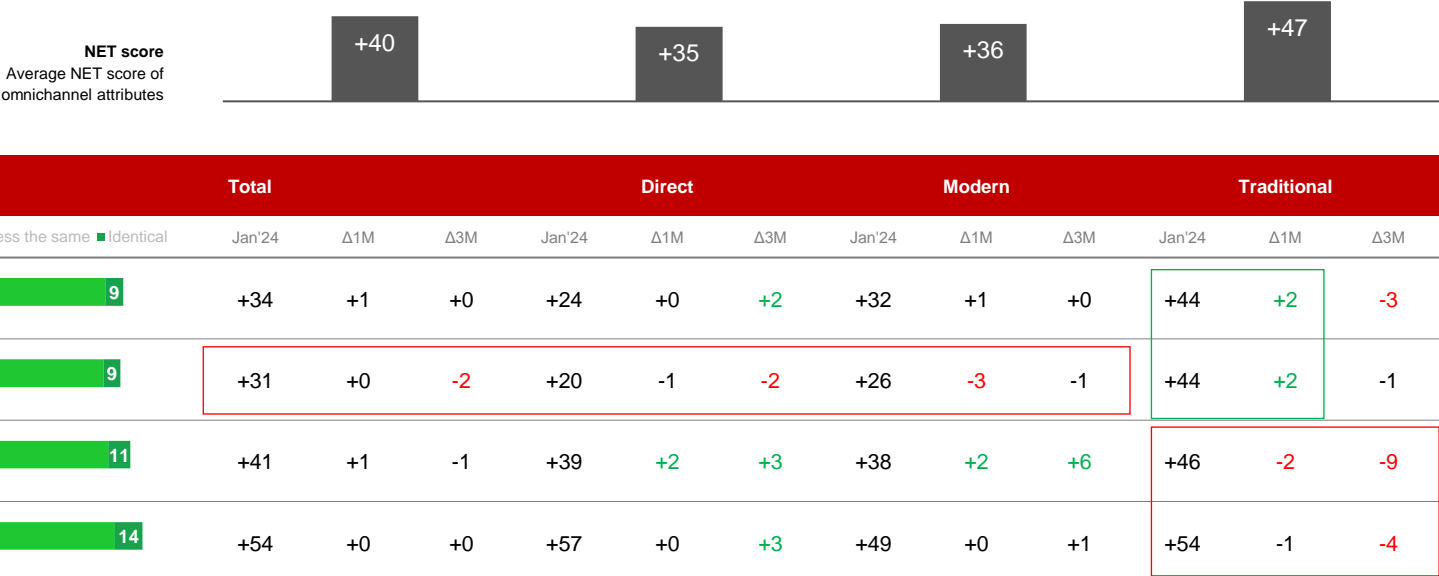
GREEN: Significantly improve RED: Significantly decline

TSEL: The similarities or differences observed across various channels

The omnichannel experience of TSEL users has decreased in terms of package specifications, primarily driven by users of direct and modern channels. In contrast, users of traditional channels have recently reported a more positive experience with packages, although there has been a decrease in satisfaction regarding transaction processes.

Omnichannel Experience Score

NET score with range -100 to +100



Base: TSEL primary card users

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

GREEN: Significantly improve RED: Significantly decline

Summary

Summary: Customer satisfaction

TSEL's overall NPS remains stable, but trends vary across areas, correlating with CSI changes except for AREA 1 & 2. SMARTFREN's CSI decline aligns with its NPS decrease, but AXIS in AREA 1 show discrepancies between NPS and CSI trends. Additionally, BY.U's CSI improvement has not yet reflected in NPS.

		TSEL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
Total	CSI	7.54			7.67	▲	▲	7.36			7.28			7.26			7.36		▲	7.15		▼
	NPS	+48			+47			+35		▼	+32			+37			+33	▼	▼	+30	▼	
Java	CSI	7.61			7.63	▲	▲	7.39			7.25			7.29			7.31			7.17	▼	
	NPS	+52			+43			+36		▼	+30		▲	+39			+29		▼	+31		
Non-Java	CSI	7.46			7.78		▲	7.27			7.33			7.15		▼	7.41	▲	▲	7.10		▼
	NPS	+44		▼	+56			+31	▲	▼	+35		▼	+30	▼	▼	+37	▼	▼	+26		▼
Area 1	CSI	7.40			7.43	▲	▲	7.19	▲		7.31			7.11		▼	7.40	▲	▲	7.02		▼
	NPS	+42		▼	+48		▲	+19	▲	▼	+35			+26	▼	▼	+36		▼	+25		▼
Area 2	CSI	7.71			7.71	▲	▲	7.71			7.71			7.71		▲	7.71			7.71	▼	
	NPS	+58	▲	▲	+58			+58			+58		▲	+58			+58		▼	+58	▼	
Area 3	CSI	7.52		▼	7.52			7.52			7.52			7.52			7.52			7.52	▼	▼
	NPS	+47		▼	+47			+47		▼	+47	▼		+47			+47		▼	+47		▲
Area 4	CSI	7.55			7.55		▲	7.55			7.55	▲	▲	7.55			7.55		▲	7.55		▼
	NPS	+49	▼		+49			+49			+49		▼	+49			+49			+49		▼

Base: Respective primary card users

CSI is significant if +/- 0.1 points

NPS significance based on NET score

▲: Significantly improve ▼: Significantly decline

Summary: Brand performance

TSEL PRE TOTAL's share experiences growth across AREA 1-3, especially noteworthy in AREA 2. Similarly, XL observes substantial growth in AREA 3. Meanwhile, the Brand Equity Index (BEI) remains stable for all operators.

		TELKOMSEL HALO			TSEL PRE TOTAL			BY.U			ISAT			3 TRI			XL			AXIS			SMARTFREN		
		Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M	Jan'24	Δ1M	Δ3M
Total	BEI	0.4			3.4			0.3			1.7			1.6			0.9			1.3			0.9		
	Share	2			38			1			19			12			11			9			6		
Java	BEI	0.4			3.0			0.4			2.1			1.7			1.1			1.2			1.0		
	Share	2			32			1			23			13			14			8			7		
Non-Java	BEI	0.4			4.3			0.3			1.2			1.5			0.6			1.5			0.7		
	Share	3			49			1			12			12			7			12			5		
Area 1	BEI	0.4			4.3			0.2			0.9			1.4			0.5			1.9			0.6		
	Share	3			51			1			9			11			5			17			4		
Area 2	BEI	0.4			3.0			0.4			2.1			2.0			0.9			1.3			0.8		
	Share	3			31		▲	2			24			16			10			9			5		
Area 3	BEI	0.3			2.9			0.3			2.0			1.3			1.2			1.0			1.2		
	Share	2			33			1			23			10		▼	16	▲	▲	7			8		
Area 4	BEI	0.4			4.2			0.3			1.6			1.6			0.7			0.8			0.8		
	Share	3			46			1			17			13			8			5			6		▼

Base: Mobile phone users

BEI is significant if +/- 0.3 points

Card share is significant if +/- 2%

▲ Significantly improve ▼ Significantly decline

Analysis by region: CSI vs. NPS trend

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

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

CSI increase			
CSI stable	(-) Network, Tariff		(+) Network, Tariff
CSI decrease	(-) Network	(-) Tariff, Purchase Method	
	NPS decrease	NPS stable	NPS increase

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