



Consumer Study on Fixed WiFi Operator

KPI report

Data ending: Feb'24

Mar'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

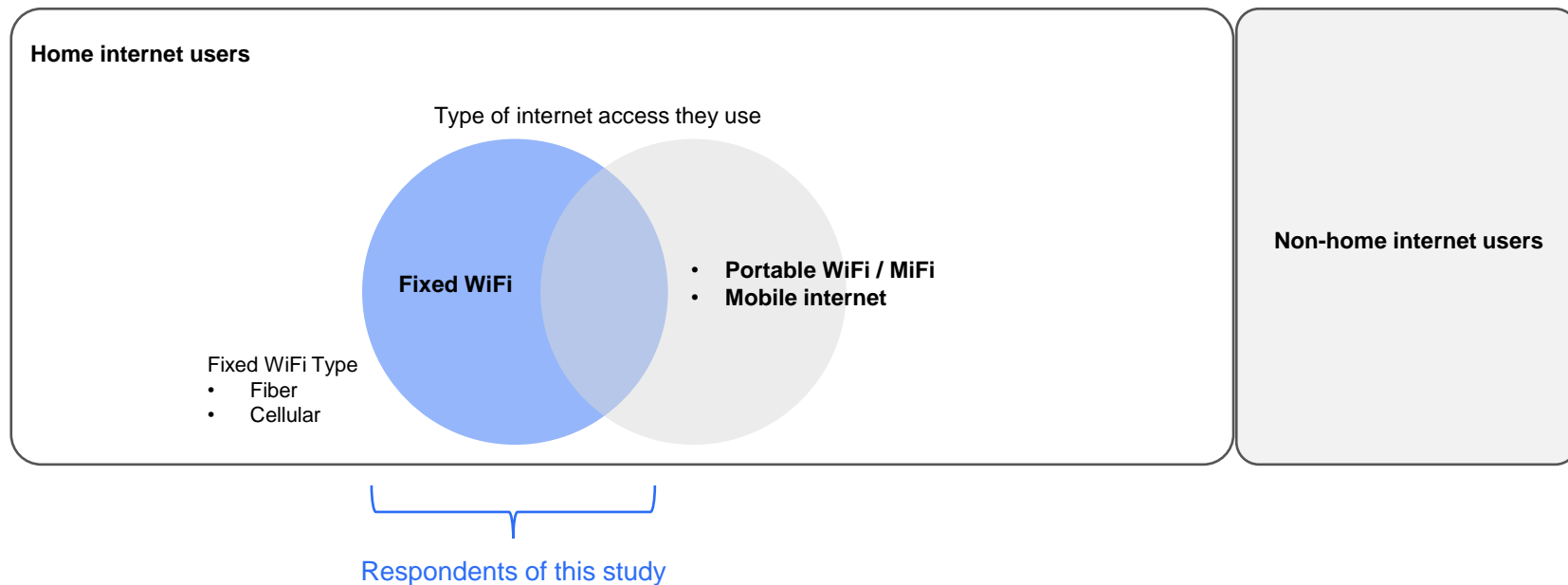
- **Offline**
Survey method: Face-to-face interview using CAPI (Computer Assisted Personal Interview)
Recruitment method: Random (general respondent) and convenience (booster respondent) sampling

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

Jan 2024

Feb 2024



Fieldwork Period

Oct-Dec 2023

Nov 2023-Jan 2024

Dec 2023-Feb 2024



Coverage

Urban + Rural, 13 TSEL regions
PUMA urban only

Urban + Rural, 13 TSEL regions
PUMA urban only

Urban + Rural, 13 TSEL regions
PUMA urban only



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: 5,652 resp
- Online: 5,478 resp

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

2

Booster Sample

550 resp

551 resp

569 resp

Net Promoter Score (NPS)

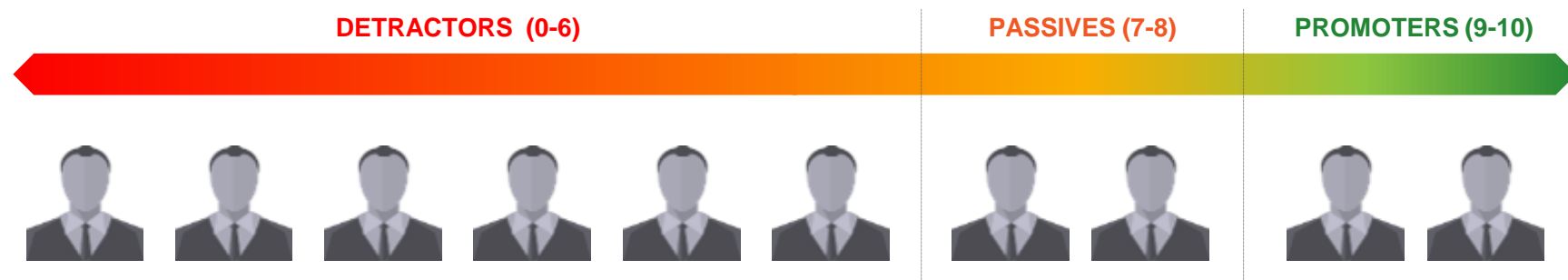
How to obtain Net Promoter Score (NPS)?

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



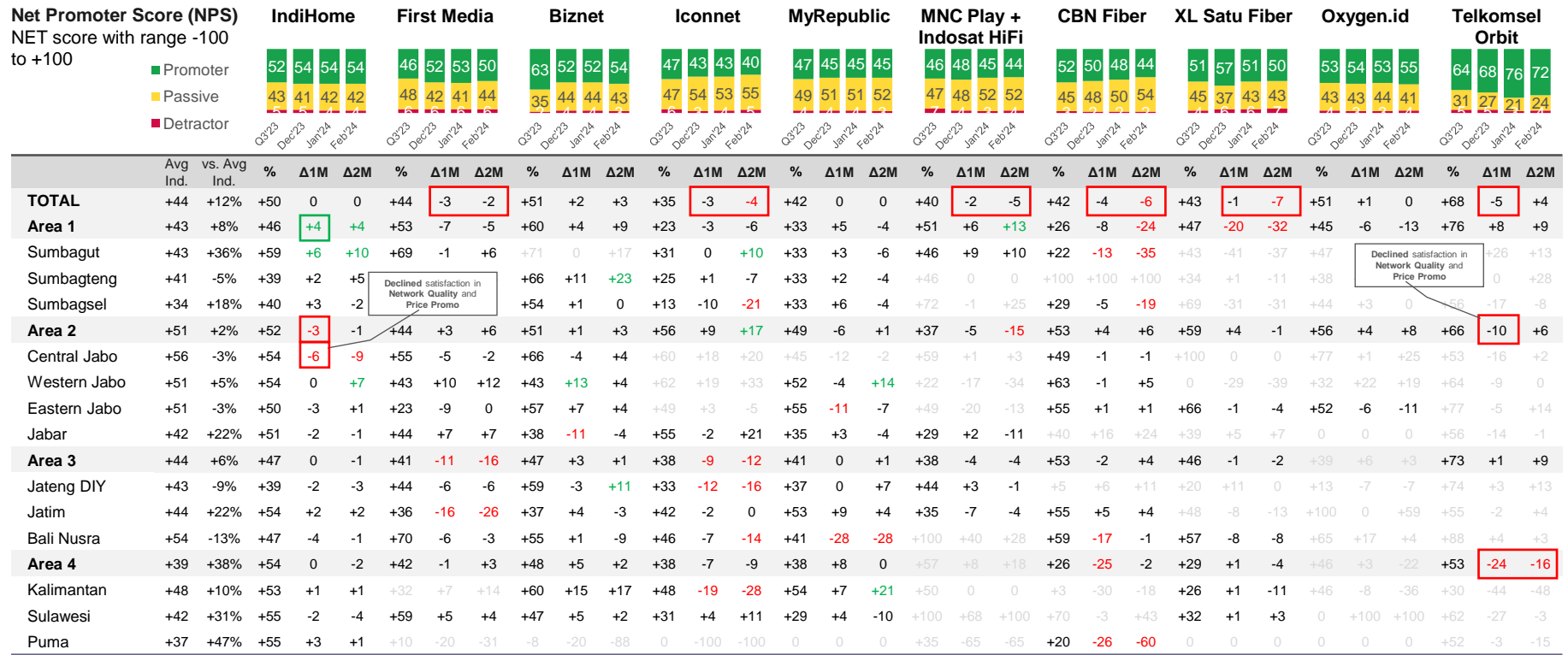
NPS:

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

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

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

Indihome performance is relatively stable in compared to previous period, with both positive and negative performance in Area 1 and Area 2. As Telkomsel Orbit performed quite a negative trend, especially in Area 4 and Area 2. On the other hand, competition performance also relatively stable in compared to previous period, even though most the brand performance negative trend in compared to 2 months before.



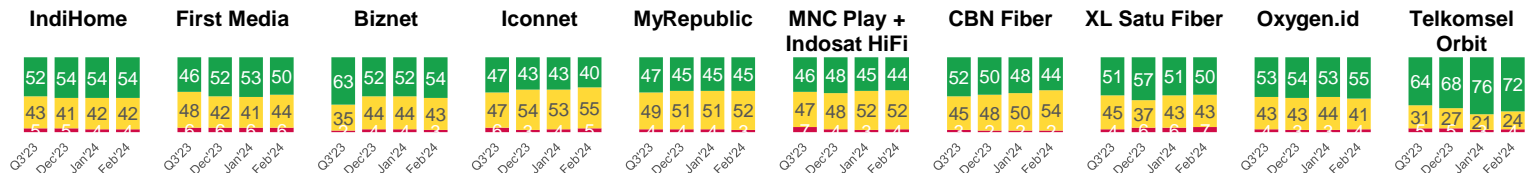
Base: Respective Fixed WiFi users | Avg Ind: Exclude Telkomsel Orbit | Δ1M = gap vs Jan'24 Δ2M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

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

Indihome performance among premium speed internet users is continuously performed positive trend. On the other hand, Telkomsel Orbit NPS among consumers with 15-30 Mbps speed internet is declined, which also reflected among competitors

Net Promoter Score (NPS)
NET score with range -100 to +100

■ Promoter
■ Passive
■ Detractor



	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M
TOTAL	+50	0	0	+44	-3	-2	+51	+2	+3	+35	-3	-4	+42	0	0	+40	-2	-5	+42	-4	-6	+43	-1	-7	+51	+1	0	+68	-5	+4
Speed of Internet	• Proportion of Promoter downgrade to Passive (scale 8) • Lower mention on affordable packages price offered in compared to previous period						• Proportion of Promoter downgrade to Passive (scale 7&8) • Lower mention on Internet network quality, easy installation and affordable packages price compared to previous period						• Proportion of Promoter downgrade to Passive (scale 8) • Lower mention on affordable internet rates and stable network						• Proportion of Promoter downgrade to Passive (scale 8) • Lack of information on error period, bad customer service experience											
< 15 Mbps	+36	0	+2	+38	-2	+2	+33	+3	+3	+38	+2	-6	+36	-7	-2	+37	+4	-2	+39	-3	-2	+45	-4	-14	+55	+5	+14	+47	+10	-1
15-30 Mbps	+47	0	-1	+33	-8	-6	+43	+3	-2	+31	-7	-3	+39	+1	-1	+36	-4	-9	+35	-1	-13	+35	-10	-15	+49	0	-1	+54	-17	+3
31-40 Mbps	+53	-1	+1	+54	+1	+9	+62	+1	+3	+41	-9	-3	+44	-9	-5	+51	+14	+7	+28	-19	-5	+45	-10	-14	+55	0	+1	+75	+3	+21
41-50 Mbps	+57	0	-1	+46	+8	+1	+57	+1	+11	+63	+9	-5	+75	+5	+5	+38	-5	-14	+55	0	+1	+45	-10	-14	+55	0	+1	+42	-28	-30
51-100 Mbps	+63	-1	-1	+64	-3	-5	+63	-4	-6	+62	+12	+21	+50	+5	+4	+68	-17	-11	+55	-26	+4	+52	-8	-17	+18	-36	-52	+73	+8	+3
> 100 Mbps	+72	+4	+6	+69	+1	+21	+76	0	+14	+100	+21	+30	+49	-18	-12	+76	-15	-24	+98	0	-2	+70	-10	-21	+100	0	0	+86	-6	0
Additional service	• Proportion of Promoter downgrade to Passive (scale 8) • Lower mention on affordable internet rates and stable network																													
Internet service only	+44	0	0	+31	-3	-1	+44	+3	0	+32	-4	-1	+39	+2	+1	+33	-3	-5	+40	-3	-3	+39	-4	0	+53	+5	+4	0	0	0
Cable TV	+47	0	+2	+40	-6	+10	+61	+4	+6	+58	+12	-6	+46	-20	+3	+39	-5	-1	+23	-15	-5	+20	-4	-22	+55	-1	-20	0	0	0
Video streaming	+58	0	+1	+61	0	-7	+64	+1	+4	+53	+3	-3	+51	-5	-7	+53	-10	+6	+51	+1	-7	+53	+2	-14	+39	-31	+12	0	0	0
Cable TV & Video streaming	+71	0	0	+71	-4	+6	+70	-3	+4	+46	-13	-17	+68	-13	+9	+61	+8	+3	+79	-5	+1	+78	+8	-3	+35	-8	-57	0	0	0
Length of service (LOS)	• Proportion of Promoter downgrade to Passive (scale 8) • Higher mention on Unstable Signal in compared to Jan'24																													
New users (less than 1 year)	+43	-2	0	+35	-5	-2	+43	-2	+2	+31	-2	-2	+31	-1	-3	+34	-10	+3	+45	-2	-2	+40	+1	+1	+60	-3	-4	+59	+4	+8
1 – 3 years	+52	+1	0	+47	-1	0	+53	+4	+2	+39	-5	-1	+54	+3	+6	+38	-1	-5	+34	-7	-6	+39	-2	-7	+46	+1	+2	+61	-13	+11
3 – 5 years	+50	-2	+1	+50	-8	+8	+56	-1	-3	+46	0	-1	+55	-10	+9	+43	0	-11	+55	+17	-3	+57	-3	-10	+47	+6	-6	+86	-5	+6
More than 5 years	+51	+1	-1	+38	+1	-2	+59	+3	-14	+100	+51	0	+38	+5	-17	+61	+8	+9	+88	-12	+31	+100	0	0	+100	+28	+1	0	0	0

Base: Respective Fixed WiFi users | Δ1M = gap vs Jan'24 Δ2M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

NIQ Actual number of respondents = 30 - 6,519 | Margin of error = 18%-1% | Confidence level = 95%

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

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User positive feedback on IndiHome

SULAWESI, Female, 45-55 YO, Middle SES, 15-30 Mbps.

Sinyal kuat, banyak yang gunakan, provider yang sudah lama terkenal, petugas pemasangan handal dan rapi serta mudah aktivasi internet nya.

- Takeouts:
- Strong connection
 - Professional technician
 - Easy activation

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

Memiliki aplikasi software yang bisa dihubungi dengan merespon yang cepat dengan maksimal penyelesaian masalah selama kurang lebih 1 minggu. Selain itu harga yang relatif murah dengan kualitas jaringan yang dengan kecepatan tinggi bisa memuaskan penggunaanya.

- Takeouts:
- Customer service in the software
 - Fast response
 - Quality worth the price

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

Banyak pilihan cara pembayaran tagihan internet dan mudah digunakannya.

- Takeouts:
- Convenient payment method
 - Easy to use

EASTERN JABOTABEK, Female, 25-34 YO, Middle SES, >100 Mbps.

Sangat bagus dan terbantu selama menggunakan layanan internet Indihome dengan mudah melakukan kegiatan, kerjaan, bisnis, belanja dan lainnya

- Takeouts:
- Convenient

BALI NUSRA, Male, 45-55 YO, Lower SES,41-50 Mbps.

Layanan WiFi Indihome yang paling luas layanannya dan tidak ada penyedia layanan lainnya lagi di lokasi/wilayan Kabupaten Rote Ndao.

- Takeouts:
- Wide coverage

WESTERN JABOTABEK, Male, 45-55 YO, Middle SES,15-30 Mbps.

Jaringan internet luas, sinyal internet kuat, internetan stabil , jarang mengalami gangguan.

- Takeouts:
- Wide coverage
 - Strong connection
 - Stable connection

Base: Indihome users

User **negative** feedback on IndiHome

PUMA, Male, 25-34 YO, Lower SES,15-30 Mbps.

Kecepatan yang kecil namun harga yang sangat mahal, terkadang terjadi gangguan atau lag saat bermain game. Sebenarnya tidak di rekomendasikan namun hanya IndiHome yang lebih baik dan murah di Kota Ambon.

- Takeouts:
- Low speed
 - High price
 - Network interruption

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

Jika sudah mendekati tenggang waktu pembayaran atau sudah mau habis waktu langganan snyal internetnya jadi lambat.

- Takeouts:
- Slow speed approaching payment due date

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

untuk pemakaian di komputer dengan jaringan wireless, masih ada beberapa kendala jaringan yang membuat membuka google saja susah.

- Takeouts:
- Network interruption

JATENG DIY, Female, 18-24 YO, Lower SES,41-50 Mbps.

Harga semakin mahal, kecepatan tidak sesuai yang ditawarkan, sinyal sering hilang dan terputus sendiri.

- Takeouts:
- Expensive price
 - Speed unmatched with the offer
 - Network lost

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

Bagi sebagian kalangan menengah ke bawah harga indihome cukup mahal,dan sering ketika melebihi tanggal 20 kadang eror tanpa sebab.

- Takeouts:
- Quite expensive
 - Network interruption

WESTERN JABOTABEK, Male, 18-24 YO, Upper SES, 31-40 Mbps .

Beberapa waktu mengalami gangguan dan internet kurang stabil untuk bermain game online.

- Takeouts:
- Network interruption
 - Unstable network

Base: Indihome users

User positive feedback on Telkomsel Orbit

CENTRAL JABOTABEK, Male, 35-44 YO, Upper SES,>100 Mbps.

Registrasi mudah, koneksi stabil, layananan konsumen sangat ramah

- Takeouts:
- Easy registration
 - Stable connection
 - Friendly customer service

EASTERN JABOTABEK, Male, 25-34 YO, Upper SES,>100 Mbps.

Telkomsel orbit menyediakan pilihan paket bulanan yang relevan untuk saya.

- Takeouts:
- Relevant monthly plan

JATENG DIY, Male, 25-34 YO, Upper SES,>100 Mbps.

internet yang cepat, penyelesaian masalah yang cepat oleh para operator.

- Takeouts:
- Fast internet speed
 - Fast problem solving by the operators

SUMBAGTENG, Female, 35-44 YO, Middle SES,31-40 Mbps .

Telkomesl orbit memiliki harga yg kompetitif dan pilihan paket yg bervariasi.

- Takeouts:
- Competitive price
 - Various plan offers

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

Alasan saya merekomendasikan telkomsel orbit karena jaringan yang selalu stabil di cuaca buruk. telkomsel orbit juga mudah untuk di pindahkan atau di bawa saat pergi nongkrong, kerja, atau main game.

- Takeouts:
- Stable connection despite heavy weather
 - Portability

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

Telkomsel orbit memiliki signal yang baik di segala cuaca karena sebagian wifi yang lain, ketika cuaca hujan atau mati lampu sinyal tidak bagus.

- Takeouts:
- Strong connection despite heavy weather
 - Good connection

Base: Telkomsel Orbit users

User **negative** feedback on Telkomsel Orbit

JABAR, Female, 25-34 YO, Upper SES,51-100 Mbps.	JATENG DIY, Male, 25-34 YO, Upper SES,>100 Mbps.	JATENG DIY, Male, 35-44 YO, Upper SES,51-100 Mbps.
Harga yang relatif mahal.	Jaringan sering bermasalah dan sering lag ketika bermain game online.	Telkomsel orbit jarang ada promo diskon kuota.
<i>Takeouts:</i> <ul style="list-style-type: none">• <i>Expensive price</i>	<i>Takeouts:</i> <ul style="list-style-type: none">• <i>Network problem occurs often</i>• <i>Unstable network for online gaming</i>	<i>Takeouts:</i> <ul style="list-style-type: none">• <i>Not enough promo and discount</i>
EASTERN JABOTABEK, Male, 18-24 YO, Middle SES,15-30 Mbps.	KALIMANTAN, Female, 35-44 YO, Upper SES,31-40 Mbps.	KALIMANTAN, Male, 18-24 YO, Middle SES,41-50 Mbps.
Jika saya bawa modem ke pegunungan kurang bagus	Ketersediaan jaringan modem tergantung terhadap listrik sekitar.	Jangkauan sinyal dari modem pendek.
<i>Takeouts:</i> <ul style="list-style-type: none">• <i>Network coverage in highlands/mountain area</i>	<i>Takeouts:</i> <ul style="list-style-type: none">• <i>Network availability depends on electricity</i>	<i>Takeouts:</i> <ul style="list-style-type: none">• <i>Short network range.</i>

Base: Telkomsel Orbit users

Customer Satisfaction

Experience with the main home internet
brand

Customer Strength Index (CSI)

Customer Satisfaction Index Metrics

There are 6 metrics used in this study to measure Customer Satisfaction Index (CSI) – Overall Satisfaction, Relative Satisfaction, Value for Money, Needs Fulfillment, Trustability, and Resistance to Price.

Overall Satisfaction

Question:
To what extent would you say you are satisfied or dissatisfied with the overall products and services of _____ [Brand / Product]?

- Response:**
- 1 Very dissatisfied
 - 2 Dissatisfied
 - 3 Satisfied
 - 4 Very satisfied
 - 5 Extremely satisfied

Relative Satisfaction

Question:
Please compare _____ [Brand / Product] with other fixed wi-fi brands. Compared to other fixed wi-fi brands in the market, what is your overall opinion about _____ [Brand / Product]?

- Response:**
- 1 Much worse than others
 - 2 Worse than others
 - 3 Somewhat better than others
 - 4 Better than others
 - 5 Much better than others

Value for Money

Question:
The product & services and benefits that you receive from _____ [Brand / Product] make it well worth the money you pay for it

- Response:**
- 1 Strongly disagree
 - 2 Disagree
 - 3 Somewhat agree
 - 4 Agree
 - 5 Strongly agree

Needs Fulfillment

Question:
_____ [Brand / Product] is highly responsive to your needs and requirements

- Response:**
- 1 Strongly disagree
 - 2 Disagree
 - 3 Somewhat agree
 - 4 Agree
 - 5 Strongly agree

Trustability

Question:
_____ [Brand / Product] is a fixed wi-fi brand that you can truly trust

- Response:**
- 1 Strongly disagree
 - 2 Disagree
 - 3 Somewhat agree
 - 4 Agree
 - 5 Strongly agree

Resistance to Price

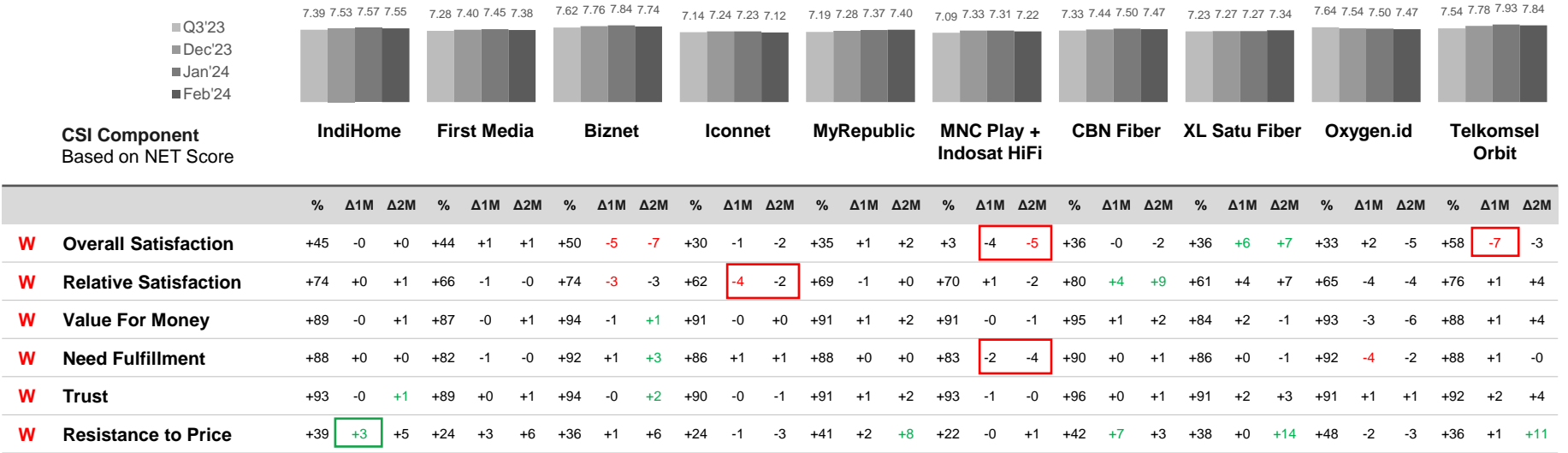
Question:
If another fixed wi-fi brand were to offer you a similar product & service at marginally lower charges/price, how likely are you to shift from _____ [Brand / Product] to the other fixed wi-fi brand?

- Response:**
- 1 Most likely to move
 - 2 Likely to move
 - 3 Somewhat unlikely to move
 - 4 Unlikely to move
 - 5 Most unlikely to move

CSI and components' overall assessment: National level

Indihome consumers has a better Resistance to Price in compared to previous period, while Telkomsel Orbit consumers Overall Satisfaction level is declined. Both Iconnet and MNC Play Indosat Hifi consumers continue to have lower assessments in some aspects

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



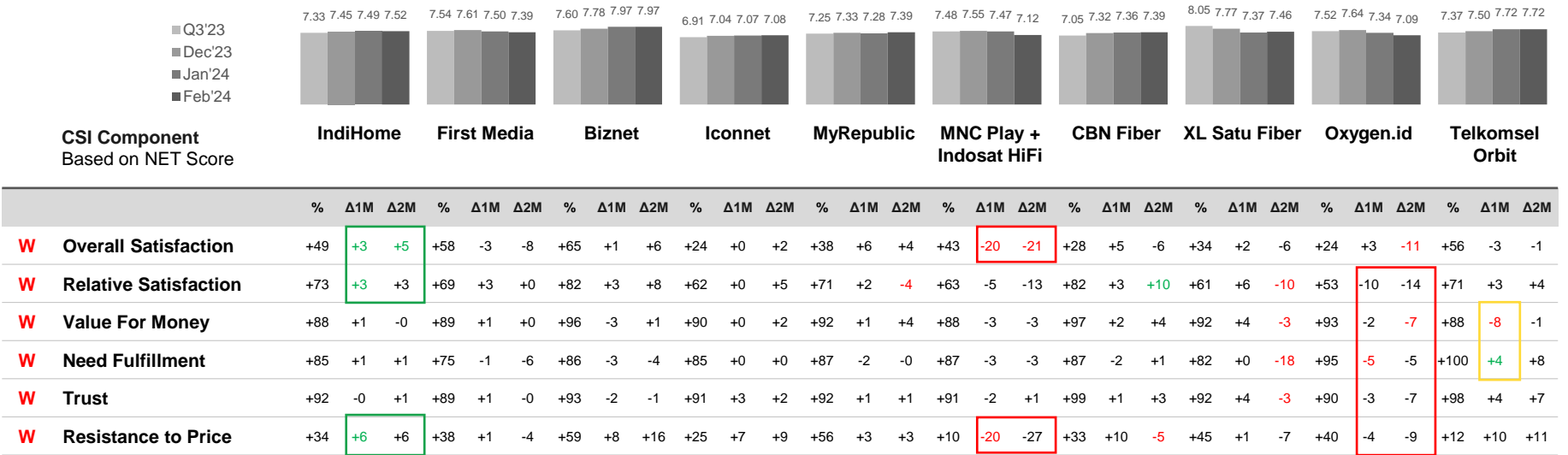
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S: IndiHome is significantly strong vs closest competitor (exclude Telkomsel Orbit) P: IndiHome is parity vs closest competitor (exclude Telkomsel Orbit) W: IndiHome is significantly weak vs closest competitor (exclude Telkomsel Orbit)

CSI and components' overall assessment: Area 1

Indihome performed continuous positive performance in some aspects in Area 1, while Telkomsel Orbit performance remains stable in this period despite positive and negative performance on respective aspect. On the other hand, negative performance in National level for MNC Play Indosat HiFi is highly contributed by consumers in Area 1, and Oxygen.id performance also still perform negative in the last 2 months

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



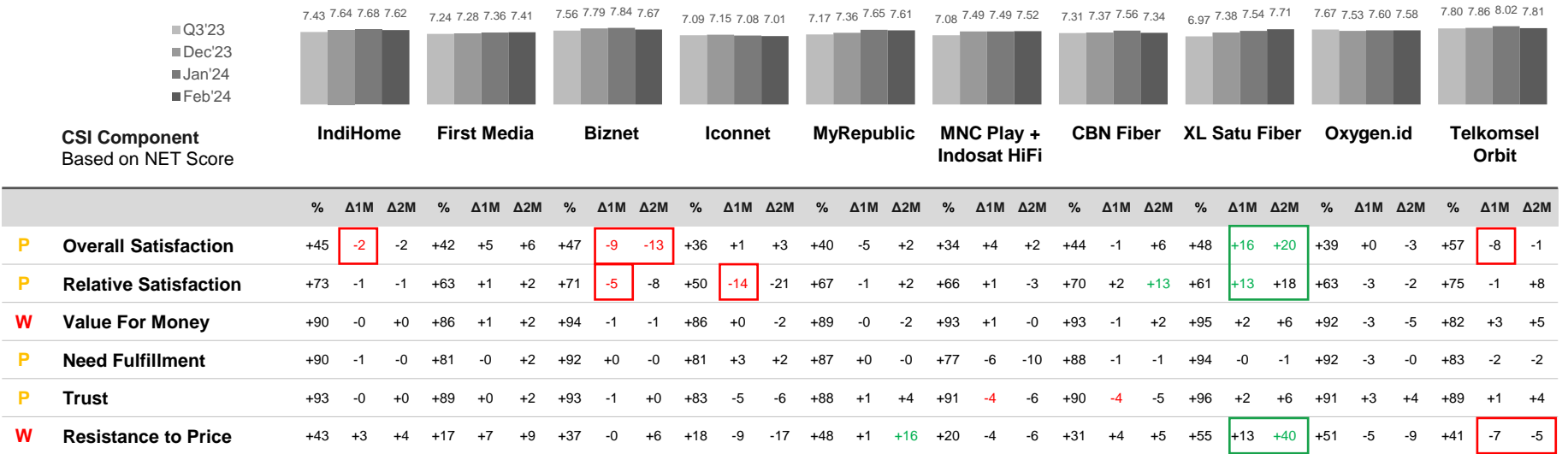
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CSI and components' overall assessment: Area 2

Despite performed lower Overall Satisfaction in Area 2, Indihome still manage to compete with other competitions. Telkomsel Orbit however, declined in CSI performance in contribution of lower Overall Satisfaction and Resistance to Price. Positive performance shown in XL Satu Fiber on this area in compared to 2 previous months, as Biznet and Iconnet begin to slowly declined its performance.

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

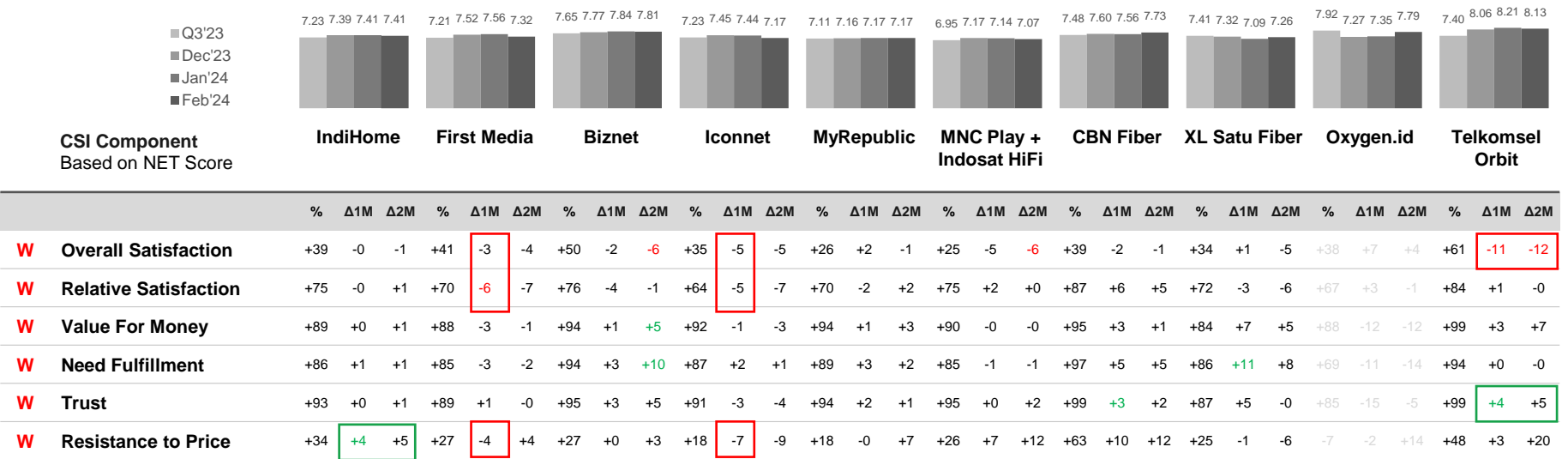


Base: Respective Fixed WiFi users | Δ1M = gap vs Jan'24 Δ2M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base
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CSI and components' overall assessment: Area 3

Positive trend shown on Indihome Resistance to Price in Area 3 in last 2 months, while Telkomsel Orbit declining CSI mostly contributed by its Overall Satisfaction level, but also improved in Trust level in compared to 2 previous months. Similar with First Media and First Media, where both players performed negative in compared to previous period, especially in Overall Satisfaction, Relative Satisfaction and Resistance to Price.

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

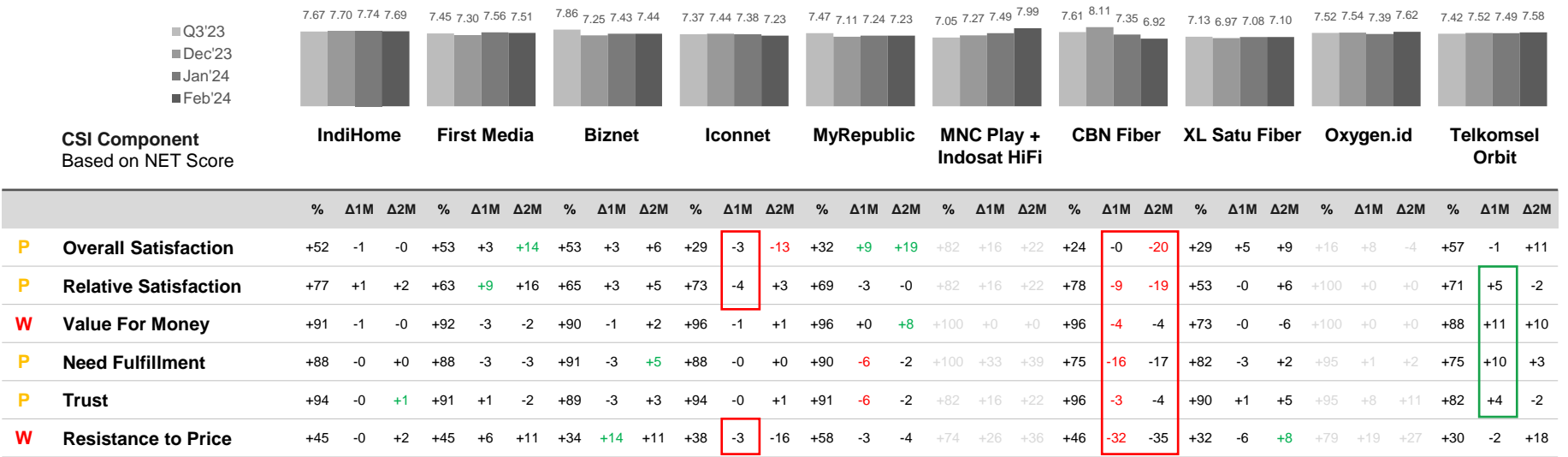


Base: Respective Fixed WiFi users | Δ1M = gap vs Jan'24 Δ2M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base
S: IndiHome is significantly strong vs closest competitor (exclude Telkomsel Orbit) P: IndiHome is parity vs closest competitor (exclude Telkomsel Orbit) W: IndiHome is significantly weak vs closest competitor (exclude Telkomsel Orbit)

CSI and components' overall assessment: Area 4

Both Indihome and Telkomsel Orbit performance in Area 4 are relatively stable across period, in addition Telkomsel Orbit shown quite a positive trend this period. On the other hand, Iconnet suffers a quite declining contributed by Satisfaction and Resistance to Price, while CBN Fiber performance still lower than its performance in the last 2 months.

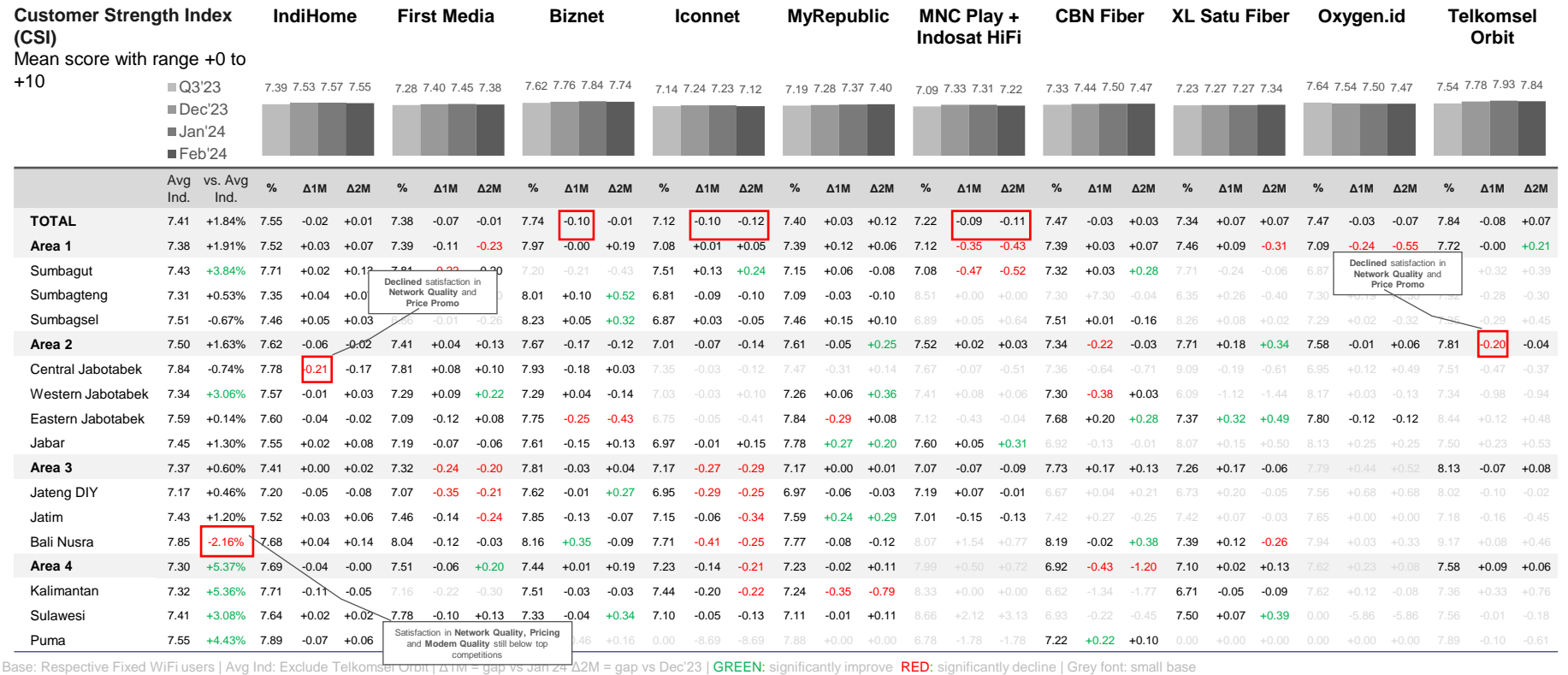
Customer Strength Index (CSI)
Mean score with range +0 to +10



Base: Respective Fixed WiFi users | Δ1M = gap vs Jan'24 Δ2M = 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): Summary – by area & region

Indihome performance is relatively stable in compared to previous period, while Telkomsel Orbit performance is slowly declining. Both Iconnet and MNC Play Indosat Hifi suffers quite a bit loss in compared to 2 previous month. Biznet also performed quite a bit loss performance compared to previous period.



Base: Respective Fixed WiFi users | Avg Ind: Exclude Telkomsel Orbit | Δ1M = gap vs Jan 24 | Δ2M = gap vs Dec'23 | GREEN: significantly improve | RED: significantly decline | Grey font: small base

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	Modem 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 consumers experienced better in installation and activation process in compared to 2 respective months before, but also not a good experience in purchase and payment while Telkomsel Orbit still performed negative in Installation & Activation Process, Purchase Payment and Overall Internet Network Quality, in addition of price and promo to some extent. As Biznet performed a slightly declined in most aspects this period, even further Iconnet and MNC Play Indosat HiFi that mostly performed negative

Factor Satisfaction		IndiHome			First Media			Biznet			Iconnet			My Republic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Telkomsel Orbit			vs. closest comp
Based on NET score		%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	
COMMUNICATION	Clarity of information	+34	-1	-1	+36	-1	+1	+39	-3	-3	+25	-2	-4	+31	+3	+5	+24	-5	-11	+24	-2	-2	+30	+4	+6	+33	-8	-1	+48	-3	+0	W
INSTALLATION & ACTIVATION PROCESS	Ease of activation/installation	+40	+2	+3	+34	-1	-5	+40	+3	+4	+26	-2	-6	+37	+5	+10	+30	-2	-1	+35	+4	-2	+40	+1	+7	+46	-9	-10	+46	-3	-3	P
	Ease of activating through platforms	+37	+2	+3	+33	+1	-8	+36	-4	-3	+24	-0	-2	+34	+6	+10	+24	-5	-1	+33	-0	-3	+33	+4	+8	+49	+1	+3	+33	-5	-7	W
	Neatness of equipment installation	+35	+1	+2	+38	+1	-4	+39	-2	+2	+26	-1	-1	+31	+2	+6	+20	+1	-1	+35	-2	-4	+35	+0	+9	+48	-2	+1	+31	-2	-13	W
	Availability of various platforms for activation	+35	+2	+3	+34	+1	-5	+37	-0	+2	+21	-1	-3	+27	+1	+3	+17	+0	-2	+28	+0	-5	+30	+5	+8	+35	-12	-12	+29	+2	-13	P
PRICE & PROMO	Suitability of offered package prices	+31	-1	0	+33	-2	-1	+37	-0	-1	+26	-1	-3	+32	+4	+7	+26	-2	-5	+27	-1	-2	+34	+3	+13	+43	-1	+2	+42	-1	-1	W
	Suitability of activation/installation fee	+32	+1	+1	+34	-1	-6	+36	-1	+1	+30	-1	-1	+35	+5	+8	+22	-2	-6	+35	-1	-1	+32	+2	+7	+43	-4	-7	+36	+4	-2	W
	Suitability of offered package promotions	+29	0	0	+33	-0	-0	+33	-3	-3	+24	+0	+1	+28	+3	+5	+25	+1	-4	+24	-1	-1	+33	+3	+10	+42	-0	+2	+40	-2	-4	W
	Ease of getting promotions	+23	0	0	+27	-2	-1	+27	-1	+1	+14	-2	-2	+19	+1	+5	+15	-4	-5	+26	+3	+5	+28	+5	+14	+35	-1	+3	+33	-4	-5	W
PRODUCT & PACKAGE	Modem device quality	+37	-1	0	+35	+0	-1	+38	-0	-1	+26	-2	-3	+33	+1	+4	+24	-2	-8	+36	+2	+5	+39	+3	+10	+46	-0	+1	+49	-6	-1	W
	Suitability of offered package specifications	+32	-1	0	+31	-1	-3	+37	-1	-1	+24	-0	-2	+31	+4	+7	+26	-0	-6	+27	-1	+1	+35	+3	+9	+44	+4	+10	+44	-1	-1	W
	Ease of changing internet packages	+37	0	0	+26	-4	-7	+44	-1	+5	+43	+9	+9	+19	-6	-14	+38	-18	-4	+60	+0	+0	+55	+4	+2	+13	-24	-27	+42	+14	+16	P
CONNECTIVITY	Completeness of channel options in cable TV	+43	0	+3	+30	-1	+0	+58	+2	+15	+26	-12	-23	+47	+3	+16	+30	+5	-2	+23	+1	-4	+32	-0	+1	+62	+15	+7	0	0	0	W
	Overall internet network quality	+42	0	+1	+40	-3	-3	+51	+2	+4	+26	-4	-7	+37	+4	+9	+27	-8	-13	+44	+0	+9	+39	+3	+12	+39	-4	-7	+55	-5	-1	W
PURCHASE & PAYMENT	Ease of purchasing packages	+40	-1	0	+36	-2	-3	+44	+0	+3	+29	-2	-4	+34	-1	+0	+28	-6	-11	+36	-1	+2	+36	-1	+3	+40	-4	-2	+55	-5	-3	W
	Availability of various payment methods	+41	-1	0	+43	-1	-1	+43	+1	+4	+25	+0	-3	+37	+3	+5	+29	-3	-8	+33	-6	-1	+38	+1	+7	+39	+0	+0	+50	-5	-5	P
	Availability of various platforms for purchasing packages	+39	-1	0	+40	-3	-4	+40	+1	+4	+23	-2	-2	+32	+1	+3	+27	-4	-8	+35	+0	+2	+39	+3	+11	+42	-4	+1	+52	-2	-5	P
LOYALTY PROGRAM	Ease of obtaining rewards through loyalty programs	+40	0	0	+35	+2	-5	0	0	0	0	0	0	+29	-2	-1	+25	-2	-4	0	0	0	0	0	0	0	0	0	+41	-4	-1	P
	Clarity of loyalty program mechanisms	+42	0	-1	+43	+3	+1	0	0	0	0	0	0	+39	-1	+6	+20	-5	-19	0	0	0	0	0	0	0	0	0	+45	-7	-3	P
AFTER-SALES SERVICES	Speed in handling requests/complaints	+33	-1	0	+24	+2	-1	+47	-3	-1	+19	-4	-4	+27	+1	+9	+30	-2	-3	+27	-8	+1	+23	+3	-1	+42	-1	+10	+53	-4	-5	W
	Ease of access in submitting requests/complaints	+36	-1	-2	+34	+0	+0	+44	-3	-2	+20	-9	-9	+40	+3	+16	+45	+10	+10	+30	+3	+12	+41	+11	+20	+38	+8	+12	+48	-5	+2	W
	Quality of solutions provided	+33	-1	-2	+30	-1	+1	+50	-0	-1	+20	-6	-6	+27	+0	+9	+35	+1	+3	+26	+1	-6	+20	+2	-3	+36	+3	+5	+45	-5	+2	W
	Overall agent or technician service	+38	0	0	+40	+0	+3	+41	-2	-3	+28	-2	-3	+30	+2	+2	+24	-2	-7	+29	+0	-5	+37	+1	+4	+48	-2	-1	+43	-5	-4	W
SELFCARE APPS	Ease of login process to self-care apps	+43	0	+1	+43	-1	+2	-	-	-	+31	-3	-12	+42	-3	+7	+33	-6	-12	+48	+4	+3	+42	-2	+1	+51	+1	+1	+50	-3	-1	P
	Ease of using self-care apps	+45	+1	+3	+43	+0	-0	-	-	-	+31	+1	-7	+45	+1	+8	+33	-4	-10	+38	-6	-7	+47	+3	+2	+46	+13	+8	+52	-3	-4	P

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ1M = gap vs Jan'24 Δ2M = 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 continue shown among Indihome consumers for Communication and Selfcare apps experience in the last 2 months, as for Telkomsel Orbit, satisfaction level is relatively stable this period. On the other hand, both MNC Play Indosat HiFi and Oxygen.id performed lower in most of factors, especially internet network quality

Factor Satisfaction Based on NET score		IndiHome			First Media			Biznet			Iconnet			My Republic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Telkomsel Orbit			vs. closest comp
		%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	
COMMUNICATION	Clarity of information	+34	+3	+3	+21	-6	-12	+44	-0	+5	+23	-1	-0	+29	+6	+5	+24	-12	-11	+19	-1	-3	+39	+5	-6	+19	-9	-7	+51	-0	+13	W
	Ease of activation/installation	+35	-1	0	+34	-2	-21	+34	-0	+2	+22	-3	-5	+34	+6	+10	+12	-5	-15	+28	-1	-15	+29	-3	+3	+37	-12	-15	+32	-2	-22	P
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+38	+3	+3	+36	-7	-13	+33	-3	-5	+20	+0	+1	+29	+9	+11	+9	-9	-15	+23	+1	-7	+35	+11	-2	+24	-6	-13	+16	-4	-26	P
	Neatness of equipment installation	+31	0	+3	+48	-4	-18	+47	-5	+0	+24	+1	+0	+29	+4	+6	+19	-6	-12	+30	-2	-7	+30	+11	+10	+28	-3	+2	+15	-16	-44	W
	Availability of various platforms for activation	+33	+3	+2	+34	-6	-20	+48	+5	+13	+19	+1	-0	+24	-1	-5	+5	+8	-10	+17	+1	-7	+30	+13	-3	+11	-17	-33	+12	-6	-30	W
	Suitability of offered package prices	+28	+1	+3	+36	-9	-14	+47	+8	+8	+22	-2	-0	+27	+6	+3	+23	-9	-7	+30	-2	+3	+31	+0	-2	+40	-6	-5	+48	+5	+8	W
PRICE & PROMO	Suitability of activation/installation fee	+28	+1	0	+28	-13	-15	+38	+0	+5	+23	-1	+0	+36	+6	+5	+12	-1	+3	+31	-2	-5	+34	+6	+6	+33	-7	-18	+25	+11	-3	W
	Suitability of offered package promotions	+27	+2	+2	+42	-8	-12	+37	-6	+1	+21	+1	+6	+23	+6	+5	+29	-7	-9	+20	-1	-3	+33	+1	+4	+25	-10	-19	+40	+3	+6	W
	Ease of getting promotions	+20	+3	+3	+38	-7	-5	+34	+1	+8	+9	-2	-3	+18	+4	+8	+20	-10	+1	+17	-3	-12	+32	+1	+1	+15	-1	-5	+31	-3	-8	W
	Modem device quality	+37	0	+2	+30	-2	-10	+37	-4	-1	+26	+2	+5	+30	+5	+6	+20	-13	-11	+39	+6	+9	+35	+0	-2	+33	-0	-1	+44	-4	+9	P
PRODUCT & PACKAGE	Suitability of offered package specifications	+30	0	+1	+32	-8	-18	+42	+2	+5	+19	+1	+2	+29	+5	+4	+25	-15	-12	+18	-4	-7	+34	-4	-6	+33	-1	+5	+33	-1	-5	W
	Ease of changing internet packages	+40	-1	+3	+55	+5	+1	+57	+7	+22	+38	+2	-2	+10	-17	-25	+44	-24	-21	+49	+37	+39	+100	0	0	0	-33	-33	+49	+27	+24	P
	Completeness of channel options in cable TV	+44	+2	+8	+34	-2	-10	+65	+12	+14	+29	-18	-26	+49	+2	+25	+39	+3	+12	+57	-4	+29	+100	0	+23	+53	+28	+53	0	0	0	P
CONNECTIVITY	Overall internet network quality	+43	+2	+4	+42	-4	-14	+55	+1	+8	+25	-2	-1	+35	+4	+8	+34	-17	-13	+44	-6	+12	+34	-3	+3	+32	-19	-24	+50	-6	-2	W
	Ease of purchasing packages	+38	0	+2	+34	-6	-15	+45	-0	+6	+24	+1	-1	+26	-0	-1	+30	-17	-17	+25	+2	+4	+30	-5	+3	+26	-12	-12	+54	+3	+5	W
PURCHASE & PAYMENT	Availability of various payment methods	+39	+2	+2	+37	-4	-16	+49	+3	+7	+21	+2	+2	+31	+8	+11	+27	-10	-20	+33	-6	+1	+33	-2	-3	+32	-4	-2	+55	+1	+2	W
	Availability of various platforms for purchasing packages	+39	+2	+4	+38	-8	-9	+46	+2	+8	+21	+1	+2	+24	+5	+0	+19	-14	-14	+30	+1	-3	+28	-4	-8	+20	-7	-11	+54	-1	-3	W
LOYALTY PROGRAM	Ease of obtaining rewards through loyalty programs	+46	+3	+3	+60	-11	-12	0	0	0	0	0	0	+35	-2	-2	+28	+14	+8	0	0	0	0	0	0	0	0	0	+46	+5	+7	S
	Clarity of loyalty program mechanisms	+44	0	-1	+39	-16	-18	0	0	0	0	0	0	+42	-7	-6	+45	+17	+27	0	0	0	0	0	0	0	0	0	+46	-5	-8	P
AFTER-SALES SERVICES	Speed in handling requests/complaints	+34	+2	+1	+36	+11	-13	+45	+4	+4	+15	-5	-1	+30	+4	+6	+41	+17	+15	+32	-8	+5	+86	+10	+13	+71	-13	-11	+55	-0	-8	P
	Ease of access in submitting requests/complaints	+40	+3	+4	+60	+8	-0	+43	+11	+18	+16	-8	-10	+45	+3	+17	+41	+20	+18	+36	+2	+24	+86	+10	+44	+37	-3	+2	+53	-2	+9	W
	Quality of solutions provided	+33	+2	+2	+39	-1	-8	+46	+10	+2	+12	-7	-7	+34	+2	+15	+60	+19	+23	+26	+4	+0	+72	-5	-1	+40	-15	-11	+46	-6	-12	P
	Overall agent or technician service	+35	+1	+1	+48	+3	+0	+44	-8	-6	+23	-3	-3	+28	+6	+2	+27	-8	-9	+17	-1	-14	+44	+9	+9	+39	-9	-5	+41	-4	-6	W
SELF-CARE APPS	Ease of login process to self-care apps	+48	+4	+8	+26	-2	-8	-	-	-	+26	-2	-17	+50	-11	+5	+28	-3	-5	+41	-5	-16	+64	-11	+2	+33	-29	-21	+44	+2	+1	P
	Ease of using self-care apps	+50	+2	+7	+43	+13	+3	-	-	-	+24	-3	-14	+48	-6	+5	+28	+0	-5	+21	-1	-21	+75	+10	+22	+53	+11	+13	+48	+4	-6	P

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ1M = gap vs Jan'24 Δ2M = 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

Indihome consumers positive satisfaction on National level for Installation & Activation Process mostly contributed by Area 2 performance, despite there is still factors to be improved especially in communication, price promo and after sales services. Telkomsel Orbit consumers on the other hand, performed negative in most of factors this period, especially price promo, network quality and purchase payments. Both Biznet and CBN Fiber also suffers declining in some aspects, especially CBN Fiber that still below respective two months before.

Factor Satisfaction		IndiHome			First Media			Biznet			Iconnet			My Republic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Telkomsel Orbit			vs. closest comp	
Based on NET score		%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M		
COMMUNICATION	Clarity of information	+38	-3	-4	+41	+3	+6	+38	-7	-7	+37	+8	+14	+44	-2	+7	+33	-4	-16	+20	-12	-9	+34	+4	+10	+41	-10	-0	+48	-6	-8	W	
	Ease of activation/installation	+47	+5	+5	+40	+4	+2	+46	+2	+3	+45	-2	-10	+55	-1	+14	+52	+0	+10	+30	-0	+3	+33	-4	-0	+51	-12	-13	+44	-16	-7	W	
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+41	+4	+3	+33	+3	-13	+42	-8	-1	+39	+6	+8	+54	+0	+14	+42	+5	+11	+39	-6	+1	+38	+4	+15	+67	+7	+16	+30	-18	-8	W	
	Neatness of equipment installation	+37	+1	+2	+42	+4	-2	+41	-3	+0	+29	-3	+5	+44	-5	+4	+29	+3	+5	+41	-3	-5	+35	-4	+8	+67	-2	+1	+27	+5	-2	W	
	Availability of various platforms for activation	+39	+3	+3	+39	+7	+2	+40	-1	-1	+42	-0	+10	+38	-3	+5	+27	+6	+8	+26	-14	-13	+28	-0	-0	+54	-12	-5	+20	-7	-23	W	
	Suitability of offered package prices	+33	-3	-2	+35	+2	+6	+38	-5	-5	+25	-2	-2	+44	+3	+15	+43	+2	-2	+19	-12	-16	+45	+6	+18	+43	-1	+2	+39	-6	-13	W	
PRICE & PROMO	Suitability of activation/installation fee	+35	0	+1	+38	+1	-9	+40	-2	-0	+60	+9	+13	+48	-0	+9	+34	-3	-9	+34	-8	-10	+40	+1	+9	+49	-8	-9	+23	-8	-22	W	
	Suitability of offered package promotions	+34	-2	-1	+37	+3	+5	+33	-6	-6	+28	+5	+3	+40	-2	+5	+39	-8	-4	+16	-8	-8	+38	+2	+10	+51	+3	+8	+42	-3	-10	W	
	Ease of getting promotions	+28	-2	-1	+28	-0	+2	+29	-2	-2	+27	+5	+11	+30	-3	+7	+19	-8	-14	+25	-3	+2	+31	+5	+15	+43	-1	+7	+30	-9	-17	W	
PRODUCT & PACKAGE	Modem device quality	+42	-2	-2	+39	+3	+5	+41	-1	-4	+36	+3	+10	+46	-4	+7	+42	+3	-7	+26	-9	-10	+48	+8	+14	+49	-5	-3	+48	-7	-4	P	
	Suitability of offered package specifications	+39	0	+2	+34	+4	+3	+38	-3	-3	+36	+6	+7	+42	-1	+9	+44	+5	-1	+22	-8	-5	+44	+10	+19	+45	+4	+11	+46	-0	-1	P	
	Ease of changing internet packages	+50	-2	+1	+23	+0	-6	+48	-8	+1	+53	+36	+30	+15	-14	-29	+50	-34	-42	+41	-9	-28	+46	-19	+14	+100	0	0	+41	+19	+36	P	
	Completeness of channel options in cable TV	+42	-1	0	+31	+3	+10	+55	+1	+16	+29	-28	-20	+42	+5	+12	+44	+8	-10	+5	-7	-20	+50	+15	+15	+64	-6	-21	0	0	0	W	
CONNECTIVITY	Overall internet network quality	+46	-2	0	+41	-1	+2	+53	+0	+0	+21	-13	-11	+54	+1	+15	+36	-2	-9	+40	-4	+3	+46	+4	+14	+41	-1	-2	+57	-6	-4	W	
PURCHASE & PAYMENT	Ease of purchasing packages	+46	-1	+1	+40	+1	+1	+44	-1	+3	+37	-2	+7	+48	-4	+2	+38	-5	-12	+37	-11	-9	+48	+4	+13	+47	-3	+2	+52	-14	-9	P	
	Availability of various payment methods	+45	-2	-1	+49	+3	+5	+46	+0	+4	+33	+3	+1	+52	-2	+9	+43	-0	-6	+28	-12	-8	+47	+5	+15	+44	-0	+1	+45	-12	-14	W	
	Availability of various platforms for purchasing packages	+44	-2	-1	+43	+0	+0	+39	-2	-0	+23	-6	-2	+43	-4	+5	+38	-5	-11	+30	-9	-6	+46	+6	+15	+51	-4	+3	+54	-6	-9	W	
LOYALTY PROGRAM	Ease of obtaining rewards through loyalty programs	+42	+1	-1	+34	+8	-3	0	0	0	0	0	0	+18	-6	-8	+29	+3	+10	0	0	0	0	0	0	0	0	0	0	+44	-2	+4	S
	Clarity of loyalty program mechanisms	+45	+1	-2	+47	+4	+6	0	0	0	0	0	0	+34	-2	+10	+16	-5	-16	0	0	0	0	0	0	0	0	0	0	+48	-12	-7	P
AFTER-SALES SERVICES	Speed in handling requests/complaints	+35	-5	-1	+25	+6	+9	+47	-8	-4	+22	+5	+4	+12	-12	+1	+34	-7	-12	+15	-16	-14	+25	-2	-8	+22	+0	+9	+62	-5	+14	W	
	Ease of access in submitting requests/complaints	+37	-4	-5	+36	+3	+7	+44	-9	-6	+18	-11	-11	+29	-3	+12	+59	+11	+10	+19	+1	-2	+25	+3	-6	+33	+17	+25	+53	-8	+14	W	
	Quality of solutions provided	+38	-4	-3	+29	-0	+3	+53	-7	-5	+33	+3	+12	+13	-8	-1	+41	-1	+6	+25	-3	-14	+19	+3	-8	+38	+22	+30	+56	-11	+17	W	
	Overall agent or technician service	+44	-1	+1	+42	+4	+8	+45	-3	-1	+42	+7	+9	+36	-3	-0	+33	+1	-8	+30	-6	-7	+38	+2	+2	+53	-2	-1	+43	-3	-6	W	
SELFCARE APPS	Ease of login process to self-care apps	+46	-2	0	+46	-0	+3	-	-	-	+59	+5	+12	+43	-7	+10	+39	-8	-15	+38	+4	-5	+47	-4	-4	+56	+12	+12	+53	-9	-2	W	
	Ease of using self-care apps	+45	-1	+2	+47	+4	+4	-	-	-	+66	+12	+16	+50	-0	+11	+34	-9	-21	+35	-9	-18	+47	-7	-9	+40	+10	+2	+59	-9	-7	W	

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ1M = gap vs Jan'24 Δ2M = 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

While in Area 3, Indihome satisfaction performance are relatively stable this period, similar with Telkomsel Orbit even though the trend is more negative. Biznet and Iconnet on the other hand, suffers a lower satisfaction in most of aspects, include network quality and modem quality

Factor Satisfaction Based on NET score		IndiHome			First Media			Biznet			Iconnet			My Republic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Telkomsel Orbit			vs. closest comp
		%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	
COMMUNICATION	Clarity of information	+28	0	-1	+29	-7	-4	+39	+0	+0	+22	-7	-13	+18	+3	+1	+18	-3	-6	+33	+8	+8	+32	-2	-1	+63	+18	+25	+47	-9	-9	W
	Ease of activation/installation	+36	+1	+3	+21	-6	-10	+32	+3	+3	+23	-2	-5	+22	+3	-1	+24	+2	-0	+53	+16	+11	+49	+4	+14	+51	+16	+25	+50	-4	+12	W
INSTALLATION & ACTIVATION PROCESS	Ease of activating through platforms	+32	-1	+1	+28	+3	-3	+28	+1	-6	+23	-2	-7	+16	+1	-2	+18	-5	-1	+46	+8	+6	+22	-3	+4	+42	+8	+4	+38	-7	+1	W
	Neatness of equipment installation	+33	+2	+3	+25	+1	-4	+32	+3	+5	+26	-1	-2	+18	+2	+2	+15	+3	-1	+40	+1	+5	+41	+1	+20	+27	+24	+25	+27	-9	-8	P
	Availability of various platforms for activation	+32	+2	+3	+25	-2	-7	+30	-2	+1	+16	-3	-8	+17	+4	+1	+16	-4	-5	+50	+16	+11	+24	+4	+16	+27	+14	+5	+30	-8	-14	W
	Suitability of offered package prices	+26	+1	0	+28	-5	-6	+31	+2	-1	+31	+1	-7	+23	+1	-1	+16	-0	-3	+31	+8	+7	+29	+6	+23	+68	+16	+16	+47	+1	+6	P
PRICE & PROMO	Suitability of activation/installation fee	+29	+1	+1	+32	+4	+0	+31	+2	+4	+26	-6	-14	+18	+3	+0	+19	-1	-6	+45	+9	+16	+23	-5	+1	+42	+8	+17	+39	-8	+0	W
	Suitability of offered package promotions	+23	0	-1	+20	-4	-6	+31	+1	-2	+26	-5	-6	+20	+4	+3	+16	+1	+0	+38	+8	+9	+31	-0	+1	+57	+12	+19	+39	-7	-10	W
	Ease of getting promotions	+17	0	-2	+18	-4	-4	+22	-0	+1	+15	-3	-6	+8	+0	-0	+10	+1	+1	+36	+16	+23	+20	+11	+21	+34	-0	+13	+47	+3	+10	W
	Modem device quality	+31	0	-1	+27	-4	-8	+36	+2	+1	+20	-8	-14	+20	-1	-3	+14	-2	-6	+43	+8	+15	+38	-3	+11	+68	+30	+44	+54	-9	-5	W
PRODUCT & PACKAGE	Suitability of offered package specifications	+25	-1	-3	+24	-5	-7	+34	+1	+0	+26	-3	-8	+21	+5	+4	+17	+1	-5	+45	+12	+17	+29	-3	+5	+64	+17	+25	+50	-3	+0	W
	Ease of changing internet packages	+34	+2	+1	+18	-8	-4	+35	+5	+3	+43	-28	+13	+29	+6	+4	+29	-11	+17	+94	+0	+6	+60	+17	+14	0	0	0	+18	-8	-3	P
CONNECTIVITY	Completeness of channel options in cable TV	+37	+2	+5	+22	-13	-26	+64	-0	+13	+17	-1	-16	+58	-2	+15	+11	+3	+7	-4	-4	-32	+13	+2	-1	0	+100	+100	0	0	0	S
	Overall internet network quality	+34	+1	0	+34	-8	-10	+48	+4	+5	+30	-3	-9	+21	+4	+2	+19	-8	-15	+46	+10	+13	+30	+3	+18	+52	+0	+8	+55	-9	-4	W
PURCHASE & PAYMENT	Ease of purchasing packages	+33	-1	-3	+28	-4	-5	+44	-0	+1	+31	-3	-9	+27	+0	-4	+21	-4	-7	+48	+10	+16	+26	-2	-8	+31	+5	+9	+61	-4	+0	W
	Availability of various payment methods	+36	0	-1	+33	-6	-8	+40	+2	+3	+28	-2	-5	+27	+1	-7	+22	-2	-5	+36	+0	+4	+28	-8	-6	+44	+12	+17	+53	-0	+0	P
	Availability of various platforms for purchasing packages	+33	-1	-2	+35	-6	-8	+40	+5	+7	+27	-2	-5	+28	+2	-0	+23	-0	-1	+45	+10	+14	+35	+0	+5	+51	+12	+18	+46	-1	-3	W
LOYALTY PROGRAM	Ease of obtaining rewards through loyalty programs	+32	-1	-2	+30	-6	-4	0	0	0	0	0	0	+38	-1	-4	+19	-12	-23	0	0	0	0	0	0	0	0	0	+41	-16	-12	P
	Clarity of loyalty program mechanisms	+36	-1	-1	+33	+6	-2	0	0	0	0	0	0	+44	+8	+7	+10	-12	-41	0	0	0	0	0	0	0	0	0	+45	+5	+16	P
AFTER-SALES SERVICES	Speed in handling requests/complaints	+31	-1	0	+16	-11	-15	+46	-0	-1	+19	-9	-9	+4	+17	+22	+24	-5	-4	+62	+21	+42	+16	-1	-5	+66	+66	+66	+27	-17	-34	W
	Ease of access in submitting requests/complaints	+32	-2	-2	+21	-7	-12	+43	-4	-8	+26	-12	-7	+49	+14	+21	+33	+2	+0	+61	+18	+40	+46	+6	+37	+66	+66	+66	+37	-7	-12	W
	Quality of solutions provided	+29	-1	-1	+28	-2	+0	+46	+2	-1	+14	-13	-16	+39	+9	+11	+22	-7	-7	+27	+7	+2	+14	+2	-3	0	0	0	+7	-8	-21	W
	Overall agent or technician service	+32	0	-1	+33	-6	-6	+35	-0	-5	+31	-6	-8	+24	+3	+4	+17	-3	-5	+41	+10	+10	+48	+0	+6	+73	+12	+14	+46	-8	-4	W
SELFCARE APPS	Ease of login process to self-care apps	+37	-1	-1	+39	-3	+0	-	-	-	+21	-8	-18	+37	+4	+4	+26	-6	-12	+68	+10	+31	+27	-5	+8	+82	+16	+16	+58	-3	-1	P
	Ease of using self-care apps	+39	+1	0	+34	-12	-10	-	-	-	+20	-4	-15	+37	+6	+4	+31	-5	-5	+55	-1	+18	+38	+6	+7	+82	+16	+16	+48	-1	+8	P

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ1M = gap vs Jan'24 Δ2M = 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

Similar with Area 3, Indihome performance also relatively stable this period in Area 4, except Availability of Purchasing Packages. Telkomsel Orbit on the other hand, performed positive in communication, but also slightly negative in easiness on getting promotions. On the other hand, despite most of performance is relatively stable in compared to previous period, Iconnet performance is mostly performed quite negative.

Factor Satisfaction		IndiHome			First Media			Biznet			Iconnet			My Republic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Telkomsel Orbit			vs. closest comp	
Based on NET score		%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M		
COMMUNICATION	Clarity of information	+35	-2	-2	+49	+3	+9	+37	+5	+8	+22	-4	-10	+19	+3	+11	+47	-27	-22	+27	+11	-22	+24	+7	+10	0	0	-6	+49	+16	+18	W	
INSTALLATION & ACTIVATION PROCESS	Ease of activation/installation	+40	-2	+2	+53	-1	+33	+39	+15	+19	+29	0	-9	+19	+4	+10	+100	0	0	+40	+31	-5	+45	+5	+11	+41	+9	-4	+55	+4	+4	W	
	Ease of activating through platforms	+38	+2	+4	+42	+3	+19	+34	+4	+8	+23	-5	-9	+14	+3	+9	+73	-15	-15	+27	+1	-13	+37	+7	+9	+35	-0	-16	+48	+5	+6	P	
	Neatness of equipment installation	+38	+2	+3	+43	-4	+18	+31	-2	+5	+29	-5	-12	+22	+3	+9	0	0	0	+56	+48	+5	+34	-0	+3	+33	+0	-11	+65	-0	-0	W	
	Availability of various platforms for activation	+39	-1	+4	+41	+1	+14	+33	+6	+12	+15	-7	-17	+29	+12	+23	0	0	0	+51	+43	+35	+35	+6	+11	+19	+4	+2	+65	+34	+35	W	
PRICE & PROMO	Suitability of offered package prices	+38	-1	+3	+42	-1	+2	+36	+4	+10	+29	-1	-6	+20	-0	+11	+82	-18	-18	+31	+9	-23	+32	+3	+10	+39	+3	+8	+32	+3	+6	P	
	Suitability of activation/installation fee	+36	0	0	+47	+0	+11	+19	-3	-10	+35	-1	+8	+25	+6	+17	0	0	0	+41	+22	-6	+32	+5	+9	+41	+28	+17	+69	+16	+30	W	
	Suitability of offered package promotions	+36	-1	0	+43	+9	+11	+39	-1	+11	+21	+2	+1	+20	+1	+9	+57	-18	-13	+32	+13	+5	+29	+7	+18	+17	+2	+6	+32	-0	-1	W	
	Ease of getting promotions	+27	-1	-1	+48	-7	+6	+33	+3	+9	+11	-3	+1	+26	+4	+10	+73	-13	-11	+29	+11	-5	+31	+5	+16	+37	-3	-10	+22	-5	+3	W	
PRODUCT & PACKAGE	Modem device quality	+40	-1	0	+47	-1	+8	+31	+4	+6	+27	-6	-16	+18	+2	+9	+74	+59	+75	+45	+30	-23	+35	+5	+14	+40	+15	+3	+52	-2	-1	W	
	Suitability of offered package specifications	+37	-2	0	+44	-4	+1	+32	-1	+4	+20	-5	-7	+24	+6	+19	+65	+64	+82	+31	+12	-22	+32	+4	+9	+59	+12	+10	+37	-2	-4	W	
	Ease of changing internet packages	+17	-2	-6	+16	-56	-56	+40	-17	-1	+51	+41	+23	0	0	0	0	0	0	0	0	0	+42	+2	-9	0	0	-29	+77	+6	+10	P	
CONNECTIVITY	Completeness of channel options in cable TV	+51	-4	+2	+53	+1	+20	+41	-4	+25	+64	+14	-11	0	0	0	+59	-41	-41	0	0	0	+16	-10	-5	+82	+10	+0	0	0	0	P	
	Overall internet network quality	+46	-2	0	+52	+4	+14	+44	+0	+14	+23	-8	-14	+26	+6	+10	+61	+17	+8	+63	+34	-13	+41	+5	+15	+37	+23	-2	+57	+1	+10	W	
PURCHASE & PAYMENT	Ease of purchasing packages	+44	-1	0	+49	-11	-6	+40	+15	+16	+27	-5	-16	+28	+9	+15	+82	+16	+22	+36	+11	-21	+36	-1	+3	+29	+11	-10	+55	+5	-5	P	
	Availability of various payment methods	+45	-1	0	+52	-5	+1	+35	+1	+6	+25	-5	-18	+25	+5	+13	+74	+66	+83	+44	+18	+4	+40	+5	+12	+25	+13	-7	+53	-3	+3	W	
	Availability of various platforms for purchasing packages	+41	-2	-1	+50	-10	-5	+37	-0	+7	+22	-4	-6	+26	+5	+17	+47	+6	+17	+38	+29	+6	+40	+6	+20	+37	-3	+4	+53	+3	-5	W	
LOYALTY PROGRAM	Ease of obtaining rewards through loyalty programs	+42	-4	+2	+30	-26	-12	0	0	0	0	0	0	+8	-6	+10	+27	-45	-45	0	0	0	0	0	0	0	0	+20	-12	-10		P	
	Clarity of loyalty program mechanisms	+42	-3	+1	+51	-14	-20	0	0	0	0	0	0	+15	-14	+7	+73	-16	-16	0	0	0	0	0	0	0	0	+33	-16	-15		P	
AFTER-SALES SERVICES	Speed in handling requests/complaints	+33	+2	0	+13	-21	-12	+63	+8	+29	+24	-8	-15	+83	+29	+58	+100	+83	+83	0	0	0	0	-6	+3	+1	+45	+18	+28	+57	+9	-10	P
	Ease of access in submitting requests/complaints	+37	+2	-2	+25	+2	+9	+57	+16	+40	+20	-5	-13	+16	+37	-22	+100	+166	+166	0	0	0	+22	+8	+16	+51	-17	-28	+38	+4	-19	P	
	Quality of solutions provided	+32	-1	-4	+13	-2	+3	+62	+12	+37	+28	-9	-12	+22	+3	+25	+100	+83	+83	0	0	0	-0	-9	-5	+31	-10	-48	+58	+1	+13	P	
	Overall agent or technician service	+39	-1	0	+45	-2	+4	+35	+1	+14	+24	-1	-4	+28	+2	+7	+73	+13	+20	+43	+10	-26	+28	-4	+3	+29	+11	-0	+42	-4	+8	P	
SELFCARE APPS	Ease of login process to self-care apps	+40	-1	-2	+59	+13	+14	-	-	-	+32	-4	-18	+7	-5	-9	+73	+13	+20	+1	-69	-99	+40	+2	+3	+40	+2	-19	+39	+0	-6	W	
	Ease of using self-care apps	+48	+1	+7	+49	-17	-19	-	-	-	+36	+10	+1	+18	+7	+1	+82	+49	+61	+34	-36	-66	+41	+7	+5	+33	+33	+16	+39	-9	-21	P	

Base: Respective Fixed WiFi users | NET: T2B Score – B2B Score | Δ1M = gap vs Jan'24 Δ2M = 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)

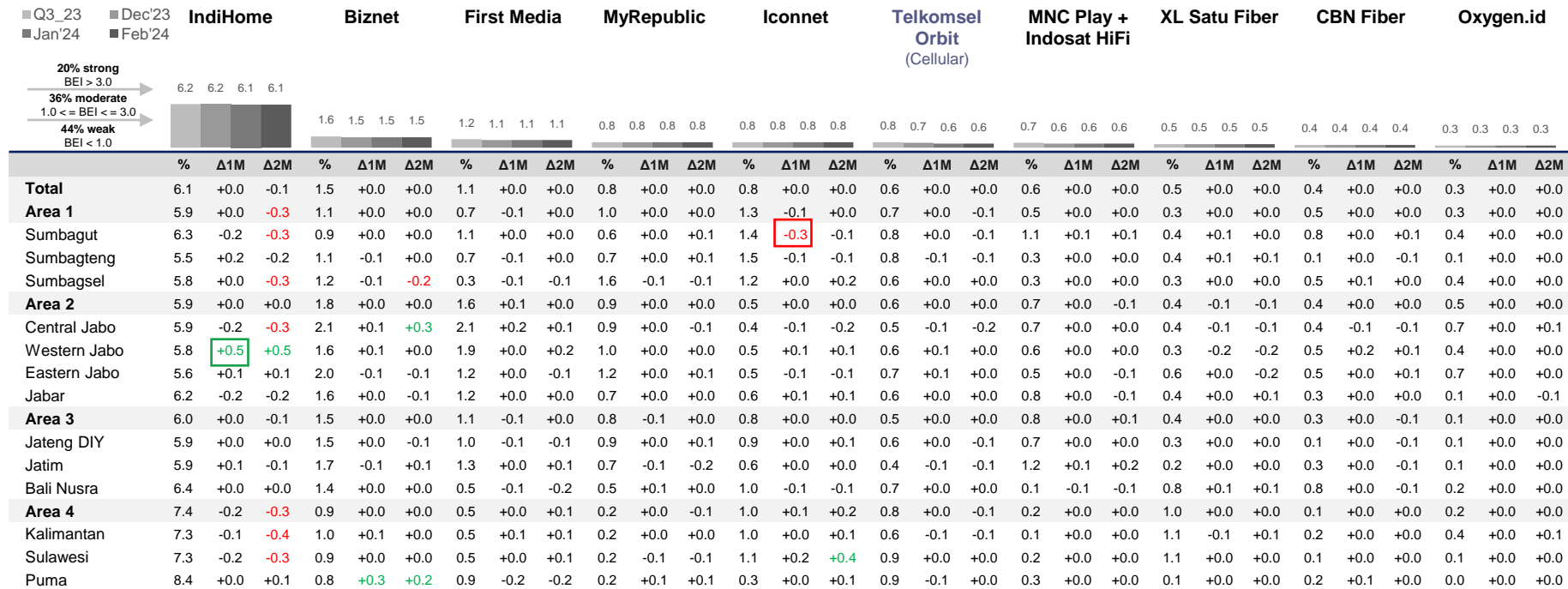
Brand Performance

Evaluation of the Fixed WiFi brand in the market

Brand Equity Index (BEI)

No major difference across brands in all Teikōmsel area, with some movements including improvement for Indihome in Western Jabo, and declining in Iconnet's Sumbagut.

Mean score with range +0 to +10



Base: Fixed WiFi users | sort by largest BEI | $\Delta 1M$ = qap vs Jan'24 $\Delta 2M$ = qap 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

Brand Leverage In percentage (%)

	Fixed WiFi Fiber																								Fixed WiFi Cellular											
	IndiHome			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Telkomsel Orbit			Isat Home Wireless			XL Satu Lite		
	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M			
Recommender	57	+0	-1	5	-0	+0	8	-0	-0	5	-0	+0	4	-0	-0	3	+0	+0	2	+0	-0	2	-0	+0	2	-0	+0	2	+0	-0	0	-0	-0	0	+0	+0
Preferer	59	+0	-1	5	-0	-0	7	-0	+0	5	-0	+0	4	-0	-0	3	+0	+0	2	+0	+0	2	-0	-0	2	+0	+0	2	+0	-0	0	-0	+0	0	-0	+0
BUMO user	58	-0	-2	6	-0	-0	6	-0	+0	5	-0	+0	4	-0	+0	3	+0	+0	2	+0	-0	2	-0	+0	2	+0	+0	2	+0	+0	0	-0	+0	0	-0	-0
Current user	59	-0	-2	6	+0	+0	7	-0	+0	5	-0	+0	4	-0	+0	3	+0	+0	2	+0	-0	2	-0	+0	2	+0	+0	3	+0	+0	0	-0	-0	0	-0	-0
Trial P3M	59	-0	-2	7	+0	+0	7	-0	+0	5	-0	+0	4	-0	-0	4	+0	+0	2	+0	-0	3	-0	-0	2	+0	+0	3	+0	+0	1	-0	-0	0	-0	-0
Trial P1Y	62	-0	-2	8	+0	+0	9	-0	+0	6	-0	+1	5	-0	+0	5	+0	+0	2	+0	-0	3	-0	-0	2	+0	+0	4	-0	+0	1	+0	+0	0	-0	-0
Considerer	66	-0	-2	17	-0	-0	22	+0	+1	12	-0	+1	12	-0	+0	10	+0	-0	6	-0	-0	8	-0	-0	5	-0	+0	11	-0	-1	4	-0	-0	3	-0	+0
Aware	96	-0	-0	48	-0	-1	57	+0	-1	35	-0	+1	41	+1	+1	40	+0	+0	21	+0	+0	25	-0	-1	19	-0	+0	30	-1	-1	16	-0	-1	11	-0	-0
Rejecter	7	4		5	52		5	43		5	65		5	59		8	60		4	79		5	75		6	81		4	70		4	84		4	89	
Not Consider Not Aware Retention	99			94			93			97			95			94			94			94			96			86			77			53		
Conversion	61			13			12			15			10			9			8			10			9			9			3			1		

Base: Fixed WiFi users | Retention: Current user / Trial P3M Conversion: Current user / Aware | Δ1M = gap vs Jan'24 Δ2M = 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

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 Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M	% Δ1M Δ2M																															
IndiHome	58	-0	-2	56	+0	-2	54	+0	-1	57	-0	-2	76	-2	-4	59	-1	-4	53	+3	+0	57	-1	-3	56	-2	-3	54	+5	+3	50	+1	+1	57	-3	-4	55	-1	-2	56	+1	-1	63	-0	-2	76	-2	-5	74	-3	-5	86	-0	+2
Biznet	6	-0	+0	3	-0	-0	8	+0	+0	6	-0	+0	2	+0	+0	2	-0	+0	4	+0	+0	4	-1	-1	9	+1	+2	7	+1	+1	9	-1	-1	7	+0	-1	5	+1	+1	8	-1	+1	6	+0	-0	3	+1	+0	2	-1	-1	2	+2	+1
First Media	6	-0	-0	3	-0	-0	9	+0	-0	5	-0	+0	2	+0	-0	6	+0	-0	3	-1	-0	1	-0	-0	13	+2	+1	11	-1	-1	5	-0	-1	7	+0	-0	5	-1	-1	6	+1	+1	2	-1	-1	1	+0	-0	2	+0	+1	5	-2	-5
Iconnet	5	-0	+0	9	-1	+0	2	-0	-0	5	-0	+0	6	+1	+3	10	-2	+0	11	-1	-2	8	-0	+1	2	-1	-2	2	-1	-0	1	-0	-0	3	+1	+2	6	+0	+1	3	-0	-0	7	-0	+0	6	+0	+2	8	+2	+4	0	-0	-0
MyRepublic	4	-0	+0	6	-0	+0	4	-0	+0	4	-1	-0	0	-1	-1	1	-0	-0	4	+0	+1	12	-1	+0	3	+1	-1	6	-1	-1	6	+0	+1	3	-0	+1	6	-0	+1	2	-1	-1	2	+1	+1	0	-0	+0	0	-1	-2	0	-0	-0
MNC Play + Indosat HiFi	3	+0	+0	2	+0	+0	3	-0	-0	5	+0	+1	0	-0	-0	6	+1	+1	1	-0	-0	1	+0	+1	3	+1	+0	3	-2	-2	1	+0	+0	3	+0	-0	4	+0	-0	8	+1	+2	0	-0	-1	0	-0	-0	0	-0	-0	1	+0	+0
XLSatu Fiber	2	-0	+0	2	+1	+1	2	-1	-1	2	+0	+0	7	-0	+1	2	+1	+1	2	+0	+1	1	+0	+0	1	-0	-0	0	-2	-2	4	-0	-1	2	-0	+1	1	-0	-0	1	+0	+0	7	+1	+2	8	-0	+2	7	+0	+0	0	+0	+0
Telkomsel Orbit	2	+0	+0	2	-0	-1	2	+1	+1	1	+0	+0	2	+0	+0	2	-1	-2	2	+0	-0	1	+0	+0	2	-0	-0	3	+1	+1	3	+1	+2	2	+0	+1	1	+0	-0	1	+0	+0	3	-0	+1	1	-0	-0	2	+0	+0	4	-0	+1
CBN Fiber	2	+0	-0	3	+1	+1	1	-0	-0	2	-0	-0	0	+0	+0	6	+1	+2	0	-0	-1	3	+1	+0	1	-0	-0	2	+0	-1	2	-0	-0	1	-0	-0	0	-0	-0	2	-0	-0	5	+0	-1	0	+0	+0	0	+0	+0	1	+1	+1
Oxygen.Id	2	+0	+0	2	+0	+0	3	+0	+0	0	+0	-0	1	+0	+0	3	+0	+1	1	+0	+1	2	-0	-0	4	+0	+1	2	+0	+0	5	+1	+1	0	-1	-1	0	-0	-0	0	-0	-0	1	+0	+0	3	+1	+1	0	-0	-0	0	+0	+0
Faznet	1	+0	+0	4	+0	+1	0	+0	+0	0	+0	+0	1	+1	+1	0	+0	+0	6	-0	+1	5	+0	+2	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	+0
Mega Vision	1	-0	-0	0	+0	+0	2	-0	-0	0	+0	+0	0	-0	-0	0	+0	+0	0	+0	+0	0	+0	+0	0	+0	+0	0	+0	+0	1	-1	-2	4	+0	+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	1	+0	+0	0	-0	-0	0	+0	+0	0	-0	+0	0	+0	+0	0	+0	+0	0	+0	+0	2	-0	+0	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	2	+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	-0	0	+0	+0	0	+0	+0	0	+0	+0	0	+0	+0	0	+0	+0	0	+0	+0
Others	9	+0	+0	7	+1	-0	10	+0	+1	11	+0	+0	3	+1	+1	3	+1	+2	15	-2	-2	5	+1	-0	8	+0	+1	11	-0	+2	10	-0	+0	10	+1	+0	11	+1	+1	13	+0	-1	4	-0	+1	1	-1	-1	5	+2	+2	1	-0	-0

Base: Fixed WiFi users | Δ1M = gap vs Jan'24 Δ2M = gap vs Dec'23 | GREEN: significantly improve RED: significantly decline | Grey font: small base

Summary

Summary: Customer satisfaction

In Total, no major difference on both NPS and CSI performance in compared to previous month. Indihome on the other hand, performed positive trend on NPS in Area 1 two consecutive months, even though NPS in Area 2 are declined this period. Telkomsel Orbit CSI in Area 2 and NPS in Area 4 are declined in compared to previous period.

Summary NPS & CSI		IndiHome			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Telkomsel Orbit				
		%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M		
TOTAL	NPS	+50			+44			+51			+35		▼	+42			+40			+42		▼	+43		▼	+51			+68				
	CSI	7.55			7.38			7.74			7.12			7.40			7.22			7.47			7.34			7.47			7.84				
Area 1	NPS	+46	▲	▲	+53			+60			+23			+33			+51		▲	+26		▼	+47		▼	▼	+45			+76			
	CSI	7.52			7.39		▼	7.97			7.08			7.39			7.12		▼	▼		7.39			7.46		▼	7.09		▼	▼	7.72	
Area 2	NPS	+52		▼	+44			+51			+56		▲	+49			+37		▼	+53			+59			+56			+66				
	CSI	7.62			7.41			7.67			7.01			7.61		▲	7.52			7.34		▼	7.71		▲	7.58			7.81		▼		
Area 3	NPS	+47			+41		▼	▼	+47			+38		▼	▼	+41			+38			+53			+46			+39			+73		
	CSI	7.41			7.32		▼	▼	7.81			7.17		▼	▼	7.17			7.07			7.73			7.26			7.79		▲	▲	8.13	
Area 4	NPS	+54			+42			+48			+38			+38			+57			+26		▼	+29			+46			+53		▼	▼	
	CSI	7.69			7.51		▲	7.44			7.23		▼	7.23			7.99		▲	▲		6.92		▼	▼	7.10			7.62		▲	7.58	

Base: Respective Fixed WiFi users | CSI is significant if +/- 0.2 points | NPS significance based on NET score Δ1M = gap vs Jan'24 Δ2M = gap vs Dec'23 | ▲: significantly improve ▼: significantly decline

Summary: Brand Performance

Also similar for Brand performance BEI and Share, no major difference in compared to previous period across brand and area.

Summary NPS & CSI		IndiHome			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Telkomsel Orbit		
		%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M	%	Δ1M	Δ2M
TOTAL	BEI	6.1			1.1			1.5			0.8			0.8			0.6			0.4			0.5			0.3			0.6		
	Share	58		▼	6			6			5			4			3			2			2			2			2		
Area 1	BEI	5.9		▼	0.7			1.1			1.3			1.0			0.5			0.5			0.3			0.3			0.7		
	Share	56			3			3			9			6			2			3			2			2			2		
Area 2	BEI	5.9			1.6			1.8			0.5			0.9			0.7			0.4			0.4			0.5			0.6		
	Share	54			9			8			2			4			3			1			2		▼	3			2		▲
Area 3	BEI	6.0			1.1			1.5			0.8			0.8			0.8			0.3			0.4			0.1			0.5		
	Share	57			5			6			5			4			5			2			2			0			1		
Area 4	BEI	7.4		▼	0.5			0.9			1.0			0.2			0.2			0.1			1.0			0.2			0.8		
	Share	76		▼	2			2			6		▲	0		▼	▼	0		0			7			1			2		

Base: Fixed WiFi users | BEI is significant if +/- 0.3 points | Brand Share significance based on % | Δ1M = gap vs Jan'24 Δ2M = gap vs Dec'23 | ▲: significantly improve ▼: significantly decline

IndiHome: CSI vs. NPS Summary

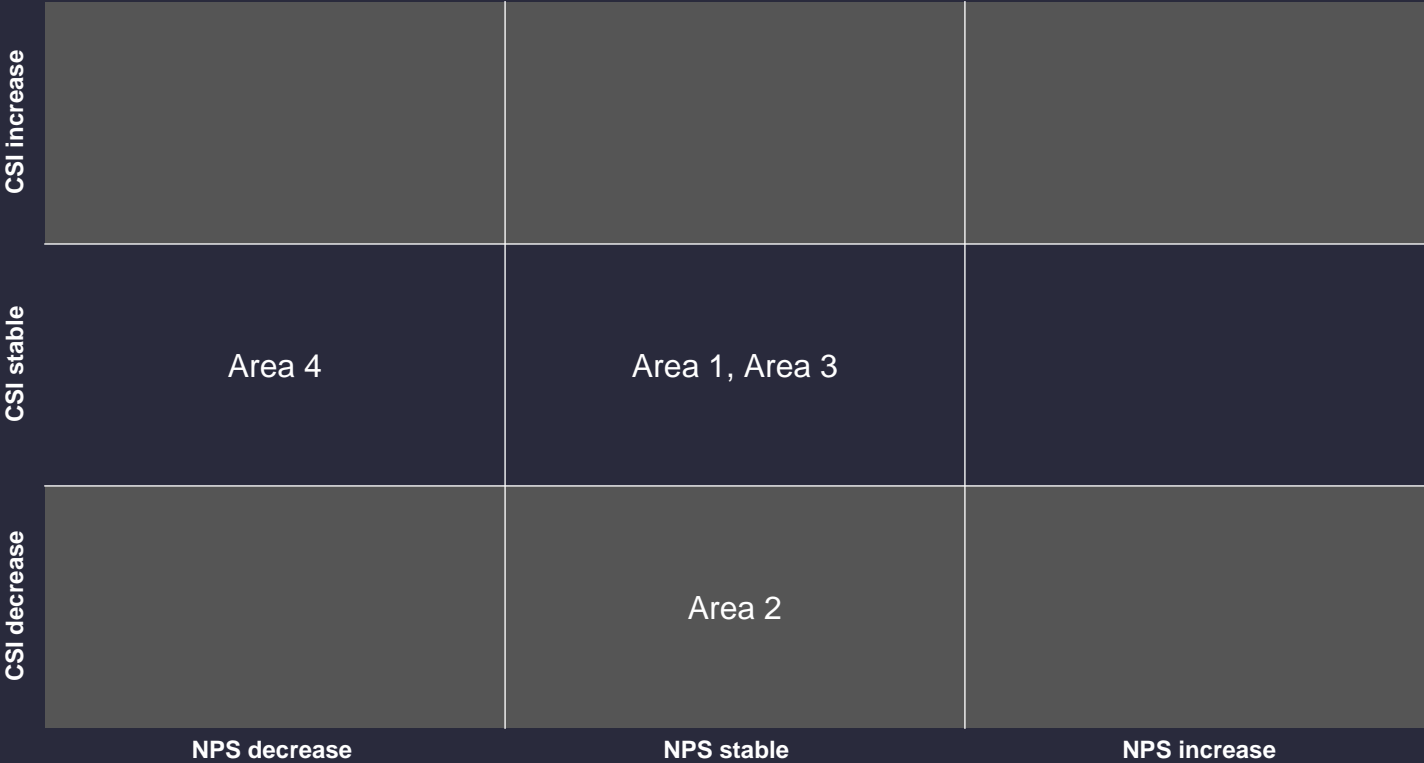
CSI increase			
CSI stable		All regions except Sumbagut & Central Jabo	Sumbagut
CSI decrease	Central Jabo		
	NPS decrease	NPS stable	NPS increase

IndiHome: Summary of issue(s) and improvement(s)

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

CSI increase			
CSI stable			(+) Wide Coverage Network
CSI decrease	(-) Branding : Famous & Widely Used Brand (-) Easiness of Purchasing Packages (-) Availability of various platform for purchasing packages		
	NPS decrease	NPS stable	NPS increase

Telkomsel Orbit: CSI vs. NPS Summary



Telkomsel Orbit: Summary of issue(s) and improvement(s)

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

CSI increase			
CSI stable	(-) Price promo : easiness to get promo (-) Unstable signal		
CSI decrease		(-) Price promo : Suitability packages prices, promotion offer, easiness to get promo (-) Overall network quality (-) Easiness of purchasing packages, availability payment method	
	NPS decrease	NPS stable	NPS increase

Installation Service Time: Summary – by area & region

In overall, Indihome able to fulfill consumer expectation for installation in most of area. Bali Nusra even managed to perform faster than consumer expectation, even though PUMA is slightly slower

Waiting time in day(s)	IndiHome			First Media			Biznet			Iconnet			MyRepublic			MNC Play + Indosat HiFi			CBN Fiber			XL Satu Fiber			Oxygen.id			Telkomsel Orbit		
	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	3	2	0	2	2	0	2	2	0	2	2	0	2	2	0	3	2	+1	2	2	0
Area 1	2	2	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	2	1	+1
Sumbagut	2	2	0	2	2	0	4	3	+1	3	3	0	3	3	0	1	1	0	2	2	0	1	1	0	2	2	+1	1	1	0
Sumbagteng	2	2	0	2	1	+1	1	1	0	2	2	0	1	1	0	0	0	0	1	2	-1	1	1	0	1	1	0	2	1	+1
Sumbagsel	2	2	0	3	1	+2	2	2	0	2	2	+1	2	3	0	2	1	+1	2	2	0	2	2	0	2	2	0	2	1	+1
Area 2	2	2	0	2	2	0	2	2	0	3	2	+1	3	3	0	2	2	0	2	2	0	2	2	+1	3	2	+1	2	2	0
Central Jabo	3	3	0	3	2	0	2	2	+1	0	0	0	4	3	0	2	2	0	3	2	+1	0	0	0	4	1	+3	3	1	+2
Western Jabo	2	2	0	2	2	0	1	2	-1	2	2	0	3	2	+1	0	0	0	2	2	0	0	0	0	3	4	-1	2	1	+1
Eastern Jabo	2	2	0	1	1	0	2	2	0	4	2	+2	3	2	+1	2	1	+1	2	3	-1	3	2	+1	3	2	+1	2	2	+1
Jabar	2	2	0	2	2	-1	1	2	0	3	2	+1	2	2	0	2	2	0	1	2	-1	2	1	0	0	0	0	1	2	-1
Area 3	3	2	0	2	2	0	3	3	0	3	3	0	2	2	0	2	3	0	2	2	0	3	2	+1	3	2	+1	4	4	0
Jateng DIY	3	3	0	2	2	-1	3	3	0	4	4	0	2	2	0	1	2	0	1	2	0	2	2	0	4	2	+2	5	5	0
Jatim	3	2	0	2	2	0	3	3	+1	1	2	-1	2	2	+1	3	3	0	2	2	0	4	3	+1	0	0	0	5	5	-1
Bali Nusra	3	2	+1	2	2	0	3	3	0	4	3	+1	2	2	+1	0	0	0	2	1	0	3	2	0	2	2	0	2	1	+1
Area 4	2	2	0	3	3	0	3	3	0	2	2	+1	2	2	+1	14	15	-1	2	3	-1	2	2	0	1	2	0	2	1	0
Kalimantan	2	2	0	4	3	+1	2	2	+1	2	1	0	3	2	+2	0	0	0	2	4	-2	2	3	-1	1	2	0	2	1	+1
Sulawesi	2	2	0	2	2	0	2	2	0	3	2	+1	1	2	0	0	0	0	1	1	0	2	2	0	0	0	0	1	1	0
Puma	3	3	-1	3	5	-2	4	4	0	0	0	0	0	0	0	14	15	-1	3	3	0	0	0	0	0	0	0	2	2	0

Base: Respective Fixed WiFi users | 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



Thank You