

# FIXED BROADBAND SATISFACTION SURVEY

REPORT  
2015





# FIXED BROADBAND SATISFACTION SURVEY: A Study on Residential and Business Broadband Users in Indonesian Cities.

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# ABOUT PUSKAKOM UI

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The Communication Research Centre, Department of Communication, Faculty of Social and Political Sciences, University of Indonesia (Puskakom UI) engages in basic and applied research, conducts trainings, conferences, and public lectures in the field of communication and media. As a multidisciplinary research body, we specialise in media and communication research.

We aspire to contribute to the relationship between the academic community and the public, by organising research, which transforms with the developments of technology and information in society.

Through high quality, accountable and rigorous basic and applied research, Puskakom UI continuously strives to contribute to evidence-based policymaking and to inform the public of new ways of communication, as well as contemporary media issues. Affiliated with the Undergraduate, Postgraduate, and International Communication Class under the Department of Communications, University of Indonesia, Puskakom UI has developed expertise in large, survey-based and highly contextualized ethnographic studies regarding information and communication technology, digital media, communication strategy, corporate communication audit, stakeholder mapping, media ethnography, and media commercialisation.

## OUR OBJECTIVE

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To become a communication research, data, and training centre that links between academics, practitioners, policymakers and the public in order to contribute to the Indonesian society.



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“

**We are a research  
body dedicated  
to nurturing  
knowledge.**



**By focusing on media and communication research, we transform together with the developments of technology and information in society.**

**”**

# INTRODUCTION

This research seeks to understand the satisfaction level of fixed broadband users. The study looks specifically at Residential Users (Residential Gated Communities, and Apartment) and Business Users (Small/Medium Business owner, and Office). The research also looks at how fixed broadband connections are provided, whether the users have the freedom to choose the provider or not. Finally, the research tries to see whether this freedom to choose a provider affects the user satisfaction level. The research was conducted in 33 Provinces throughout Indonesia with a total sample of 2,057.

This study found that the majority of Residential and Business Users are satisfied with their internet use and services provided by their Internet Service Providers. Internet use here comprise activities they conduct with their connection, such as sending and receiving emails, transferring files, downloading music and streaming, audiovisual communication, and CCTV. While services include those related to customer services that provide solutions, timely billing, quick installation, bonuses, added services, multi-method payment options, and having no hidden costs.

The majority of Users felt that their broadband internet experience is as they had expected before installation. Most of them use their connection to check email and social media. Overall, the majority of Residential Users felt that the quality of their ISP is as expected, whilst Business Users felt that it is as expected or beyond expectation.

Around half of all Users across all Residential and Business categories have exclusive broadband connectivity. This implies the presence of another ISP option in their area, but for one reason or another, they are prevented from switching. However, exclusivity did not result in lesser satisfaction among Users.

Based on the findings, PUSKAKOM UI cannot suggest that broadband exclusivity as a contributing factor to fixed broadband internet user satisfaction. Rather, the findings suggest that user satisfaction is more influenced by services and, to a lesser extent, by the product (connection speed and connection stability). Users who reported that their experience exceeded their initial expectation also reported the greatest satisfaction, regardless of exclusivity.

# KEY FINDINGS

## MAIN FINDINGS

The majority of Residential and Business Users are either “somewhat satisfied” or “satisfied” with their internet use and services provided by their ISPs.

Among Residential Users, satisfaction level based on connection speed is relatively constant, except for those with very high connection speed (above 99 MBps).

Among Business Users, satisfaction level is similarly high with around half feeling “satisfied” or more, and this is apparent in across all connection speeds.

Among Residential Users, connection stability affects their level of satisfaction more than their connection speed

Among Tenant Users, both connection stability and connection speed affects their level of satisfaction equally.

Among Business Users, both connection stability and connection speed affects their level of satisfaction equally.

The effect of ISP Services and Product on user satisfaction is stronger among Business Users.

The majority of Residential and Business Users read the subscription agreement with their ISPs. The most disadvantaging clause for both types of users pertains to cost change/fine.

The majority of both Residential and Business Users who are unsatisfied with their broadband subscription have thought about changing ISPs.

Around half of Residential and Business (both 53%) broadband users would not mind paying more for a better broadband internet services, which refers to better connection stability and higher connection speed.

Overall, users find that their experience of using internet and services they receive from providers are as expected.

However, a deeper look reveals that over a third of Business Users felt their user experience and the services received are below expectation.

The majority of Residential Users expected their broadband internet subscription to allow them to check email, browse social media, perform regular file transfers, and browse reading materials.

The majority of Residential and Business Users across all categories have an exclusive broadband subscription.

According to property managers, the main reason for broadband internet exclusivity is having no other ISP choice. This is consistent across all user categories.

Satisfaction is influenced more by services provided by ISPs rather than actual internet use experience.

# METHODOLOGY

The objective of the research is to determine the satisfaction level of fixed broadband users. It also studies whether it fluctuates in places that are subject to internet access provider exclusivity, and why. The methodology section explains the reasons behind defining “Fixed Broadband Internet Access”, the criteria of respondents, the definition of target area, research goals and objectives, research framework, method of data collection and its phases, the conceptual framework, instruments for data collection, analysis techniques, and probable expected findings. Each sub-section is supported by data and the best methodological consideration possible, both theoretically and empirically, in order to achieve the research objective.

# FIXED BROADBAND INTERNET ACCESS: DEFINITION

The term “fixed broadband Internet access”, also known as “hardwired broadband access”, refers to high-speed Internet access (more than 2 Mbps) provided/delivered by technologies using wires or cables to the customer’s location (e.g. DSL, Hybrid Fiber Coaxial, Fiber to the Home). This definition excludes other types of internet access, such as, dial-up, satellite broadband, mobile broadband. This research considers only fixed broadband Internet access.

# RESEARCH OBJECTIVE

This research aims to determine the satisfaction level of fixed broadband users and whether it fluctuates in places that are subject to internet access provider exclusivity based on their business and/or residential areas.



# Research Questions

**WHAT**

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**What is the percentage of fixed broadband users who cannot choose internet service providers due to an arrangements made by their property owner/management or other reasons?**

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**What is the quality of the fixed broadband as perceived by the users**

# Research Sub-Questions

**What is the percentage of target areas with fixed broadband exclusivity (i.e. do not allow other ISPs to enter the premises)?**

**Regardless of exclusivity, what is the satisfaction level of fixed broadband users in target areas? Why?**

**What is the satisfaction level of fixed broadband users in target areas with fixed broadband exclusivity? Why?**

**What is the satisfaction level of fixed broadband users in target areas without fixed broadband exclusivity? Why?**

**What is the percentage of users who cannot choose fixed broadband service providers? Why?**

**What is the quality of the fixed broadband service as perceived by the users (in all target areas, in target areas with exclusivity, in target areas without exclusivity)?**

**What is the expected level of quality of the fixed broadband service?**

**What are the reasons for having the exclusivity (i.e. not allowing other fixed broadband providers to enter the premises)?**




# “TARGET AREA”: WHERE THE RESPONDENTS ARE

This survey narrows the scope of research to respondents within specific areas to assess how satisfaction levels vary between areas with or without internet access exclusivity.

Residential User respondents are individuals living in highrise apartment buildings (more than 10 stories) or, where such structures are not available, housing complexes that are managed by developers/ building managers. Similarly, for Business Users, the survey respondents are individuals who work in high rise office buildings, or where such buildings do not exist, office compounds that are managed by developers/building managers.

Therefore, in this survey we explicate “Target Area” as “highrise apartment or office building (more than 10 stories, with or without shopping center) or residential complexes managed by a developer. In these locations, the building owner/management and/or the developer have the final say on the choice of fixed broadband internet service provider.”

These Residential and Business “Target Areas” are further divided, as follows:

	TYPE	DESCRIPTION
<b>INDIVIDUALS LIVING IN RESIDENTIAL “TARGET AREA”</b>	 HOUSING COMPLEXES	Residential neighborhoods developed and managed by developers.
	 APARTMENT BUILDINGS	High rise apartment buildings, preferably taller than 10 stories, managed by developers. Where a 10-story apartment do not exist, the tallest residential structure in town.
<b>INDIVIDUALS WORKING IN BUSINESS “TARGET AREA”</b>	 SHOPPING MALLS	Shopping malls managed by building management and small business tenants providing broadband internet access to their customers.
	 OFFICE BUILDINGS	Office buildings managed by building management, preferably taller than 10 stories. Where 10-story office buildings do not exist, the tallest office structure in town that provides broadband internet access to its tenants.

# POPULATION AND SAMPLING

A total of 2,000 respondents were recruited to represent the residents and the tenants of the “Target Areas” in 34 provinces in Indonesia. This research looks at three types of consumer respondents: Residential, Business, and Building Manager.

The team followed four steps to determine the sample:

1. Generate a sampling frame from publicly available data of developers in Indonesia.
2. Obtain a sampling frame from the Indonesian Association of Shopping Centre Managers (*Asosiasi Pengelola Pusat Belanja Indonesia*—APBBI), Indonesia Stock Exchange (*Bursa Efek Indonesia*—BEI), and local scouts (rapid listing, explained further in the next section).
3. Identify the locations of units owned by the developers in the sampling frame: office buildings and shopping malls (Business Users) as well as apartments and housing complexes (Residential Users).
4. Randomise.

The study applied cluster sampling with equal sample allocation for each city in 34 provinces, whereby the total population is divided into groups (or clusters) and a simple random sampling of the groups is conducted. The study opted for this technique, rather than proportional sampling, to avoid a high disparity of respondents between cities with higher and lower population density and ensure that all cities are equally represented in the study. A proportional sampling, based on a city’s total population number, would have resulted in big cities, such as Jakarta, Surabaya, Medan, overriding the samples from eastern parts of Indonesia, for instance..

With a total sample (N) of 2,000

there will be

8 (eight)

“Target Areas”  
in each city:

2 (two) apartments,  
2 (two) housing complexes,  
2 (two) shopping centres, and  
2 (two) office buildings (a total  
of 272 units for 34 provinces).

Each unit should collect 7  
(seven) respondents (a total  
1,904 respondents for 34  
provinces) and the remaining  
96 respondents will be  
distributed proportionally  
across 34 provinces.

272 building manager  
respondents will be included  
in the research by means of  
a mini questionnaire.

# INDONESIA

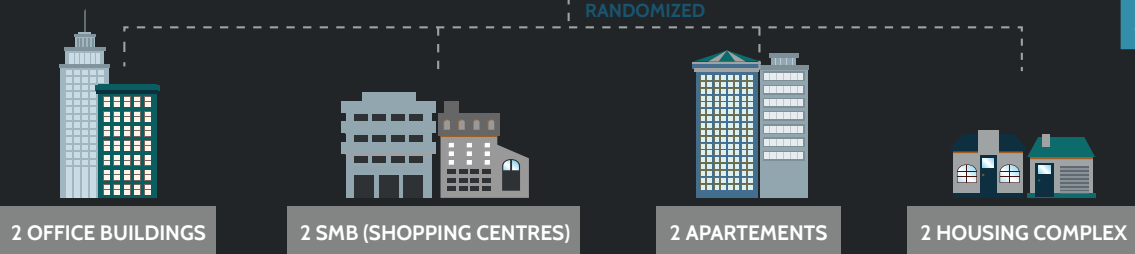


34 cities are selected based on:  
• Capital city of the province  
• City that represents its province  
• Property developer availability

34 Provinces



34 Cities

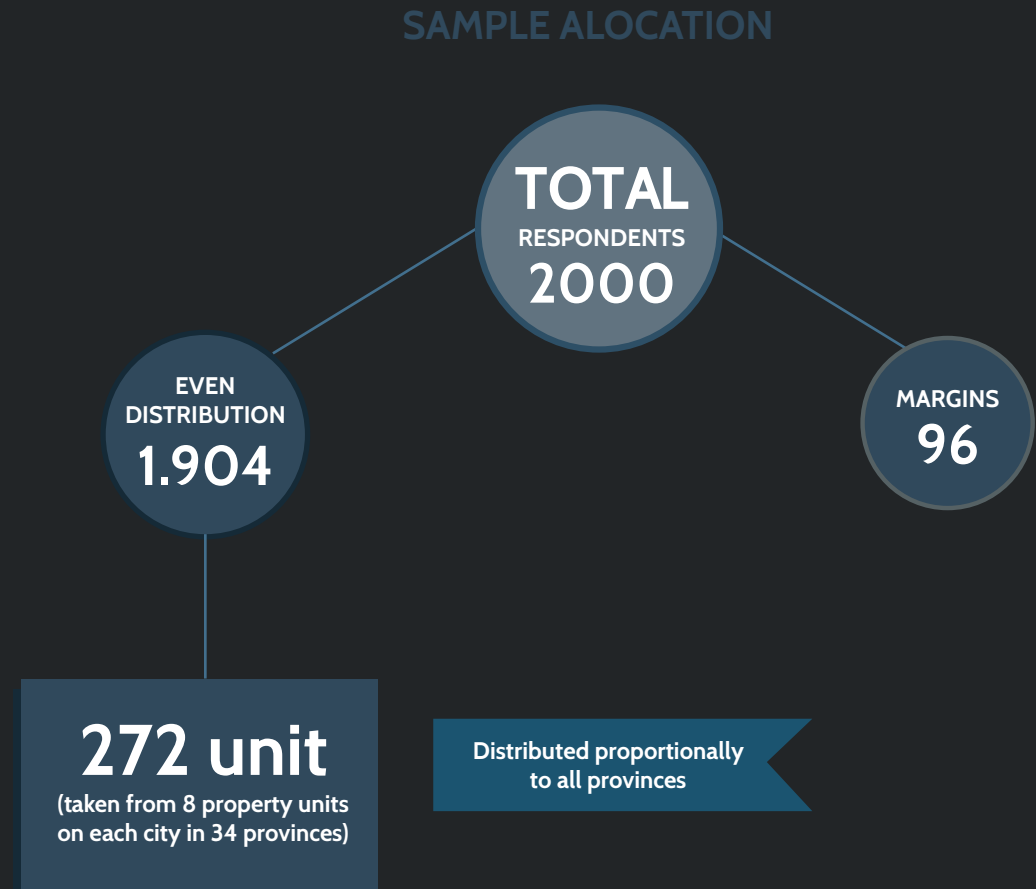


7 respondents for each building/  
home/ apartment  
( Total 1.904 respondents)

## Additional field notes:

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- Cities selected based on random sampling are generalizable for the province.
- A map of the total population, and the spread of developers, will be available. This sampling frame is completed through rapid listing by local scouts.
- Unit of measurement is location (Target Area).
- Should a unit not be available in a province, respondents in an area will be reallocated proportionally to the sample framework and the allocation would be emphasized toward “Residential” category (i.e. if there is no office building or SMB available).
- According to the target area definition in the city, the sample will be allocated to respondents in Residential area, which consist of respondents living in housing and apartment.
- The ratio between residential respondents, business-office, and tenant-shopping mall respondents is (approximately) 1000 to 500 to 500 respondents respectively. Relative to conditions in the field, in the case of the absence of a defined “Target Area”, the respondents shall be reallocated to the residential category.
- “Building management” respondents: enlist all the building managers and operations managers from each of the target areas that are part of the sampling frame, i.e., 272 respondents for the 272 buildings surveyed.



TYPE

DESCRIPTION

**RESIDENT:  
INDIVIDUALS LIVING  
IN "TARGET AREA"**



HOUSING COMPLEX

The person is a resident in the housing complex.  
 The person subscribd to a fixed broadband internet service at the apartment/house.  
 The person went through the process of application until installation of the internet access.  
 The person is aware of subscription package price.  
 The person uses the fixed broadband internet service at the premises regularly.



APARTMENT BUILDING

The person is a resident of the apartment (in a high rise building).  
 The person is subscribed to a fixed broadband internet service at the apartment/house.  
 The person went through the process of application until installation of the internet access.  
 The person is aware of subscription package price.  
 The person uses the fixed broadband internet service at the premises regularly.



OFFICE BUILDING

Offices renting spaces in office buildings.  
 The person is the owner, or someone in charge of IT.  
 The person is at least 18 years old.  
 The office subscribes to a fixed broadband internet service.  
 The person went through the process of application until installation of the internet access.  
 The person uses fixed broadband internet service at the premises regularly, or is at least aware of the user experience of using the fixed broadband internet service.

**TENANT:  
INDIVIDUALS WORKING  
IN "TARGET AREA"**



SHOPPING MALLS

Coffee shops, restaurants, mini market, etc. in shopping malls.  
 The person is the owner, or someone in charge of IT.  
 The person is at least 18 years old.  
 The business subscribes to a fixed broadband internet service.  
 The person went through the process of application until installation of the internet access.  
 The person uses fixed broadband internet service at the premises regularly, or is at least aware of the user experience of using the fixed broadband internet service.

For both types of respondents, consumer-residential and consumer-business, the building managers of the "Target Area" is also studied. The criteria for a building manager is:

- a. The person is in charge of all matters related to internet access in the target area.
- b. The person is at least 18 years old.
- c. The building subscribes to a fixed broadband internet service.
- d. The person went through the process of application until installation of the internet access.
- e. The person uses the fixed broadband internet service at the premises regularly, or is at least aware of the user experience of using the fixed broadband internet service.

# CONCEPTUAL FRAMEWORK

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The fixed broadband user satisfaction questionnaire employs several main concepts, including consumer experience or journey (Court, David, 2009) and consumer attitude (Perner, L, 2010). The customer attitude determines the customer's judgment toward services given by the fixed broadband Internet providers in specific periods during his or her journey as a consumer.

## CONATIVE ASPECTS (BEHAVIOR)

**Perceptive ability to perform actions  
related to internet use.**

# Consumer Journey

## PRE-PURCHASE (CUSTOMER EXPECTATION)

The pre-purchase phase measures the customer's expectation, i.e. what kind of services they expect to get before purchasing. This includes their expectations about internet access at the time of installation, reasons to use, and whether they had internet service provider options.

### CUSTOMER EXPECTATION

- VALUE
- SENSING
- COGNITION
- AFFECTION
- BELIEFS
- SOCIAL INFLUENCE AND ENVIRONMENT
- PRODUCT KNOWLEDGE

PRODUCT PERFORMANCE EXPECTATION

## USE (CUSTOMER SATISFACTION)

The use phase measures the customer's emotions during their experience with internet access (what emotions they feel when using the Internet). This includes their emotions at the time of using and at the time of filing a complaint. Other indicators used to verify include responses the customer gets from the provider, as well as the importance of the services used.

## POST-PURCHASE (SHARING BEHAVIOR)

The post-purchase phase is essentially gauged by measuring the sharing behavior of customers after using their Internet access. This includes whether or not they share the product with others, whether they continue the subscription, as indicated by the emotions they feel.

### CUSTOMER PERCEPTION TOWARDS PRODUCT PERFORMANCE

TANGIBLES  
RELIABILITY  
RESPONSIVENESS  
COMPETENCE  
COURTESY  
CREDIBILITY  
SECURITY  
ACCESS  
COMMUNICATION  
UNDERSTANDING THE CUSTOMER

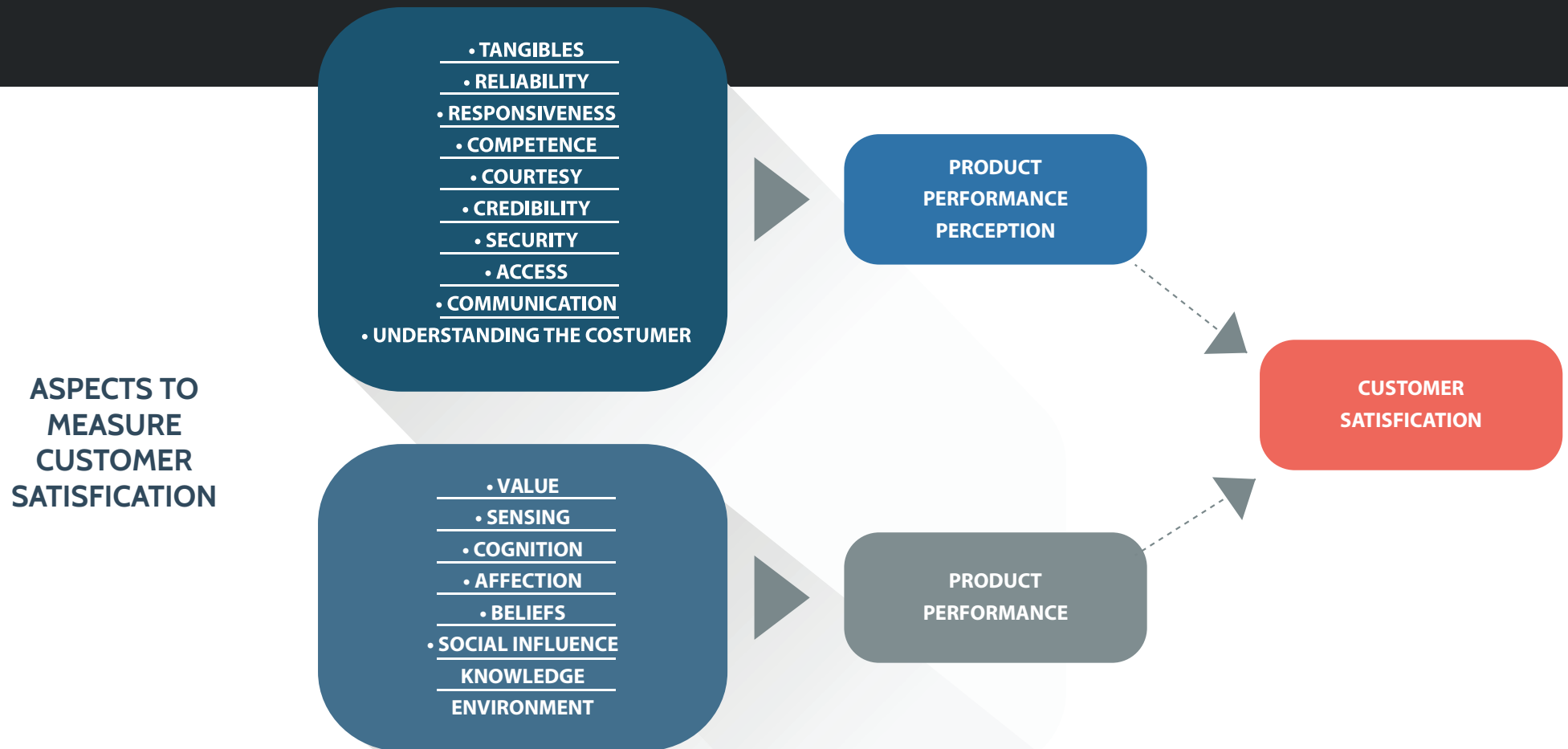
PRODUCT PERFORMANCE PERCEPTION



## MEASURING CUSTOMER SATISFACTION (ANCHOR QUESTIONS)

To measure the customer satisfaction level, the research team measured the gap between expectations during the pre-purchase phase with the emotion felt during the post-purchase phase. This is verified with anchor questions to check the consistency of the respondents' answers. This includes exploring what factors are perceived as a source of satisfaction and dissatisfaction

(Government, ministries, service providers, ISPs, the housing / apartments), priority needs to use the services, whether they recommended the product/service to others, their Satisfaction Index, and assessment toward services provided by ISPs.



# DATA COLLECTION

The concepts above were operationalized to develop questionnaires to collect data regarding Residential and Business Users. The questionnaires were arranged into parts that follow a consumer's journey. First, a questionnaire explores the consumer's pre-purchase experience by examining the respondent's expectations toward ISP services. Second, a questionnaire investigates customer experience of using internet service. Lastly, anchor questions verify the respondent's consistency in answering the questionnaires to ensure that they answered all research questions (see appendix 1, 2, 3 for questionnaires).

# ANALYSIS TECHNIQUE

After the data is input and processed, the team generated findings in these three steps:

- a. Descriptive analysis that explains the relationship between awareness, presence/absence of ISP, and satisfaction level (inferential statistics).
- b. Comparing/confirming findings against interviews with small business owners (triangulation with thematic content analysis).
- c. Measuring the relationship between limited internet access and consumer satisfaction.

Presence of more than one ISP correlates positively with higher consumer satisfaction. Absence of more than one ISP correlates positively with lower consumer satisfaction.

These analysis techniques follow the concepts described in point 10. The probable expected findings are:

**Ho:**

There is no difference in the satisfaction of fixed broadband users among those with limited and multiple accesses.

**Ha:**

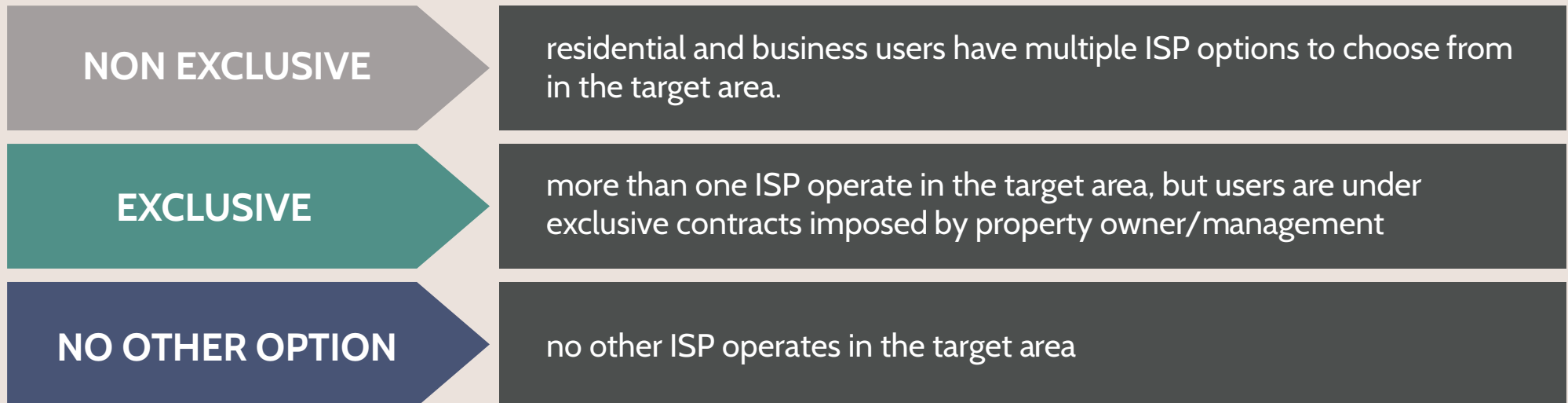
There is a difference in the satisfaction of fixed broadband users among those with limited and multiple accesses.

*Presence of more than one ISPs correlates positively with higher consumer satisfaction. Absence of more than one ISPs correlates positively with lower consumer satisfaction.*

**ANALYSIS**

This research aims to determine the satisfaction level of fixed broadband users and whether it fluctuates in places that are subject to internet access provider exclusivity.

Puskakom UI classifies three definitions of exclusivity based on the possible options that building managers, residential and business users have about selecting their ISPs:

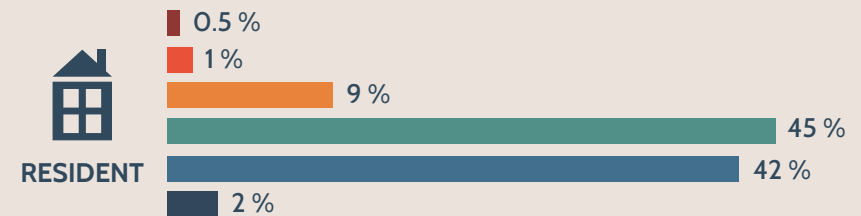


# MAIN FINDINGS

## SATISFACTION LEVEL

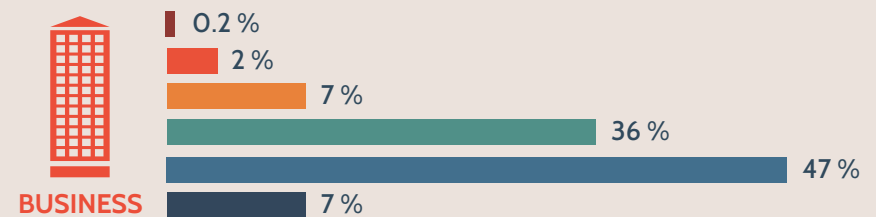
- percentage of satisfied users
- which items are most satisfying
- which items are most disappointing
- the rigour by which users study their legal rights
- whether this results in the urge to switch providers
- whether there are improvements in services and/or connection stability among users who have switched providers.

### A.1. Satisfied Users



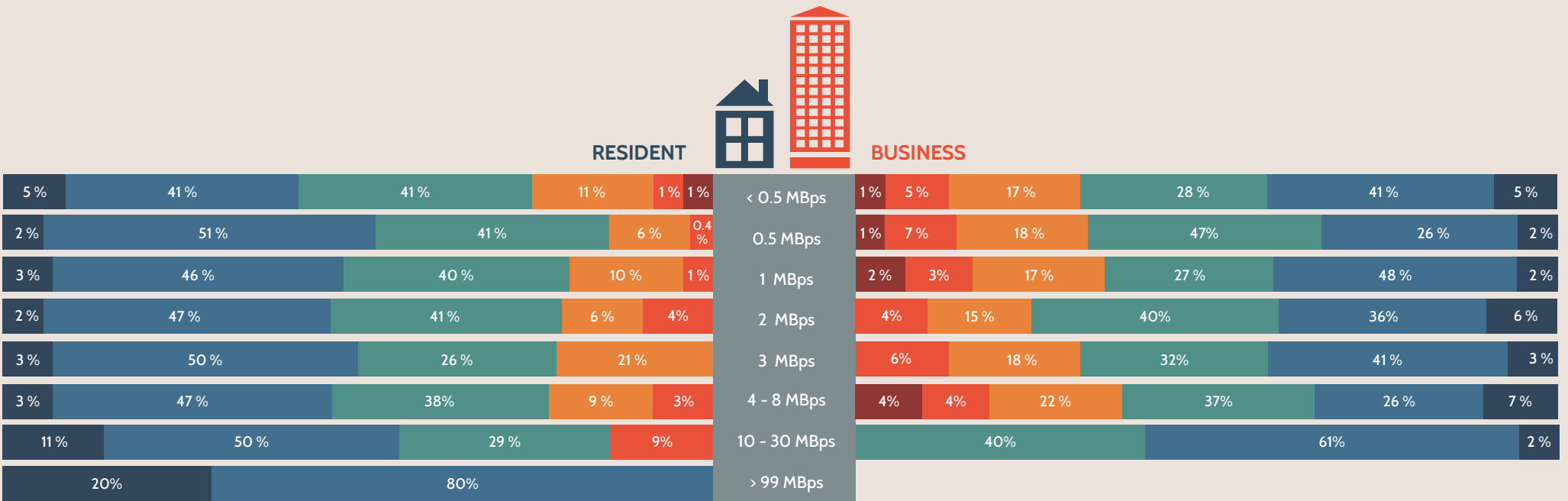
Graph 1. Residential User Overall Satisfaction

**87% of all Residential Users are either somewhat satisfied.**



Graph 2. Business User Overall Satisfaction

**83% of business users are either somewhat satisfied or satisfied.**



- very unsatisfied
- unsatisfied
- slightly unsatisfied
- somewhat satisfied
- satisfied
- very satisfied

Residential Users are generally satisfied, with around half feeling “satisfied” or “very satisfied”. Only at the highest connectivity all subscribers are satisfied, although they only amount to 2% of all Residential Users (5 people).

Similarly, Business Users are generally happy, with around half feeling “satisfied” or more, and this is apparent at all connection speeds.

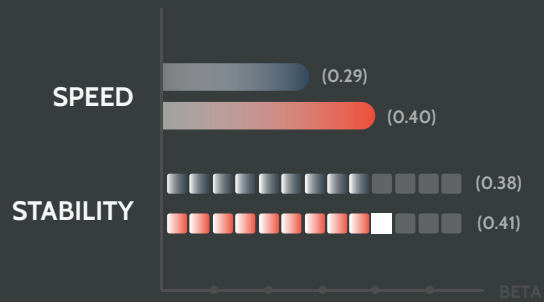
## A.2. Effect of Product and Services on Satisfaction

**How satisfied are you** by the connection stability and connection speed?

**How important** is connection stability and connection speed to your satisfaction?



## PRODUCT



(0.37)

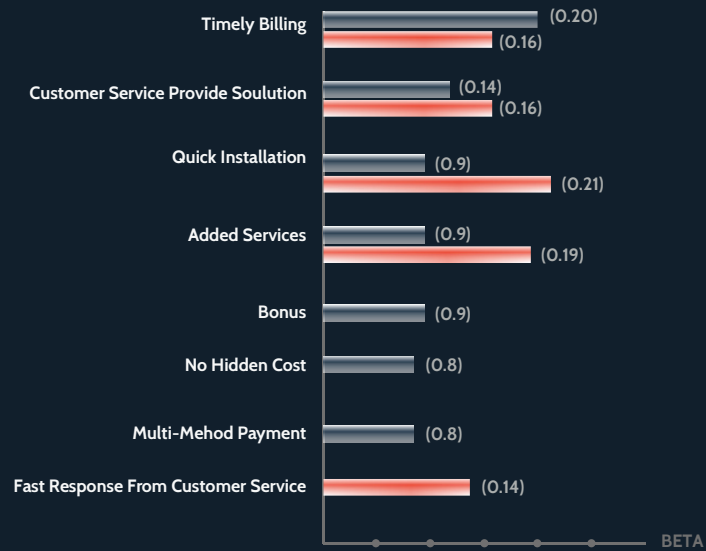


(0.19)

BETA

## OVERALL

## SERVICES



(0.44)



(0.27)

BETA



RESIDENT



BUSINESS

Among Residential Users, both connection stability and connection speed (Product) influence the overall Residential User satisfaction.

Among Business Users, both aspects influence the overall customer satisfaction more than they do among Residential Users.

Overall, for both user categories, connection stability influences satisfaction more than connection speed. This is consistent with the kinds of activities users are engaged in, namely email and social media.

**Overall, it is clear that for both Residential and Business Users, Services influence their satisfaction more than the Product itself.**

**The effect of Services and Product on user satisfaction is more pronounced among Business Users.**

**A.3. Unfavorable Subscription Clauses:**

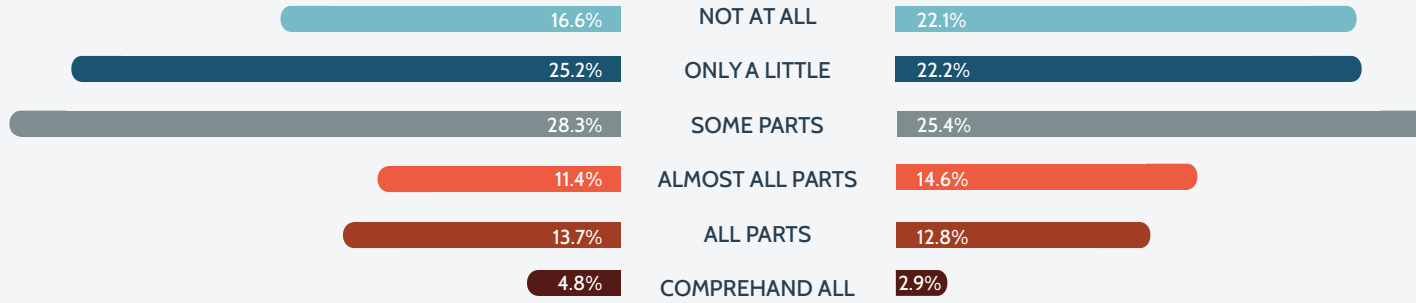
**DID YOU READ  
YOUR SUBSCRIPTION  
CONTRACT?**

**ANY UNFAVORABLE  
CLAUSES?**

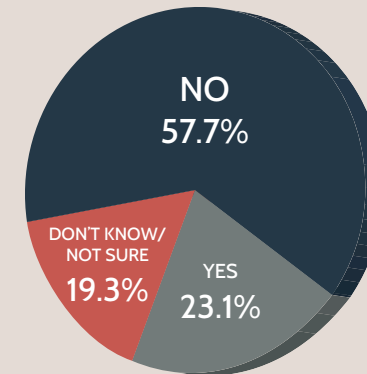
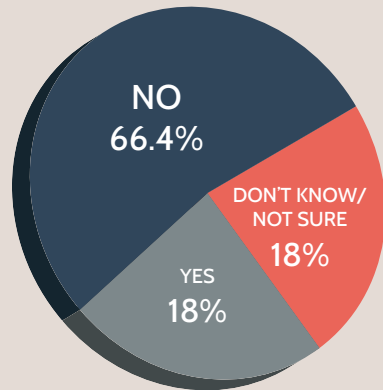
**WHAT ARE THEY?**



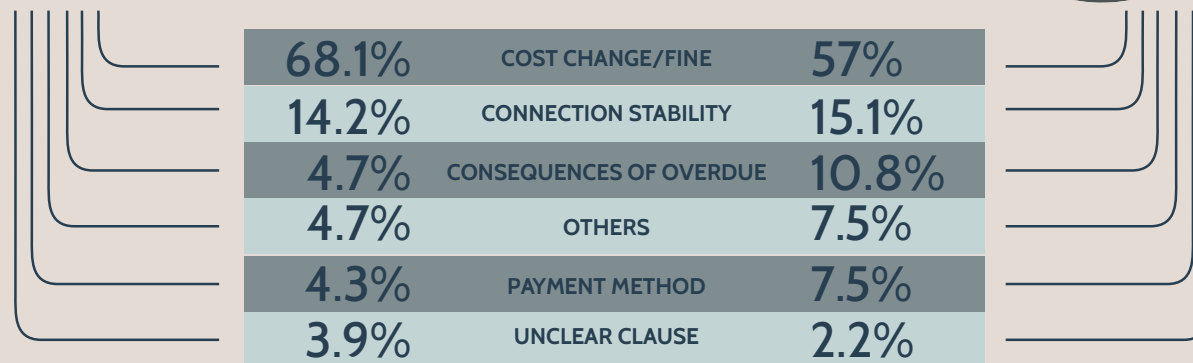
### DID YOU READ YOUR SUBSCRIPTION CONTRACT?



### ANY UNFAVORABLE CLAUSES?



### WHAT ARE THEY?



## FINDINGS (RESIDENTIAL):

MOST USERS

(84%)

HAVE READ THEIR  
SUBSCRIPTION CONTRACT

A QUARTER

(23.1%)

FIND SOME CLAUSES  
UNFAVORABLE

MOST OF THEM

(68.1%)

OBJECT TO  
COST CHANGE AND FINES

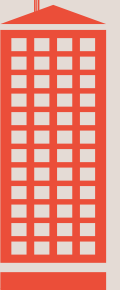


The majority of Residential Users have read the subscription contract with their ISP (84%).

Over half of them did not find any unfavorable clauses, and almost a quarter (23%) did find some unfavorable clauses, mostly concerning cost and subscription price change (68%).

The majority of Business users have read the subscription contract with their ISP (78%). Only 22% did not read at all. Over half of them did not find any unfavorable clauses.

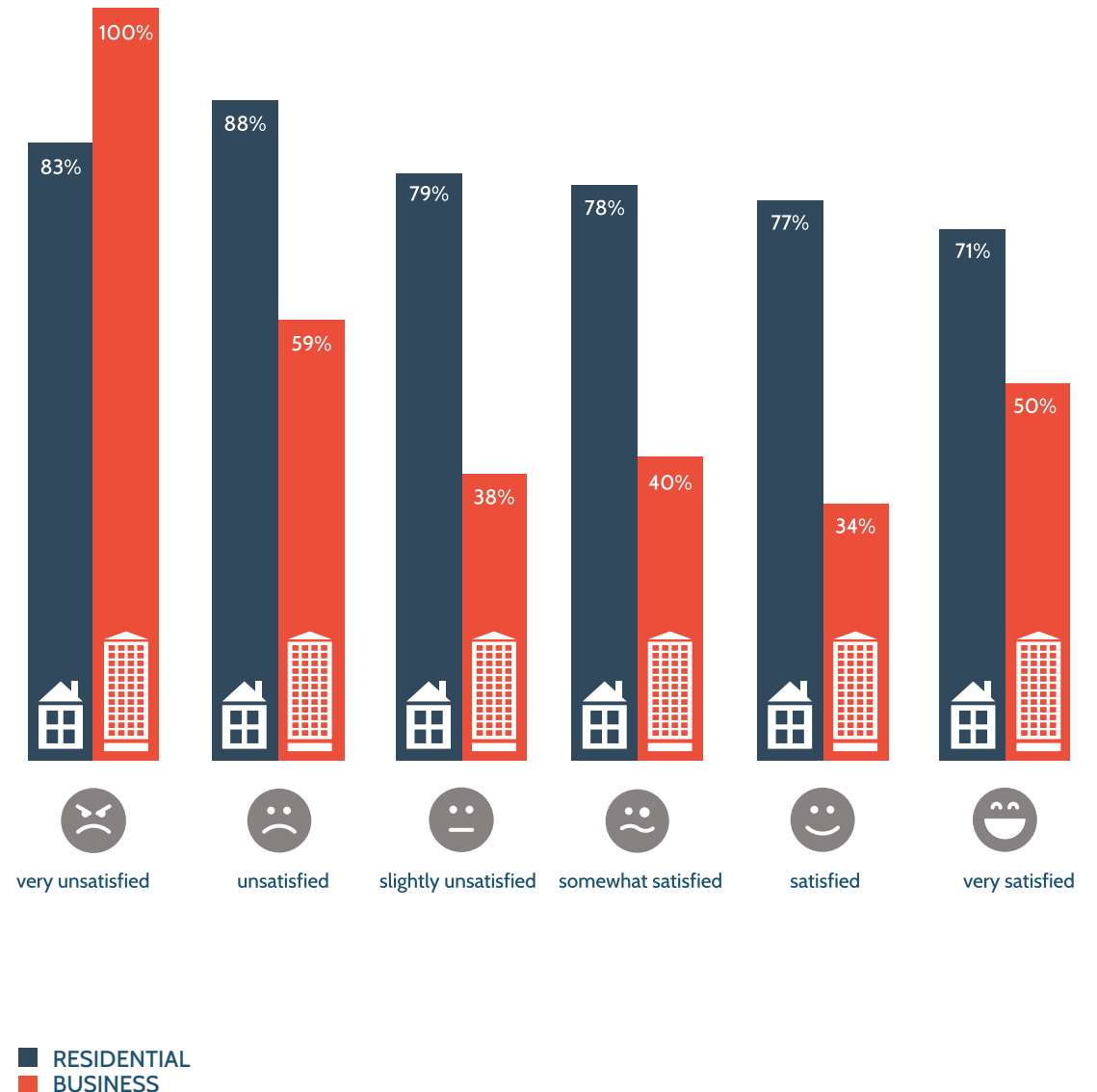
18% of users who did find unfavorable clauses were mostly concerned about change in subscription fee and penalties (57%).



## A.4. Motivation to Switch ISPs

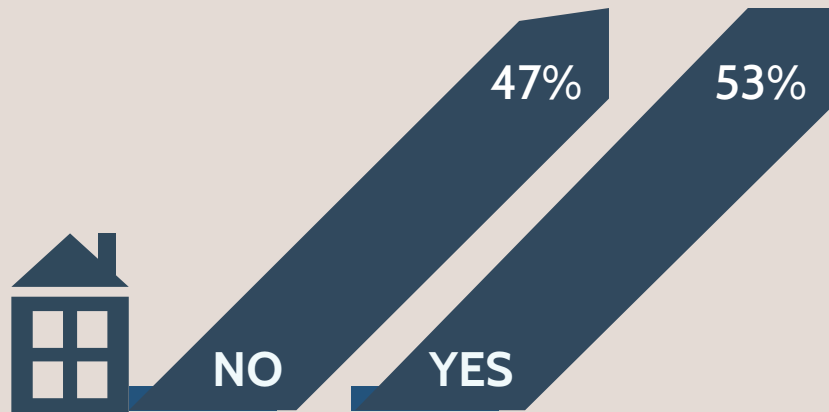
Despite their stated satisfaction, most Residential Users (over 70%) have thought about changing their broadband subscription.

All Business Users who are very unsatisfied with their broadband subscription had thought of changing it. The percentage decreases to around 59% and remains constant between 34% to 40% across higher levels of satisfaction. Interestingly, half of Business Users who are very satisfied with their broadband subscription have also thought about changing their ISP.

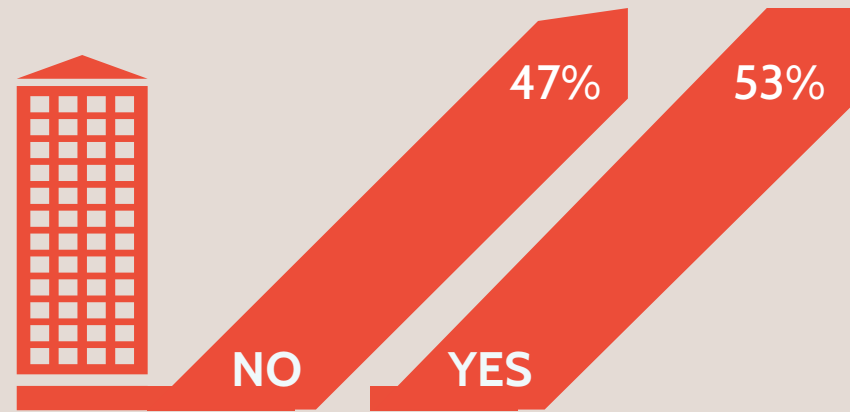


## A.5. Willingness to Pay for Better Internet

Will you pay for better connection stability and speed?



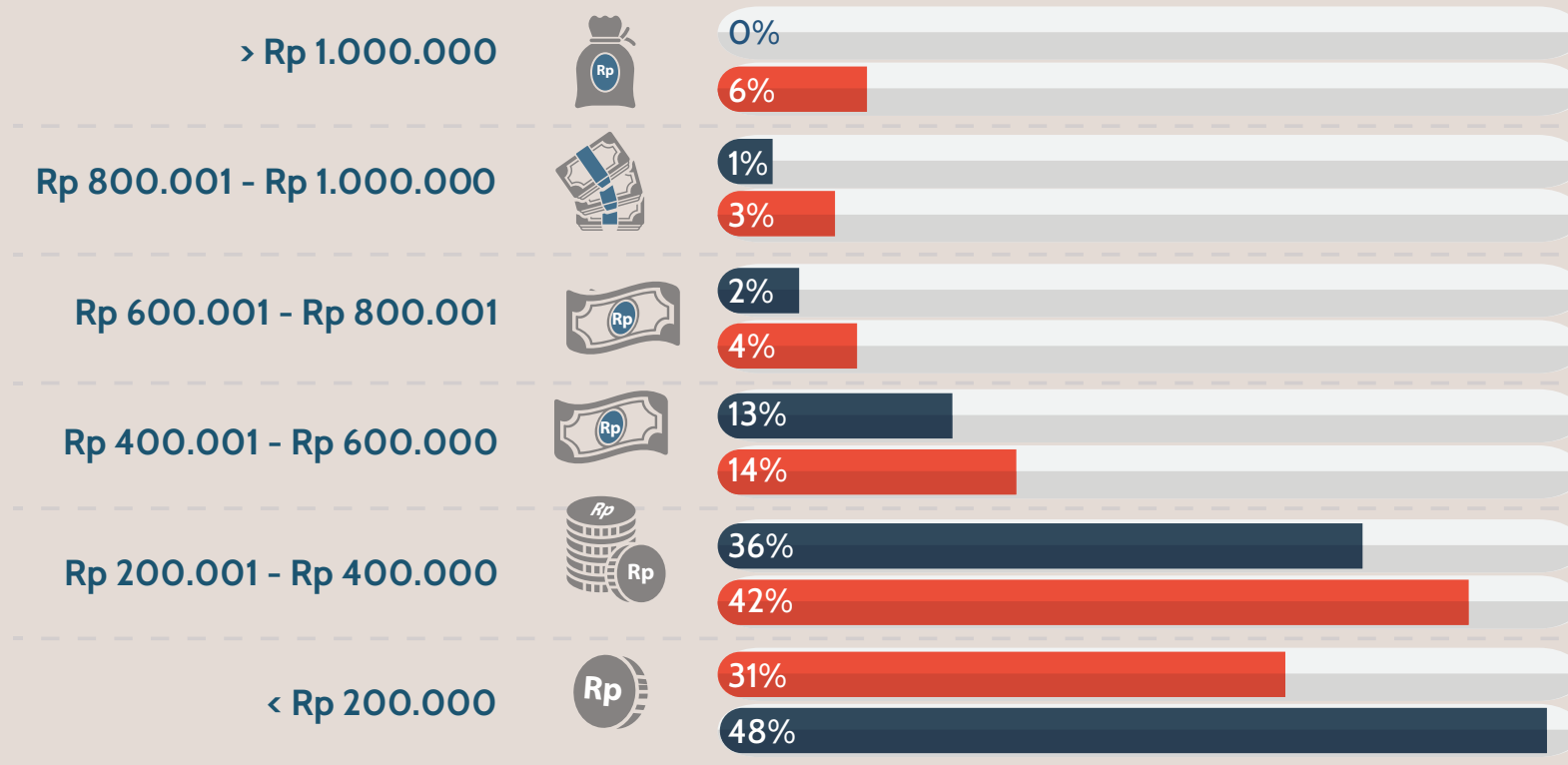
RESIDENTIAL



BUSINESS



# How much are you willing to pay?

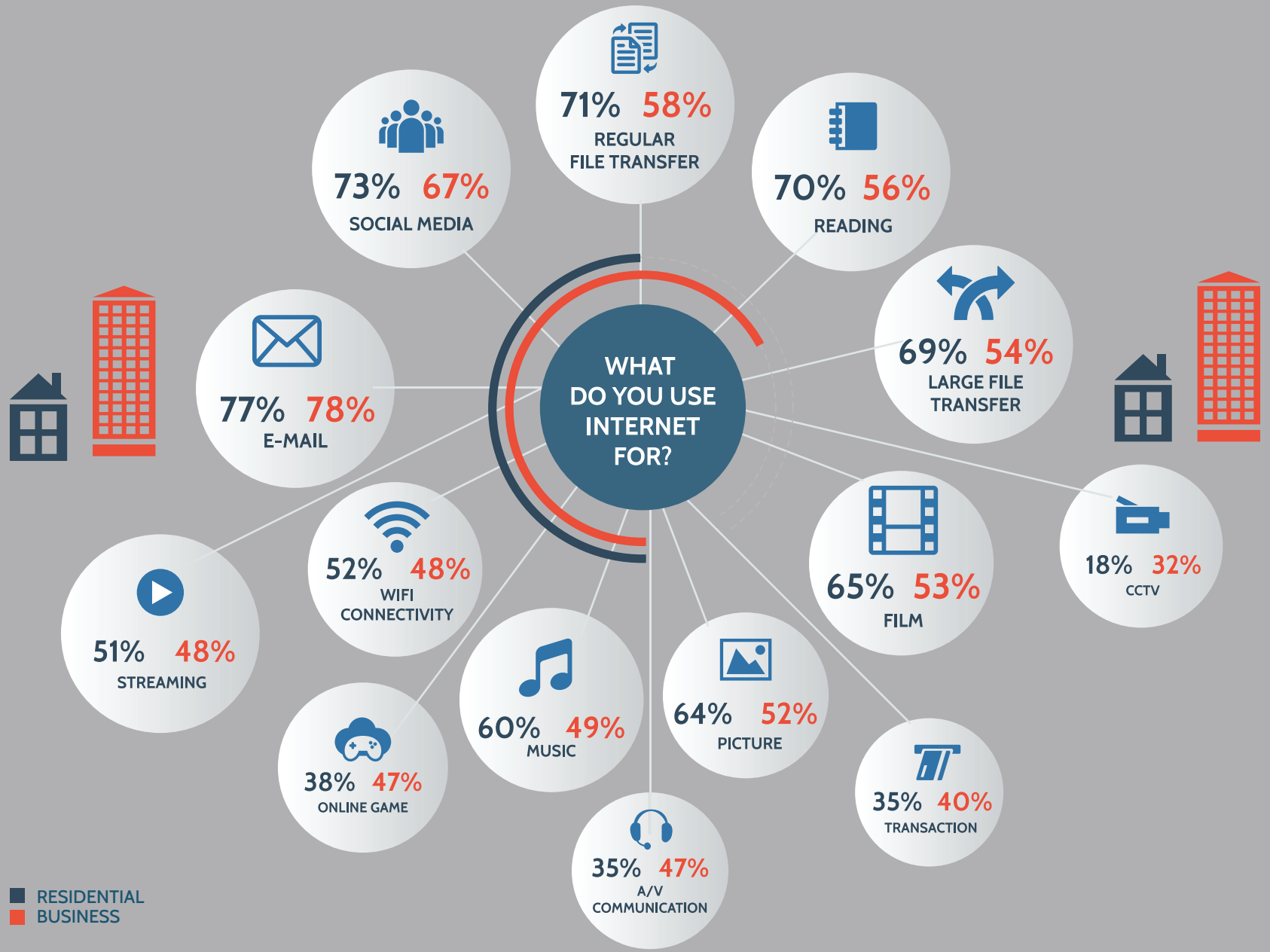


■ RESIDENTIAL  
■ BUSINESS

# QUALITY

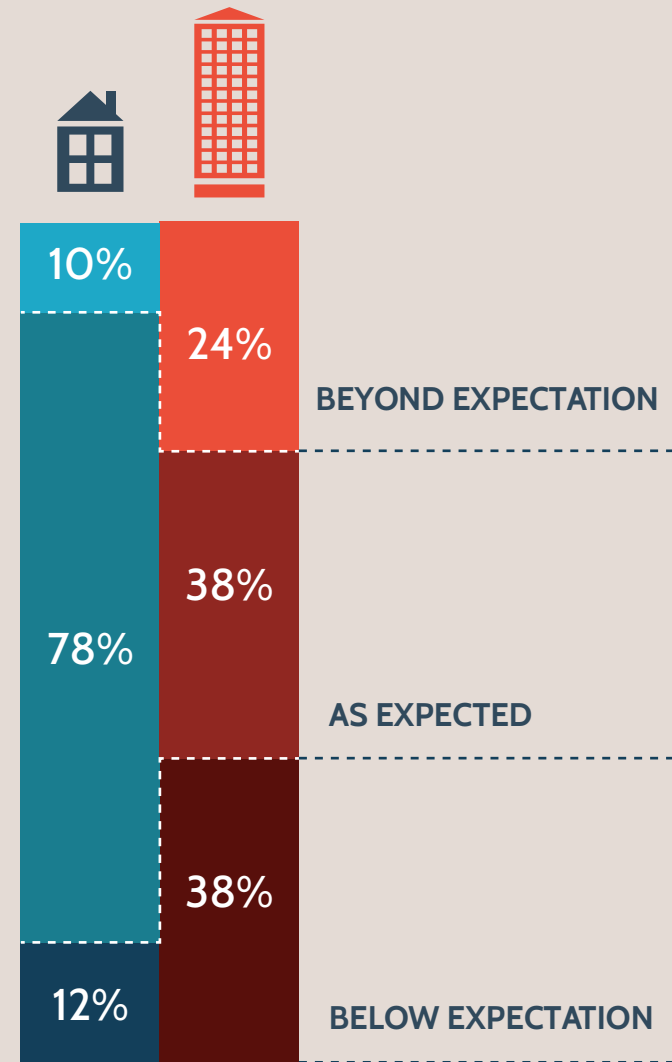
## B.1 Expected Quality

What do you do  
with your broadband  
internet access?

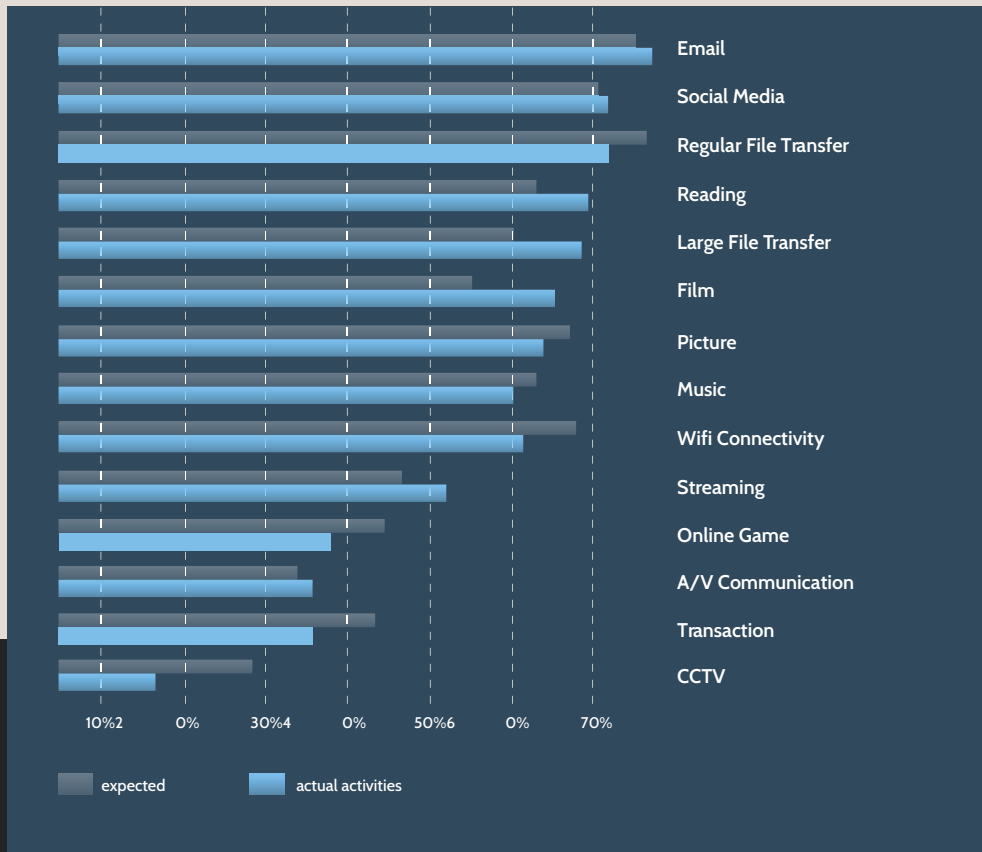


## B.2. Perceived Quality

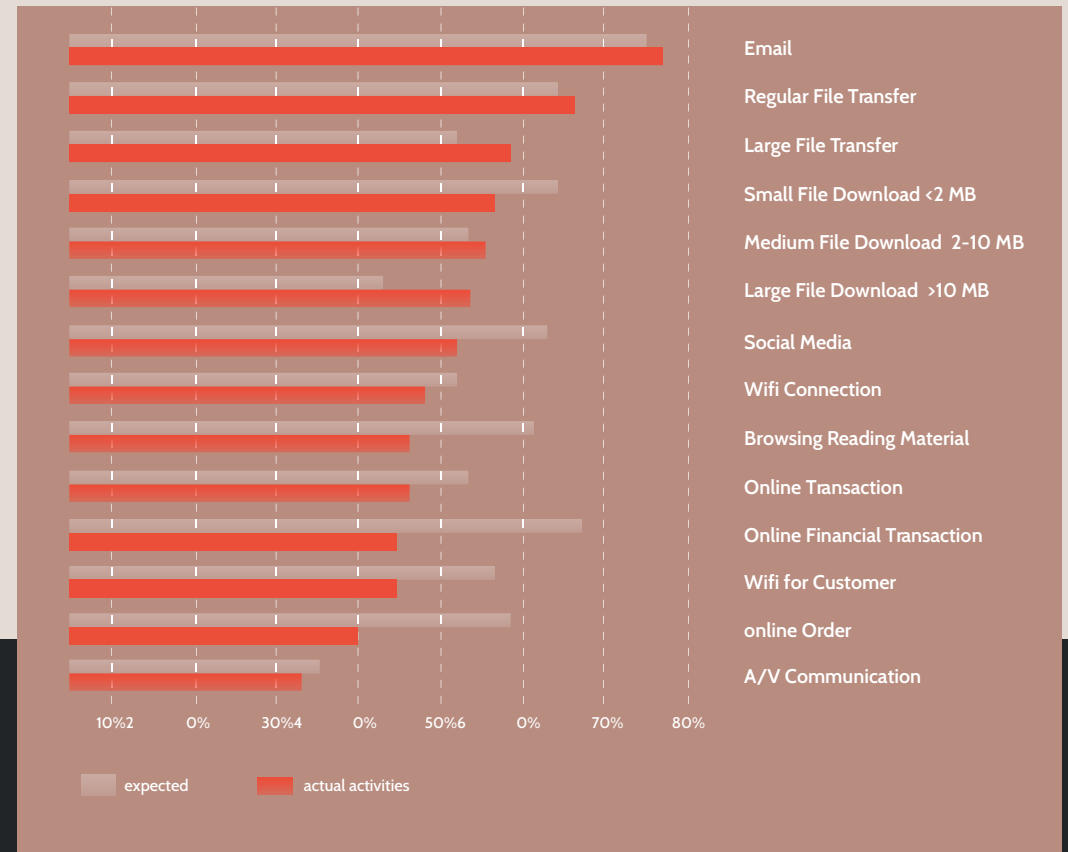
How is your experience using your broadband internet service for the activities that you do online?



## RESIDENTIAL



## BUSINESS



In general, all online activities evoke comparable positive emotions among both residential and business users.

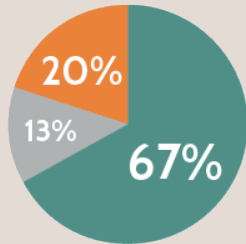
# EXCLUSIVITY

## C.1. The Number of Users and Their Internet Exclusivity

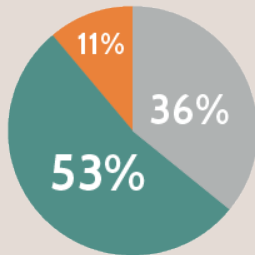
**What sort of contract  
do you have with  
your provider?**



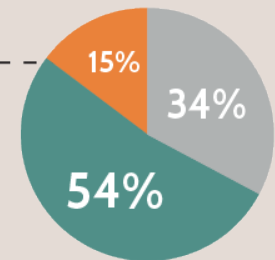
### APARTMENT



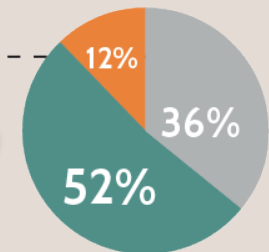
### LANDED HOUSE



### HIGHRISE OFFICE

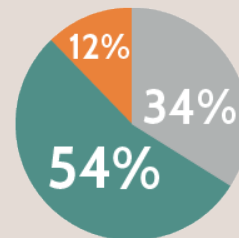


### LOWRISE BUSINESS

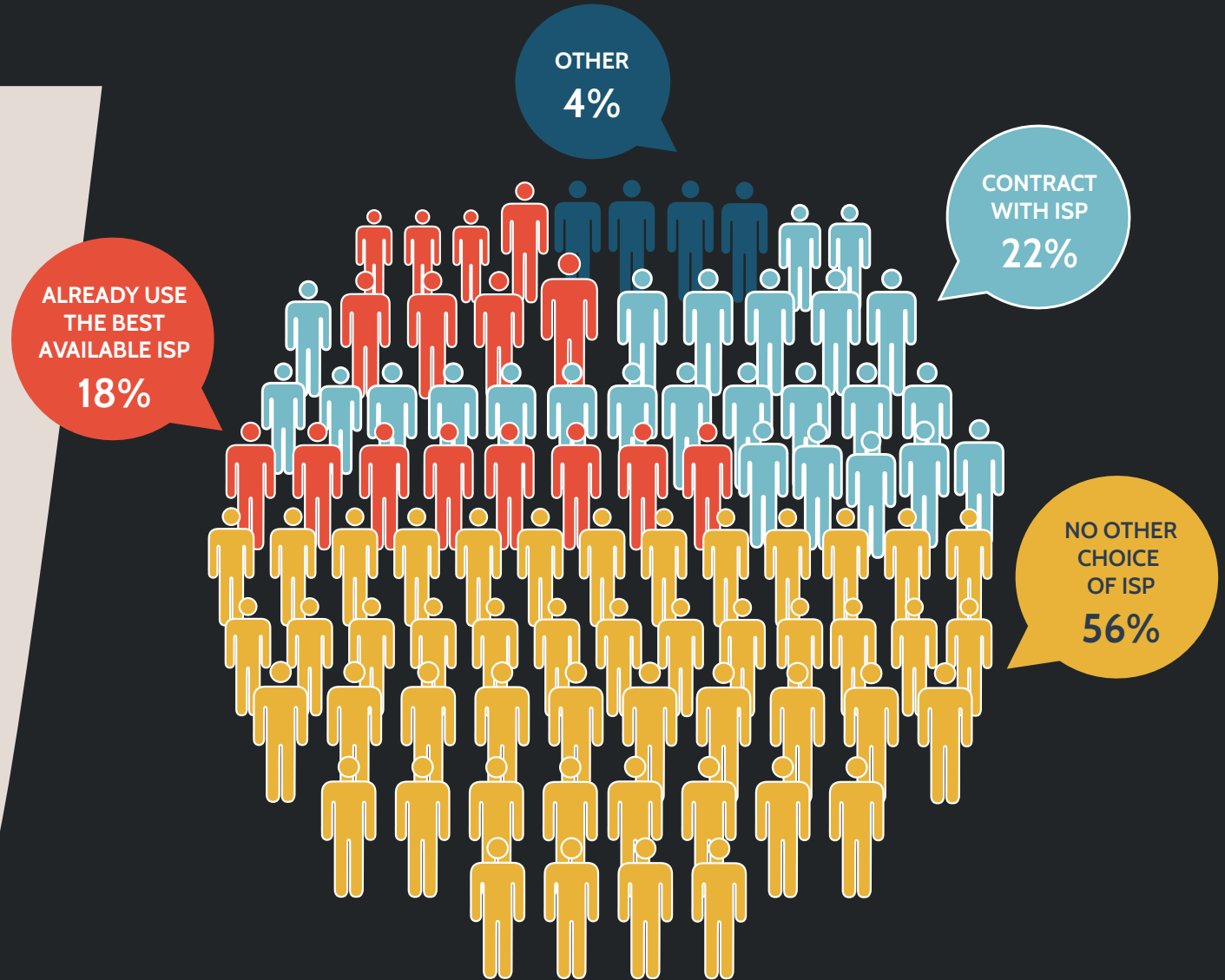


■ non exclusive  
■ exclusive  
■ no other option

### OVERALL

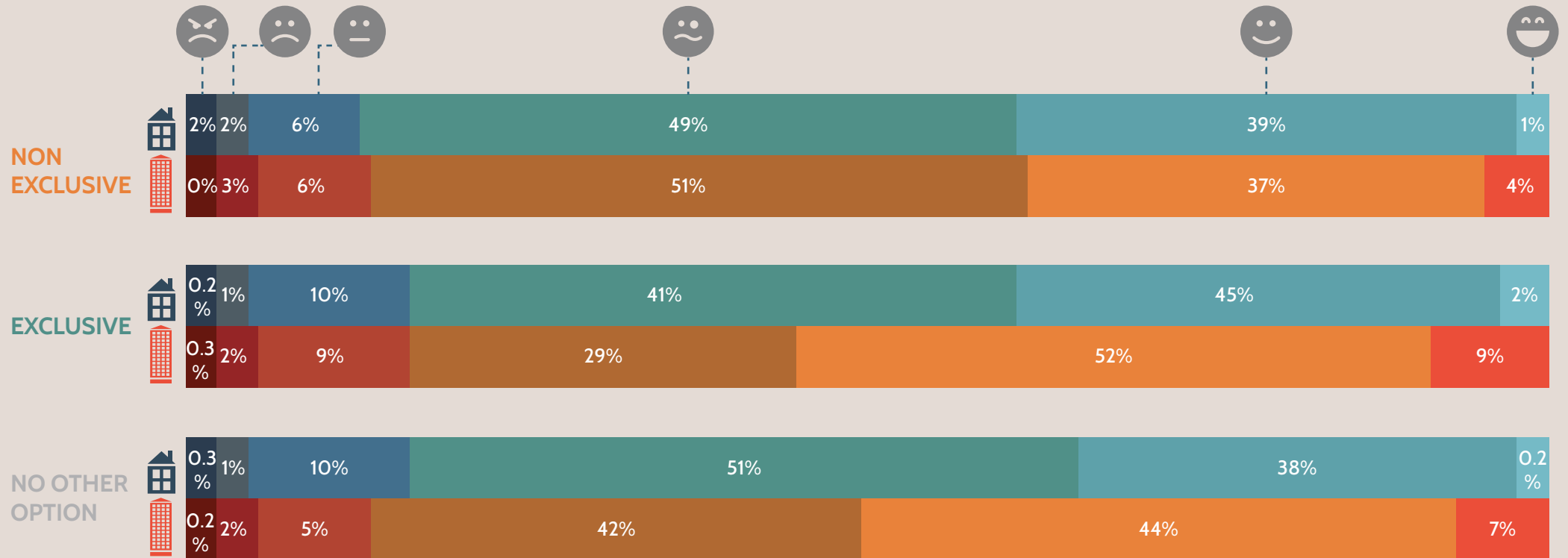


# What is the reason for ISP exclusivity? (building managers)

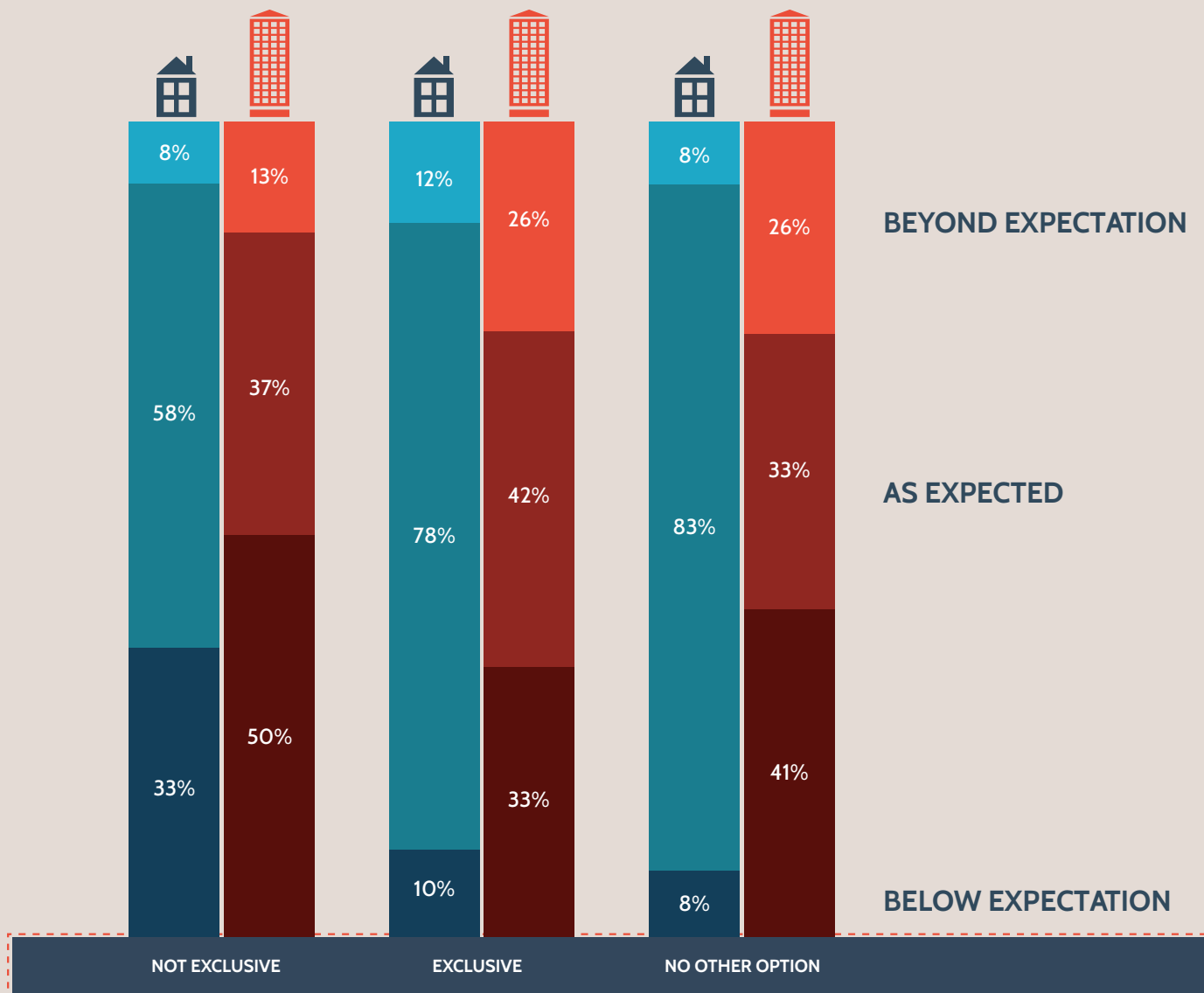




## C.3. Satisfaction Level and Internet Exclusivity



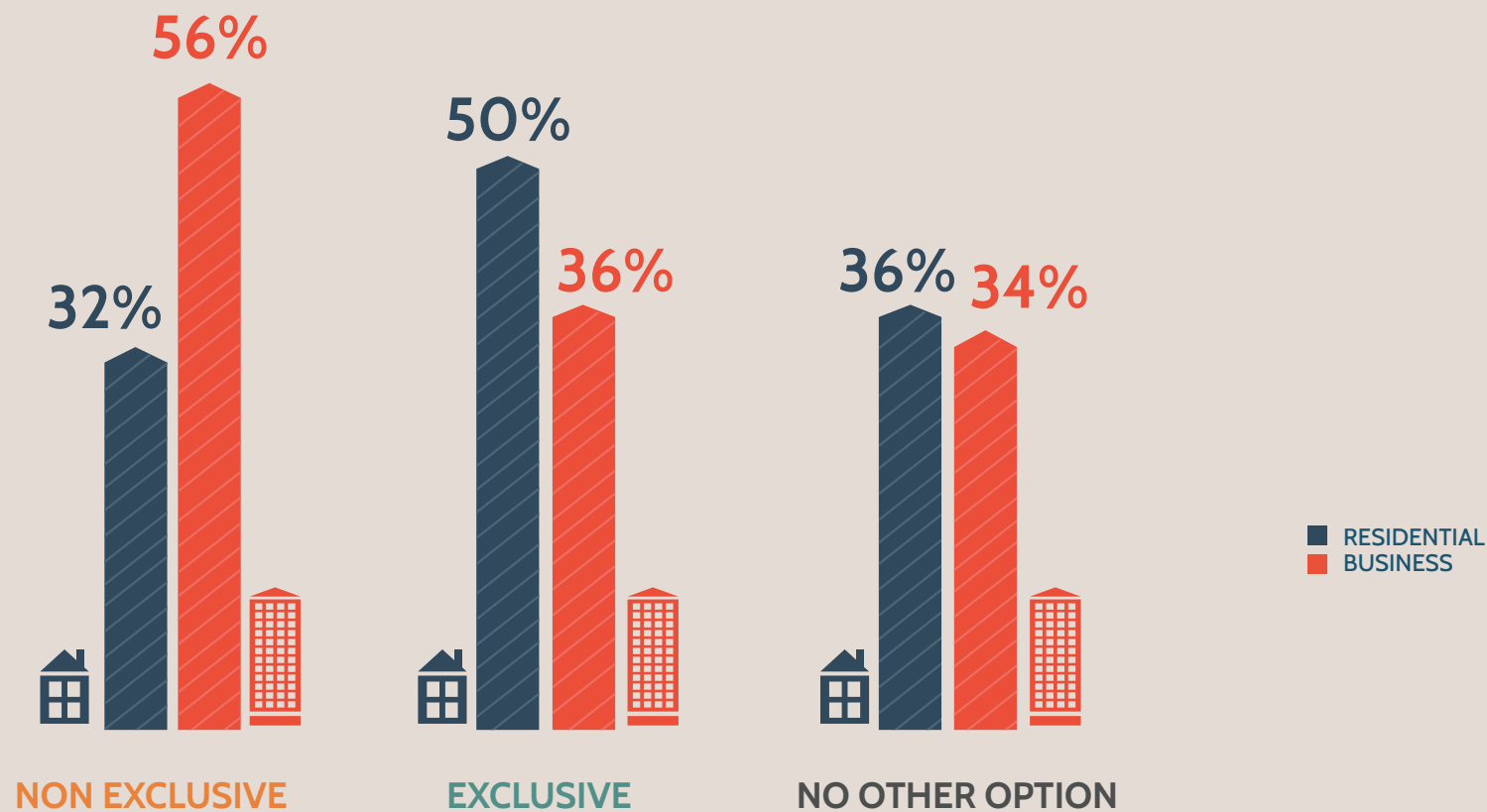
## C.4. Perceived Quality by Internet Exclusivity



How good  
is your  
broadband  
internet  
experience?

## C.5. Intention to Switch Providers and Internet Exclusivity

# Would you change your ISP if it were possible?



# ADDITIONAL

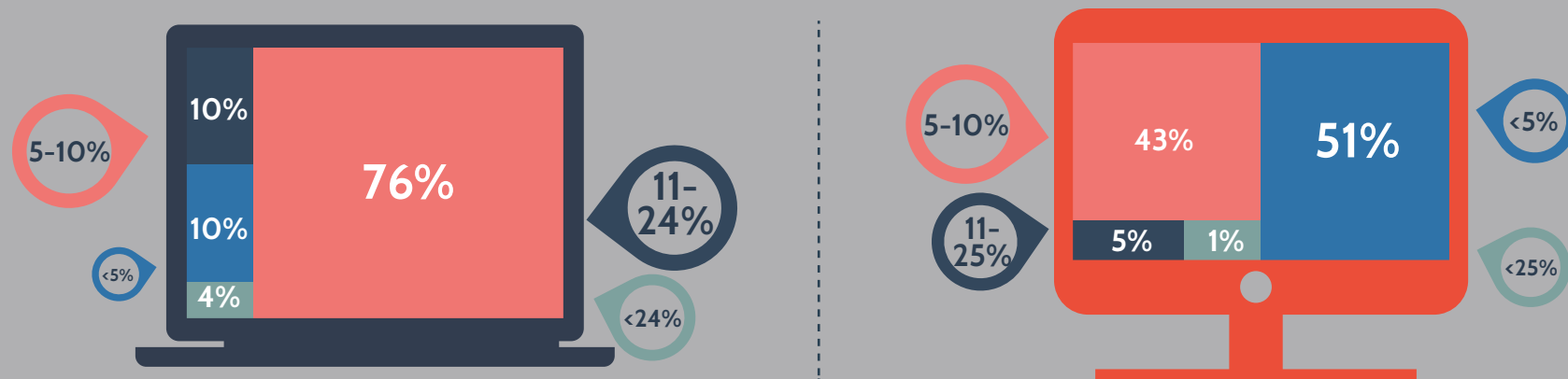
## D.1. Expenses



HOW MUCH DO YOU SPEND FOR YOUR BORADBAND INTERNET?



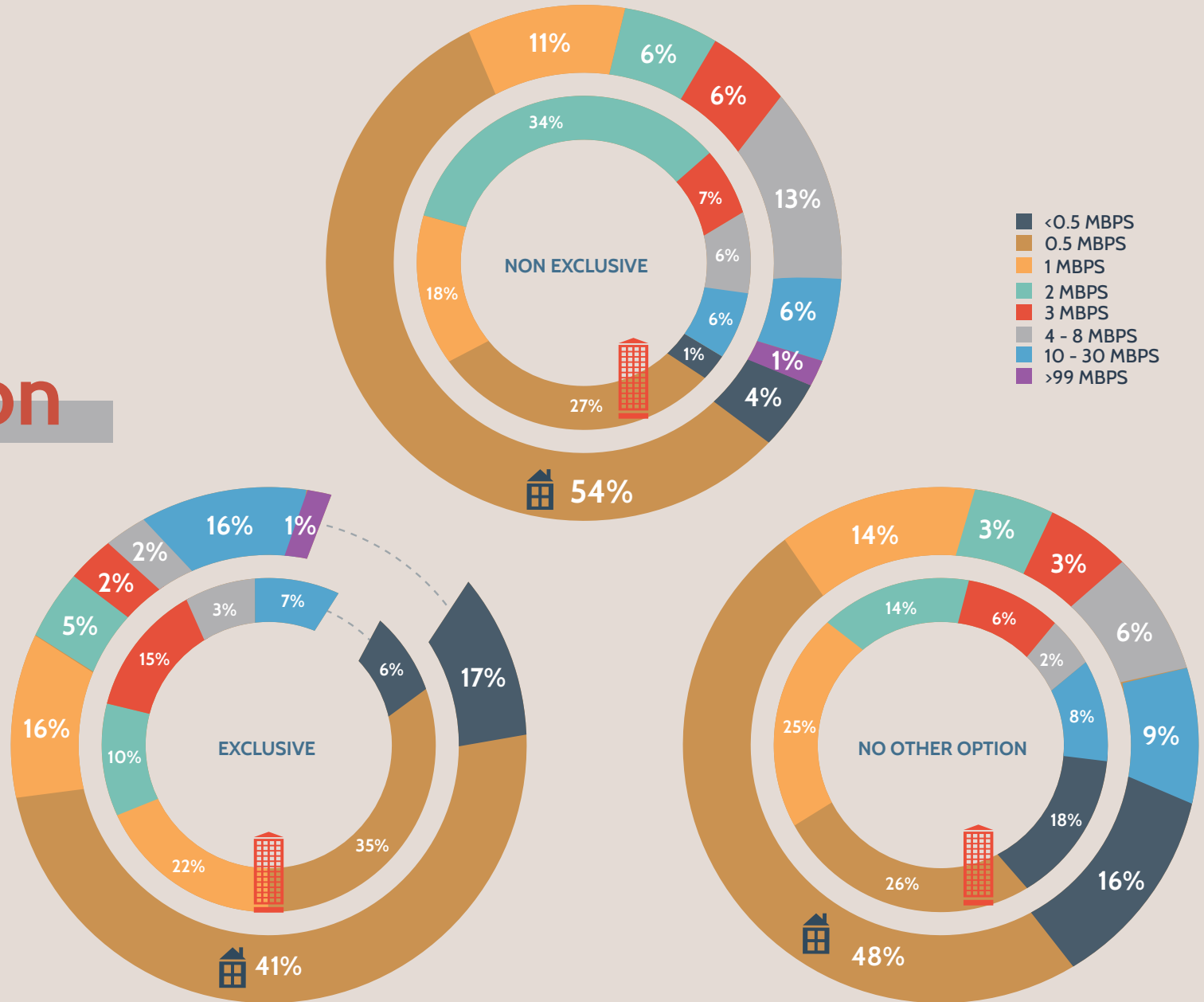
WHAT PORTION OF YOUR TOTAL EXPENSES?



Graph 15.

## D.2. Speed Connection

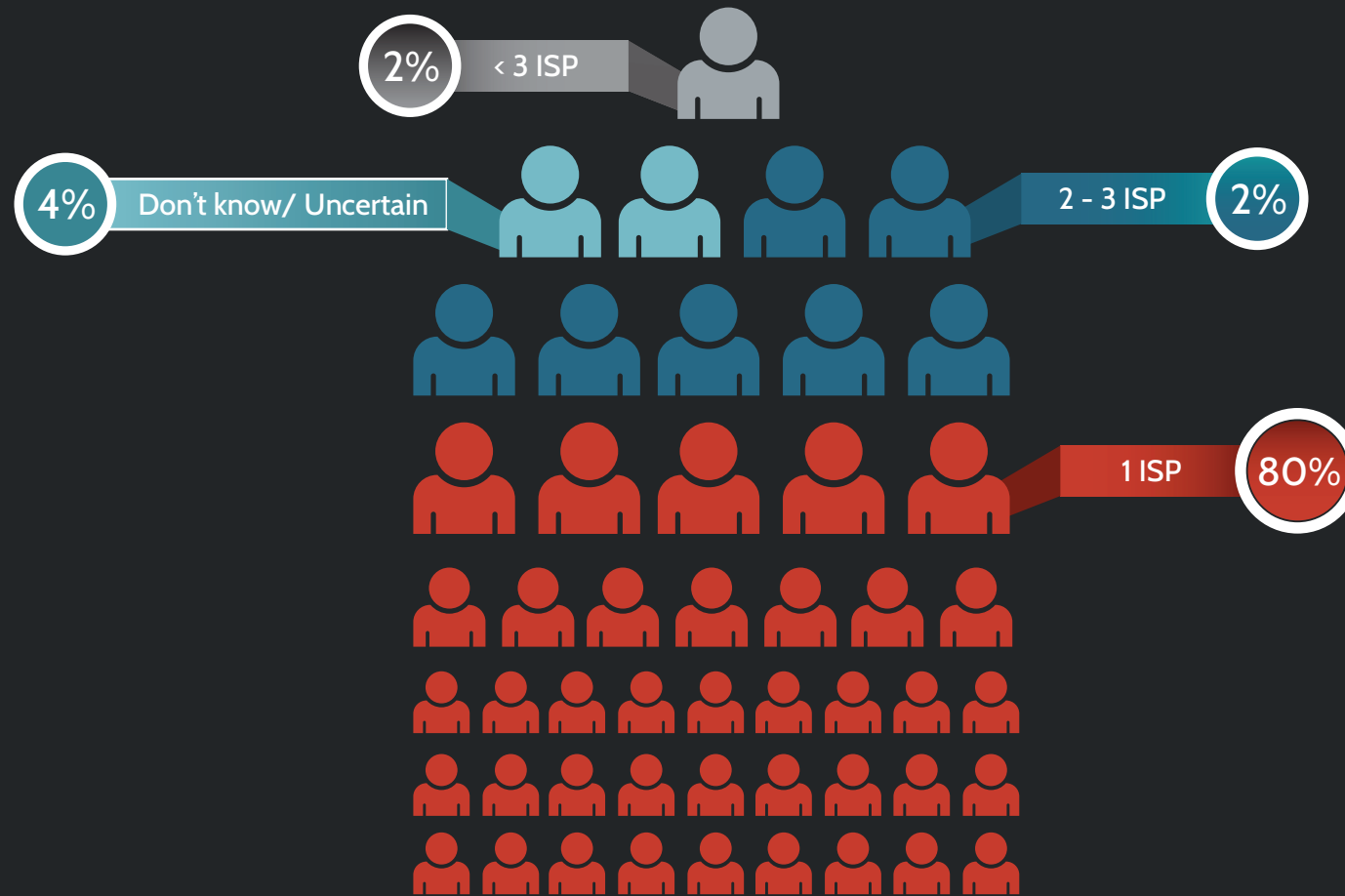
What  
is your  
connection  
speed?

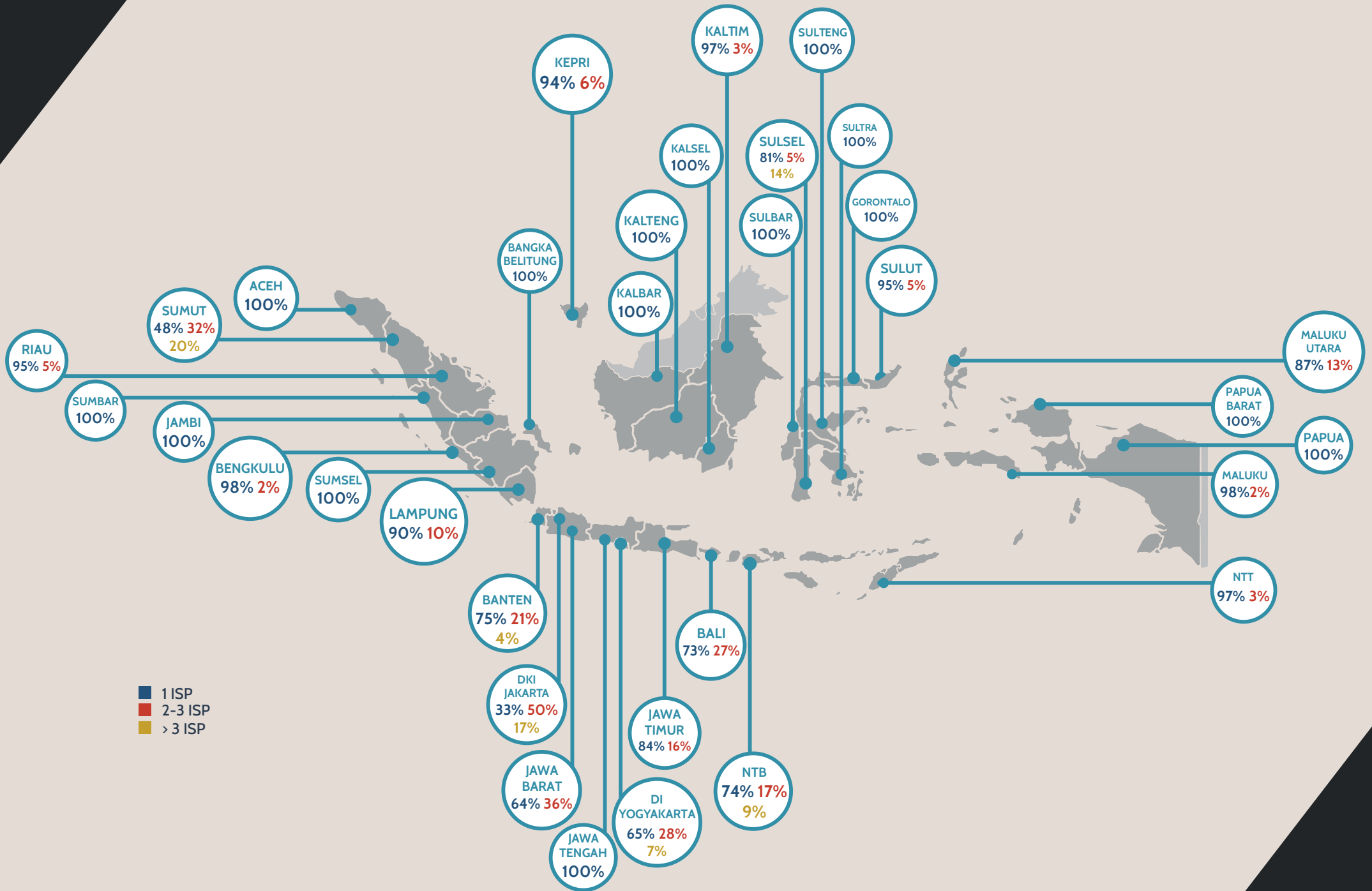


Graph 16.

## D.3. Number of ISPs

# How many ISPs are available in your area?





■ 1 ISP  
■ 2-3 ISP  
■ > 3 ISP

## Notes from the Field:

# Exclusive Services

Despite exclusivity or having no options, most respondents feel their internet service is good enough for most of their online activities. Some respondents did not have internet access options when they moved into their housing complexes or apartments, and simply continued with whatever existing subscription that was available to them. Some respondents even expressed that exclusivity actually made them feel special, and they would often praise the speed with which their complaints are handled and the direct human interaction with the provider's service personnel. Exclusivity and not having options are, in fact, the norm for fixed broadband internet service in the majority of Indonesian cities surveyed. This finding suggests that providers, despite exclusivity, can still satisfy their users by maintaining good customer service.



