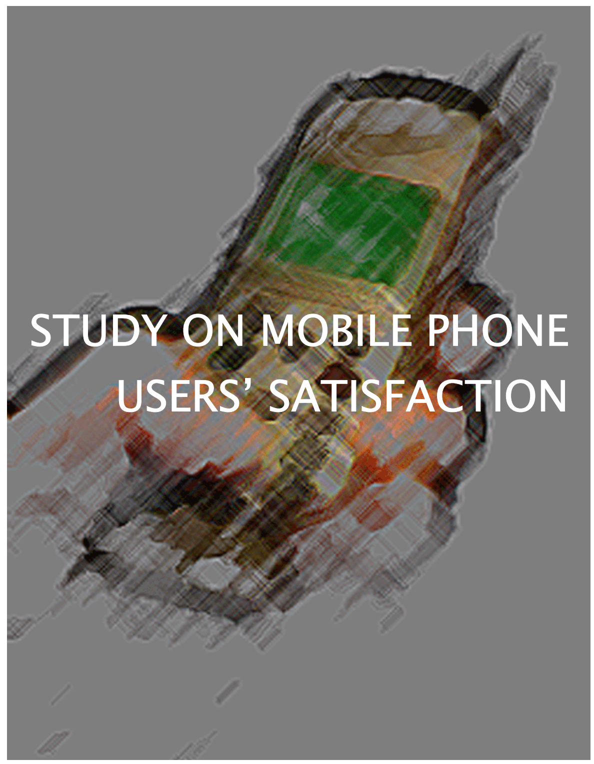
SERIES ON FOCUSED SOCIO-ECONOMIC AND MARKET STUDIES



# STUDY ON MOBILE PHONE USERS' SATISFACTION

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# Acknowledgements

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# Abbreviations and Data Notes

| | |
|---|---|
| BSNL | Bharat Sanchar Nigam Limited |
| CDMA | Code-Division Multiple Access |
| EDGE | Enhanced Data Rates for Global Evolution |
| FGD | Focus Group Discussion |
| GSM | Global System for Mobile Communication |
| MMS | Multimedia Messaging Service |
| MTNL | Mahanagar Telephone Nigam Limited |
| NCR | National Capital Region |
| QOS | Quality of Service |
| TRAI | Telecom Regulatory Authority of India |
| WLL | Wireless Loop |

# 1

# Need for the Study

Telecom Regulatory Authority of India publishes a quarterly report on 'The Indian Telecom Services Performance Indicators'. The information contained in the report is collected from various telecom operators and service providers. TRAI collects performance-oriented data from various service providers on a quarterly basis to monitor the growth trend in the sector and to decide upon pro-active and suo motto measures to fuel the growth of the telecom services in the country. Also, in exercise of the powers vested in the Telecom Regulatory Authority of India (TRAI) under the TRAI Act, 1997, the Authority has been conducting periodical survey of the quality of basic and cellular telephone services provided by different telecommunication service providers all over the country. The survey also covers an assessment of the level of satisfaction with the services received by subscribers of these telephone service providers.

Few other agencies also do some scanty research in the area.

Despite the surveys conducted by TRAI, the present study was deemed necessary because of the following reasons:

- Performance indicators captured by TRAI, particularly the surveys conducted to assess the consumer satisfaction misses out on the multifaceted nature of consumer satisfaction and thus do not capture the status of consumer satisfaction holistically. The study gives a comprehensive assessment of the satisfaction of consumers encompassing quality of technical service, quality and operational aspects of gadgets; and social / psychological costs due to unsolicited promotional calls/SMSs etc.

- Sometimes, the strategies of service providers / producers to ensure customer satisfaction by serving them in a better way or providing quality gadgets use to be based on erroneous theoretical and partially tested empirical postulates. The study aims to provide inputs to testify few of such postulates in order to provide the service providers / producers afresh insights on the consumer behavior.

# 2

# Methodology

The aim of study is to objectively understand the behavior of mobile phone users in Delhi and further capture their satisfaction level that is influenced by various technical and non technical factors. Specific aspects to be studied were:

- Usage pattern in terms of purpose of mobile phones for various categories of consumers
- Level of the satisfaction of users
- Reasons for dissatisfaction
- Level of satisfaction with gadgets and added services provided
- Liking for various attributes of the mobile phone instrument
- Usage Pattern of functionalities and added services provided

The methodology to conduct the study was composed of different tasks as follows:

1. A review of literature on consumer satisfaction in telecom industry was undertaken in order to define the comprehensive scope of the study and ensuring its objectivity.
2. Empirical research was based on a stratified random sample survey, a series of structured interviews and few focus group discussions. The sample size of 562 for the survey was drawn from various categories of consumers and thus appropriate representation of all market segments was ensured. The length of survey questionnaire was kept optimum to avoid the psychological burden of responding for the sampled consumers. The information collected through survey was supplemented by conducting a few Focus Group Discussions with consumers in the all market segments. The questionnaires and other tools used for the empirical research are provided under Appendix 2.
3. Analytical Framework for the study is aimed at getting an insight in to the behavior of consumer by analyzing the data / information gathered through empirical research.

**Empirical Research - Sampling**

A survey of 562 sampled respondents was conducted online as well as offline. There were 126 online responses while the remaining respondents were contacted offline. These online and offline surveys were conducted between 7$^{th}$ December 2004 and 30$^{th}$ April 2005. The composition of the survey sample is given in Tables 1 to 4 below.

**Table 1 - Age wise Composition of the Sample**

| Age Group | Sex | No. of Respondents |
|---|---|---|
| 14-19 | M | 12 |
| | F | 8 |
| | T | 20 |
| 20-25 | M | 114 |
| | F | 38 |
| | T | 152 |
| 26-30 | M | 108 |
| | F | 62 |
| | T | 170 |
| 30-40 | M | 93 |
| | F | 60 |
| | T | 153 |
| 40-50 | M | 31 |
| | F | 12 |
| | T | 43 |
| 50-60 | M | 16 |
| | F | 2 |
| | T | 18 |
| above 60 | M | 5 |
| | F | 1 |
| | T | 6 |
| Total | | 562 |

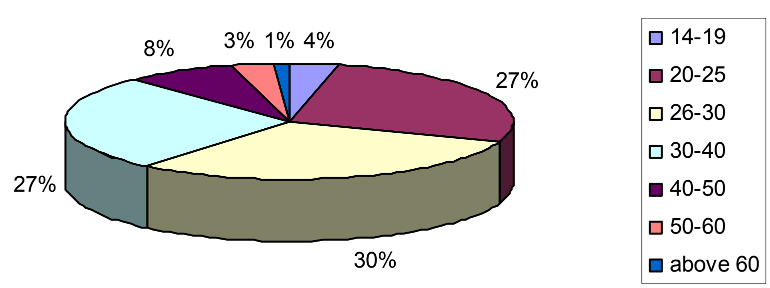



**Figure 1: The Sample – Age wise Composition**

**Table 2 - Occupation wise Composition of Sample**

| Occupation | No. of Respondents |
|---|---|
| Students | 124 |
| Service Personnel (Govt./Public Sector) | 88 |
| Service Personnel (Private Sector) | 235 |
| Self Employed Professionals | 56 |
| Business Persons | 16 |
| Retired Persons | 6 |
| Others (didn't reveal) | 37 |
| **Total** | **562** |

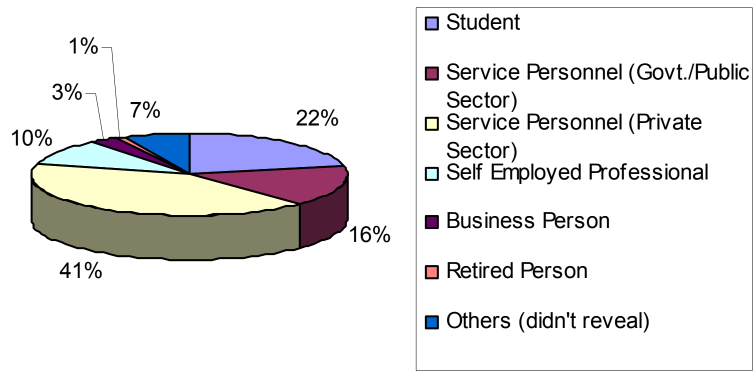



**Figure 2: The Sample – Occupation wise Composition**

**Table 3 - Composition of the Sample per Service Providers**

| Service Providers | No. of Respondents |
|---|---|
| Airtel | 205 |
| Hutch | 168 |
| Idea | 35 |
| MTNL | 28 |
| Reliance | 120 |
| Others | 6 |
| **Total** | **562** |

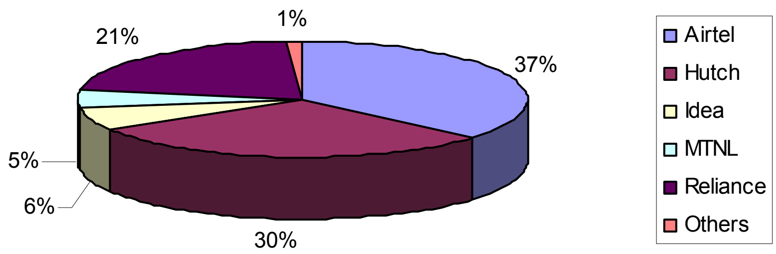



**Figure 3: The Sample – Composition as per Service Providers**

**Table 4 – Composition of Sample per duration of Mobile Phone Usage**

| Duration of Usage | No. of Respondents |
|---|---|
| Less than one year | 136 |
| 1-2 years | 249 |
| 2-3 Years | 57 |
| 3-5 Years | 64 |
| More than five years | 32 |
| Did'nt reveal | 24 |
| **Total** | **562** |

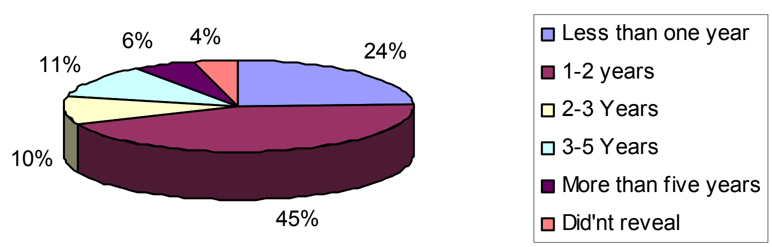



**Figure 4: The Sample per duration of Mobile Phone Usage**

# 3

# Mobile Telephony in Delhi

As reported by TRAI, the mobile telephony sector has almost touched a subscriber base of 43 million mark (GSM 33.6 million & CDMA 9.4 million) at the end of quarter ending 30th September 2004. The mobile subscribers' base stood at almost 43 million as against 37.8 million for the quarter ending 30th June 2004, adding around 5.24 million subscribers in one quarter. Riding on a wave of increasing growth, mobile telephony in India is expected to rise to a consumer base of over 120 million by 2008, making the telecommunication sector one of the most lucrative markets for global mobile phone manufacturers & cell phone providers.

Considering the major service providers in four Metros, there were more than 10 million users in January 2005 (Table 5). In Delhi, there were more than 3.9 million subscribers in the same month.

**Table 5 – Cellular Statistics**

| City/Circle | Operators | Oct'2004 | Nov'2004 | Dec'2004 | Jan'2005 |
|---|---|---|---|---|---|
| Delhi | Bharti Cellular | 1545600 | 1551052 | 1554429 | 1567421 |
| | Hutchison Essar | 1316939 | 1362043 | 1407243 | 1415518 |
| | MTNL | 218180 | 241857 | 273450 | 318127 |
| | Idea Cellular | 571171 | 568368 | 603336 | 621935 |
| ***Sub Total*** | | ***3651890*** | ***3723320*** | ***3838458*** | ***3923001*** |
| Mumbai | BPL Mobile | 1169335 | 1179435 | 1189750 | 1196873 |
| | Hutchison Max | 1329416 | 1384493 | 1439568 | 1479530 |
| | MTNL | 224564 | 271634 | 321292 | 371394 |
| | Bharti Cellular | 612170 | 633870 | 646528 | 677838 |
| Chennai | Aircel Cellular | 479967 | 485277 | 492504 | 502238 |
| | Bharti Mobinet | 442928 | 456872 | 445817 | 448719 |
| | Hutchison Essar | 228828 | 223184 | 219624 | 219117 |
| | BSNL | 305282 | 306001 | 309757 | 316668 |
| Kolkata | Bharti Mobitel | 415184 | 429905 | 501123 | 502363 |
| | Hutchison Telecom | 591403 | 602615 | 616640 | 626557 |
| | BSNL | 216220 | 226017 | 238648 | 248654 |
| **All Metros** | **Total** | **9667187** | **9922623** | **10259709** | **10512952** |
| **All India** | **Total** | **34794031** | **35937490** | **37378807** | **38649590** |

Source: Cellular Operators Association of India

Mobile telephony services providers in Delhi include Bharati Cellular Limited, Tata Teleservices Ltd/ Idea, MTNL, Hutchison Essar and Reliance Info com.

**Bharti Cellular Ltd**

Bharti Cellular Ltd is the mobile operating arm of Bharti Televentures. Bharti Televentures is 28.5%-owned by SingTel. The operator is listed on the national, Mumbai and New Delhi stock exchanges. Bharti Cellular offers mobile services under its Aircel brand.

Bharti reported mobile revenues of Rs10.99bn for the three months ending June 2004 a year-on-year growth of 67%. Bharti had 7.67m mobile subscribers at end-June 2004, up 18% from March 2004

Bharti is the largest GSM player in the Indian mobile market. The company has operational networks in 16 out of 23 circles across India. The operator also holds unified licenses for the remaining seven circles. The operator is following Reliance's aggressive tariff stance in the pre-paid sector. It has also introduced cuts in the post-paid sector as a means of retaining its contract subscriber base. The operator is investing in expanding its network nationwide. It is working with Ericsson, Siemens and Nokia in a network-management outsourcing arrangement to help speed deployment and increase the efficiency of its network expansion until 2007.

Bharti operates a GSM network, over which it is currently rolling out EDGE technology. It offers pre- and post-paid voice, MMS and internet access services.

**Idea Cellular**

Idea Cellular is owned by AT&T Wireless (33%), the Indian groups Tata and Birlas holding (65% between them) and AIG (2%). Idea Cellular reported operational revenues of Rs 8.5bn in the financial year to March 2003. Idea Cellular had 3.7m subscribers at June 2004.

The operator is currently placed fifth in the mobile market. Telekom Malaysia and Singapore's STT Telemedia are poised to become the largest shareholders in the operator, once they acquire AT&T's 33% stake in it. The operator is expanding primarily through acquisitions - in June 2004, it fully incorporated the Kerala, Haryana and Uttar Pradesh West operations of Escotel. The operator is also interested in making further acquisitions in the market (Punjab operator Spice Telecom and BPL are the sole remaining targets for the operator), but such moves must wait until the shareholder structure of the operator has been finalized. The operator was the first to launch EDGE services in India, in July 2004.

Idea offers GSM services across 11 circles in India, including the metro area of Delhi. It offers pre- and post-paid voice, MMS and internet access services.

**Reliance Infocomm**

Reliance Infocomm is the local telecom service provider unit of diversified conglomerate Reliance Group. The company offers mobile services under the brand RelianceMobile.

Reliance Infocomm is an un-listed company and does not publish financial results. Reliance had 8.7m mobile subscribers at the end of August 2004.

Reliance is the largest player in the mobile market. The company targets the prepaid mobile market in India, primarily with its CDMA service, which offers both full and (cheaper) limited mobility services to end users. The operator is aggressively pricing its prepaid services and in particular 'on net' tariffs, as a means of increasing its market share. In addition to its CDMA operations, the operator also has a small GSM network with around 900,000 subscribers at August 2004. Reliance is investing in expanding its CDMA network nationwide.

The operator has a CDMA2000 1X network, covering 17 operating circles across India. Reliance offers prepaid and post-paid voice services, international calling cards, as well as MMS and internet access. It also offers limited mobility services over its WLL network.

**Mahanagar Telephone Nigam Limited**

MTNL has been licensed to operate cellular services in the National Capital Region (NCR) of Delhi (including its four satellite towns of Ghaziabad, NOIDA, Faridabad & Gurgaon ) and Mumbai ( including Navi Mumbai & Kalyan).

MTNL has introduced GSM Cellular Mobile Service with a capacity of 100,000 subscribers in each of the two metro cities of Delhi and Mumbai under the brand name dolphin. The service was launched on Feb. 7, 2001 in Delhi and on Feb. 27, 2001 in Mumbai. The cellular network supports Intelligent Network Services such as prepaid, auto roaming (National as well as International), free phone, premium rate service etc.

MTNL has a strong financial base and has shown consistent improvement in performance over the years. It has market share of about 13 % of the National Telecom Network. MTNL possesses an impressive financial profile comprising of Paid up Capital of Rs.630 crores, Reserves and Surplus amounting to Rs.8309.64 crores and Fixed Assets worth Rs.5311.80 crores (as on 31.12.2003).

Vision of the company is to become a total solution provider company and to provide world class telecom service at affordable price by expanding new services viz. Long distances, Cellular mobile, Internet and ‘IN’ – services and development of telecom software. It also aims to become the largest provider of private networks and leased lines.

**Hutchison-Essar**

Hutchison-Essar is a Hutchison Whampoa company. It is a joint venture between the Hong Kong based mobile group and the Indian conglomerate Essar Group.

Hutchison declared revenues of HK$ 3.2bn in H1 2004 from its Indian operations, up from HK$1.95bn in H1 2003. Hutchison-Essar had 6.9m subscribers at end-June 2004.

Hutchison-Essar entered the mobile market in 1995 in the first wave of operator licensing. The operator has a presence in all four metro circles in India. The operator is expanding its business and increasing market share through a combination of growth by acquisition (it has acquired the operations of Fascel and Aircel in the year to September 2004) as well as network investment. Nokia is currently increasing capacity on its networks in Chennai, Andhra Pradesh and Karnataka, while also rolling out new networks in West Bengal and western Uttar Pradesh. The operator has followed the 60% tariff cuts introduced by Reliance Infocomm to the pre-paid mobile market in August 2004, in a bid to maintain market share. The operator launched EDGE services in July 2004.

Hutchison-Essar currently offers GSM services across 12 circles in India. It offers pre- and post-paid voice, MMS and internet access services.

# 4

# Consumers' Satisfaction – An Analysis

The study assesses the satisfaction level of consumers encompassing quality of technical service, quality and operational aspects of gadgets; and social / psychological costs due to unsolicited promotional calls/SMSs etc. The analysis in this chapter throws light on the consumption behavior of the mobile phone users in Delhi and covers the aspects like usage pattern of the mobile phone services, assessment of the level of satisfaction, preference for various attributes and functionalities of gadgets etc.

## USAGE PATTERN OF MOBILE PHONES

Various categories of consumers were asked about the purpose for which they use the mobile phone. The results are summarized in Table 6 and presented in Figure 5. Maximum usage is for personal purpose, followed by official and business purposes. Self employed professionals and businessmen use the mobile phone almost equally for business, official and personal purposes, while maximum usage by students and retired persons is for personal purposes.

**Figure 5 Mobile Phones used for Purposes (%)**

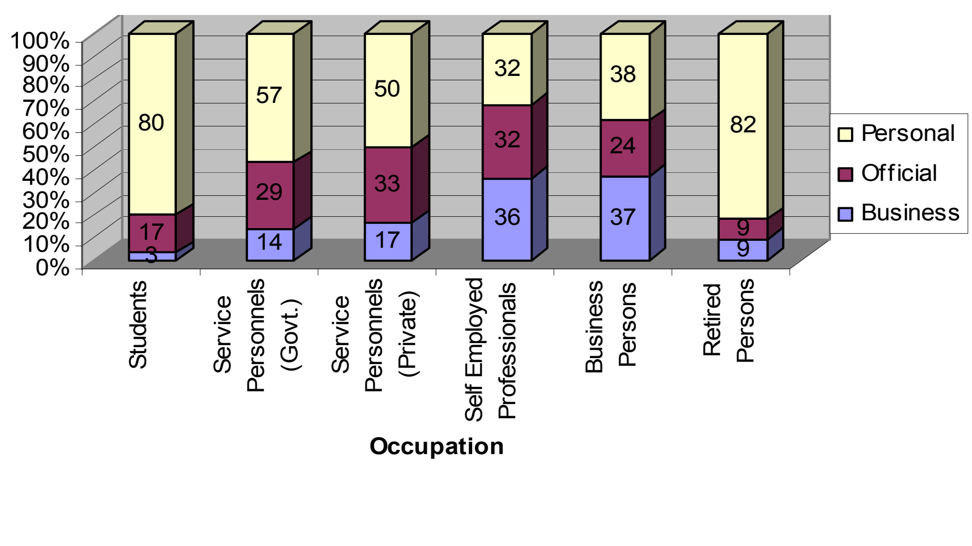


**Table 6 – Mobile Phones Used for Purposes (%)**

| Occupation | Business | Official | Personal |
|---|---|---|---|
| Students | 3 | 17 | 80 |
| Service Personnels (Govt.) | 14 | 29 | 57 |
| Service Personnels (Private) | 17 | 33 | 50 |
| Self Employed Professionals | 36 | 32 | 32 |
| Business Persons | 37 | 24 | 38 |
| Retired Persons | 9 | 9 | 82 |

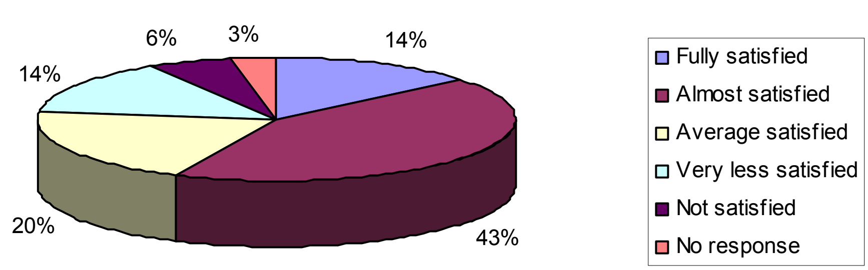
## LEVEL OF SATISFACTION

The satisfaction level of users was analyzed on a five point scale ranging from 'not satisfied' to 'fully satisfied'. The analysis is summarized in Table 7 and presented in Figure 6. Only 14 percent of the consumers say that they are fully satisfied with the services, while 6 percent responded as 'not satisfied'. A major group of consumers either say that they are 'almost satisfied' (43%) or 'average satisfied' (20%). Very less satisfied plus 'not satisfied' combined together comes to 20 percent of the total consumers.

**Table 7 – Mobile Phone Users' Level of Satisfaction**

| Level of Satisfaction | No. of Respondents | % of Sample |
|---|---|---|
| Fully satisfied | 80 | 14 |
| Almost satisfied | 241 | 43 |
| Average satisfied | 112 | 20 |
| Very less satisfied | 80 | 14 |
| Not satisfied | 33 | 6 |
| No response | 16 | 3 |
| Total | 562 | 100 |

**Figure 6** Mobile Phone Users' Level of Satisfaction



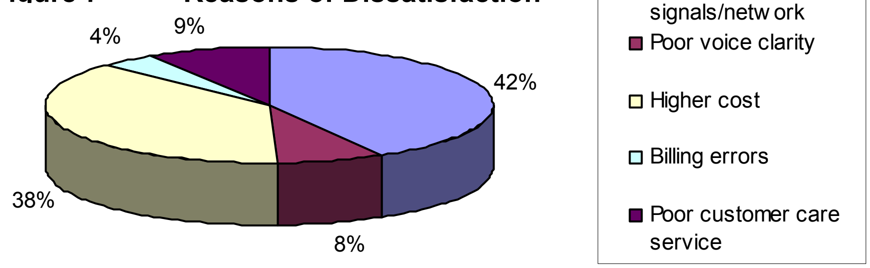
## REASONS OF DISSATISFACTION

The major reasons cited for dissatisfaction are poor quality of signals (42%) and higher costs (38%). Poor quality of signals means unavailability of signals, call failure, call drop downs etc. Only 4 percent complaints about billing errors while 9 percent are not happy with the quality of customer care services being provided (Table 8 and Figure 7). Many respondents have cited multiple reasons also for dissatisfaction.

**Table 8 – Reasons of Dissatisfaction**

| Reason of Dissatisfaction | % of Dissatisfied Consumers |
|---|---|
| Poor quality of signals/network | 42 |
| Poor voice clarity | 8 |
| Higher cost | 38 |
| Billing errors | 4 |
| Poor customer care service | 9 |

**Figure 7 Reasons of Dissatisfaction**



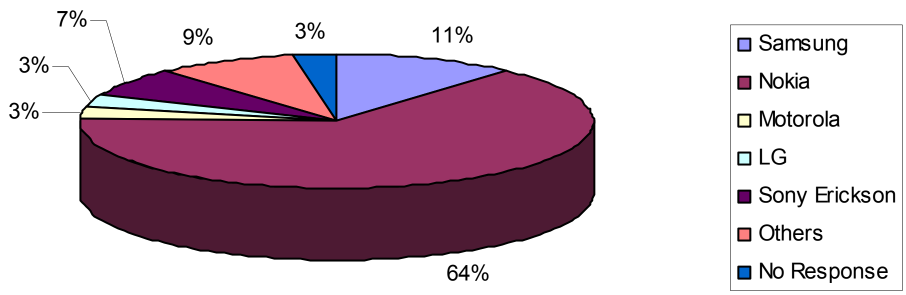

## MOBILE INSTRUMENT BRANDS USED

Out of total 562 sampled consumers, 361 consumers own a Nokia mobile handset which comes to 64 percent share of the market (Table 9 and Figure 8). This is followed by Samsung (11%), Sony Erickson (7%), LG and Motorola (3% each) and others (12%).

**Table 9 – Market Share of Various Brands of Mobile Phone Handsets**

| Brand Name of Instrument | No. of Respondent | % of Respondent |
|---|---|---|
| Samsung | 64 | 11 |
| Nokia | 361 | 64 |
| Motorola | 16 | 3 |
| LG | 16 | 3 |
| Sony Erickson | 40 | 7 |
| Any other | 49 | 9 |
| No Response | 16 | 3 |
| **Total** | 562 | 100 |

**Figure 8 Market Share of Various Brands of Mobile Phone Handsets**




## LIKING FOR VARIOUS ATTRIBUTES OF HANDSETS

Consumers were asked to reveal their likings for various attributes of the mobile phone instrument. The responses are summarized in Table 10 and presented in Figure 9 below. Operational ease (53%) and price (22%) are two attributes most valued by the customers followed by looks of the handset (11%) and multiple functionalities (10%).

**Table 10 – Liking for Various Attributes of Mobile Phone Handset**

| Attributes of the Instrument | No. of Respondent | % of Respondent |
|---|---|---|
| Operational Ease | 297 | 53 |
| Looks | 64 | 11 |
| Price | 121 | 22 |
| Latest Design | 16 | 3 |
| Functionalities | 56 | 10 |
| No Response | 8 | 1 |
| **Total** | **562** | **100** |

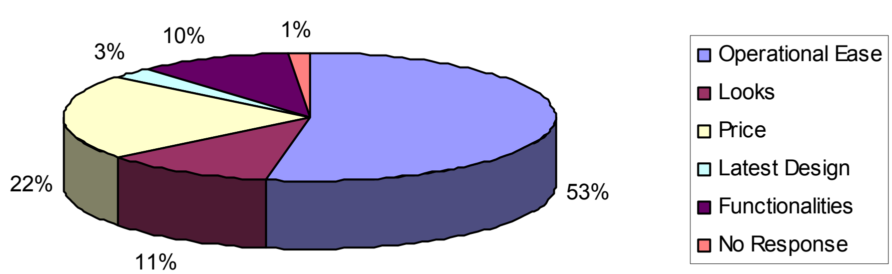



**Figure 9 Liking for Various Attributes of Handsets**

Major functionalities of the handset and other added services mostly used by the consumers are making and receiving calls, SMSs/MMSs, telephone diary and auto answering. The usage of other attributes that are being added and advertised by the handset manufacturers like camera, organizer, games, and radio etc. is quite less.

**Table 11– Usage Pattern of Functionalities of Gadgets and Added Services Provided**

| Functionalities | Mostly | Average | Sometimes | Rarely | Never | No Response | Total |
|---|---|---|---|---|---|---|---|
| Making and receiving calls | 91 | 4 | 3 | 1 | 0 | 1 | 100 |
| SMS/MMS | 31 | 29 | 29 | 6 | 4 | 1 | 100 |
| Telephone diary | 50 | 21 | 19 | 3 | 1 | 6 | 100 |
| Organizer | 6 | 9 | 27 | 26 | 26 | 6 | 100 |
| Games | 4 | 10 | 21 | 30 | 27 | 8 | 100 |
| WWW services | 1 | 0 | 0 | 11 | 86 | 2 | 100 |
| Voice dial | 1 | 3 | 4 | 10 | 71 | 11 | 100 |
| Voice command | 1 | 1 | 4 | 4 | 70 | 20 | 100 |
| Auto Answering | 11 | 4 | 1 | 5 | 56 | 23 | 100 |
| Call waiting | 9 | 9 | 17 | 11 | 33 | 21 | 100 |
| Call diverting | 0 | 0 | 3 | 11 | 66 | 20 | 100 |
| Camera | 0 | 1 | 4 | 3 | 72 | 20 | 100 |
| Radio | 1 | 3 | 10 | 3 | 64 | 19 | 100 |

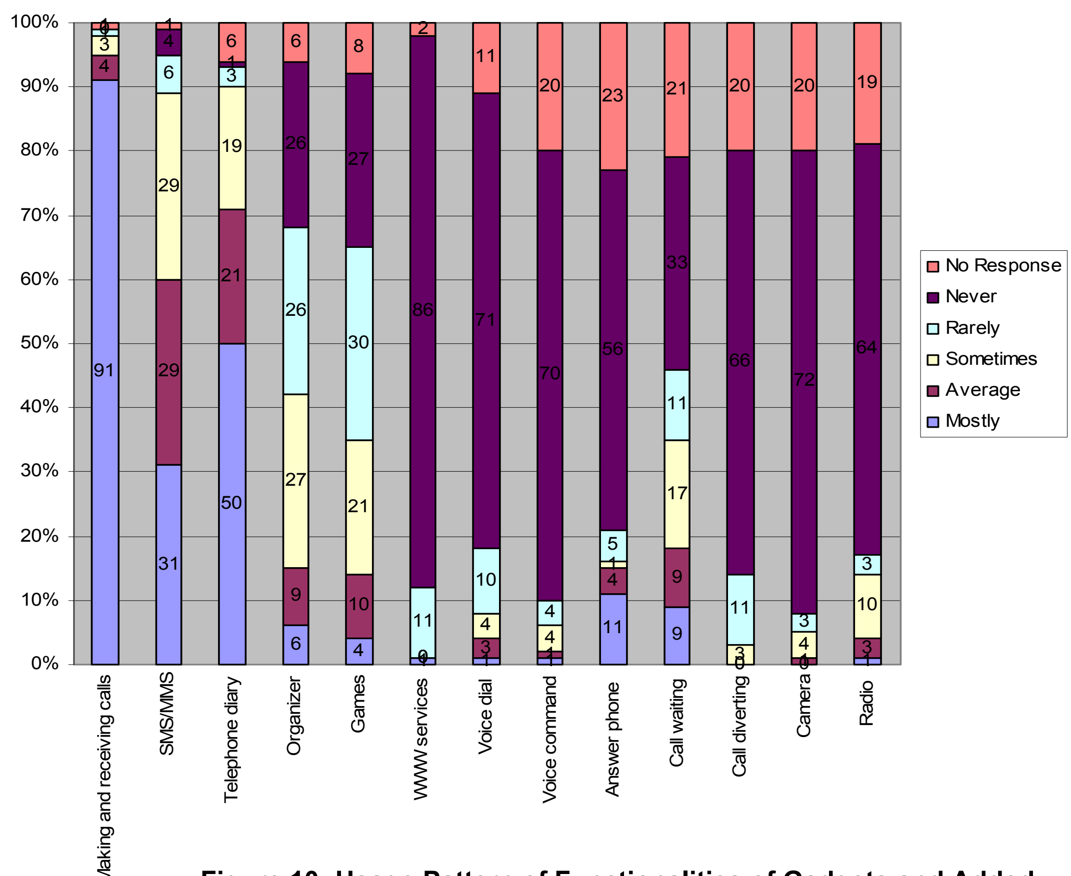



**Figure 10: Usage Pattern of Functionalities of Gadgets and Added Services Provided**

## UNSOLICITED CALLS

Seventy seven percent of the sampled consumers said that they receive unsolicited calls while only 17 percent of the sample accepts that, on getting the unsolicited call/SMSs, they feel happy because of the importance given to them as customers. Twenty percent say that they are receptive to such calls/SMSs but not always. Twenty three percent stays indifferent to such calls while thirty percent accepts that they get disturbed and feel irritated. Six percent accept that they get very angry on receiving unsolicited calls while three percent did not respond to this query in the questionnaire at all.

In response to a question on the action they take while get disturbed and irritated by unsolicited calls/SMSs, ninty three percent who receive such calls accept that they do not complain to ‘customer care’ division of the service provider and simply ignore the call/SMSs. Only twenty eight percent of the consumers who approach ‘customer care’ against the unsolicited calls/SMSs accept that such calls get discontinued on their request while sixty four percent say that calls continue to disturb them even after their request to discontinue it. Eight percent intimated that unsolicted calls/SMSs get discontinued for some time in response to their request, but the same start pouring in after a time lag. Rest of the consumers didn’t respond to this query.

# 5

# Conclusion

The need was felt to comprehensively assess the satisfaction level of mobile phone users encompassing quality of technical service, quality and operational aspects of gadgets; and socio-psychological costs due to unsolicited promotional calls/SMSs etc. Following are the major findings:

- The satisfaction level of users was analyzed on a five point scale ranging from ‘not satisfied’ to ‘fully satisfied’. Only 14 percent of the consumers say that they are fully satisfied with the services, while 6 percent responded as ‘not satisfied’. A major group of consumers either say that they are ‘almost satisfied’ (43%) or ‘average satisfied’ (20%). ‘Very less satisfied’ plus ‘not satisfied’ combined together comes to 20 percent of the total consumers.

- The major reasons cited for dissatisfaction are poor quality of signals (42%) and higher costs (38%). Poor quality of signals means unavailability of signals, call failure, call drop downs etc. Only 4 percent complaints about billing errors while 9 percent are not happy with the quality of customer care services being provided. Many respondents cited multiple reasons for dissatisfaction.

- Users’ feedback on likings for various attributes of the mobile phone instrument was recorded. Operational ease (53%) and price (22%) are two attributes most valued by the customers followed by looks of the handset (11%) and multiple functionalities (10%).

- Major functionalities of the handset and other added services mostly used by the consumers are making and receiving calls, SMSs/MMSs, telephone diary and auto answering. The usage of other attributes that are being added and advertised by the handset manufacturers like camera, organizer, games, and radio etc. is quite less.

- Seventy seven percent of the sampled consumers receive unsolicited calls while only seventeen percent of it feel happy on getting such calls. Out of the consumere who get such calls twenty three percent stays indifferent to such calls while thirty percent accepts that they get disturbed and feel irritated. Six percent gets very angry on receiving unsolicited calls.

- On getting disturbed and irritated by unsolicited calls/SMSs, ninty three percent do not complain to ‘customer care’ and simply ignore the calls/SMSs. Only twenty eight percent of the consumers who approach customer care against the unsolicited calls/SMSs accept that such calls get discontinued on their request while sixty four percent say that calls continue to disturb them even after their request to discontinue. Eight percent intimated that unsolicted calls/SMSs get discontinued for some time in response to their request, but the same start pouring in after a time lag.

Besides other things, there are two major questions that emerge from this study:

- Is it proper to feed the customers randomly with unsolicited promotional calls/SMSs? Why not to segment the market on the basis of socio-economic attributes of the consumers and target the promotional calls to various segments as per their taste / usefulness as well as convenient hours of the day? Can such mechanism to target the promotional calls/SMSs generate more revenue to the service providers and provide useful information on products to the consumers who welcome it? Need is to explore this further
- Is the technology trajectory followed by the producers of mobile phone gadgets is justified by the needs of the market? This study reveals that a very small segment of the market weigh in favour of the features like camera, games, radio etc. embedded with the mobile phone instruments and a hefty amount is spent by producers to advertise such attributes of the gadgets. Majority of consumers value the attributes like 'operational ease' and price of the gadgets most. Does this finding is an indication to the requirement of a rethought on the technology trajectory for the mobile phone gadgets?

# Appendix 1 - Survey Questionnaire

**MOBILE PHONE USERS' SATISFACTION SURVEY**

(This user satisfaction survey is part of a series of focused socio-economic and market surveys being undertaken by VisionRI Connexion Services Private Limited, New Delhi. All the information provided by you will be kept confidential and will be used for research purpose only. Please spare some time out of your busy schedule for filling in the questionnaire given below and send the same to research@visionri.com . We will be extremely thankful to you for your cooperation)

1. Date:

2. Name of the Respondent:

3. Age: [ ] Years Sex: 1. Male, 2. Female [ ]

4. Mobile Number:

**About your Service Provider**

5. Your Service Provider (Please use the code): [ ]

| | | |
|---|---|---|
| 1. Airtel | 2. Hutch | 3. Idea |
| 4. MTNL | 5. Reliance | 6. Dolphin |
| 7. Other (Please specify) | | |

6. Which Market Segment do you belong to? [ ]
   (Please use the code)
   1. Student
   2. Service Personnel (Govt./Public Sector)
   3. Service Personnel (Private Sector)
   4. Self Employed Professional
   5. Business Person
   6. Retired Person
   7. Other (Please specify)

7. Since how long have you been using mobile phone? [ ]
   (Please use the code)
   1. Less than one year
   2. 1-2 years
   3. 2-3 Years
   4. 3-5 Years
   5. More than five years

8. Mobile phone is used for the following purposes:
   (Please indicate the pattern of usage as 1 for 'Mostly', 2 for 'Average', 3 for 'Sometimes', 4 for 'Rarely' and 5 for 'Never')

   - Business [ ]
   - Official [ ]
   - Personal [ ]

9. Are you satisfied with the services?

   (Please use the code)
   1. Fully satisfied
   2. Almost satisfied
   3. Workable
   4. Partially satisfied
   5. Not satisfied

10. If your response to Question 9 is 2. Almost satisfied or 3. Workable or 4. Partially satisfied or 5. Not satisfied', what are the reasons for your dissatisfaction?
   (Please use the code)
   1. Poor quality of signals/network
   2. Poor voice clarity
   3. Higher cost
   4. Billing errors
   5. Poor customer care service
   6. Any other (Please specify)

**About Gadgets**

11. Which mobile phone instrument do you use
   (Please use the code)
   1. Samsung
   2. Nokia
   3. Motorola
   4. LG
   5. Benq
   6. Sony Erickson
   7. Any other (Please specify)

12. What do you like most about your mobile telephone instrument?
   (Please use the code)
   1. Operational ease
   2. Look
   3. Price
   4. It is the latest instrument available in the market
   5. Functionalities

13. Usage pattern of functionalities of your mobile phone instrument:
   (Please indicate the pattern of usage as 1 for 'Mostly', 2 for 'Average', 3 for 'Sometimes', 4 for 'Rarely' and 5 for 'Never')

   - Making and receiving calls
   - SMS/MMS
   - Telephone diary
   - Organizer
   - Games
   - WWW services

- Voice dial
- Voice command
- Answer phone
- Call waiting
- Call diverting
- Camera
- Radio

**About Promotional Calls and SMS**

14. Do you receive unsolicited promotional calls and SMS?
    (Please use the code)
    1. Yes
    2. No

15. How do you usually react?
    (Please use the code)
    1. Feel happy about the importance given to you as a customer
    2. Receptive but not always
    3. Indifferent
    4. Get disturbed and feel irritated
    5. Get very angry

16. If 'get disturbed and feel irritated' or 'get very angry', what do you do?
    (Please use the code)
    1. Ignore
    2. Complain at customer care with a request to block such calls and SMS

17. Does the service provider unsubscribe you for receiving such calls and SMS on your request? (Please use the code)
    1. Yes
    2. No
    3. Yes, but calls and SMS/MMS start coming in after some time

**Comments:**

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**Thank you!**
**Please e-mail the filled in questionnaire to research@visionri.com**

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# Appendix 2 - Questionnaire for Focused Group Discussions

1. What do you say about the need of this study on mobile phone users' satisfaction level?
2. Although service providers are working really hard to provide you the quality services, still something remains to be done. What do you say about that something which still remains to be done and why?

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## We offer

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## Tools

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