A REPORT ON

STUDY TO ASSESS THE PERCEPTION OF CONSUMERS TOWARDS BASIC TELEPHONY (WIRE LINE), CELLULAR AND BROADBAND SERVICE PROVIDER IN

Kerala Licensing Area

Prepared for

Prepared by

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(IS/ISO 9001-2008 Certified Organisation)

IMRB International | eTech

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CHAPTER #1: INTRODUCTION

1.1. About TRAI

The Telecom Regulatory Authority of India (TRAI) was established on 20th February 1997, by an Act of Parliament, called the Telecom Regulatory Authority of India Act, 1997, to regulate telecom services, including fixation/revision of tariffs for telecom services which were earlier vested in the Central Government.

TRAI's mission is to create and nurture conditions for growth of telecommunications in the country in a manner and at a pace that will enable India to play a leading role in the emerging global information society. One of the main objectives of TRAI is to provide a fair and transparent policy environment which promotes a level playing field and facilitates fair competition.

In pursuance of above objective, TRAI has been issuing regulations, order and directives to deal with the issues or complaints raised by the operators as well as the consumers. These regulations, order and directives have helped the nurture the growth of multi operator multi service- an open competitive market from a government owned monopoly. Also, the directions, orders and regulations issued cover a wide range of subjects including tariff, interconnection and quality of service as well as governance of the Authority.

TRAI initiated a regulation- The Standard of Quality of Service of Basic Telephone Service (Wire line) and Cellular Mobile Telephone Service regulations, 2009 (7 of 2009) dated the March 20, 2009 and Quality of Service of Broadband Service Regulations, 2006 (11 of 2006) dated the October 6, 2006 provide for benchmarks for the parameters on customer perception of service to be achieved by service provider.

In order to assess the above regulations TRAI has commissioned a third party agency to conduct this survey on behalf of TRAI among the customers.

1.2. Objectives of the study:

The objective of the survey is as follows:-

1. Assess the compliance of the service providers and the satisfaction of the subscribers of Basic (Wireline), Cellular Mobile (Wireless) and broadband services with 'various regulation, directions and orders issued by TRAI in the interest of consumers.

2. Assess the satisfaction with Quality of Services (QoS) provided by Basic (Wireline), Cellular Mobile (Wireless) and broadband service providers on the 'Quality of Service' parameters laid down by TRAI.

3. To compare the findings against the Quality of Service benchmarks notified by TRAI and identify the critical areas for improvement for the telecom service providers.

1.3.   Framework Used

There are multiple ways in a quality of a service can be defined. Two of the most popular definitions of quality include 'conformance to requirements' and 'fitness for use'. Keeping this as a base and the existing regulations in mind, different frameworks were discussed to effectively measure the quality of service being offered in the telecom sector. One such model that most precisely helps measure the quality of service was the SERVQUAL MODEL. However, as this model posed limitation both in terms of robustness of the model in the Indian scenario as well as practical execution. Given this, a variant SERVPERF MODEL was used.   The details of the both the models are given below.

SERVQUAL MODEL

The service quality (SERQUAL) model or popularly as the 'GAP Model' introduced by Parasuraman et al. 1985 is a predominant method for measurement of Service Quality. It identifies five 'gaps' that causes unsuccessful delivery. Originally, it measured the quality in 10 different aspects but was later revised to 5 due to overlap of some of the parameters in 1988.

The model measures service quality as the difference or gap between consumer expectations about the service and the actual perceived performance (i.e. the disconfirmation paradigm). The concept of measuring level of service quality in terms of expectations and perceptions using SERVQUAL gap score. The Five key dimensions measured by the model as follows:-
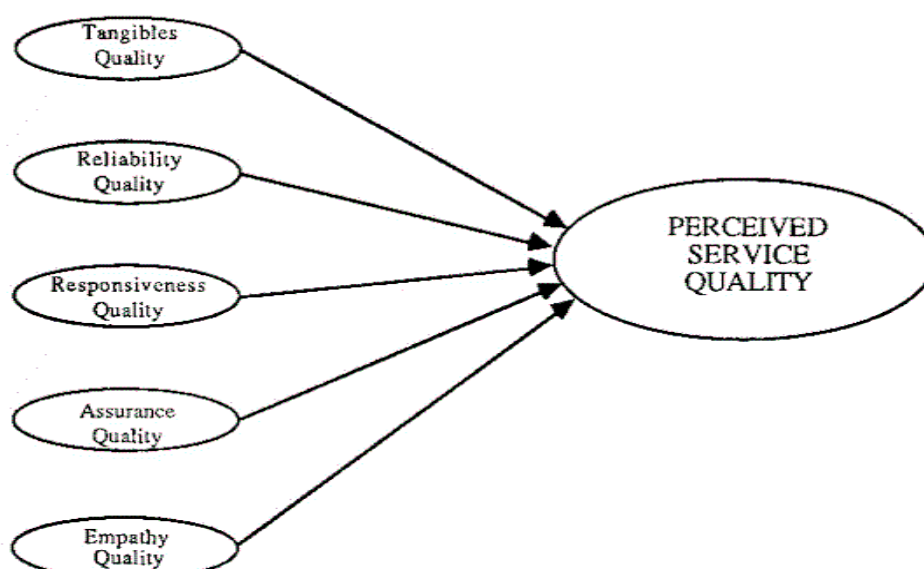
The 5 dimensions represent the differences between consumers' expectations and perceptions of a firm's performance along each quality dimension. Perceived service quality is a function of the magnitude and direction of the 5 perceptual dimensions.

However, SERVQUAL Model has its limitations- overly complex, subjective and statiscally unreliable. Also given that the survey covered both urban and rural India, it did not take in to account the difference in awareness of certain expectation. Given these limitations, a more robust model SERVPERF model was suggested.

SERVPERF MODEL

SERVPERF model is an extension to the SERVQUAL model and address one of the critical criticism of the operation deficiencies. According to SERVPERF model, perception portion can best describe the satisfaction level of customers as compared to difference score of perception minus expectations. 'SERVPERF' model nullifies the expectation portion of the original SERVQUAL model. The Five dimensions of the SERVQUAL MODEL were also adapted for this model and they are

Tangibility	Reliability	Responsiveness	Assurance	Empathy
• Physical facilities, equipment and appearance of service firm's employees	• Performing the promised services at stated level.	• Providing prompt services and willingness to help customers.	• knowledge and courtesy of employees and their ability to inspire trust and confidence in the firm.	• caring and personalized attention to its customers.

However, the TRAI regulation of Quality of service measurement also included three other critical parameters of Network /technical quality, economy and convenience. Given this, the SERVPEPF model was modified to include these three parameters.

Each of the 8 dimensions was further subdivided to capture various aspects starting from availability of suitable plans to availability of the signal in the area etc. The figure below highlights the various dimensions and parameters in each of the dimensions

Parameter/ Dimensions and sub dimensions used in the study		
Tangibility (TA)		
TA 1	Availability of suitable plans	Service Provision
TA 2	Provision of information on SIM Card, recharge cards etc.	Service Provision
TA 3	Provision of visually attractive material – starter pack, reload card	Service Provision
TA 4	Provision of variety of entertainment facility – apps etc.	Supplementary services
Reliability (RL)		
RL 1	Provision of service accuracy and dependable	Billing
RL 2	Transparent & Accuracy of bill/ charges	Billing
RL 3	Customer friendly staff	Help services
Responsiveness (RS)		
RS 1	Provision of timely service	Service Provision
RS 2	Effective handling of downtime (maintaining a service)	Maintainability
RS 3	Prompt handling of complaint	Grievance redress
RS 4	Effective grievance redressal mechanism, customer service	Grievance redress
Assurance (AS)		
AS 1	Competency of the staff/ services/ problem solving ability	Help services
AS 2	Feedback mechanism	Grievance redress
Convenience (CV)		
CV 1	Ease of access to Customer help line numbers	Help services
CV 2	Ease of activating & deactivating any service (VAS)/ any other	Supplementary services
CV 3	Ease of registering for unwanted calls/ SMS	Supplementary services
Empathy (EM)		
EM 1	Provision of service manual, complete tariff plan at the time of subscription	Service Provision
EM 2	Having convenient periods and terms for activation, recharge and account suspension , free call times	Billing
EM 3	Ease of taking a connection	Service Provision
EM 4	Ease of recharging process (pre-paid)	Billing
EM 5	24 x 7 customer care service	Help services
Network/ Technical Quality (NT)		
NT 1	Availability of signal in your area (cell)/ working phone(basic)/ uptime (broadband)	Network Performance
NT 2	Ability to make and receive call / uninterrupted	Network Performance
NT 3	Clear Voice quality	Network Performance
Economy (EC)		
EC 1	Availability of recharging cards in various denomination	Billing
EC 2	Economical call charges per minute/ second	Billing

In order to have conformity across the telecom service providers, TRAI has set up a benchmark for each of the parameter and the quality measured for each of the dimensions of the SERVPERF model would be measured against the benchmark. The Benchmark for each of the dimensions is as follows:-

Basic Telephone Service (wireline) and Cellular Mobile Telephone Service		
S. No.	**Parameter/Dimension**	**Benchmark**
1	Customers satisfied with the provision of service	Greater than or equal to 90%
2	Customers satisfied with the billing performance	Greater than or equal to 95%
3	Customers satisfied with network performance, reliability and availability	Greater than or equal to 95%
4	Customers satisfied with maintainability	Greater than or equal to 95%
5	Customers satisfied with supplementary and value added services	Greater than or equal to 90%
6	Customers satisfied with help services including customer grievance redressal	Greater than or equal to 90%
7	Customers satisfied with overall service quality	Greater than or equal to 90%
Broadband Service		
S.No.	**Parameter/Dimension**	**Benchmark**
1	Customers satisfied with the provision of service	Greater than 90%
2	Customers satisfied with the billing performance	Greater than 90%
3	Customers satisfied with help services	Greater than 90%
4	Customers satisfied with network performance, reliability & availability	Greater than 85%
5	Customers satisfied with maintainability	Greater than 85%
6	Customer satisfied with Overall customer satisfaction	Greater than 85%
7	Customers satisfied with Customer satisfaction with offered supplementary services such as allocation of static / fixed IP addresses, email Ids etc.	Greater than 85%

1.4. Questionnaire Design

The modified SERVPERF MODEL formed the basis which the research instrument was designed. The instrument was also designed keeping in mind the fact that a huge sample was to be interviewed and spread across the regions was to be achieved which meant that the instrument had to be as short as possible as we had seen in the past that a lengthy instrument brings in respondent fatigue, biasness and degrading responses towards the end of the survey.

As the parameters had to be modified for each of the three telecom services, three separate instruments were designed to address this issue. However, the broad framework and dimensions to be measured were kept common across the instruments.

CHOICE OF SCALE USED:

Perceptions of the consumers were assessed using 7 point rating scale wherein scale varies from 1 which means 'Extremely dissatisfied' to 7 which means 'Extremely Satisfied' as against a 5 point likert scale in the earlier. However in the initial discussion, it was felt by everyone involved that the 5 Point likert scale did not allow good discrimination between the satisfaction levels, hence the decision to change the scale was adopted.

Satisfied with Services
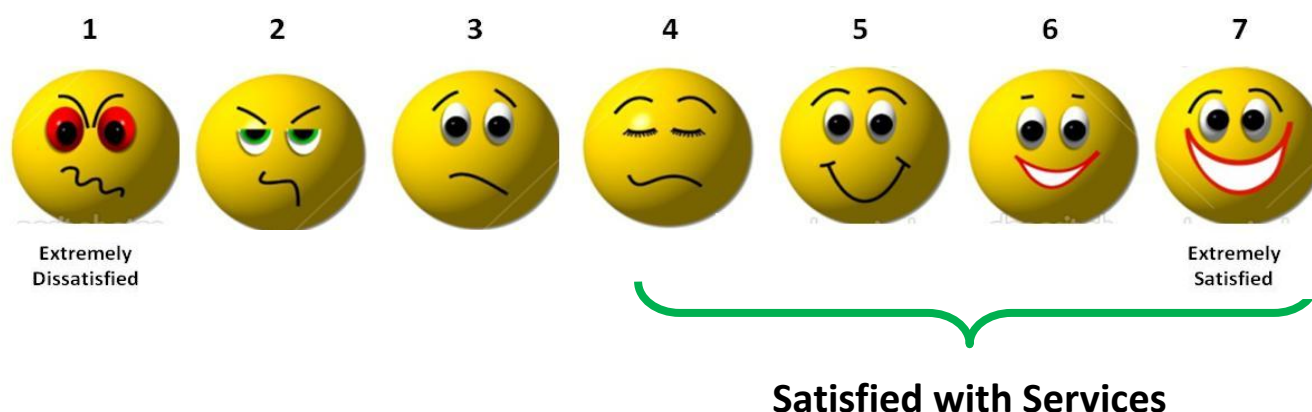
For the purpose of reporting, Top 4 scale responses i.e. 4-7 would be considered as a satisfaction score and measured against the benchmark. This would be done for each of the parameters.

For the purpose of accessing the customer loyalty, Net promoter score shall be used. Net Promoter Score (NPS) measures the loyalty that exists between a Provider and a consumer. NPS is measured on a standard 11 Point scale and loyalty would be arrived by the difference between the promoters and detractors.

- Promoters (score 9-10) are loyal enthusiasts who will keep using the services of current operators and refer others
- Passives (score 7-8) are satisfied but unenthusiastic customers who do not give any positive or negative feedback to others about the operator
- Detractors (score 0-6) are unhappy customers who can damage the reputation of operator through negative word-of-mouth.

1.5.   SAMPLING

Sampling methodology ensured that the sample is spread evenly across the circle there by maintaining the required quotas as direct by TRAI. Methodology ensured spread across gender, SEC, age and profession. Each city was divided into 8-12 zones in order to ensure the spread as shown in the picture.

In order to achieve the desired sampling size, multiple methodologies were used which include random methodology wherein 4 households were skipped following the right hand rule. Apart from the random interviews, intercept interviews were done at malls, shopping complexes, office area, colleges etc. in order to achieve the desired sample size. IMRB international ensured that a minimum of 30% representation from rural areas.

Sampling methodology also ensured that the necessary guidelines given by TRAI were met which included:

- **Basic telephone service:** Subscribers were selected from 5% of exchange that were evenly spread over 10% (ten per cent) of SDCAs with each BSO. IMRB ensured that within these SDCA's the sample was evenly spread to the extent possible.
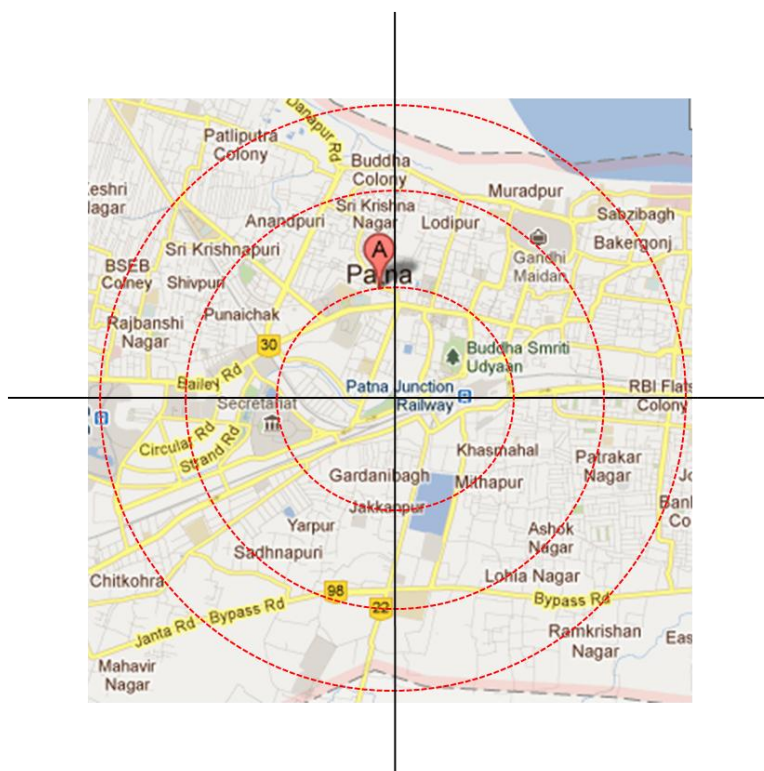
- **Cellular mobile telephone service:** Sample selected for cellular mobile telephone service subscribers was evenly spread over in 10% (ten per cent) of district headquarters of a service area where the services are commissioned. IMRB ensured that at least 30% of the subscribers were from the rural areas.

- **Broadband service:** Sample selected for broadband service subscribers was evenly spread in the areas served by 10% (ten per cent) of the Points of Presence (POPs) of each service provider in each service area.

1.6. OPERATOR DETAILS:

OPERATORS COVERED IN ASSAM CIRCLE		
Wireless	**Wireline**	**Broadband**
Bharti airtel/Airtel	BSNL	Airtel
BSNL	Airtel	Asianet
Idea cellular	Reliance	BSNL
Reliance		Reliance
Sistema shyam/MTS		
Tata Teleservices		
Vodafone		

OPERATORS NOT COVERED IN ASSAM CIRCLE*		
Wireless	**Wireline**	**Broadband**
Aircel	Tata Teleservices	Tata Teleservices
Unitech		
Videocon		
Etisalet		

*Reasons for not covering mentioned in Annexure 6.1

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Chapter #2.0:-

Executive Summary

Section discusses in brief, performance of the operators for Wireline, wireless and broadband operators on various parameters.

2.1. Summary of the Survey module for Wireless Operators

Snapshot of the Findings

Overall satisfaction
- **All operators** operating in Kerala meet the benchmark level of satisfaction with service provisioning.

Service Provisioning
- **All operators** meet the benchmark level of satisfaction with service provisioning.

Billing Performance for Pre-paid users
- **Sistema Shyam** does not meet the benchmark level of satisfaction on the aspect of billing performance for the pre-paid users.

Billing Performance for Post-paid users
- **Idea cellular**, **Sistema shyam,** and **Vodafone** do not meet the benchmark level of satisfaction on the aspect of billing performance for the post-paid users

Network performance, reliability and availability
- **Bharti airtel**, **Sistema shyam,** and **Tata Teleservices** do not meet the benchmark level of satisfaction with Network performance, reliability and availability

Maintainability
- **Bharti airtel**, **Reliance**, **Sistema shyam**, and **Tata Teleservices** do not meet the benchmark level of satisfaction with Maintainability.

Supplementary and Value Added Services
- **All operators** meet the benchmark level of satisfaction with Supplementary and Value Added Services

This table below highlights the satisfaction scores for each of the parameter in details. The operators that do not meet the benchmark have been highlighted in red color.

Legend	
Operator not meeting the benchmark	
Operators meeting the Benchmark	
Operators that are almost at 100%	

Overall Performance	Benchmark	Bharti airtel	BSNL	Idea cellular	Reliance	Sistema shyam	Tata Teleservices	Vodafone
Customers satisfied with provisioning of service	Greater than 90%	99.1%	99.3%	99.1%	98.0%	97.2%	98.7%	99.2%
Customers satisfied with billing performance - Prepaid	Greater than 95%	96.7%	96.9%	97.0%	95.4%	93.1%	96.2%	96.0%
Customers satisfied with billing performance - Postpaid	Greater than 95%	98.8%	95.7%	91.2%	98.0%	94.7%	95.9%	94.9%
Customers satisfied with help services	Greater than 90%	92.6%	93.7%	93.7%	94.4%	93.4%	90.1%	94.3%
Customers satisfied with network performance, reliability and availability	Greater than 95%	94.9%	97.7%	96.5%	96.6%	94.4%	90.9%	98.5%
Customers satisfied with maintainability	Greater than 95%	93.9%	96.8%	96.0%	94.8%	93.0%	89.9%	97.8%
Customers satisfied with supplementary and value added services	Greater than 90%	96.6%	97.2%	96.4%	99.1%	95.5%	97.5%	99.1%
Customers satisfied with overall service quality	Greater than 90%	99.1%	99.3%	98.6%	99.0%	96.6%	98.4%	99.6%

2.2. Summary of the Survey module for Wireline Operators

Snapshot of the Findings

Overall satisfaction
- Overall, **all operators** meet the benchmark level of satisfaction with service provisioning.

Service Provisioning
- **Reliance** does not meet the benchmark level of satisfaction with service provisioning.

Billing Performance for Pre-paid users
- **BSNL** and **Reliance** do not meet the benchmark level of satisfaction on the aspect of billing performance for pre-paid users.

Billing Performance for Post-paid users
- **Bharti Airtel** and **Reliance** do not meet the benchmark level of satisfaction on the aspect of billing performance for post-paid users.

Network performance, reliability and availability
- **Bharti Airtel** and **Reliance** do not meet the benchmark level of satisfaction on Network performance, reliability and availability.

Maintainability
- **Bharti Airtel**, **BSNL** and **Reliance** do not meet the benchmark level of satisfaction on Maintainability.

Supplementary and Value Added Services
- **All operators** meet the benchmark level of satisfaction on Supplementary and Value Added Services

This tablet below highlights the satisfaction scores for each of the parameter in details. The operators that do not meet the benchmark have been highlighted in red color.

Legend	
Operator not meeting the benchmark	
Operators meeting the Benchmark	
Operators that are almost at 100%	

Overall Performance	Benchmark	Bharti Airtel	BSNL	Reliance
Customers satisfied with provisioning of service	Greater than 90%	94.83%	98.20%	88.63%
Customers satisfied with billing performance - Prepaid	Greater than 95%	95.83%	70.85%	90.38%
Customers satisfied with billing performance - Postpaid	Greater than 95%	92.60%	97.30%	88.27%
Customers satisfied with help services	Greater than 90%	89.35%	93.55%	87.30%
Customers satisfied with network performance, reliability and availability	Greater than 95%	94.60%	96.70%	88.27%
Customers satisfied with maintainability	Greater than 95%	92.00%	94.60%	89.80%
Customers satisfied with supplementary and value added services	Greater than 90%	96.80%	97.20%	98.80%
Customers satisfied with overall service quality	Greater than 90%	96.80%	98.40%	90.20%

2.3. Summary of the Survey module for Broadband Operators

Snapshot of the Findings

Overall satisfaction
- Overall **Reliance** does not meet the benchmark level of satisfaction with service provisioning.

Service Provisioning
- **Bharti Airtel** and **Reliance** do not meet the benchmark level of satisfaction with service provisioning.

Billing Performance for Pre-paid users
- **Bharti Airtel** and **Asianet** do not meet the benchmark level of satisfaction on the aspect of billing performance for prepaid users.

Billing Performance for Post-paid users
- **Bharti Airtel** and **Reliance** do not meet the benchmark level of satisfaction on the aspect of billing performance for postpaid users.

Network performance, reliability and availability
- **Reliance** does not meet the benchmark level of satisfaction on Network performance, reliability and availability.

Maintainability
- **Reliance** does not meet the benchmark level of satisfaction on Maintainability.

Supplementary and Value Added Services
- **Reliance** does not meet the benchmark level of satisfaction on Supplementary and Value Added Services

This tablet below highlights the satisfaction scores for each of the parameter in details. The operators that do not meet the benchmark have been highlighted in red color.

Legend	
Operator not meeting the benchmark	
Operators meeting the Benchmark	
Operators that are almost at 100%	

Overall Performance	Benchmark	Airtel	Asia net	BSNL	Reliance
Customers satisfied with provisioning of service	Greater than 90%	88.67%	92.90%	94.87%	86.37%
Customers satisfied with billing performance - Prepaid	Greater than 90%	87.50%	89.85%	93.38%	93.78%
Customers satisfied with billing performance - Postpaid	Greater than 90%	86.70%	94.70%	94.47%	86.30%
Customers satisfied with help services	Greater than 90%	83.90%	87.35%	86.20%	77.85%
Customers satisfied with network performance, reliability and availability	Greater than 85%	88.40%	88.77%	88.90%	82.43%
Customers satisfied with maintainability	Greater than 85%	88.40%	89.10%	88.00%	81.80%
Customers satisfied with supplementary and value added services	Greater than 85%	89.90%	95.20%	91.20%	83.80%
Customers satisfied with overall service quality	Greater than 85%	89.40%	89.50%	91.40%	83.90%

Chapter #3.0:-

Detailed Findings for Wireless Service provider

This section of the report details the performance of wireless service providers on various service level parameters defined as per the 'Quality of Service' parameters.

3.1.   Service provisioning:

This section captures the level of satisfaction of users with various parameters like activation of connection, information about services, plans. As per the directive given by TRAI, more than 90% of the users should be satisfied on each sub-dimension in order to meet the benchmark. Dimension is further classified into three sub-dimensions:

3.1.1. Ease of taking a connection: The aspect seek to find out how satisfied the user is in case he/she has to purchase a new connection.

Ease of taking Connection

Operator	Value
Bharti airtel	99.5%
BSNL	99.5%
Idea cellular	99.3%
Reliance	99.0%
Sistema shyam	98.0%
Tata Teleservices	99.2%
Vodafone	99.5%
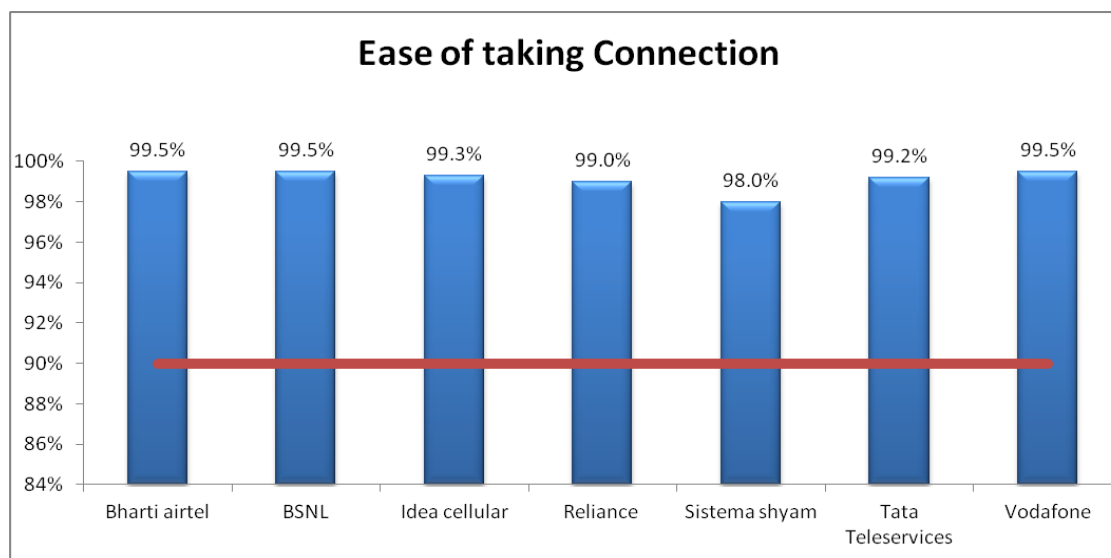
All operators operating in the **Kerala region meet the required benchmark of 90%,**

3.1.2. Relevant information related to tariff plans and charges: The parameters seek to find out how satisfied the user with the availability of information regarding tariff plan and charges.

Relevant information related to tariff plans & charges

Operator	Value
Bharti airtel	99.0%
BSNL	99.5%
Idea cellular	99.7%
Reliance	97.9%
Sistema shyam	97.2%
Tata Teleservices	98.8%
Vodafone	99.7%

All operators meet the required benchmark of 90% in Kerala Licensing area.

3.1.3. Availability of suitable plan/recharge as per requirement:

The aspects seek to find out how satisfied the user with the availability of suitable plans/recharge offers as per requirement.
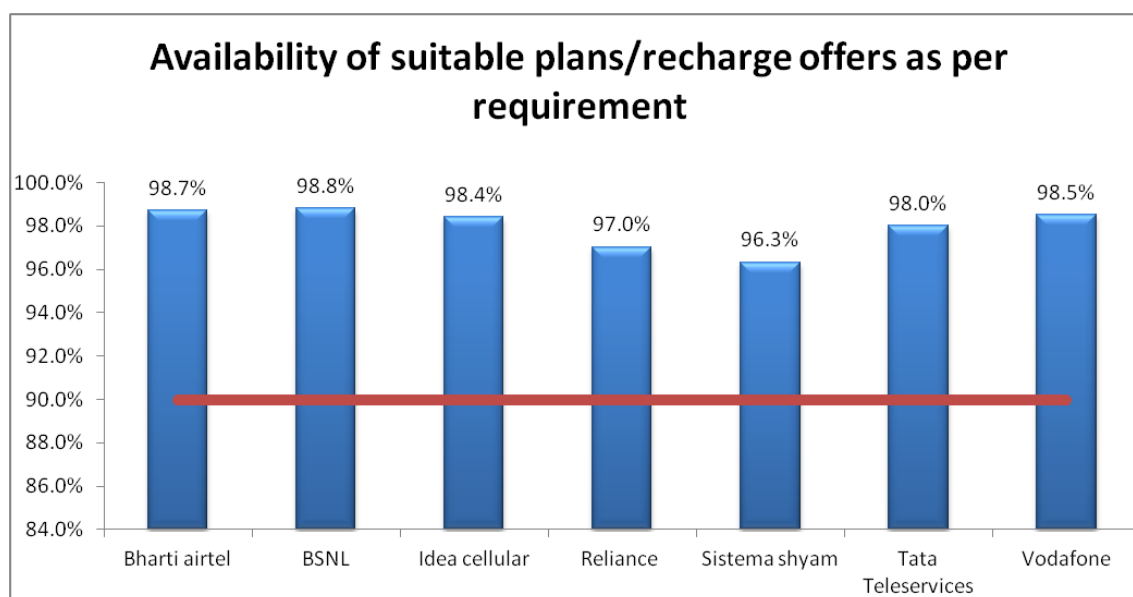
All operators meet the required benchmark set by TRAI with Sistema Shyam having the lowest score among the service providers operating in Kerala.

3.2. Billing performance for prepaid users:

This aspect captures the level of satisfaction of prepaid users on different aspects related to billing and recharge. As per the directive given by TRAI, more than 95% of the users should be satisfied on each sub-dimension in order to meet the benchmark

3.2.1. Ease of Recharging: The parameter seeks to find out how satisfied the user is with the recharge process.
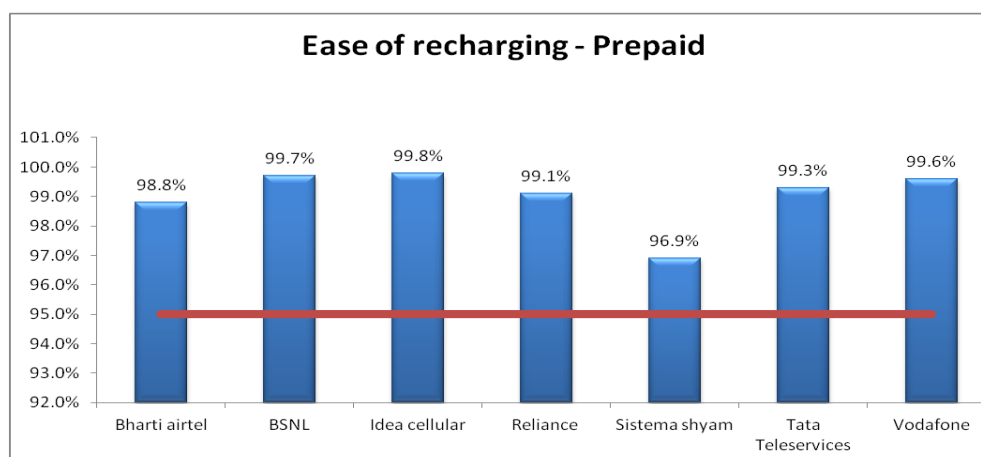
On aspect of 'ease of recharge' all operators meet the benchmark of 95% with Sistema Shyam having the lowest score.

3.2.2. Availability of recharge card of various denominations:

The aspect seeks to find out how satisfied the user with the availability of recharge of different denominations is.
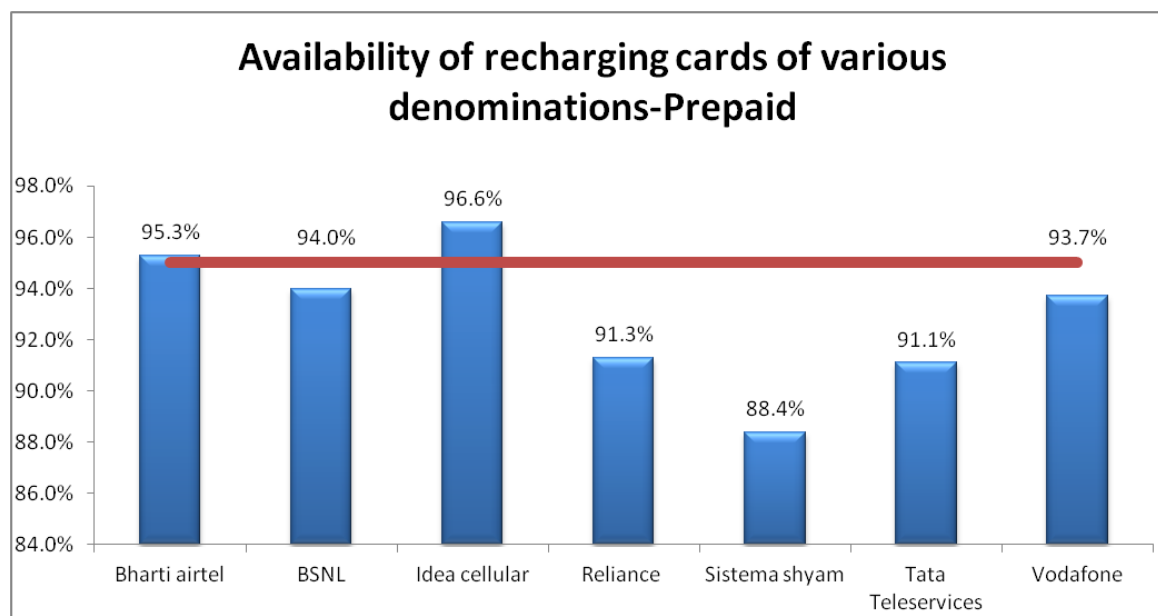
On aspect of 'Availability of recharge card of various denominations', only Bharti Airtel and Idea Cellular meet the required benchmark. Rest of them fails to meet the required benchmark of 95%

3.2.3. Transparency of recharge offer: This parameter covers the satisfaction level of prepaid users in terms of transparency of recharge offer provided by telecom operators.

Transparency of recharge offer - Prepaid
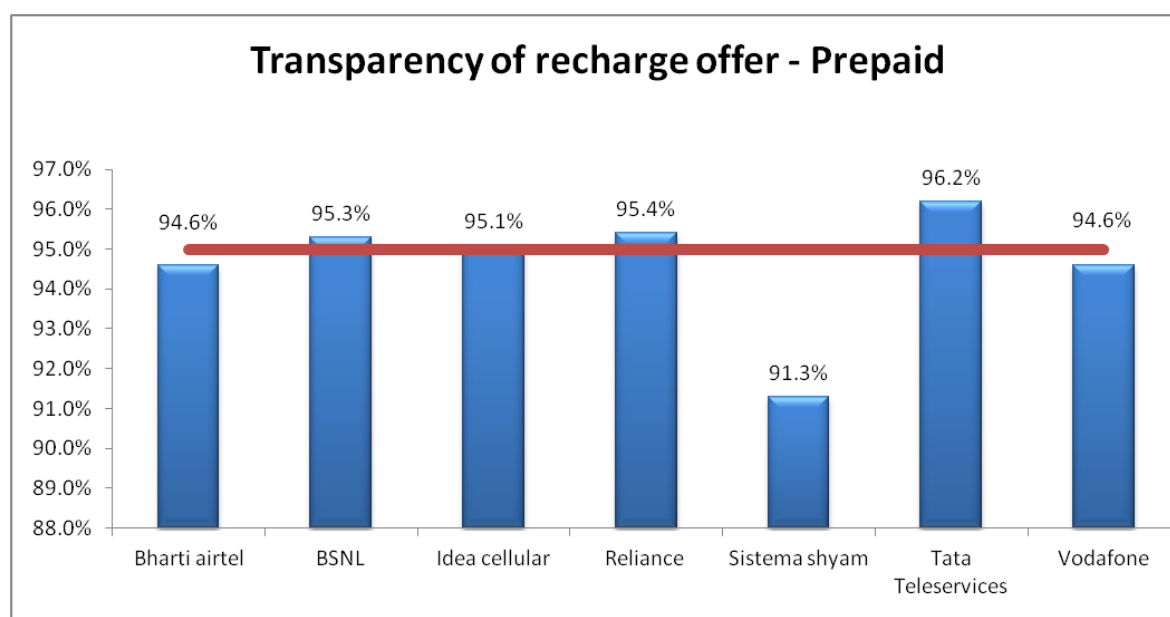
Vodafone, Bharti Airtel and Sistema Shyam are the operators do not meet the required criteria on 'transparency of recharge offer'. Rests of them just about meet the required benchmark.

3.2.4. <u>**Charges deducted for every call-**</u> Aspect covers the satisfaction level of prepaid users in terms of the charges that were levied by telecom operators for each call.

Charges deducted for every call-Prepaid
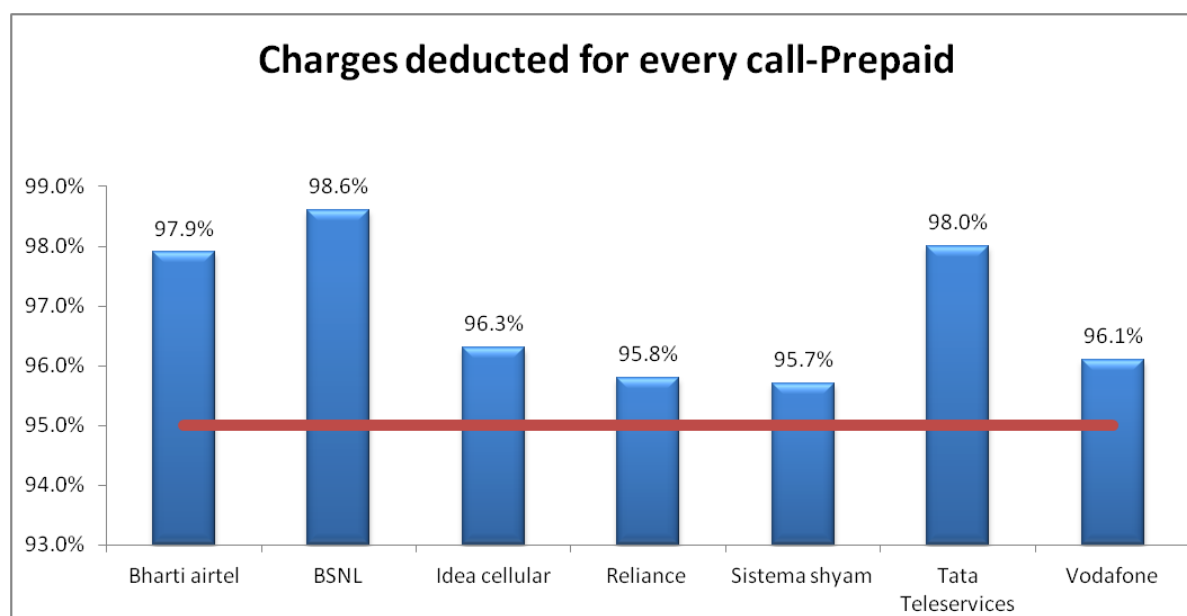
All operators meet the benchmark of 95% indicating that at an industry level the consumer is satisfied for this parameter. BSNL has the highest satisfaction score among all the operators on parameter of 'charges deducted for every call'.

3.3.   Billing performance for Postpaid Customers:

This aspect captures the level of satisfaction of postpaid users on different aspects related to billing. As per the directive given by TRAI, more than 95% of the users should be satisfied on each sub-dimension in order to meet the benchmark.

3.3.1.   Accuracy & completeness of the bills- The parameter seeks to find out satisfaction levels of postpaid users in terms of the accuracy and completeness of the bills issued by the operator.

Accuracy & completeness of the bills - Postpaid
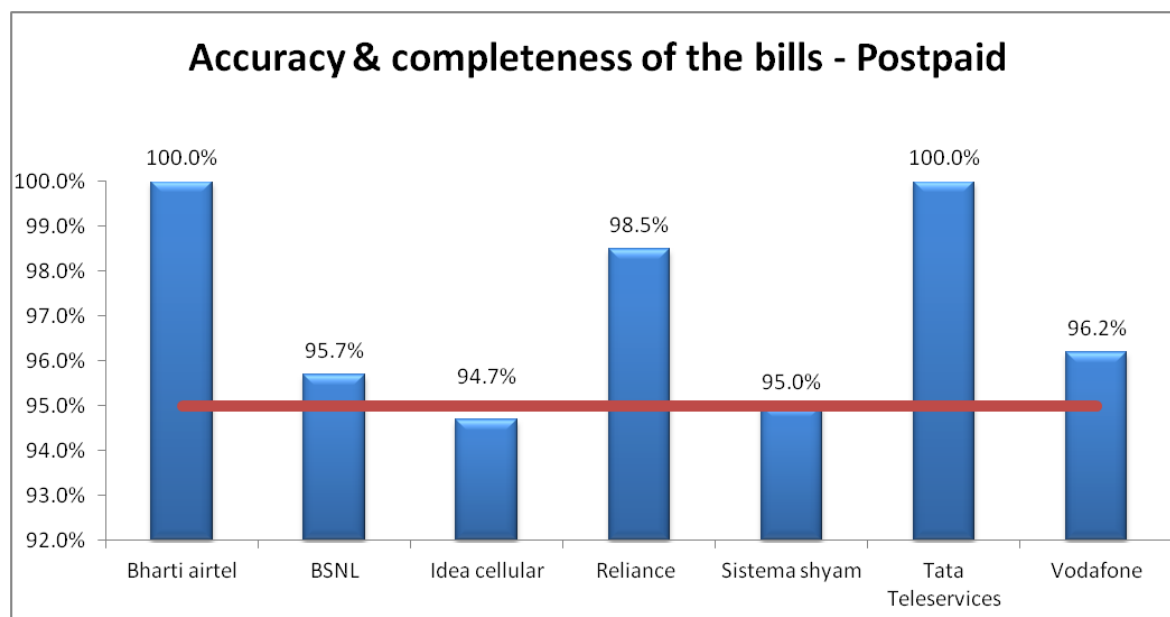
Idea cellular does not meet the benchmark of 95% on aspect of 'accuracy and completeness of bills'.

3.3.2.   Clarity of the bills in terms of transparency and understand ability- The aspects seeks to find out satisfaction level of users with their telecom operator's with respect to bills being transparent and being easily understood by the users.

Clarity of the bills in terms of transparency and understandability-Postpaid
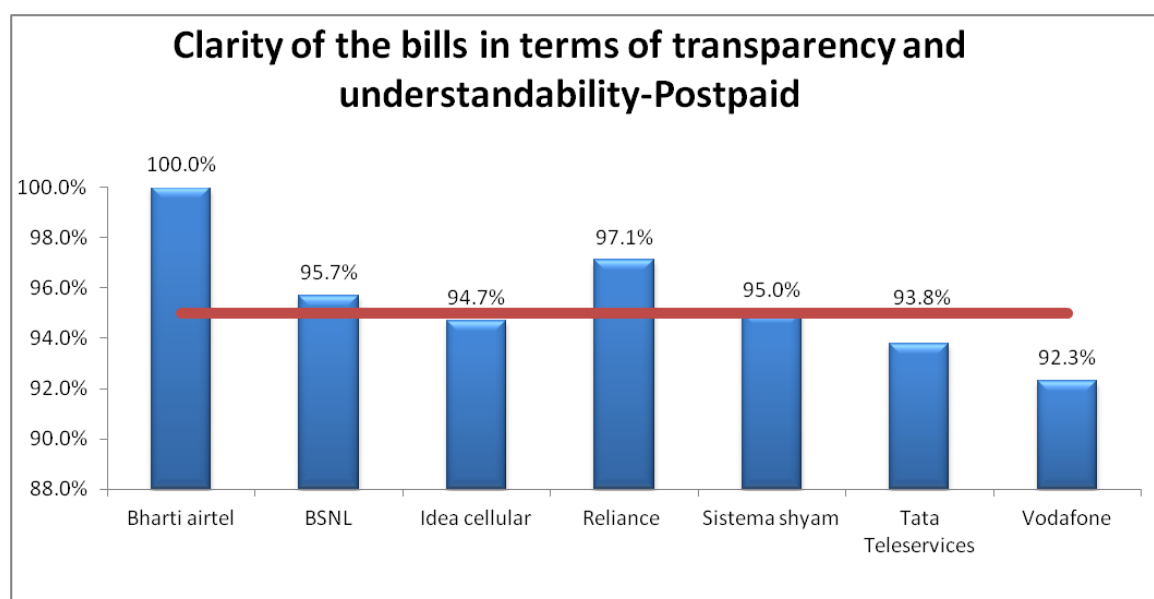
Tata Teleservices and Vodafone do not meet the required benchmark on 'Clarity of the bills in terms of transparency and understandability'.

3.3.3. **Call charges levied per minute/second-** The aspect captures the satisfaction of users with the telecom operator's with respect to the call charges levied by the operator.

Call charges levied per minute/second
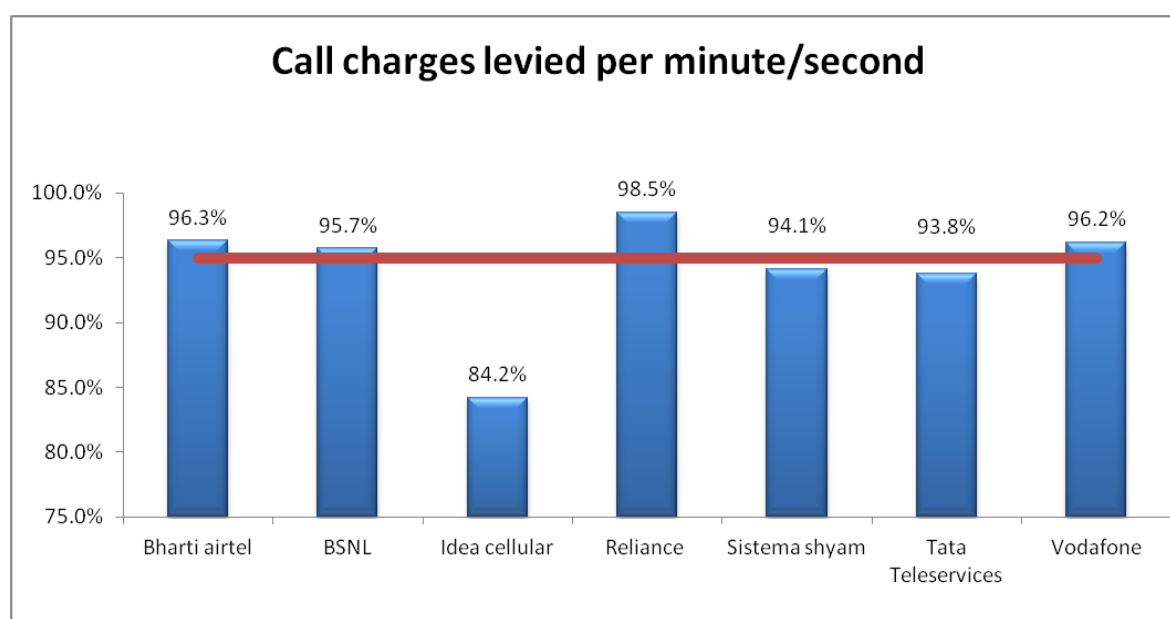
Idea cellular, Sistema shyam, and Tata Teleservices do not meet the benchmark of 95% on parameter of 'Call charges levied per minute/second'.

3.4.   Detailed findings for Help Services:

This aspect captures the level of satisfaction of users with the various help services like customer care provided by the operator. As per the directive given by TRAI, more than 90% of the users should be satisfied on each sub-dimension in order to meet the benchmark. This Dimension is further classified into four sub-dimensions which are as follows:
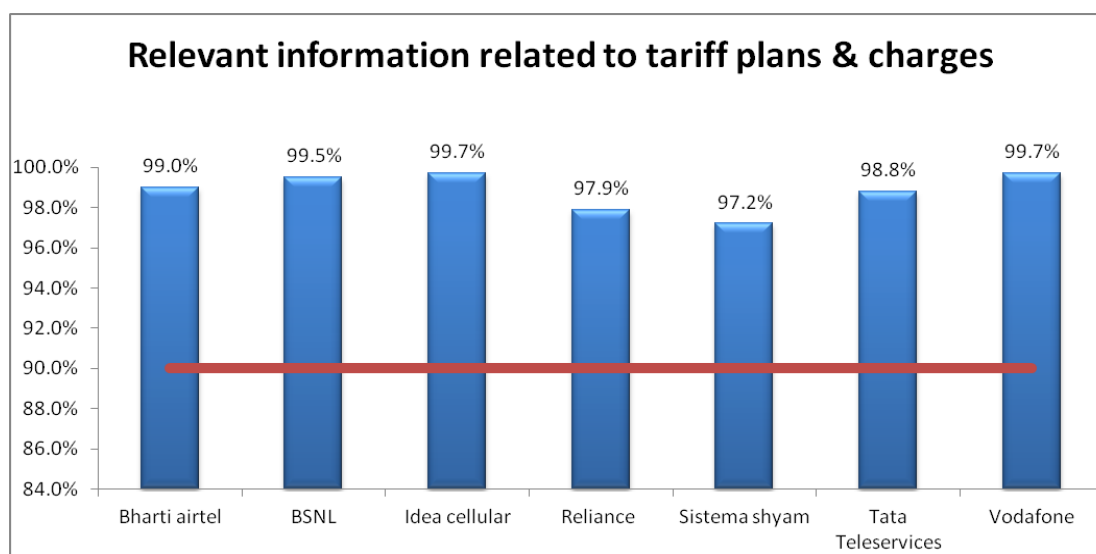
3.4.1.   Availability of customer care services 24*7: This parameter measure the satisfaction level of the users with respect to availability of customer care executive in resolving the problem throughout the day.
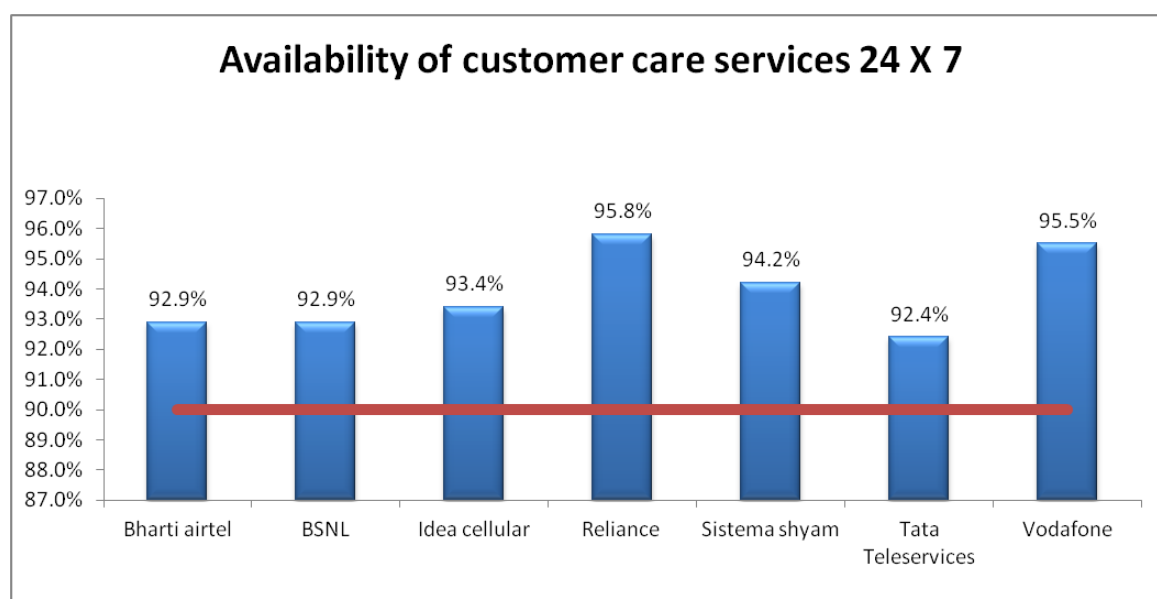
All operators comfortably meet the benchmark of 90% on aspect of 'Availability of customer care 24*7'.

3.4.2.   Ease of access of call centre/customer care or helpline and contacting the customer care executive: This parameter measure the satisfaction level of the users with respect to ease in connecting with call centre/customer care or helpline of the telecom operator as well as connecting with the customer care executive.
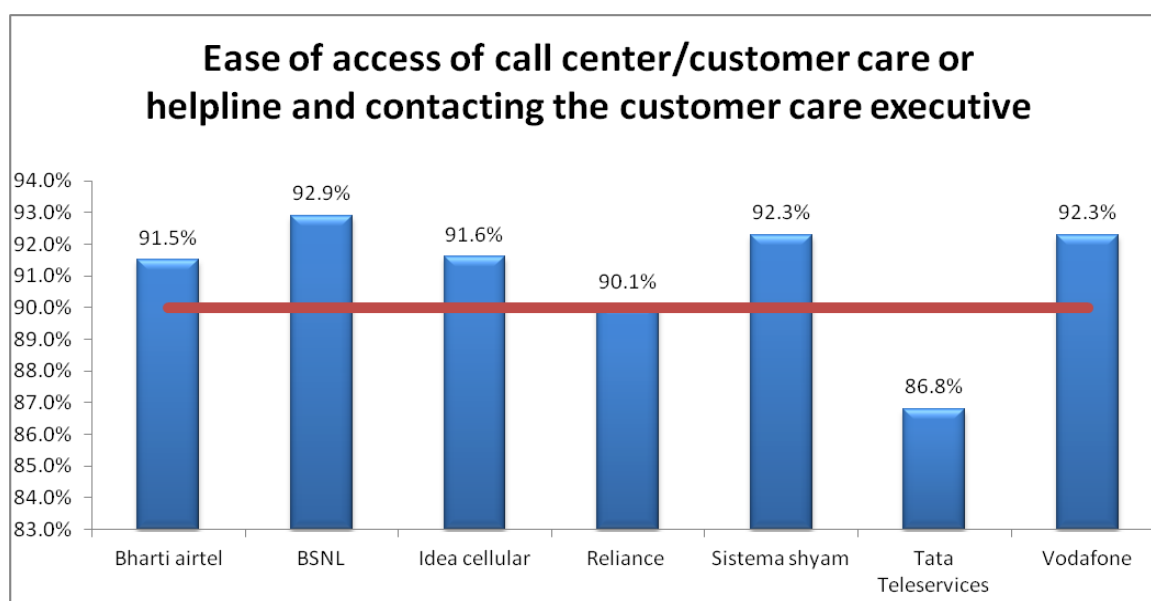
Tata Teleservices does not meet the benchmark of 90% on parameter of 'Ease of access of call centre/customer care or helpline and contacting the customer care executive'.

3.4.3. **Customer friendly approach of the customer care executive:** This parameter measure the satisfaction level of the respondent with respect to the customer friendly approach of the customer care executive.
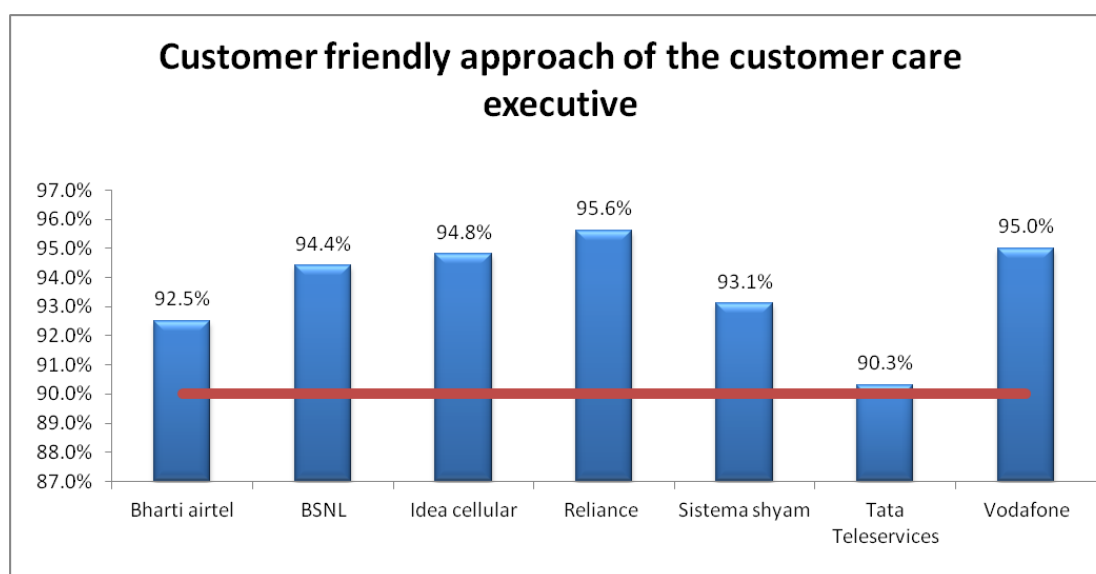
All operators meet the benchmark of 90% on aspect of 'Customer friendly approach of the customer care executive'.

3.4.4. Competency level/problem solving ability of the customer care executive: This parameter measures the satisfaction level of the respondent with respect to the competency shown by the customer care executive in solving the problems being faced by the subscribers.
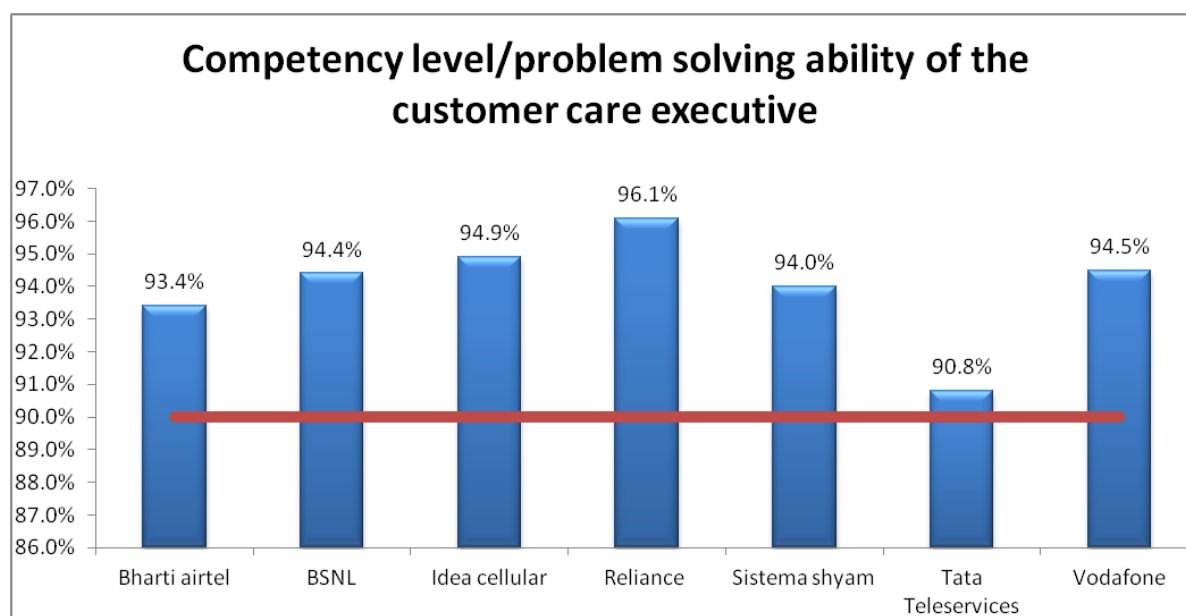
Reliance has the highest satisfaction score among all the operators on aspect of 'Competency level/problem solving ability of the customer care executive'. All operators meet the benchmark of 90%.

3.5. Network Performance, Reliability and Availability:

This parameter captures the level of satisfaction of consumers with various technical parameters related to network performance, reliability and availability. As per the directive given by TRAI, more than 95% of the users should be satisfied on each sub-dimension in order to meet the benchmark. This Dimension is further classified into three sub-dimensions which are as follows:

3.5.1. Availability of Signal of service provider in locality: This parameter measures the satisfaction level of the respondent with respect to availability of signal of the service provider in the locality.
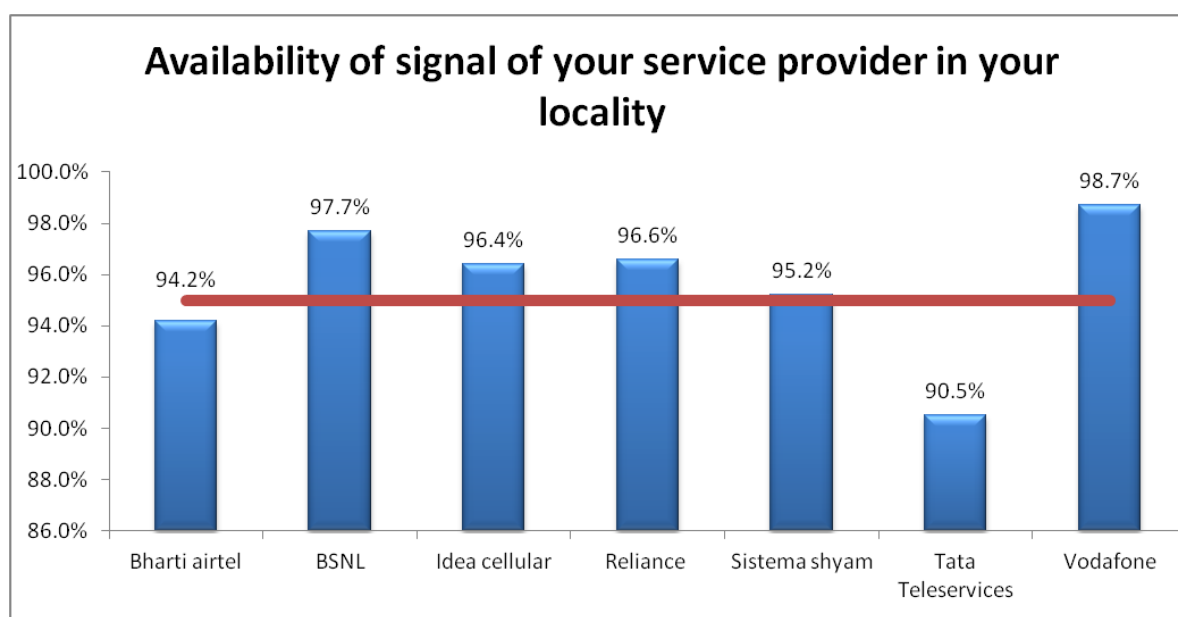
Availability of signal of your service provider in your locality

Vodafone has the highest satisfaction score among all the operators on aspect of 'Availability of Signal of service provider in locality'. Bharti airtel, Tata Teleservices do not meet the benchmark of 95%.

3.5.2. **Network of your service provider in terms of ability to make or receive calls easily:** This parameter measures the satisfaction level of the users with respect to the ability to make or receive calls.

Network of your service provider in terms of ability to make or receive calls easily
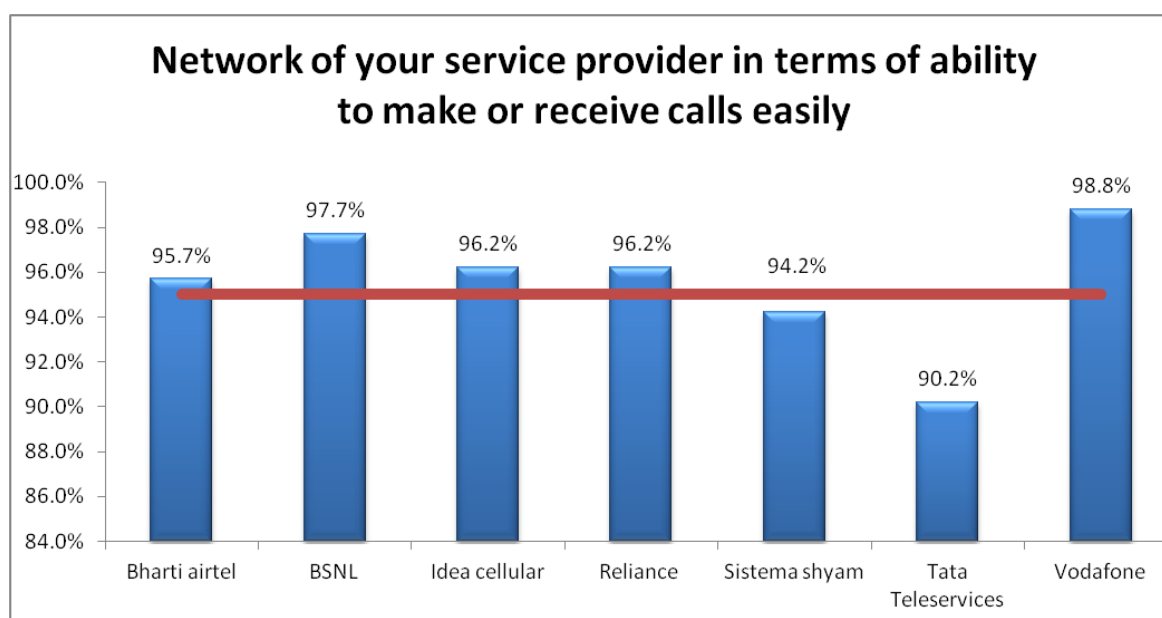
Vodafone has the highest satisfaction score among all the operators on aspect of 'Network of your service provider in terms of ability to make or receive calls easily'. Sistema shyam, and Tata Teleservices do not meet the benchmark of 95%.

3.5.3. Voice Quality: This parameter measures the satisfaction level of the users with respect to the voice quality while making or receiving calls.
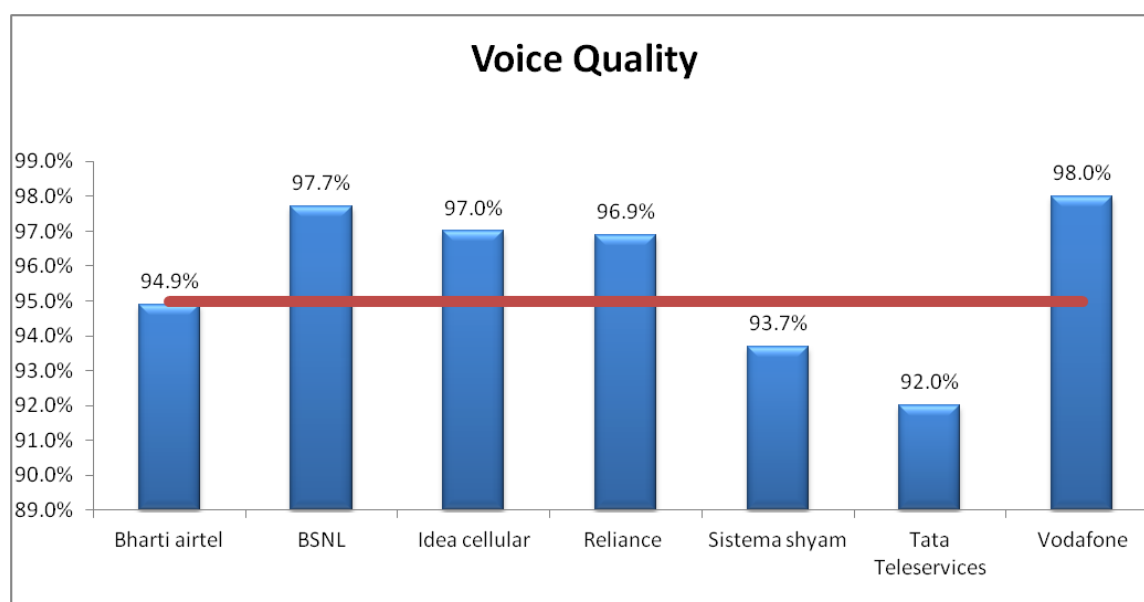
Vodafone has the highest satisfaction score among all the operators on parameter of 'Availability of Signal of service provider in locality'. Bharti airtel, Sistema shyam, and Tata Teleservices do not meet the benchmark of 95%.

Summary: We find that for all network related parameters, Tata Teleservices has not been able to meet any of the benchmarks indicating that it needs to improve on its overall network quality in Kerala circle

3.6.   Maintainability:

This aspect captures the level of satisfaction of consumers with various technical parameters related to maintainability which include troubleshooting in case of faults. As per the directive given by TRAI, more than 90% of the users should be satisfied on each sub-dimension in order to meet the benchmark. Dimension is further classified into one sub-dimension.

3.6.1.   **Effective handling of the network (signal) problems:** This parameter measures the satisfaction level of the user with respect to the handling and resolution of the network/signal problems faced by the subscriber.
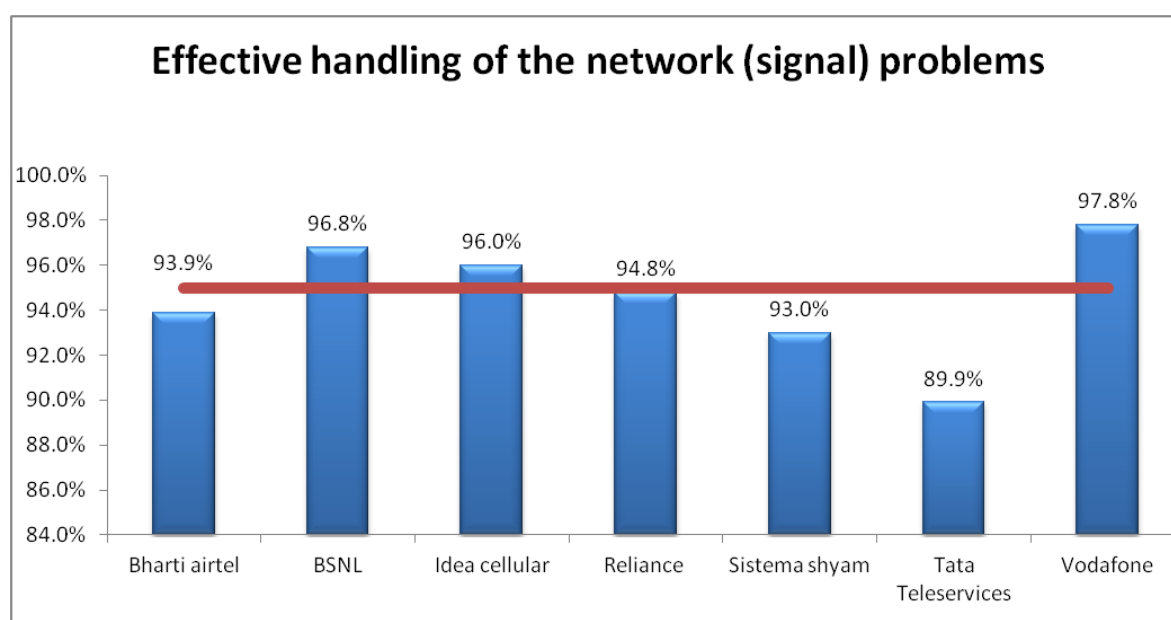
Vodafone has the highest satisfaction score among all the operators on aspect of 'Effective handling of the network (signal) problems'. Bharti airtel, Sistema shyam, Tata Teleservices do not meet the benchmark of 95%.

3.7.   Supplementary services and VAS:

This parameter captures the level of satisfaction of consumers with various technical parameters related to supplementary services and value added services like call waiting/forwarding, voice mail etc. As per the directive given by TRAI, more than 90% of the operators should be satisfied on each sub-dimension in order to meet the benchmark. Dimension is further classified into two sub-dimensions:

Usage of Supplementary/Value Added Services: Idea cellular has the highest percentage of its overall subscribers as users of supplementary services whereas Sistema shyam has the lowest percentage of its overall subscribers as users of supplementary services
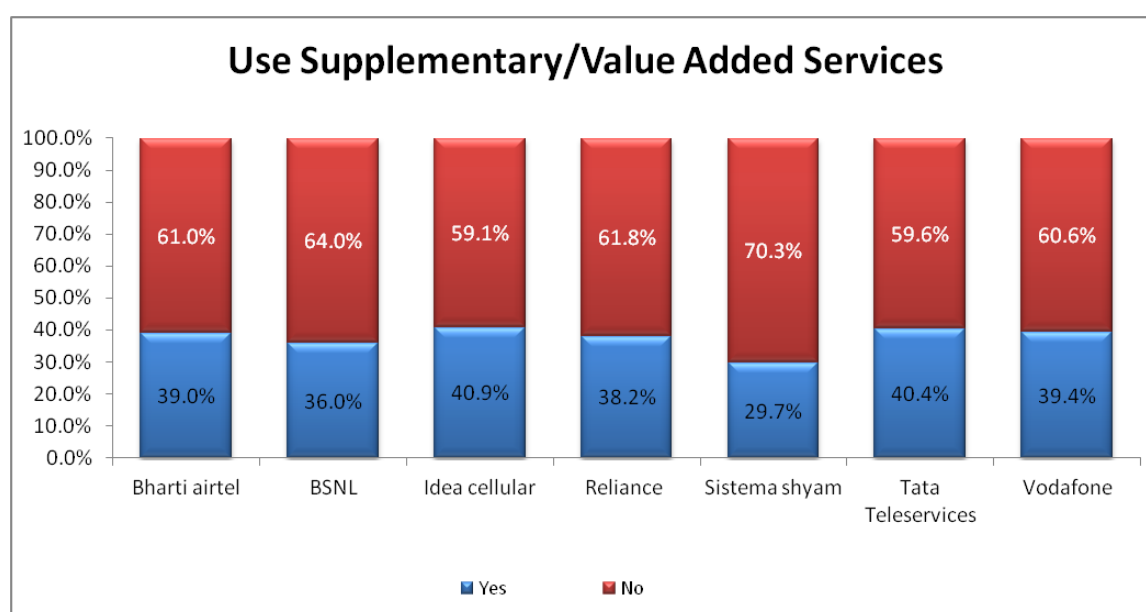
3.7.1.   Satisfaction with Quality of supplementary services / value added service provided including activation, deactivation, charges etc: This parameter measures the satisfaction level of users with the quality of supplementary services/value added services which include activation, deactivation, charges etc.

Satisfaction with Quality of supplementary services / value added service provided including activation, deactivation, charges etc.
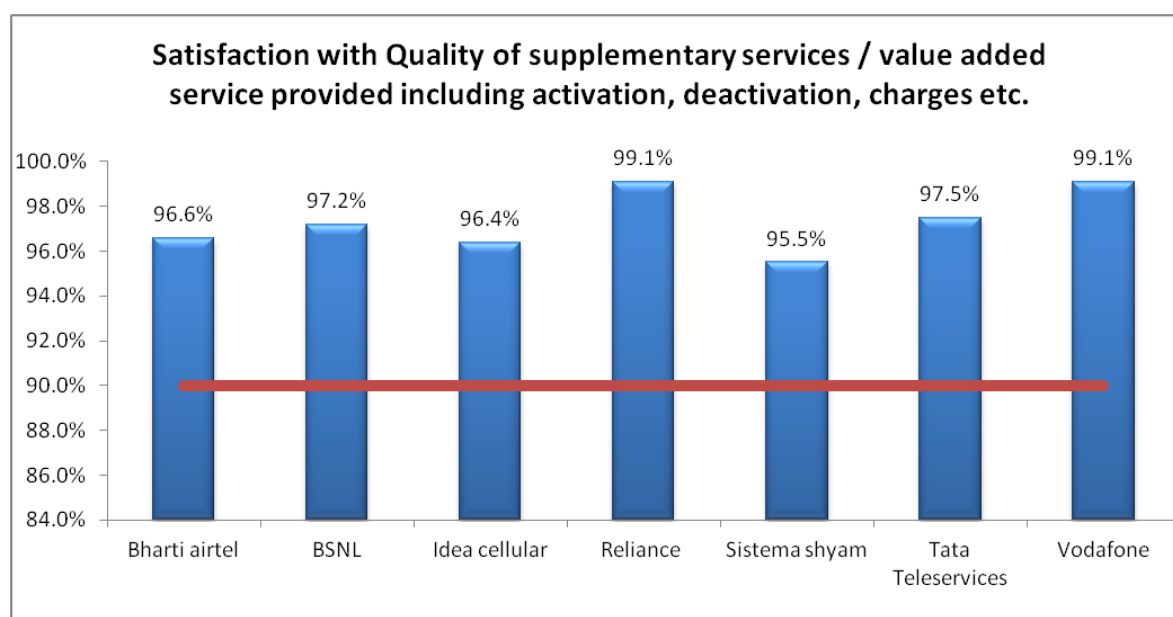
Reliance and Vodafone have the highest satisfaction score among all the operators on aspect of 'Satisfaction with Quality of supplementary services / value added service provided including activation, deactivation, charges etc'. All operators meet the benchmark of 95%.

3.8.   Assessment of TRAI Regulations and Directions:

TRAI issues regulations and directions for the operators in order to safeguard interest of consumers. This section of report discusses in detail about the awareness and satisfaction with the regulations.

3.8.1. **Do Not Disturb (DND):** This regulation was passed by TRAI in order to curb the menace of unsolicited commercial communications. TRAI had notified the Telecom Commercial Communications Customer Preference Regulation, 2010 dated 1st December 2010, published in the Gazette of India Extraordinary Part-III-Section 4 dated 1st December, 2010. As part of this regulation, a consumer can register his/her number with the operator and he/she will not receive any unsolicited commercial communications.

On an average, 11% of users have registered their number for blocking unsolicited commercial calls and SMS. Vodafone has the highest number of users registering for this service whereas Reliance has minimum number of users registered for the service.

Registered your number for blocking unsolicited commercial calls / SMSs

3.8.2. Satisfaction on blocking of unsolicited commercial calls/SMSs: This parameter measures the satisfaction level of users with the blocking of unsolicited commercial calls/SMS.
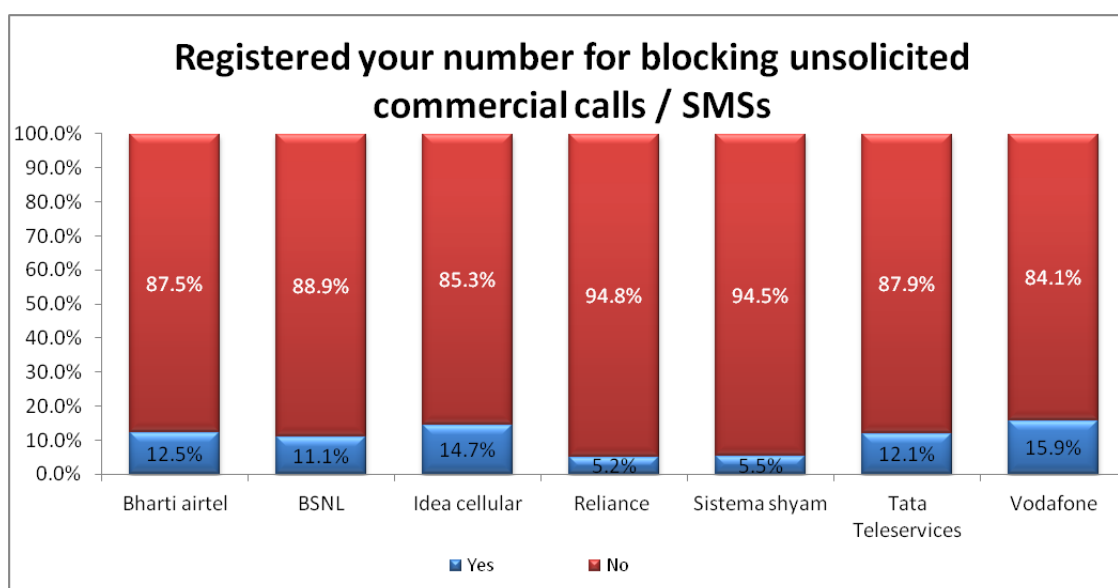
Satisfaction on blocking unsolicited commercial calls / SMSs
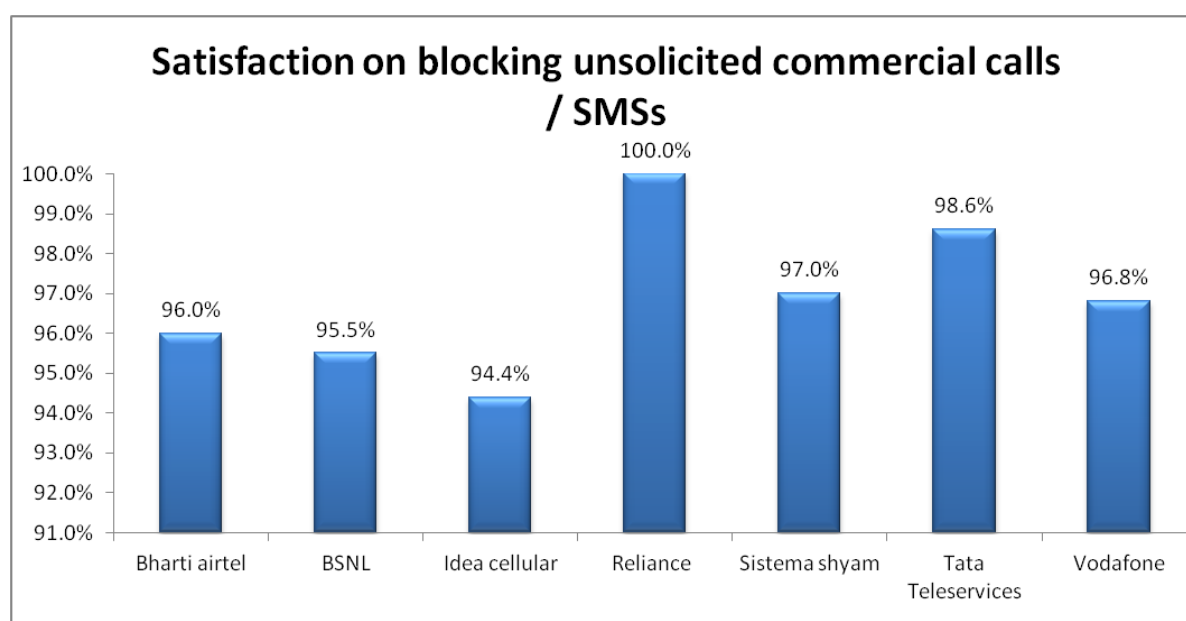
Reliance has the highest satisfaction score among all the operators on aspect of 'Satisfaction on blocking of unsolicited commercial calls/SMSs' whereas Idea cellular has the minimum satisfaction score on this parameter.

In case the unsolicited communication continues, users have the option of registering complaint with the operator. Below table indicates the percentage of respondents who have registered complaint in case unsolicited SMS have not stopped in spite of registration for the same.

3.8.3. Registration of complaint in case the unsolicited call/SMS have not been stopped in spite of registration for the same:
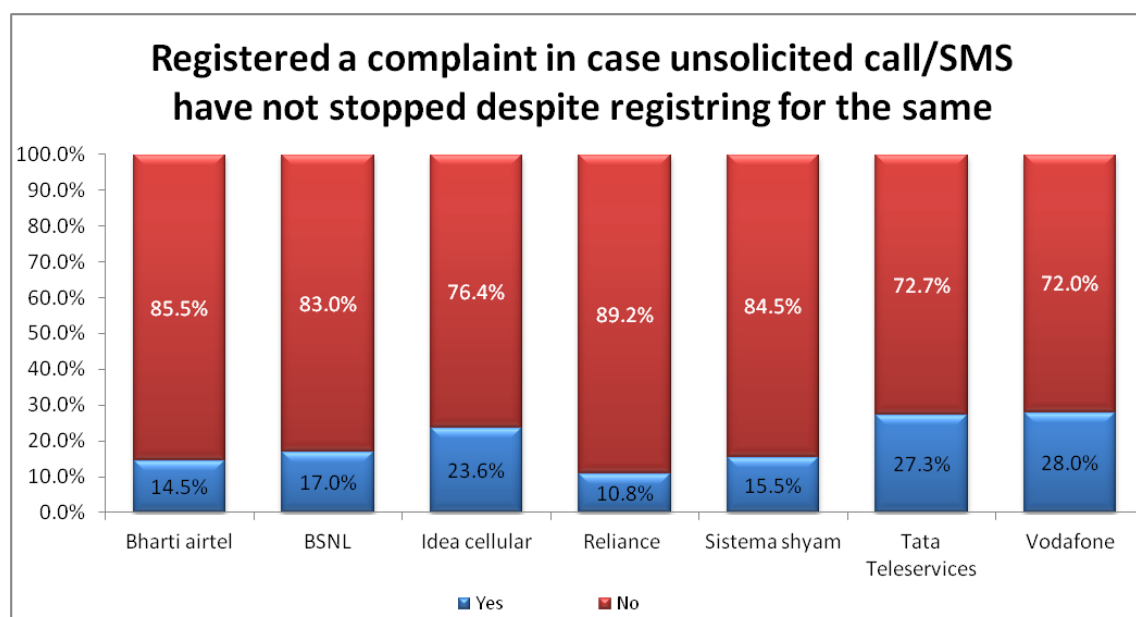
On an average, 19.5% of users have registered for the service in Kerala. Vodafone has the highest number of users registering for this service whereas Reliance has minimum number of users registered for the service.

As seen from the above chart on average 19.5% of the users (those users who had already registered their number for blocking unsolicited commercial calls and SMS) across telecom operators have registered a complaint in case the unsolicited call/SMS have not been stopped in spite of registration for the same. Given that this user base post calculation is lower than the minimum statistical base of 30 users for any type of data representation, we are unable to state the satisfaction score for these set of respondents.

3.9.   Prepaid users- Information

This section captures the satisfaction level of the prepaid users on various parameters related to information provided by operator to users like SMS giving information on amount charged, processing fees, taxes, duration of call, notifications etc.

3.9.1.   Receipt of a SMS providing information to the prepaid subscriber post recharge-Prepaid Users: This parameter measures the satisfaction of prepaid subscribers with telecom operators with respect to information provided like amount charged, processing fee, taxes deducted, title of the plan, validity etc at the time of recharge.

Receipt of a SMS giving information such as amount charged, processing fee, taxes deducted, title of the plan, validity etc. at the time of recharge

Operator	Value
Bharti airtel	97.6%
BSNL	98.8%
Idea cellular	98.3%
Reliance	99.1%
Sistema shyam	96.5%
Tata Teleservices	98.1%
Vodafone	98.6%

Reliance has the highest satisfaction score among all the operators on aspect of 'Receipt of SMS providing information to the prepaid subscriber post recharge' whereas Sistema shyam has the minimum satisfaction score on this aspect.

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3.9.2. Receipt of a SMS providing information to the prepaid subscriber after making a call -Prepaid Users: This parameter measured the satisfaction of prepaid subscribers with telecom operators with respect to information provided at the time of recharge such as duration of call, call charges, balance in account etc.

Receipt of a SMS giving information such as duration of call, call charges, balance in account etc. after making a call
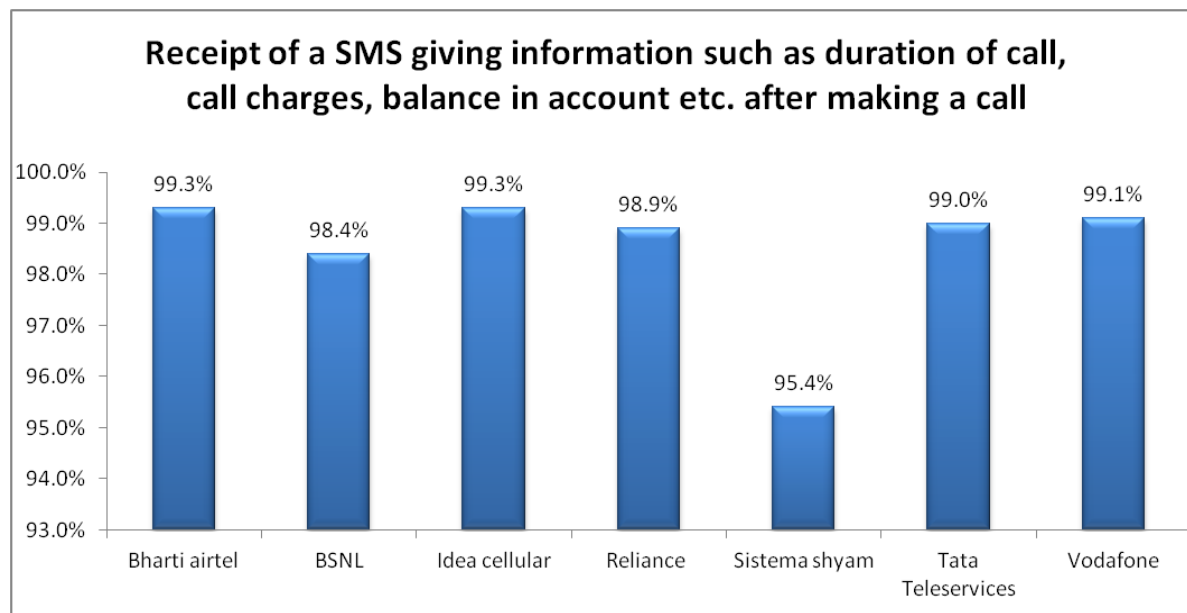
Sistema shyam has the minimum satisfaction score on this aspect while the rest of them have a good satisfaction score.

3.9.3. Request for Item-wise usage bill request- Prepaid Users: A prepaid users can request for item-wise usage bill from the operator and the operator is liable to attend to the request within 45 days of such a request. Below table captures the percentage of respondents who have made such a request to the operator.

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Item-wise usage bill within 45 days of making such request
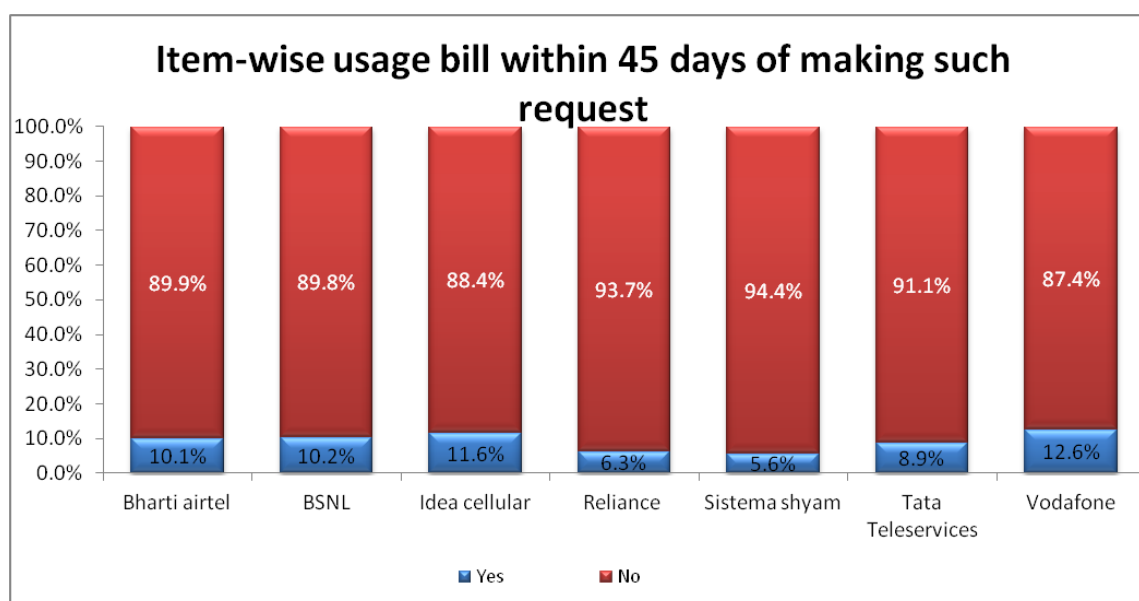
On an average, 9.3% of users have registered for the service in Kerala circle. Vodafone has the highest number of users whereas Sistema shyam has minimum number of users registering for this service.

3.9.4. Satisfaction on Item-wise usage bill request: This parameter captures the subscribers satisfaction related to receipt of item-wise usage bill on request within 45 days of making such a request.

Satisfaction- Item-wise usage bill within 45 days of making such request
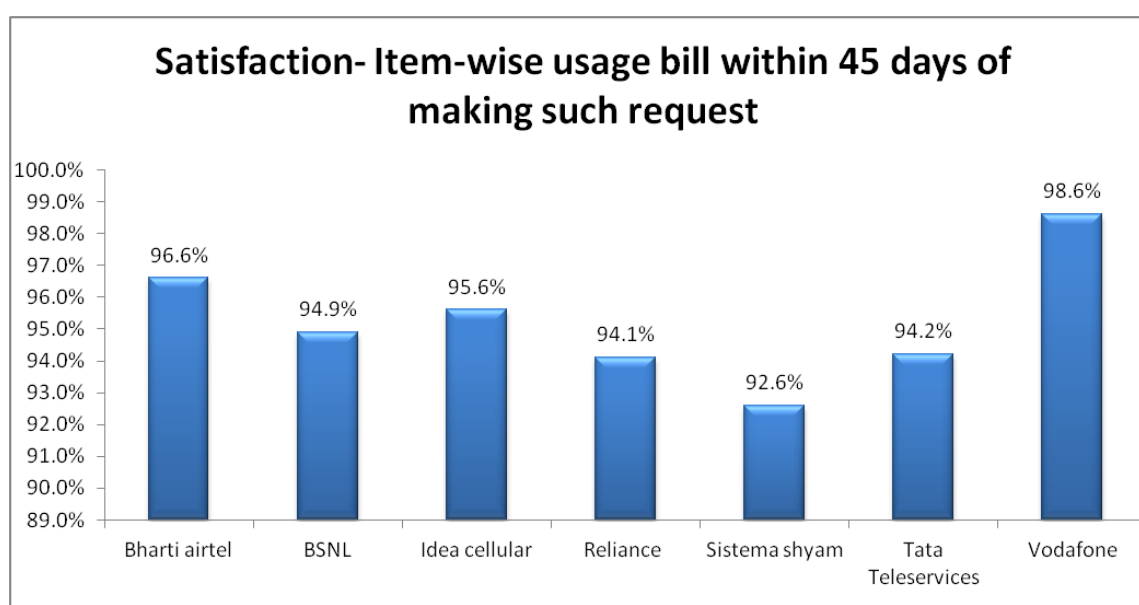
Vodafone has the highest satisfaction score among all the operators on aspect of 'Item-wise usage bill request' whereas Sistema shyam has the minimum satisfaction score on this parameter. As we notice that the number of users who have made such a request is low when compared to the number of overall subscribers.

3.10. Awareness of grievance redressal mechanism:

This parameter measures the awareness level of the subscribers about the two stage grievance redressal mechanism set up by the telecom service provider based on the TRAI regulations.
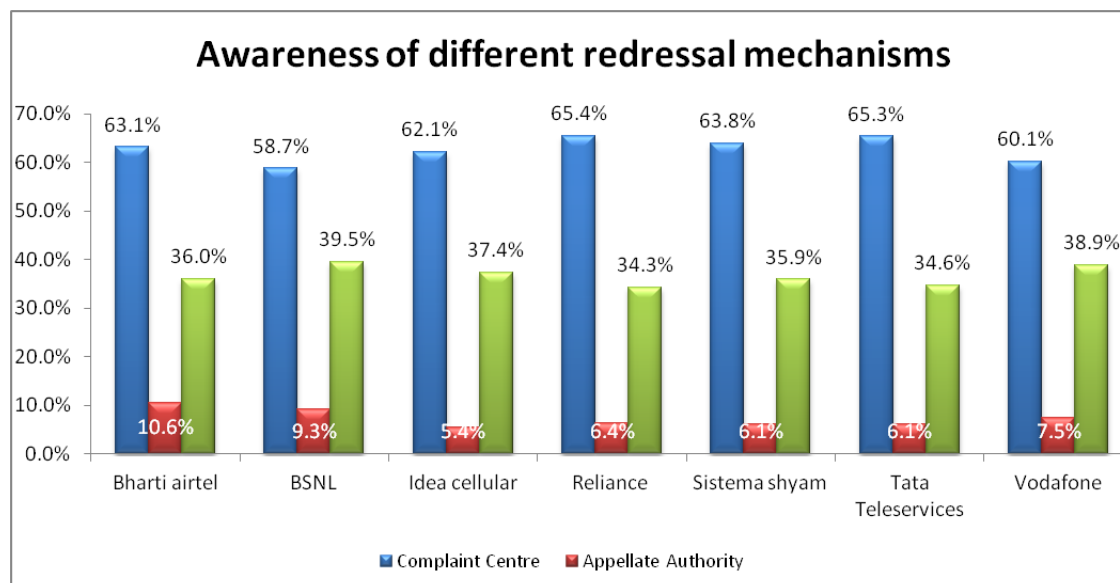
Complaint Centre: On an average 62.6% of the users are aware about the first stage of the grievance redressal mechanism. Subscribers owning connection of Reliance have the highest level of awareness whereas subscribers of BSNL have the lowest awareness level.

Appellate Authority: On an average 7.3% of the users are aware about the second stage of the grievance redressal mechanism. Subscribers owning connection of Bharti airtel have the highest level of awareness whereas subscribers of Idea cellular have the lowest awareness level.

Unaware: On an average, 36.7% of the respondents are not aware of the any stages of the redressal mechanism.

3.10.1. Complaint on Toll free number: Users can complaint on the toll free number in case of any problems being faced by them. Below table indicates the percentage of users who have availed such a service.

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(IS/ISO 9001-2008 Certified Organisation)
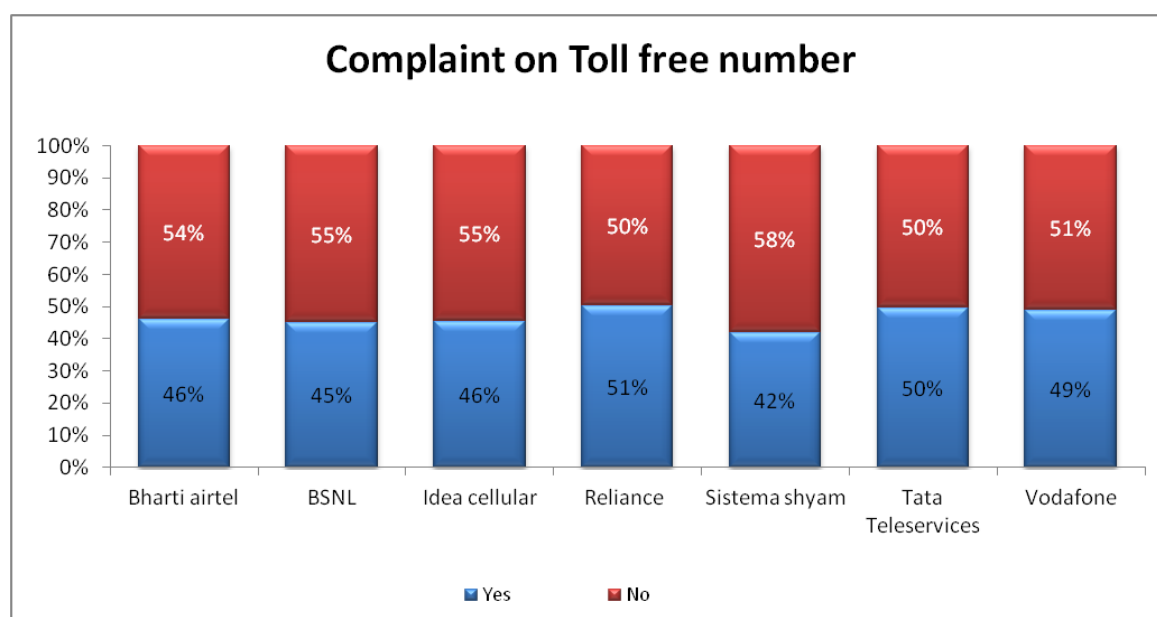
On an average, 46.9% of users have complained to the Toll free number. Reliance has the highest number of users who have made complaint to the toll free number whereas Sistema shyam has minimum number of users availing this service.

3.10.2. <u>Satisfaction - Complaint on Toll free number:</u> This parameter captures the satisfaction level of the user on adressal of complaint by the telecom service provider.
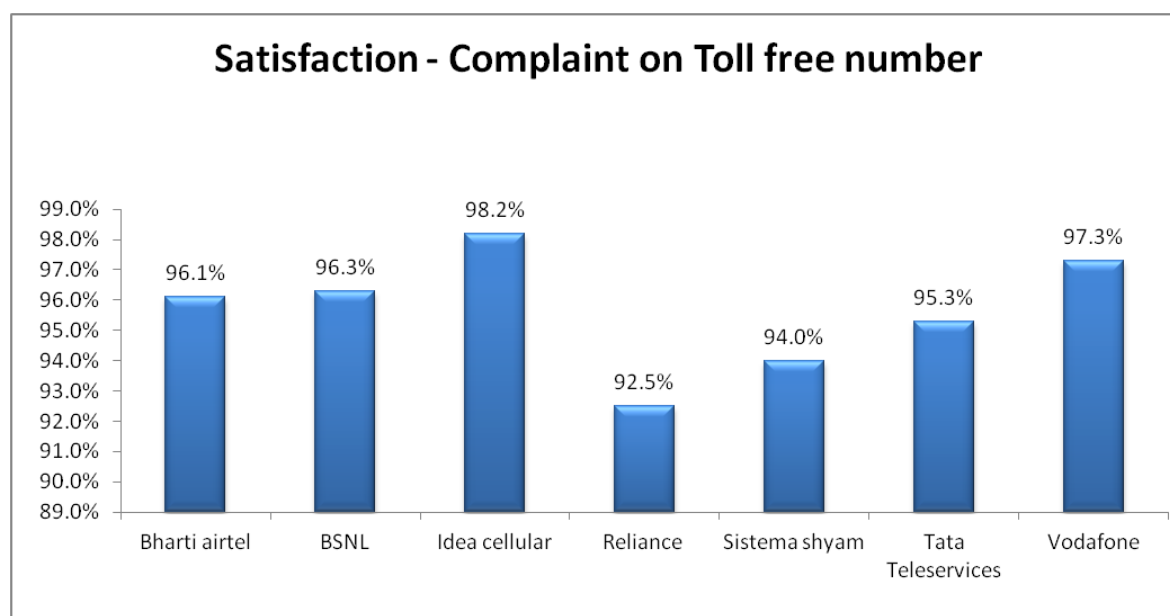
Idea cellular has the highest percentage of subscribers who are satisfied with the way in which their complaint was addressed. On the contrary, Reliance has the lowest percentage of subscribers who are satisfied with the way in which their complaint was addressed.

3.10.3. **Complaint to Appellate Authority:** Complaining to the Appellate Authority is the second stage of the redressal mechanism. This stage is used when unsatisfactory redressal is achieved from the complaint made on the toll free number. Below table indicates percentage of users who have availed such a service.
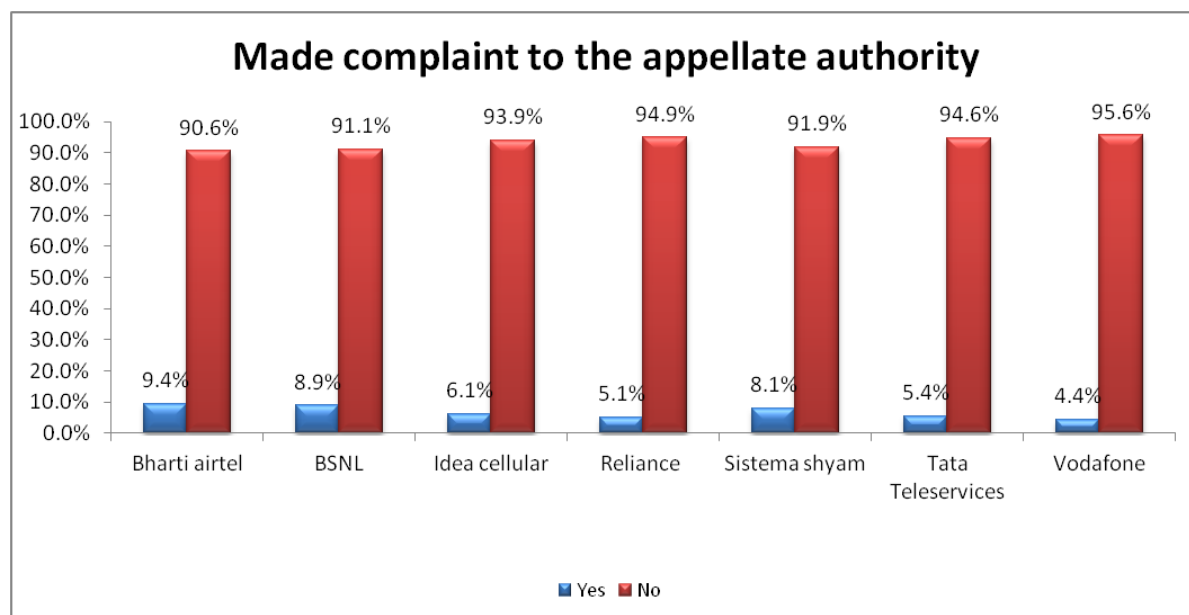
On an average, 6.8% of users have complained to the Appellate authority w.r.t to the services being offered by their service providers. Bharti airtel has the highest number of users who have made complaint to the Appellate authority whereas Vodafone has the minimum number of users availing this service.

As seen from the above chart that only 6.8% of the overall users across telecom operators have registered a complaint to the appellate authority from the 7.3% users that knew about the existence of an appellate authority. Given that this user base post calculation comes out to be lower than the minimum statistical base of 30 users for any type of data representation, we are unable to state the satisfaction score for these set of respondents.

3.11.Mobile Number Portability:

As per the latest directives issued by TRAI, a subscriber can change the service provider with changing the number using the services of MNP.
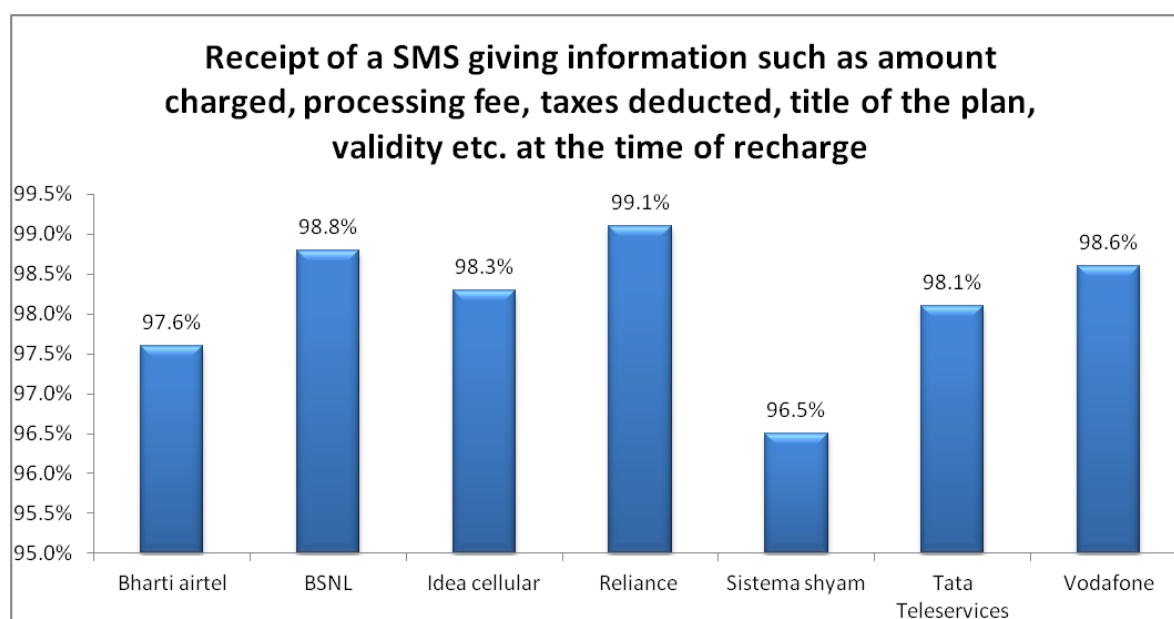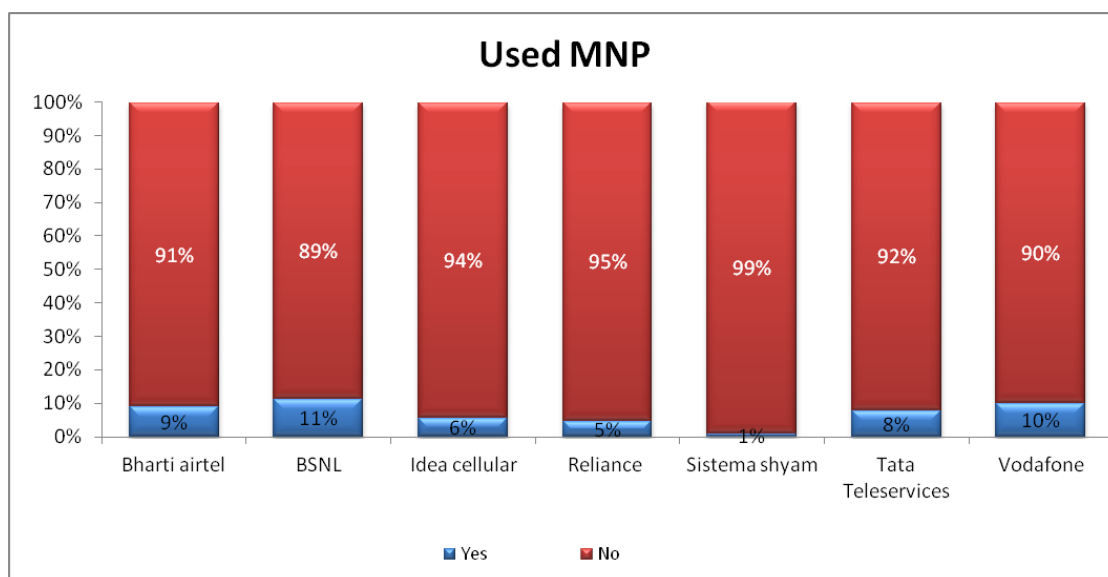

On an average, 7.1% of the users have registered for the service in Kerala circle. BSNL has the highest number of users registering for this service whereas Sistema shyam has minimum number of users registered for the service.

3.11.1. Satisfaction with Mobile Number Portability Service (MNP):

This parameter captures the satisfaction level of user with the operator on the parameter of Mobile Number Portability (MNP)
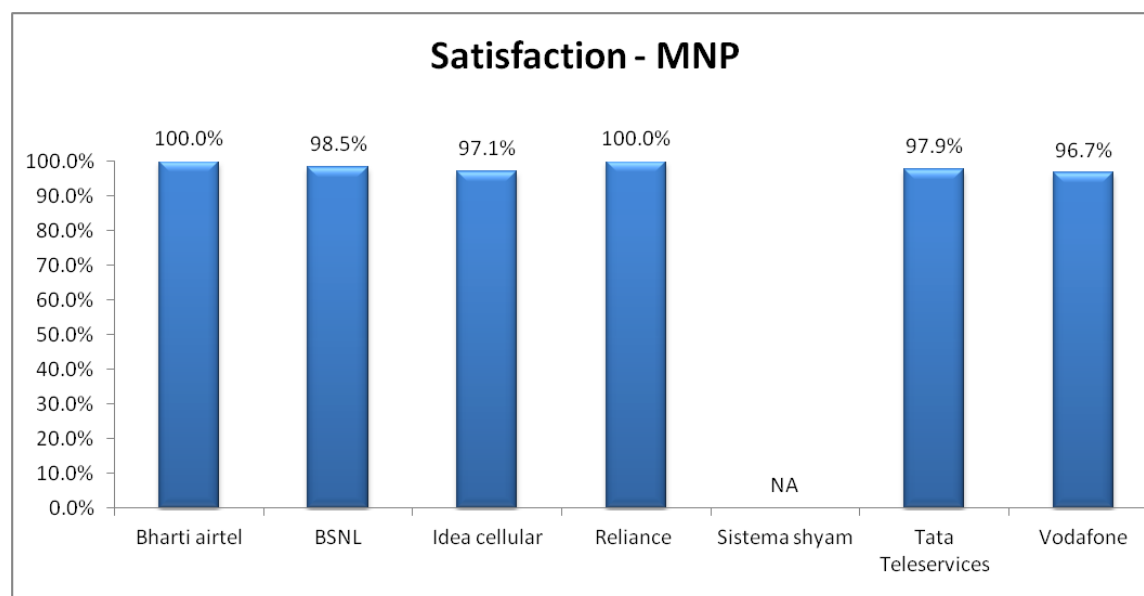
Sistema shyam has the highest percentage of subscribers who are satisfied with the operator on the parameter of MNP. On the contrary, Vodafone has the lowest percentage of subscribers who are satisfied with the operator on this aspect.

Chapter #4.0:-

Detailed Findings for Wireline Service provider

This section of the report details the performance of wire line service providers on various service level parameters defined as per the 'Quality of Service' parameters.

4.1   Service provisioning:

This section captures the level of satisfaction among users on various parameters like activation of connection, information about services, plans etc. As per the directive given by TRAI, more than 90% of the users should be satisfied on each sub-dimension in order to meet the benchmark. This dimension is further classified into three sub-dimensions:

4.1.1   **Ease of taking a connection:** This aspect seeks to find out how satisfied the user is if and when he/she has to purchase a new connection.
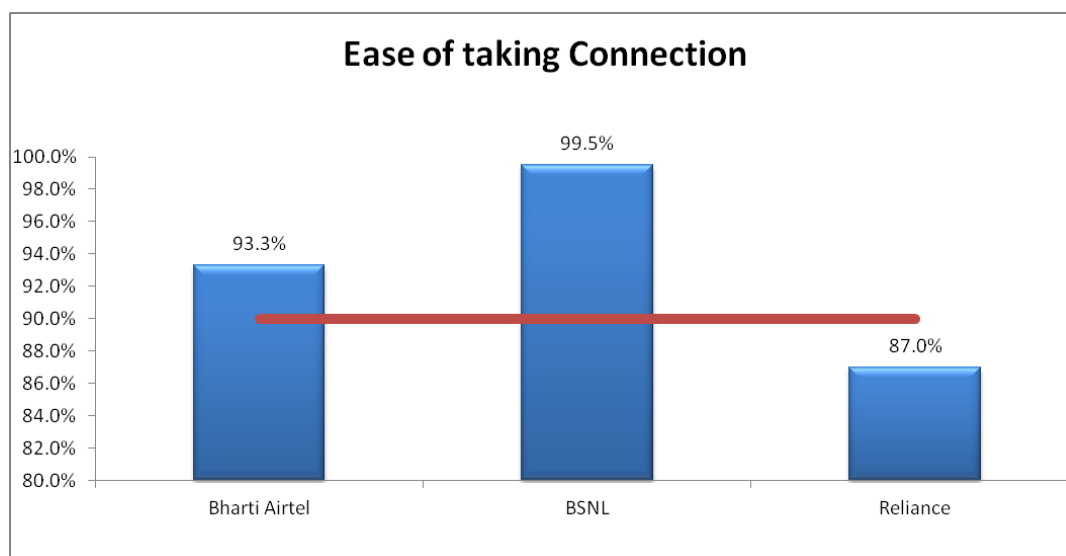
Ease of taking Connection

BSNL has the highest satisfaction score among all the operators on the aspect of 'ease of taking connection'. Reliance does not meet the benchmark level of 90% set by TRAI.

4.1.2   **Relevant information related to tariff plans and charges:** This parameter seeks to find out how satisfied the user is with the availability of information regarding tariff plan and charges.

Relevant information related to tariff plans & charges
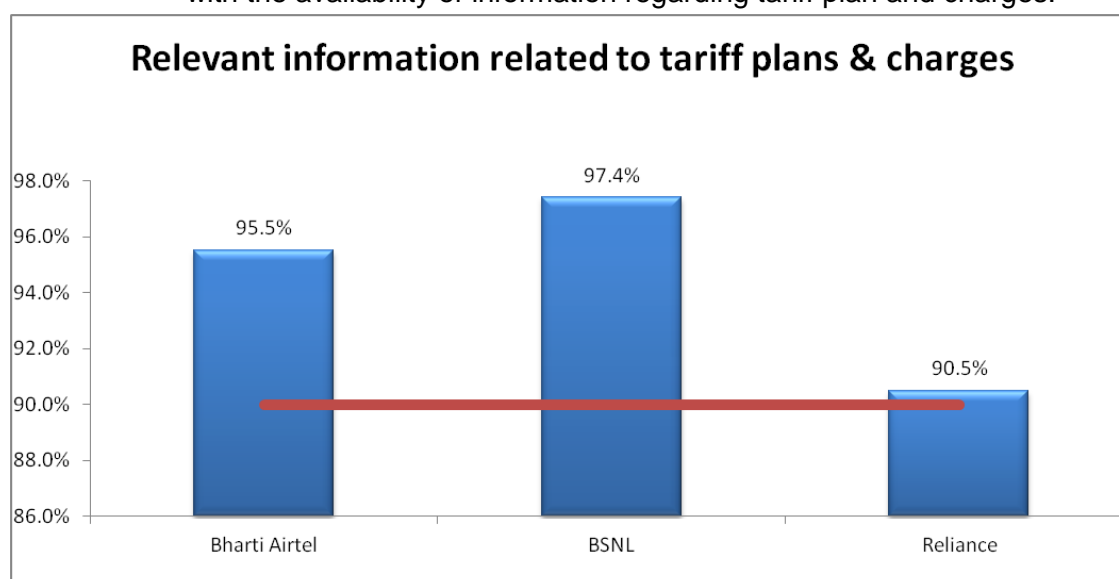
BSNL has the highest satisfaction score among all the operators on the parameter of 'Relevant information related to tariff plans & charges'. All operators meet the benchmark of 90%.

4.1.3 **Availability of suitable plan/recharge as per requirement:** The aspect seeks to find out how satisfied the user is with the availability of suitable plans/recharge offers as per requirement.
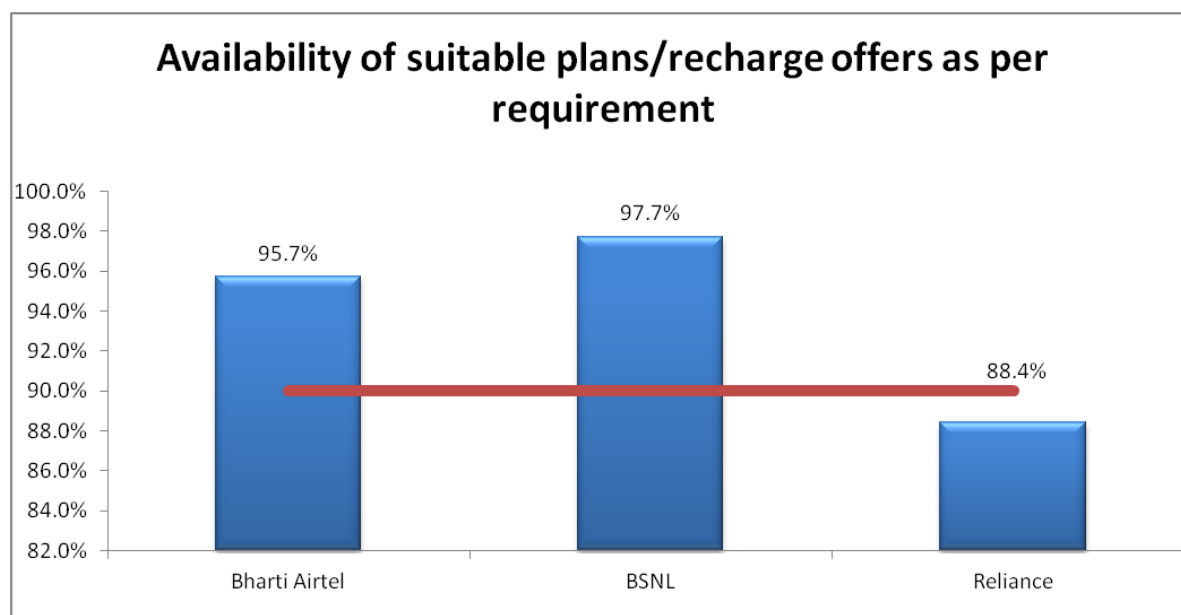
BSNL has the highest satisfaction score among all the operators on the parameter of 'availability of suitable plans/recharge offers as per requirement'. Reliance does not meet the benchmark of 90%.

4.2 Billing performance for prepaid users:

This aspect captures the level of satisfaction among prepaid users on aspects related to billing and recharge. As per the directive given by TRAI, more than 95% of the users should be satisfied on each sub-dimension in order to meet the benchmark.

On an average only 1% of the users across the wireline player are prepaid users. Given that this particular user base is lower than the minimum statistical base of 30 users for any data representation, henceforth, we are unable to state the satisfaction scores across the whole section.

4.3 Billing performance for Postpaid Customers:

This aspect captures the level of satisfaction of postpaid users on various aspects related to billing. As per the directive given by TRAI, more than 95% users should be satisfied on each sub-dimension in order to meet the benchmark.

4.3.1 **Accuracy & completeness of the bills-** This parameter seeks to find out satisfaction levels of postpaid users in terms of the accuracy and completeness of the bills issued by the operator.
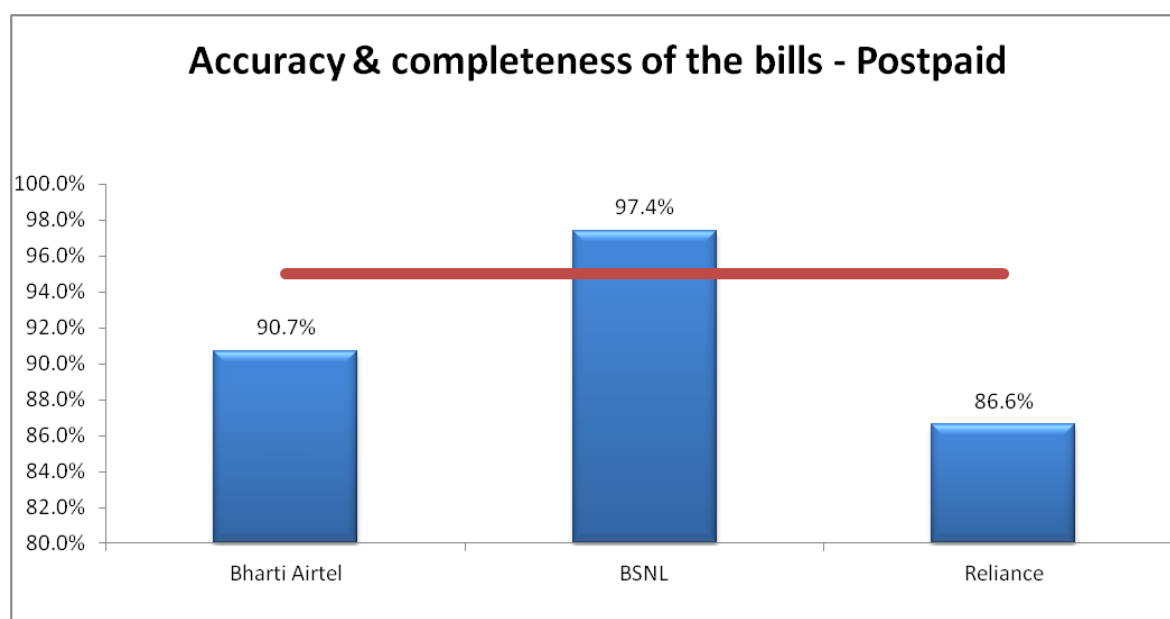
BSNL has the highest satisfaction score among all the operators on the aspect of 'accuracy and completeness of bills'. Bharti Airtel and Reliance do not meet the benchmark of 95%.

4.3.2 **Clarity of the bills in terms of transparency and understandability-** This aspect seeks to find out the satisfaction level of users with their telecom operators with respect to bills being transparent and being easily understood by the users.
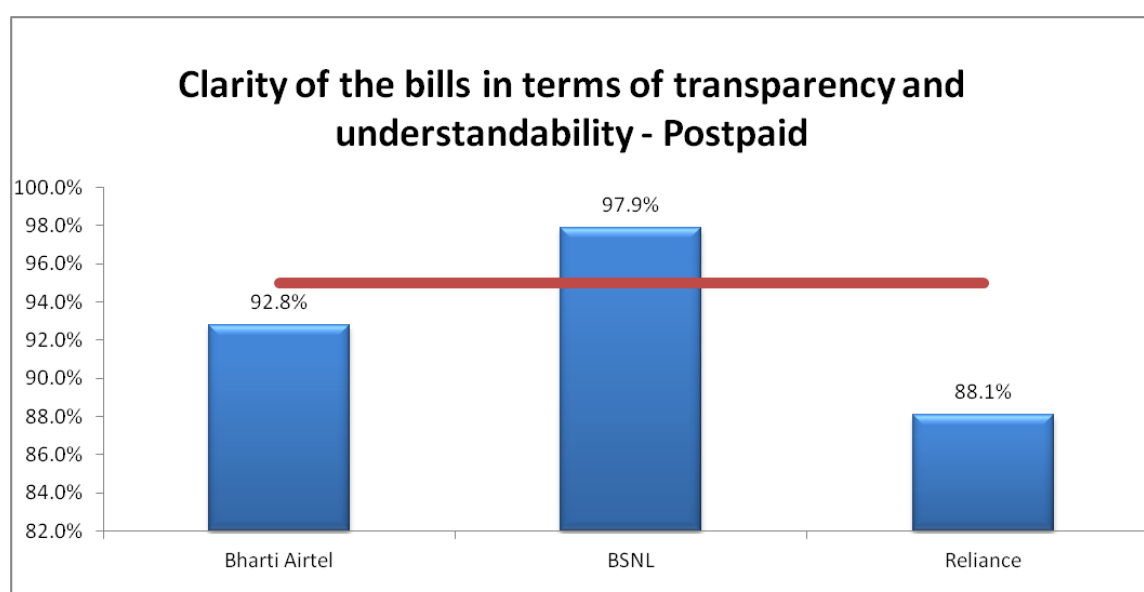
BSNL has the highest satisfaction score among all the operators on the parameter of 'Clarity of bills in terms of transparency and understandability'. Bharti Airtel and Reliance do not meet the benchmark of 95%.

4.3.3 **Call charges levied per minute/second-** The aspect captures the satisfaction of users with the telecom operators with respect to the call charges levied by the operator.
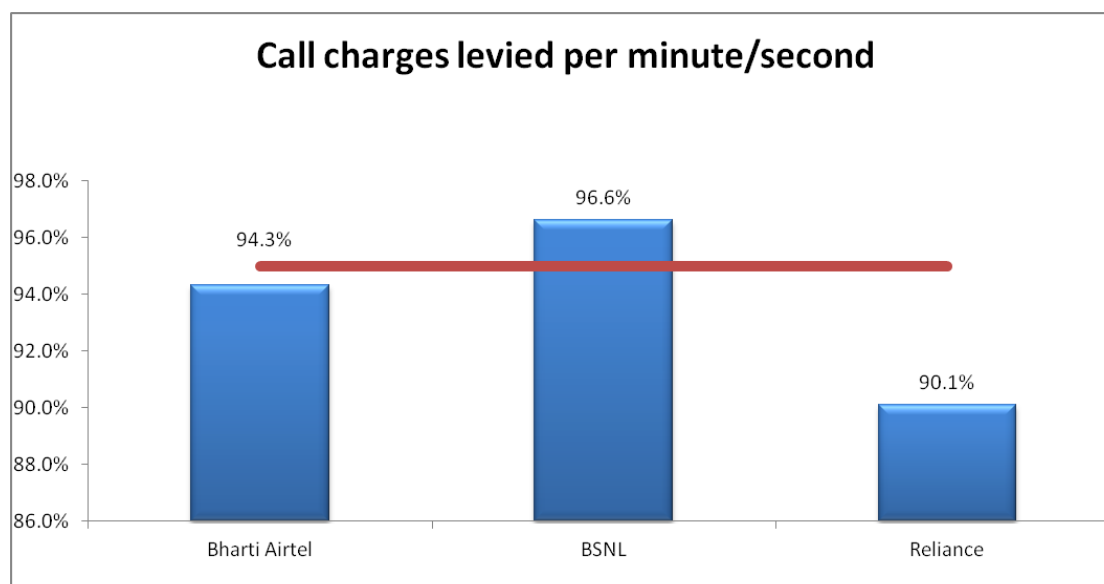
BSNL has the highest satisfaction score among all the operators on the parameter of 'Call charges levied per minute/second'.Bharti Airtel and Reliance do not meet the benchmark of 95% with Reliance scoring the lowest.

4.4 Detailed findings for Help Services:

This aspect captures the level of satisfaction of users with various help services like customer care provided by the operators. As per the directive given by TRAI, more than 90% of users should be satisfied on each sub-dimension in order to meet the benchmark. This dimension is further classified into four sub-dimensions:

4.4.1 **Availability of customer care services 24x7:** This parameter measures the satisfaction level of users with respect to the availability of customer care executive in resolving the problem throughout the day.

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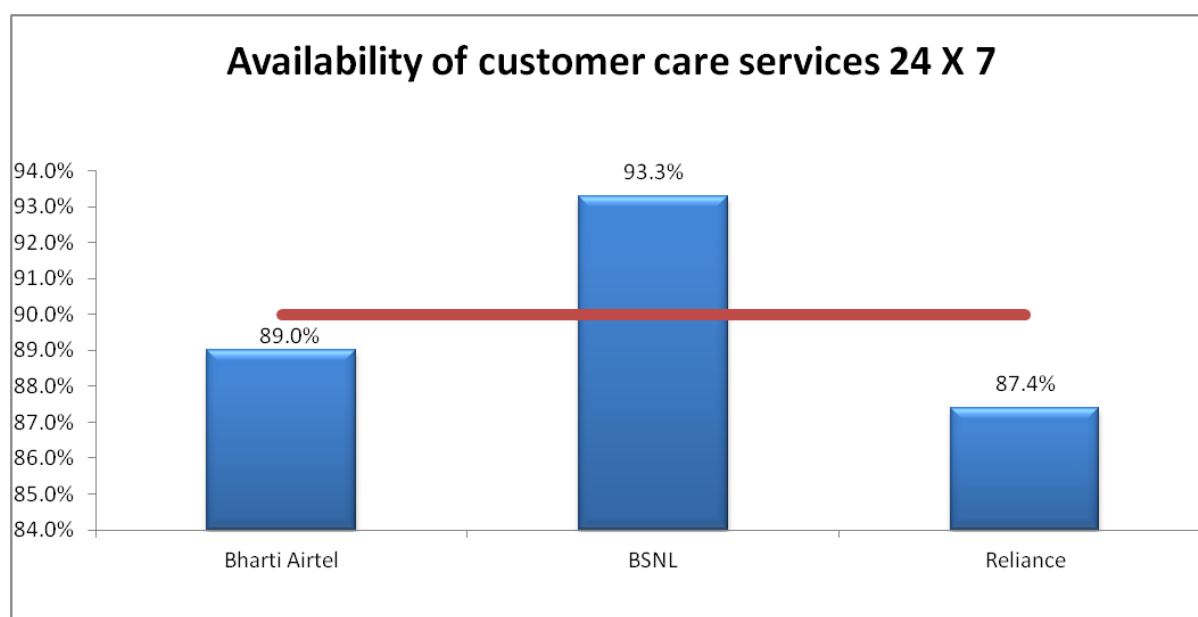
BSNL has the highest satisfaction score among all the operators on the aspect of 'Availability of customer care 24x7'.Bharti Airtel and Reliance do not meet the benchmark criteria of 90%.

4.4.2 **Ease of access of call center/customer care or helpline and contacting the customer care executive:** This parameter measures the satisfaction level of users with the aspect of ease in connecting with the call center/customer care or helpline of the telecom operator as well as connecting with the customer care executive.
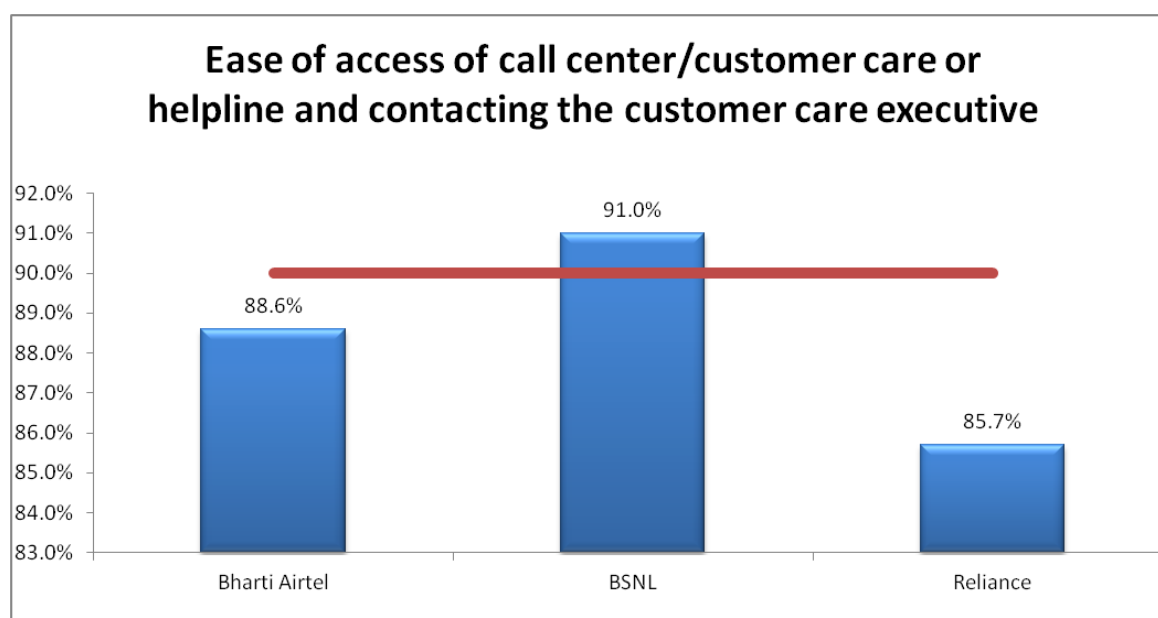
BSNL has the highest satisfaction score among all the operators on the parameter of 'Ease of access of call center/customer care or helpline and contacting the customer care executive'. Bharti Airtel and Reliance do not meet the benchmark of 90%.

4.4.3 <u>**Customer friendly approach of the customer care executive:**</u> This parameter measures the satisfaction level of the respondent with respect to the customer friendly approach of the customer care executive.
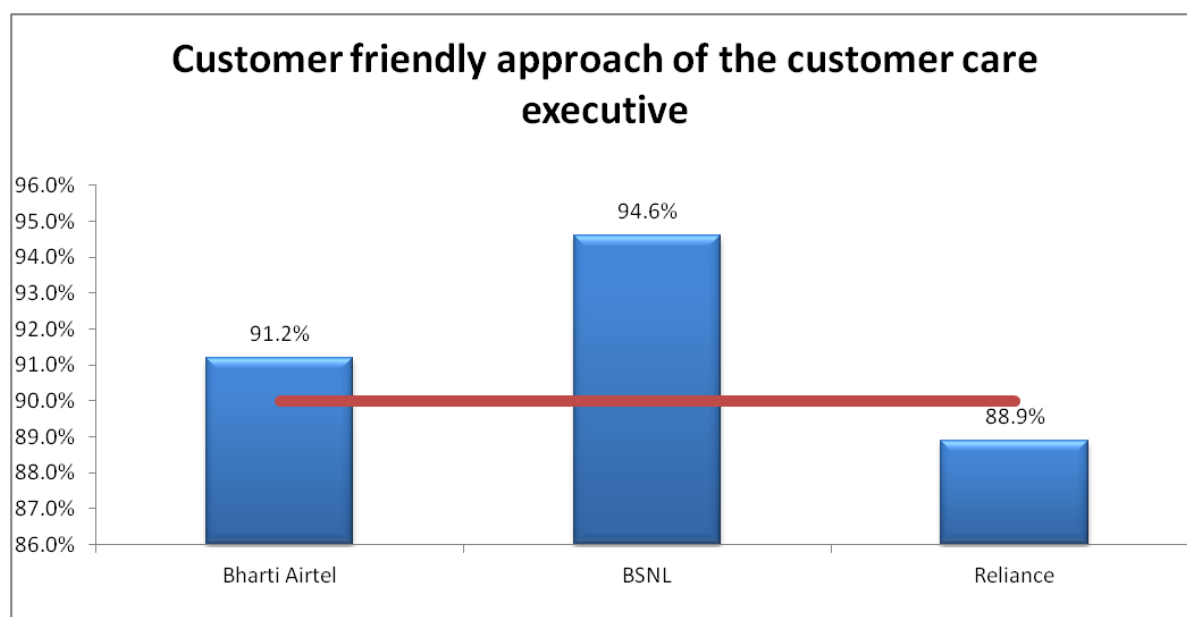
BSNL has the highest satisfaction score among all the operators on aspect of 'Customer friendly approach of the customer care executive' followed by Bharti Airtel. Reliance does not meet the benchmark of 90%.

4.4.4 <u>**Competency level/problem solving ability of the customer care executive:**</u> This parameter measures the satisfaction level of the respondent with respect to the competency shown by the customer care executive in solving the problem being faced by the subscribers.

Competency level/problem solving ability of the customer care executive
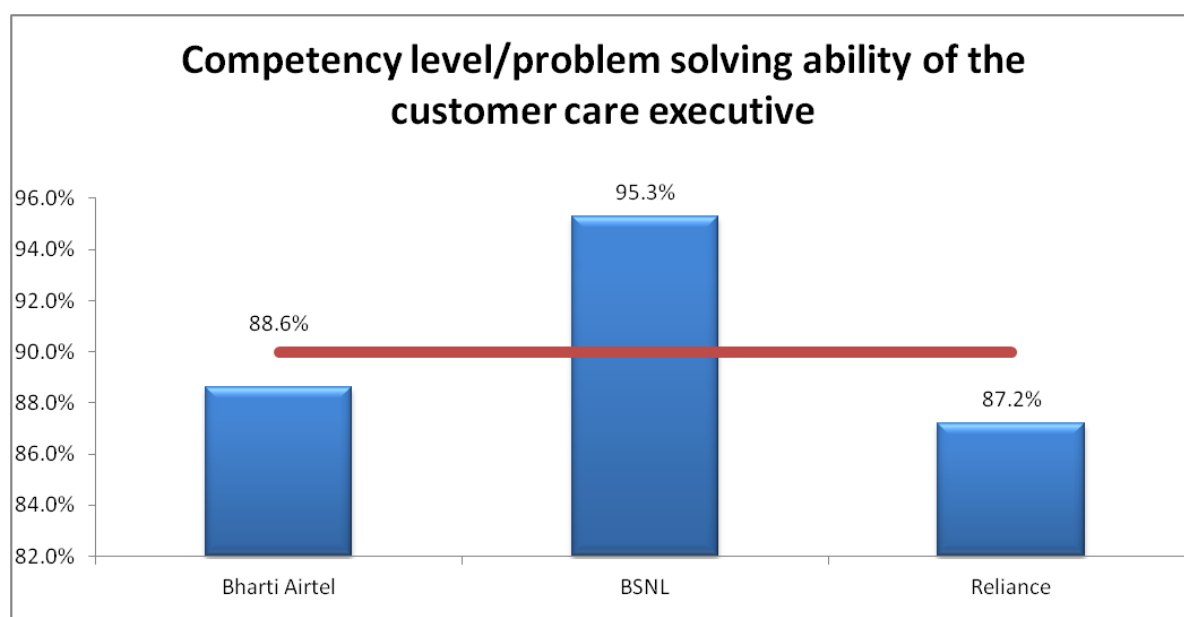
BSNL has the highest satisfaction score among all the operators on aspect of 'Competency level/problem solving ability of the customer care executive'. Bharti Airtel and Reliance do not meet the benchmark of 90%.

4.5   Network Performance, Reliability and Availability:

This parameter captures the level of satisfaction of consumers with various technical parameters related to network performance, reliability and availability. As per the directive given by TRAI, more than 95% of the users should be satisfied on each sub-dimension in order to meet the benchmark. This dimension is further classified into three sub-dimensions:

4.5.1   **Availability of Signal of service provider in your locality:** This parameter measures the satisfaction level of the respondent with respect to the availability of signal of the service provider in the locality.

Availability of signal of your service provider in your locality
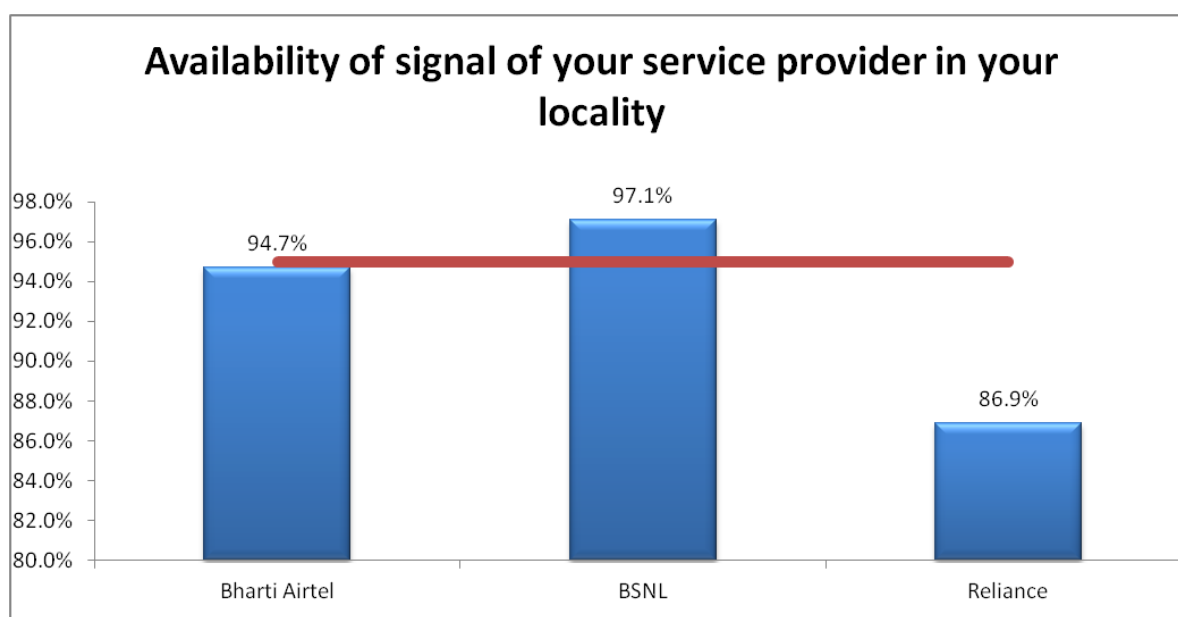
BSNL has the highest satisfaction score among all the operators on aspect of 'Availability of Signal of service provider in locality'. Bharti Airtel and Reliance do not meet the benchmark of 95%.

4.5.2 **Network of your service provider in terms of the ability to make or receive calls easily:** This parameter measures the satisfaction level of the users with respect to the ability to make or receive calls.

Network of your service provider in terms of ability to make or receive calls easily
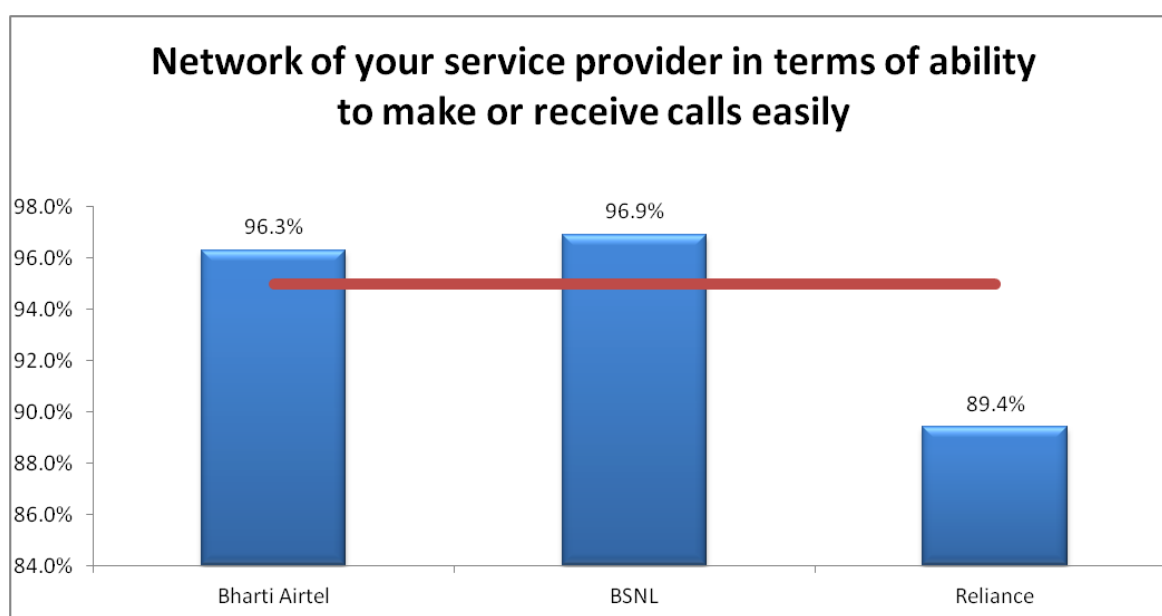
BSNL has the highest satisfaction score on the aspect of 'Network of your service provider in terms of ability to make or receive calls easily' with airtel following closely behind. Reliance does not meet the benchmark of 95%.

4.5.3 **Voice Quality:** This parameter measures the satisfaction level of users with respect to the voice quality while making or receiving calls.

Voice Quality
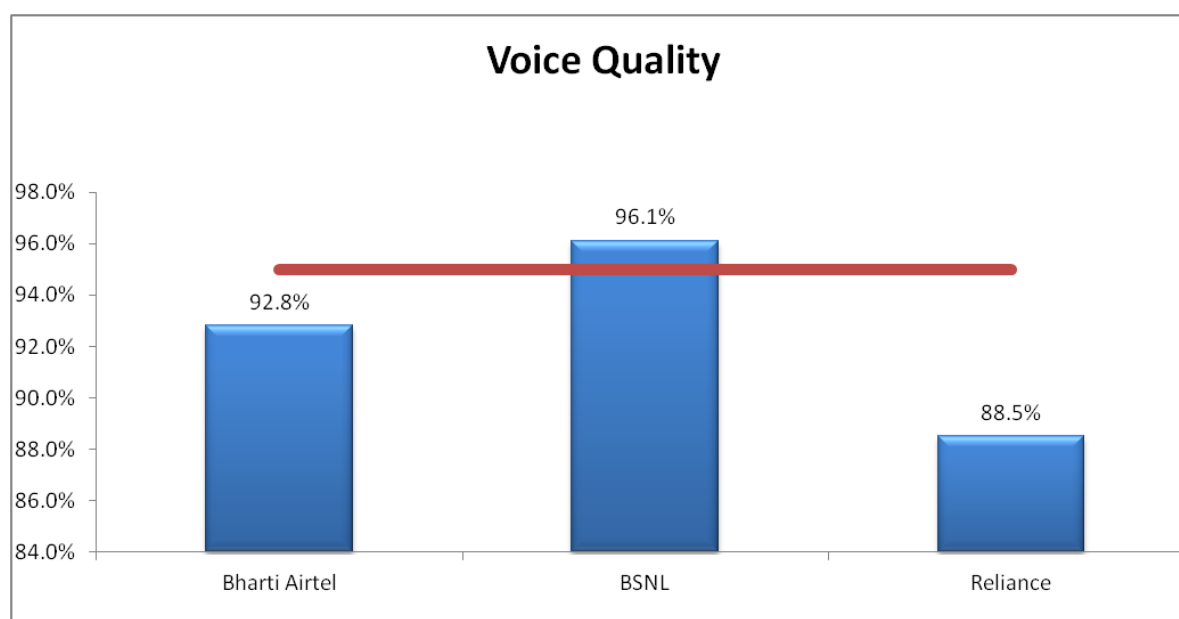
BSNL has the highest satisfaction score on the parameter of 'Availability of Signal of service provider in locality' while Reliance the lowest. Bharti Airtel and Reliance do not meet the benchmark of 95%.

4.6 Maintainability:

This aspect captures the level of satisfaction of consumers with various technical parameters related to maintainability which include troubleshooting in case of faults. As per the directive given by TRAI, more than 90% of the users should be satisfied on each sub-dimension in order to meet the benchmark. This dimension is further classified into one other sub-dimension.

4.6.1 **Effective handling of the network (signal) problems:** This parameter measures the satisfaction level of the user with respect to the handling and resolution of the network/signal problems faced by the subscriber.

Effective handling of the network (signal) problems
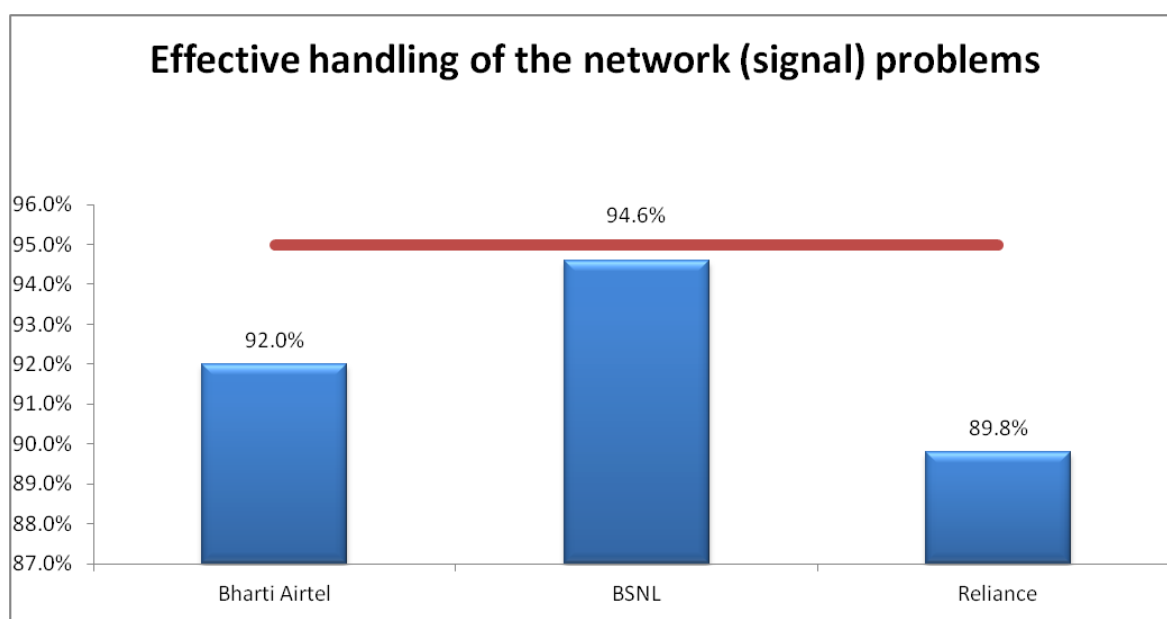
BSNL has the highest satisfaction score among all the operators on aspect of 'Effective handling of the network (signal) problems'. No operator meets the benchmark of 95% though.

4.7   Supplementary services and VAS:

This parameter captures the level of satisfaction of consumers with various technical parameters related to supplementary services and value added services like call waiting/forwarding, voice mail etc. As per the directive given by TRAI, more than 90% of the operators should be satisfied on each sub-dimension in order to meet the benchmark. This dimension is further classified into two sub-dimensions:

4.7.1   Usage of Supplementary/Value Added Services:

Reliance has the highest percentage of its overall subscribers as users of supplementary services whereas Bharti airtel has the lowest.
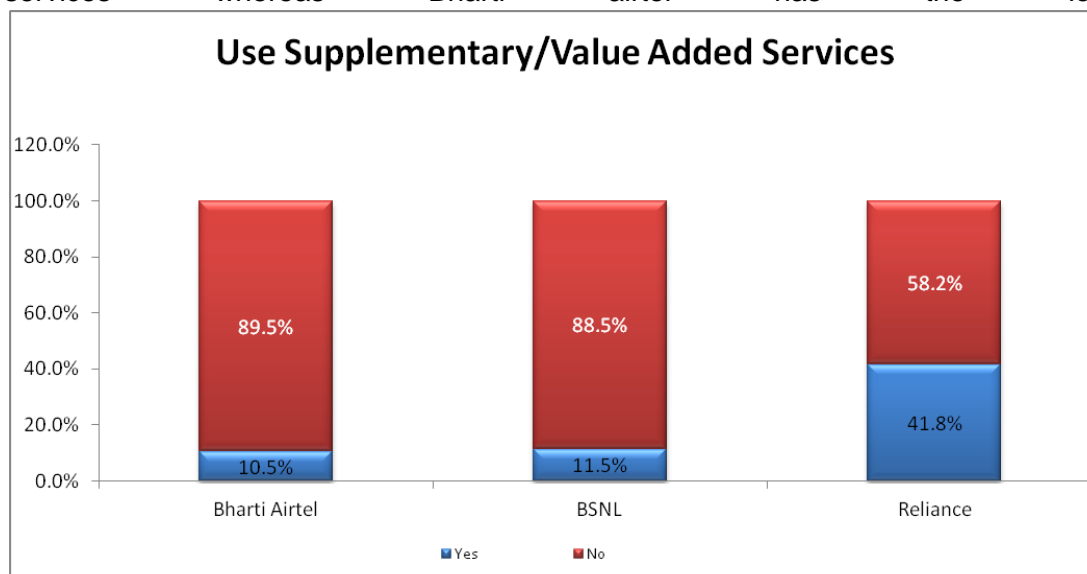
4.7.2 <u>**Satisfaction with Quality of supplementary services / value added service provided including call waiting/forwarding, voice mail etc.:**</u> This parameter measures the satisfaction level of users with the quality of supplementary services/value added services which include activation, deactivation, charges etc.
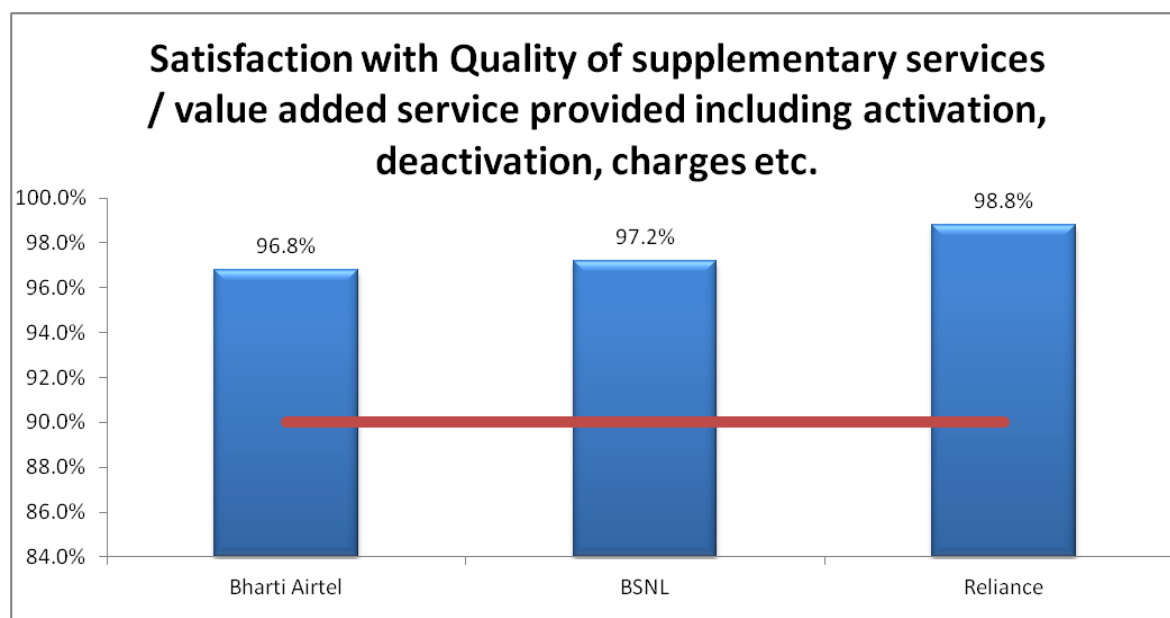
Reliance has the highest satisfaction score among all the operators on aspect of 'Satisfaction with Quality of supplementary services / value added service provided including call waiting/forwarding, voice mail etc.' All operators meet the benchmark of 95%.

4.8 Assessment of TRAI Regulations and Directions:

TRAI issues regulations and directions for the operators in order to safeguard the interest of consumers. This section of report discusses in detail about the awareness and satisfaction with the regulations.

4.8.1 <u>**Do Not Disturb (DND):**</u> This regulation was passed by TRAI in order to curb the menace of unsolicited commercial communications. TRAI had notified the Telecom Commercial Communications Customer Preference Regulation, 2010 dated 1st December 2010, published in the Gazette of India Extraordinary Part-III-Section 4 dated 1st December, 2010. As part of this regulation, a consumer can register his/her number with the operator and he/she will not receive any unsolicited commercial communications.

On an average, 7.3% of users have registered for the service in Kerala circle. Reliance has the highest number of users registered for the same while BSNL has the minimum.
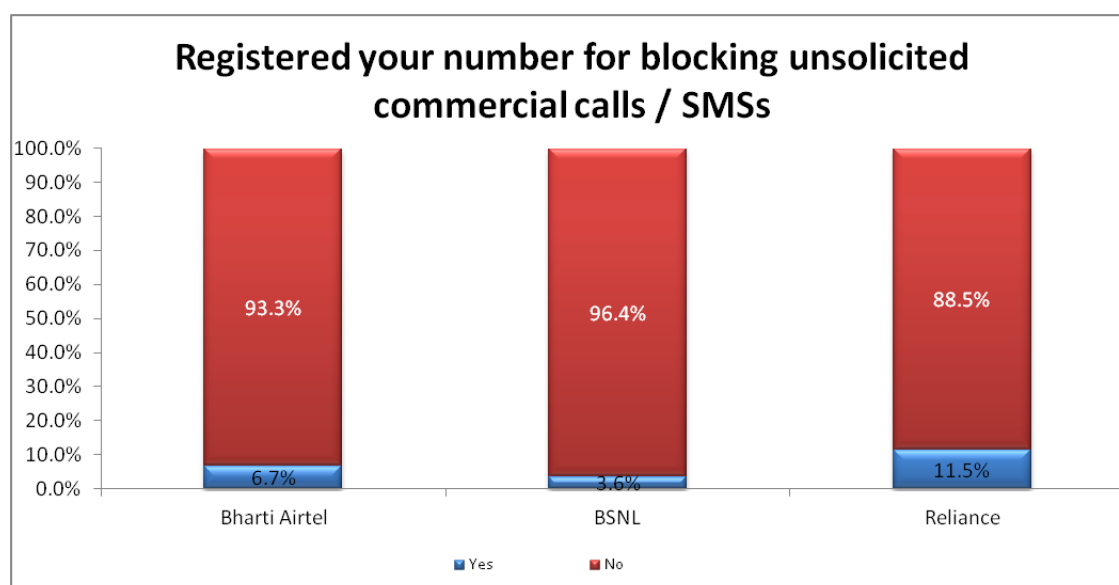
4.8.2 **Satisfaction on blocking of unsolicited commercial calls/SMSs:** This parameter measures the satisfaction level of users with the blocking of unsolicited commercial calls/SMS.
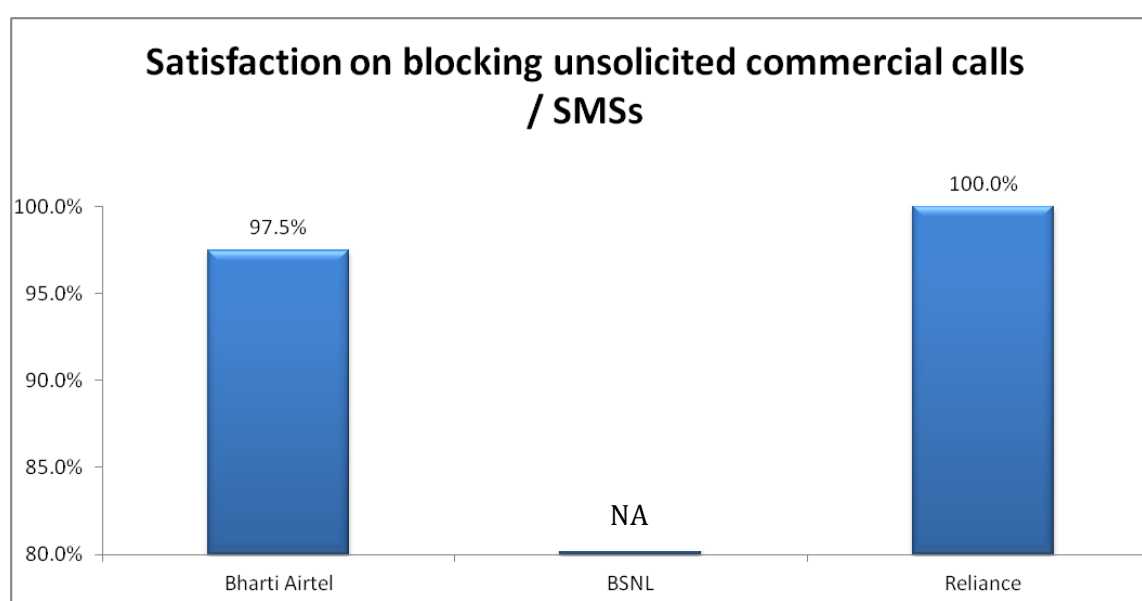
Reliance has the highest satisfaction score among all the operators on the aspect of 'Satisfaction on blocking of unsolicited commercial calls/SMSs'. In case the unsolicited communication continues, users have the option of registering a complaint with the operator.

Below table indicates the percentage of respondents who have registered complaint in case unsolicited SMS have not stopped despite registering for the same.

4.8.3 Registration of complaint in case unsolicited call/SMS have not stopped despite registering for the same:
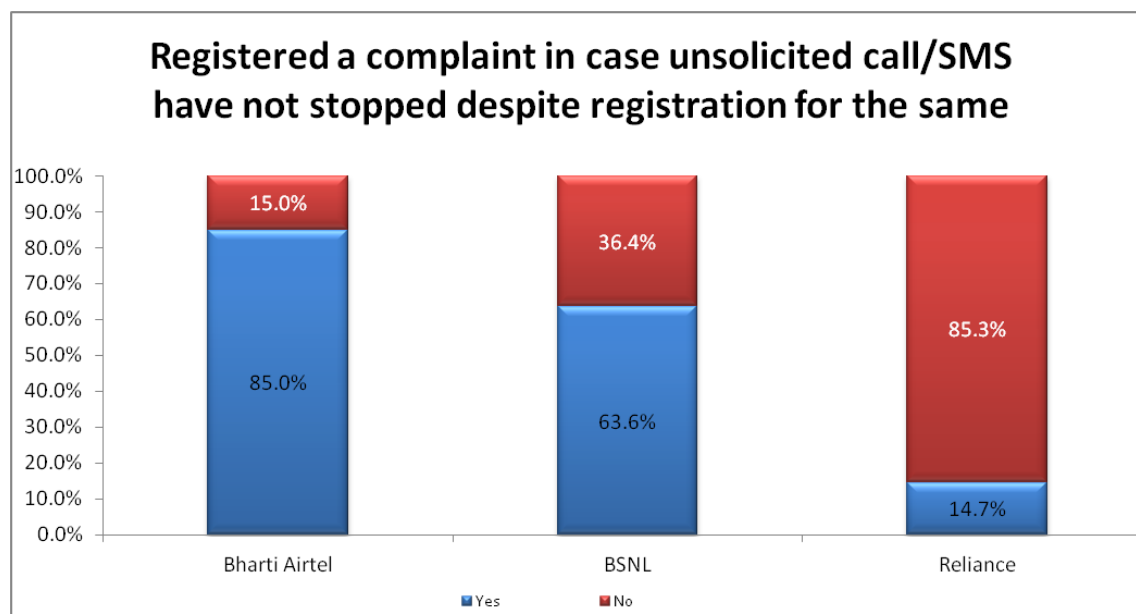
On an average, 54.4% of users have registered for the service in Kerala circle. Bharti Airtel has the highest number of users registering for this service while Reliance has the minimum.

4.8.4 Satisfaction with action taken against the complaint:
This parameter measures the satisfaction level of users with the action taken against the complaint filed by them w.r.t to receipt of unsolicited call/SMS despite them having registered for the same.

On an average only 7% of the users had registered their number for blocking unsolicited commercial calls / SMSs. Out of these subscribers on an average only 54% have registered a complaint when the unsolicited call/SMS did not stop.Given that this particular user base is lower than the minimum statistical base of 30 users for any data representation, henceforth, we are unable to state the satisfaction scores for this parameter.

4.9   Prepaid users- Information

This section captures the satisfaction level of the prepaid users on various parameters related to information provided by operator to users like SMS giving information on amount charged, processing fees, taxes, duration of call, notifications etc.

On an average only 1% of the users across the wireline player are prepaid users. Given that this particular user base is lower than the minimum statistical base of 30 users for any data representation, henceforth, we are unable to state the satisfaction scores across the whole section.

4.10 Awareness of grievance redressal mechanism:

This parameter measures the awareness level of subscribers about the two stage grievance redressal mechanism set up by the telecom service provider based on the TRAI regulations.
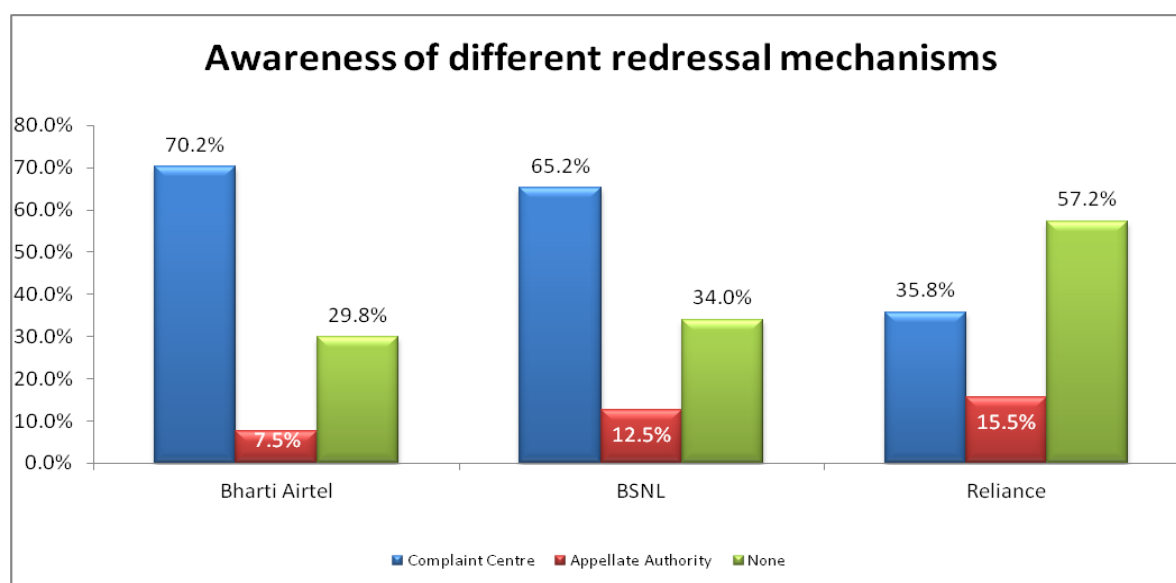
Complaint Centre: On an average 57.1% of users are aware about the first stage of the grievance redressal mechanism. Subscribers of Bharti Airtel have the highest level of awareness whereas subscribers of Reliance have the lowest awareness level.

Appellate Authority: On an average 11.8% of the users are aware about the second stage of the grievance redressal mechanism. Subscribers of Reliance have the highest level of awareness whereas subscribers of Bharti Airtel have the lowest awareness level.

Unaware: On an average, in Kerala circle, 40.3% of respondents are not aware of any stage of the redressal mechanism.

4.10.1 **Complaint on Toll free number:** Users can complain on the toll free number in case of any problem. Below table indicates percentage of users who have availed such a service.
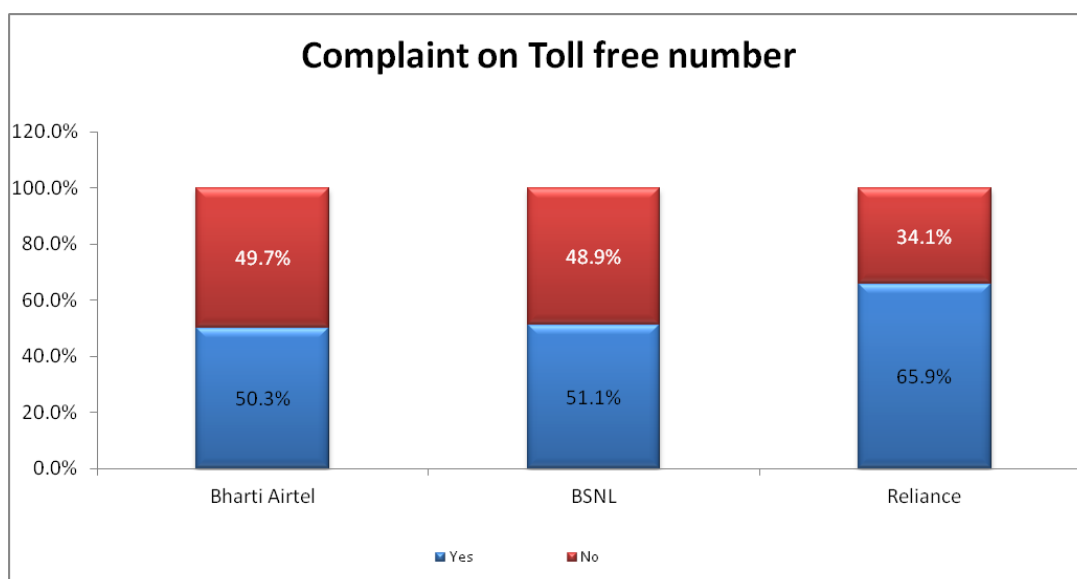
On an average, 55.8% of users have complained to the Appellate authority in Kerala circle. Reliance has the highest number of users who have made a complaint to the toll free number whereas BSNL has the minimum.

4.10.2 **Satisfaction - Complaint on Toll free number:** This parameter captures the satisfaction level of the user on adressal of complaint by the telecom service provider.
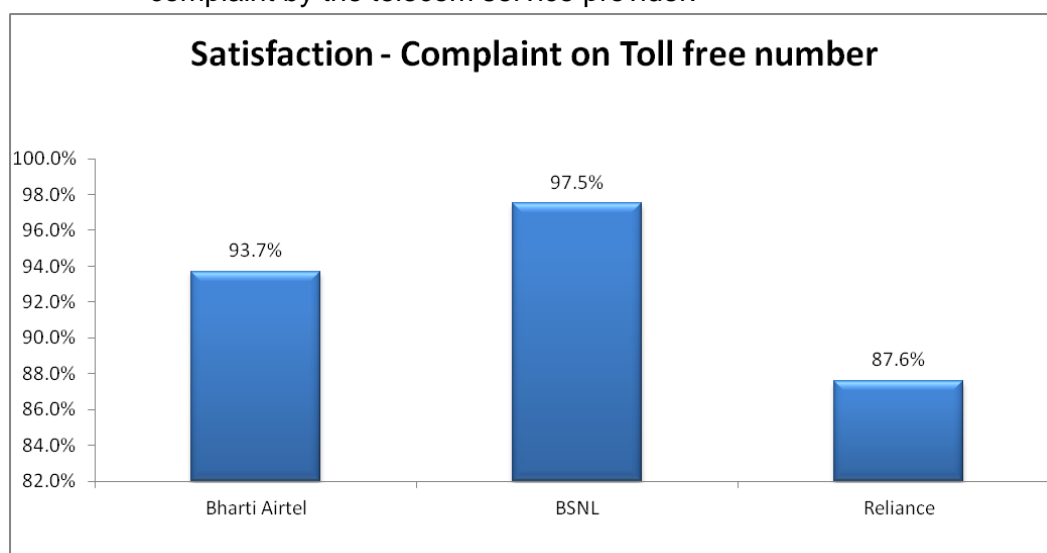
BSNL has the highest percentage of subscribers who are satisfied with the way their complaint was addressed; Reliance has the lowest.

4.10.3 **Complaint to Appellate Authority:** Complaining to the Appellate Authority is the second stage of the redressal mechanism. Below table indicates percentage of users who have availed such a service.

Made complaint to appellate authority
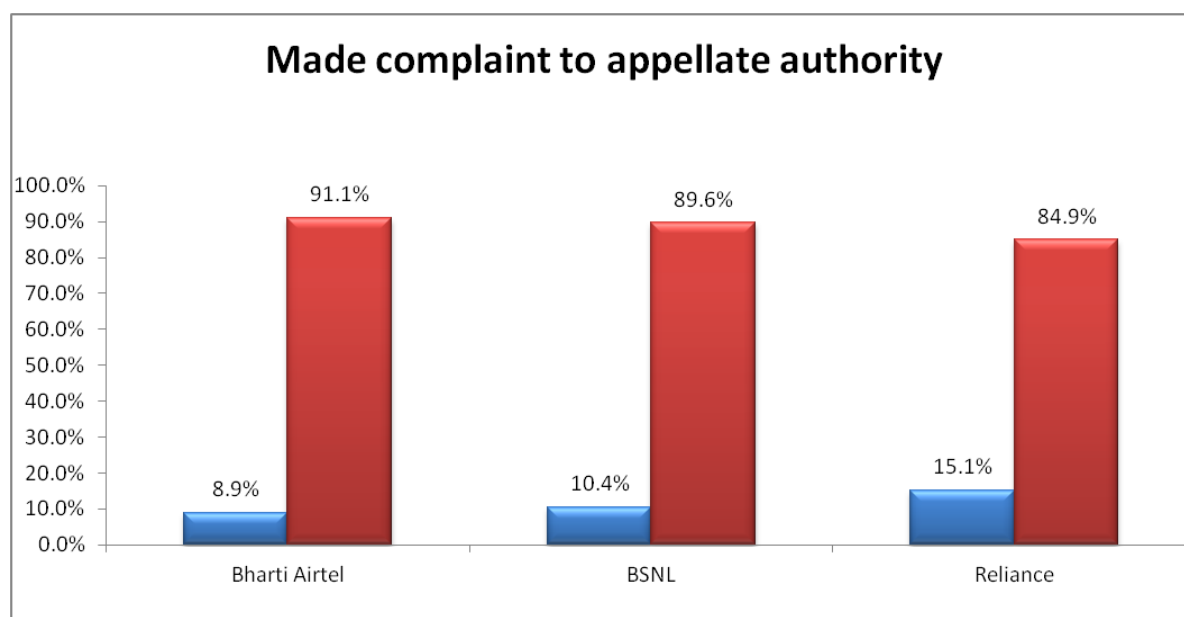
On an average, 11.5% of users have complained to the Appellate authority in Kerala circle. Reliance has the highest number of users who have made a complaint to the Appellate authority whereas Bharti Airtel has the minimum.

4.10.4 **Satisfaction on how the complaint was addressed by the Appellate Authority:** This parameter captures the satisfaction level of users on how the complaint was addressed by the appellate authority.

Out of the 12% users that were aware of the Appellate authority on an average only 11% (on an average) have made complaint to the same.Given that this particular user base is lower than the minimum statistical base of 30 users for any data representation, henceforth, we are unable to state the satisfaction scores across this section.

Chapter #5.0:-

Detailed Findings for Broadband Service provider

This section of the report details the performance of Broadband service providers on various service level parameters defined as per the 'Quality of Service' parameters.

5.1 Service provisioning:

This section captures the level of satisfaction of users on various parameters like activation of connection, information about services, plans. As per the directive given by TRAI, more than 90% of the users should be satisfied on each sub-dimension in order to meet the benchmark. This dimension is further classified into three sub-dimensions:

5.1.1 **Ease of taking a connection:** The aspect seeks to find out how satisfied the user is when he/she has to purchase a new connection.
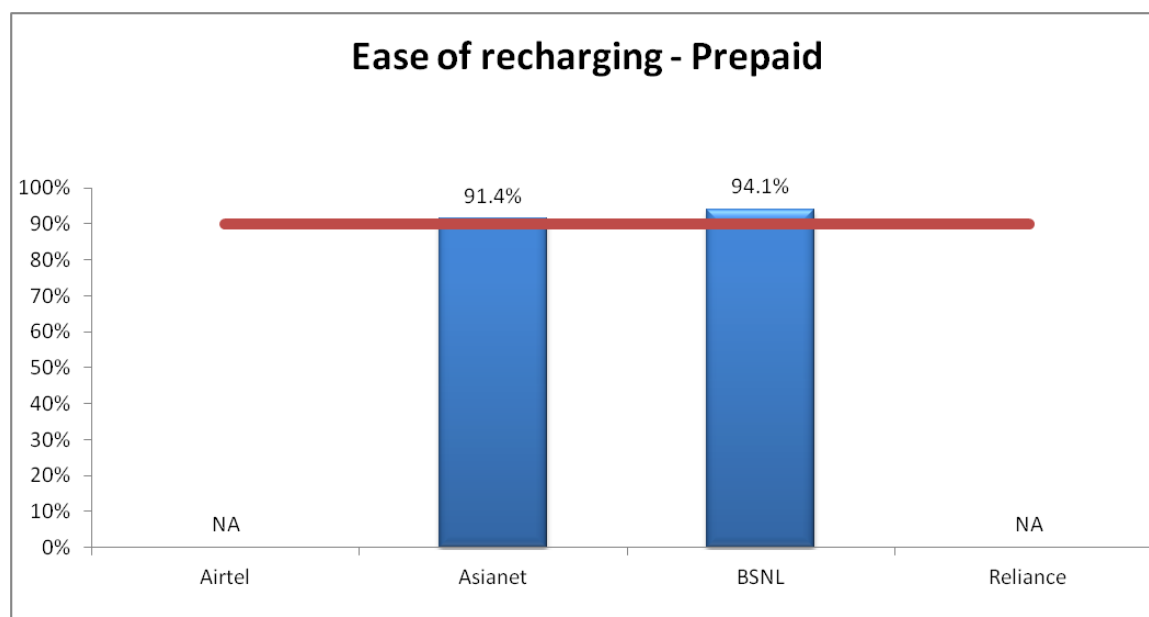
BSNL has the highest satisfaction score among all the operators on the aspect of 'ease of taking connection'. Reliance and Airtel are not represented due to statistical base falling below 30.

5.1.2 **Relevant information related to tariff plans and charges:** This parameter seeks to find out how satisfied the user is with the availability of information regarding tariff plans and charges.
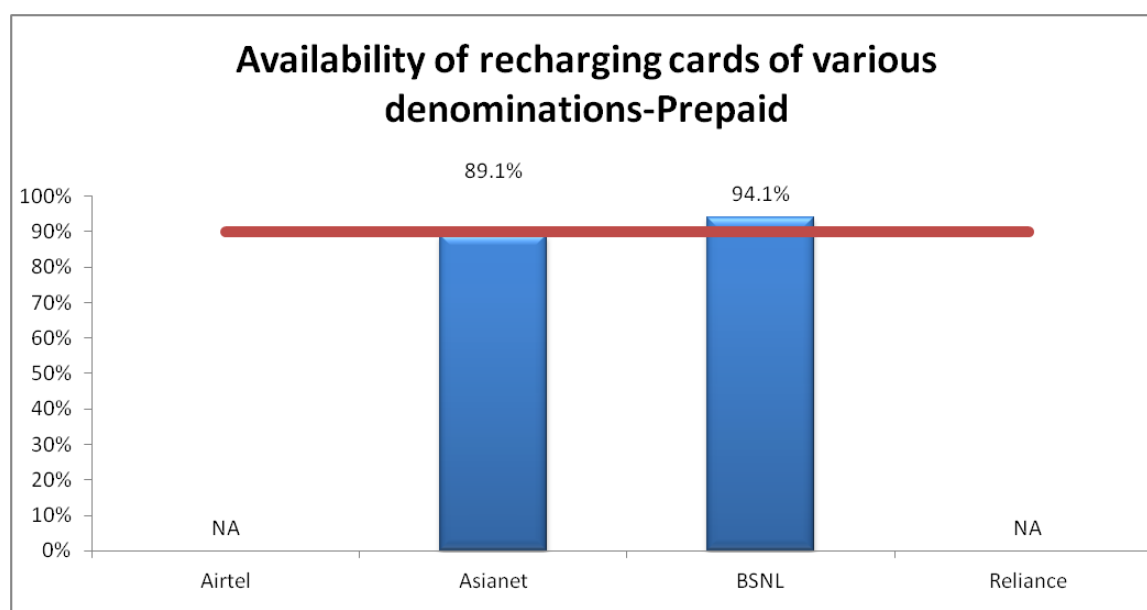
Availability of recharging cards of various denominations-Prepaid

BSNL has the highest satisfaction score among all the operators on the parameter of 'Relevant information related to tariff plans & charges'. Reliance and Airtel are not represented due to statistical base falling below 30.

Availability of suitable plan/recharge as per requirement: This aspect seeks to find out how satisfied the user is with the availability of suitable plans/recharge offers as per requirement.

Availability of suitable plans/recharge offers as per requirement
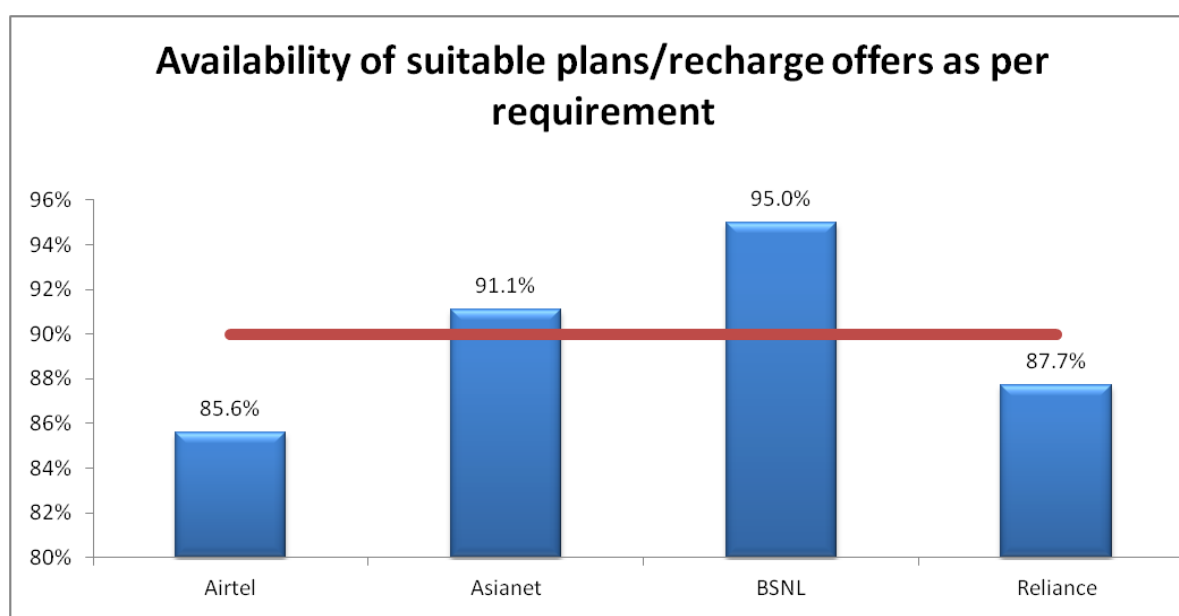
BSNL has the highest satisfaction score among all the operators on the parameter of 'availability of suitable plans/recharge offers as per requirement'. Airtel and Reliance do not meet the benchmark of 90%.

5.2   Billing performance for prepaid users:

This aspect captures the level of satisfaction of prepaid users on different aspects related to billing and recharge. As per the directive given by TRAI, more than 90% of the users should be satisfied on each sub-dimension in order to meet the benchmark

5.2.1   **Ease of Recharging:** This parameter seeks to find out how satisfied the user is with the recharge process.
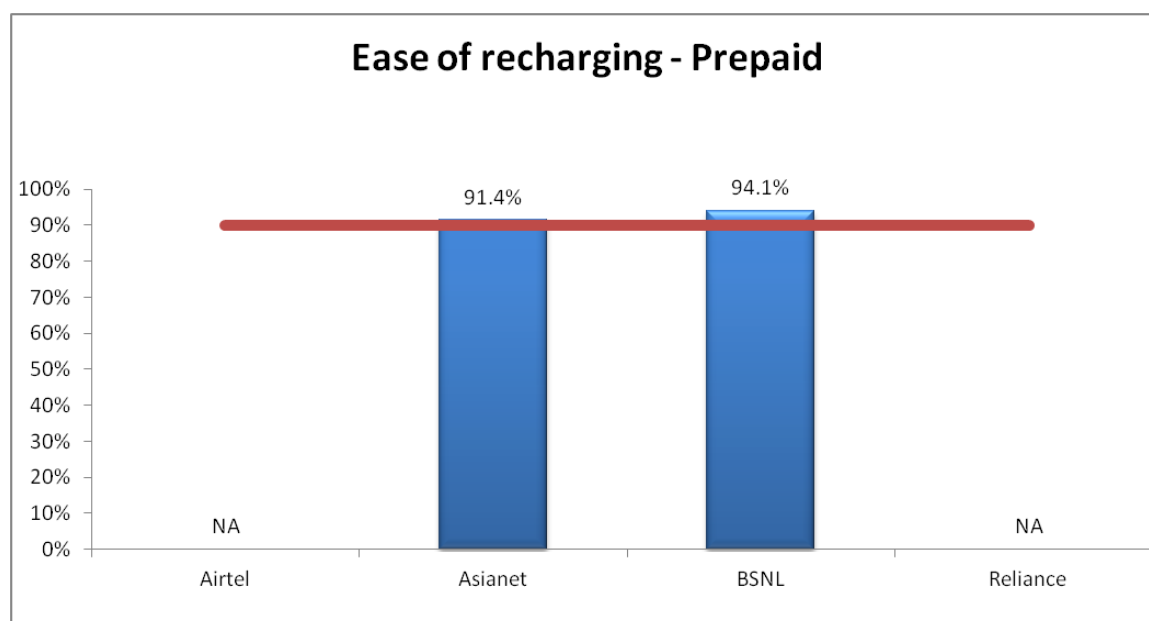
Both the operators meet the benchmark of 90%. The percentage of prepaid subscribers is very low for Bharti Airtel and Reliance, henceforth the satisfaction scores are not shown for these two operators.

5.2.2   **Availability of recharge card of various denominations:** The aspect seeks to find out how satisfied the user is with the availability of recharge of different denomination.
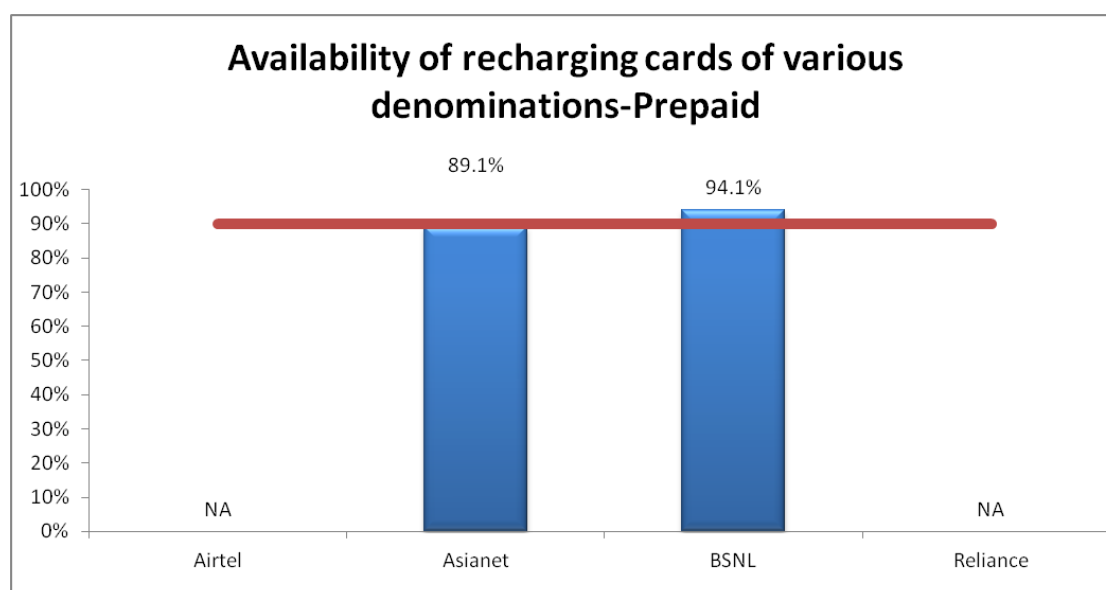
BSNL has the highest satisfaction score among all the operators on the aspect of 'Availability of recharge card of various denominations'. Asianet does not meet the benchmark of 90%. The percentage of prepaid subscribers is very low for Bharti Airtel and Reliance, henceforth the satisfaction scores are not shown for these two operators.

5.2.3 **Transparency of recharge offer:** This parameter covers the satisfaction level of prepaid users in terms of transparency of recharge offers provided by telecom operators.
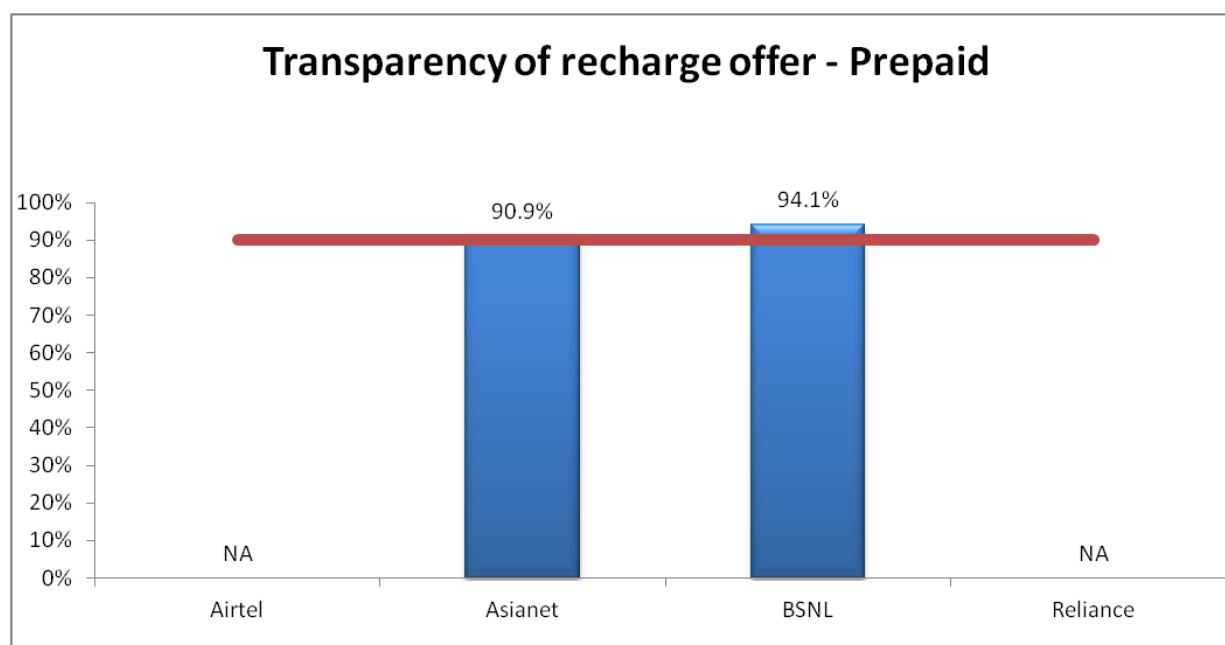
BSNL has the highest satisfaction score among all the operators on the parameter of 'transparency of recharge offer'. Both the operators meet the benchmark of 90%.

The percentage of prepaid subscribers is very low for Bharti Airtel and Reliance, henceforth the satisfaction scores are not shown for these two operators.

5.2.4 **Charges deducted for internet usage -** This aspect covers the satisfaction level of prepaid users in terms of the charges that were levied by telecom operators for internet usage.
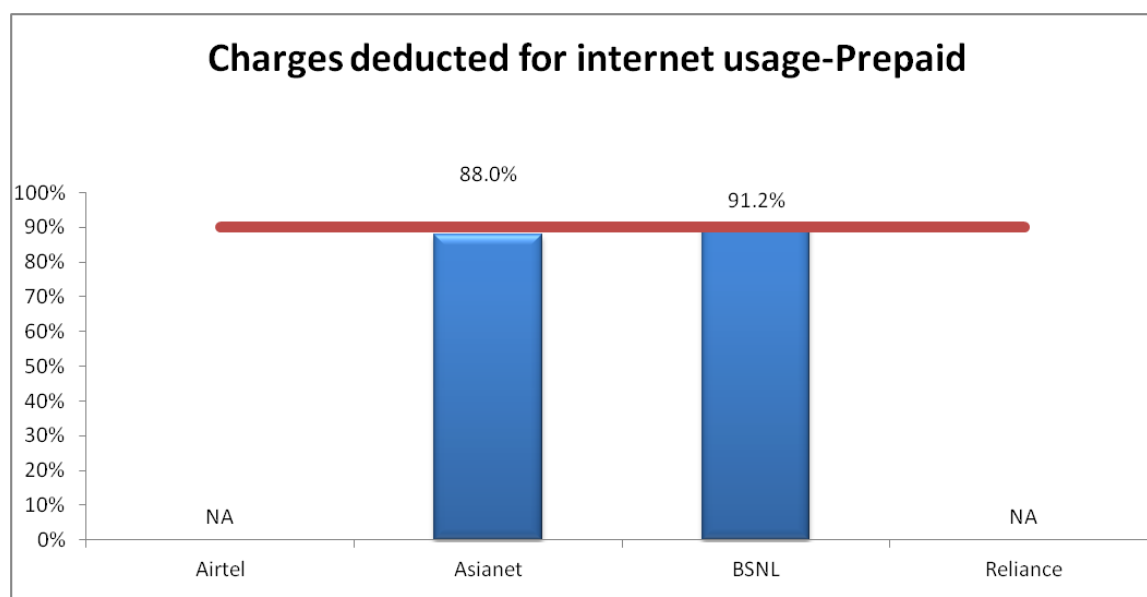
Asianet do not meet the benchmark of 90% whereas BSNL manages to meet the becnhmark.

The percentage of prepaid subscribers is very low for Bharti Airtel and Reliance, henceforth the satisfaction scores are not shown for these two operators

5.3   Billing performance for Postpaid Customers:

This parameter captures the level of satisfaction of postpaid users on different aspects related to billing. As per the directive given by TRAI, more than 90% of the users should be satisfied on each sub-dimension in order to meet the benchmark.

5.3.1   **Accuracy & completeness of the bills-** This parameter seeks to find out satisfaction levels of postpaid users in terms of the accuracy and completeness of the bills issued by the operator.

Accuracy & completeness of the bills-Postpaid
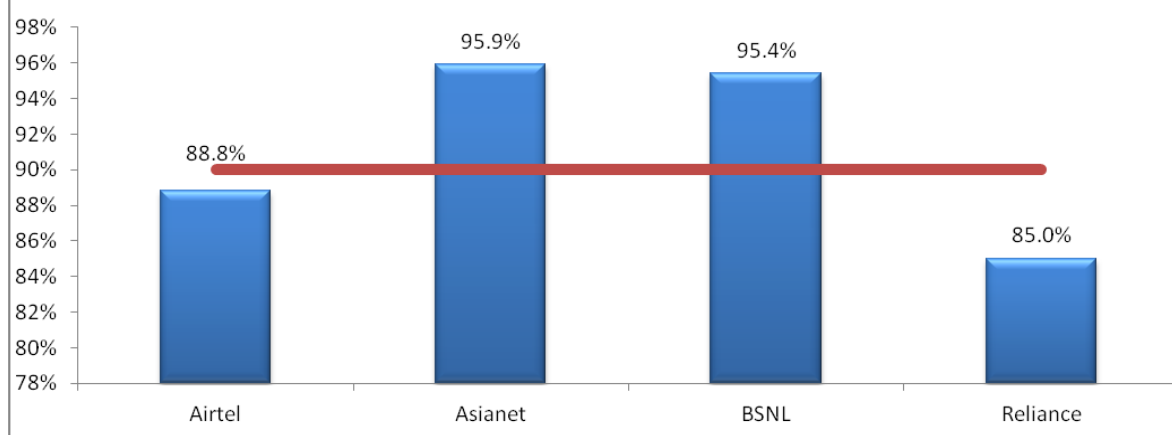
Asianet has the highest satisfaction score among all the operators on the aspect of 'accuracy and completeness of bills'. Airtel and Reliance do not meet the benchmark of 90%.

5.3.2 **Clarity of the bills in terms of transparency and understand ability-** This aspect seeks to find out the satisfaction level of users with their telecom operators with respect to bills being transparent and being easily understood by the users.

Clarity of the bills in terms of transparency and understandability-Postpaid
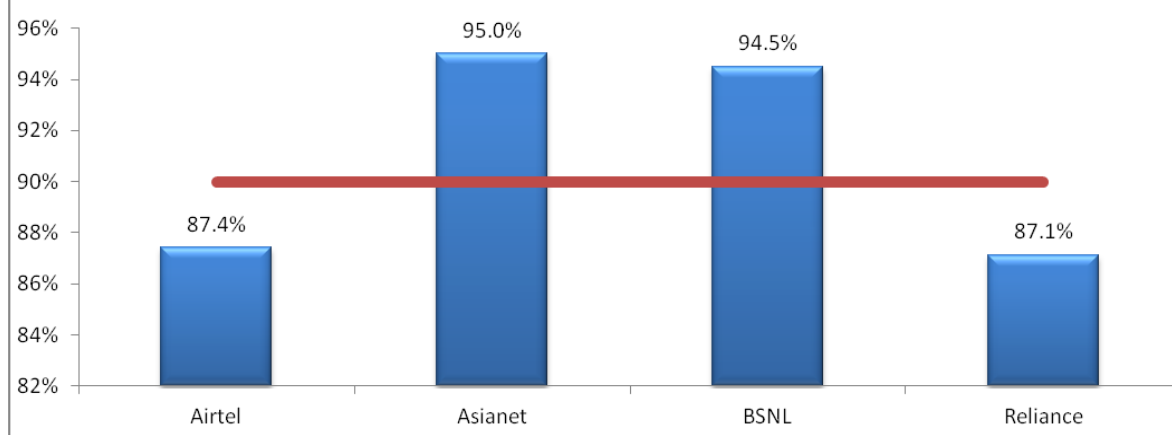
Asianet has the highest satisfaction score among all the operators on the parameter of 'Clarity of the bills in terms of transparency and understandability'. Airtel and Reliance do not meet the benchmark of 90%.

5.3.3 **<u>Charges levied for internet usage -</u>** This aspect captures the satisfaction of users with the telecom operators with respect to the internet charges levied by the operator.
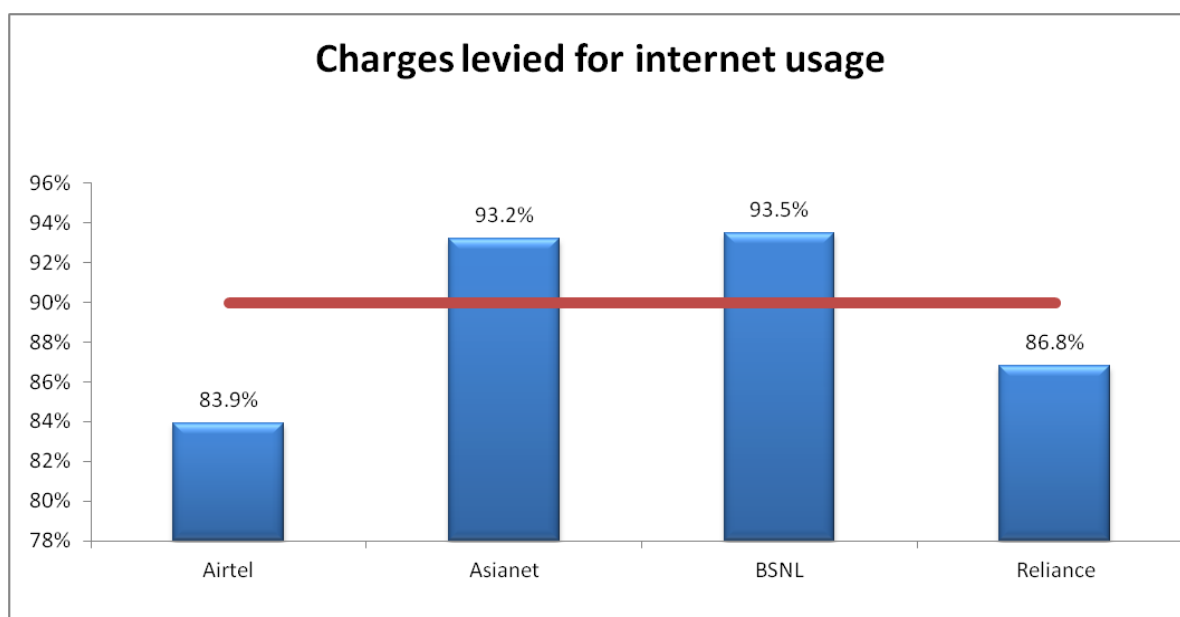
BSNL & Asianet has the highest satisfaction score among all the operators on parameter of 'charges levied for internet usage'. Airtel and Reliance do not meet the benchmark of 90%.

5.4   Detailed findings for Help Services:

This aspect captures the level of satisfaction of users with various help services like customer care provided by the operator. As per the directive given by TRAI, more than 90% of the users should be satisfied on each sub-dimension in order to meet the benchmark. This dimension is further classified into four sub-dimensions:

5.4.1 **<u>Availability of customer care services 24x7:</u>** This parameter measures the satisfaction level of users with respect to the availability of customer care executive in resolving the problem throughout the day.

Availability of customer care services 24 X 7
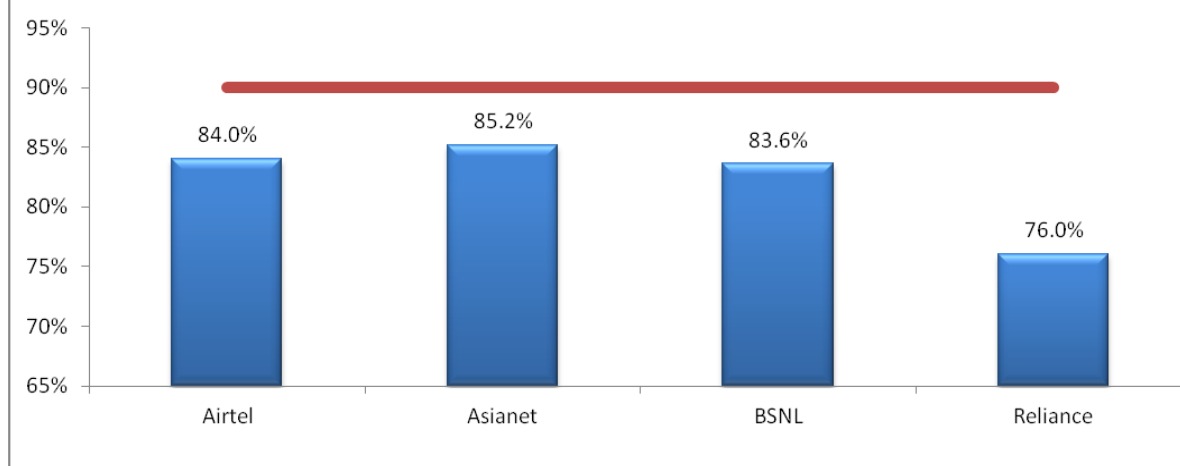
Asianet has the highest satisfaction score among all the operators on the aspect of 'Availability of customer care 24x7'. No operator meets the benchmark of 90% though.

5.4.2 **Ease of access of call center/customer care or helpline and contacting the customer care executive:** This parameter measures the satisfaction level of users with respect to ease in connecting with call center/customer care or helpline of the telecom operator as well as connecting with the customer care executive.

Ease of access of call center/customer care or helpline and contacting the customer care executive

Asianet has the highest satisfaction score among all the operators on the parameter of 'Ease of access of call center/customer care or helpline and contacting the customer care executive'. **No operator meets the benchmark of 90%.**

Telecom Regulatory Authority of India
(IS/ISO 9001-2008 Certified Organisation)

5.4.3 **Customer friendly approach of the customer care executive:** This parameter measures the satisfaction level of the respondent with respect to the customer friendly approach of the customer care executive.

Customer friendly approach of the customer care executive

Asia net has the highest satisfaction score among all the operators on aspect of 'Customer friendly approach of the customer care executive'. No operator meets the benchmark of 90%.

5.4.4 **Competency level/problem solving ability of the customer care executive:** This parameter measures the satisfaction level of the respondent with respect to the competency shown by the customer care executive in solving the problem being faced by the subscribers.

Competency level/problem solving ability of the customer care executive
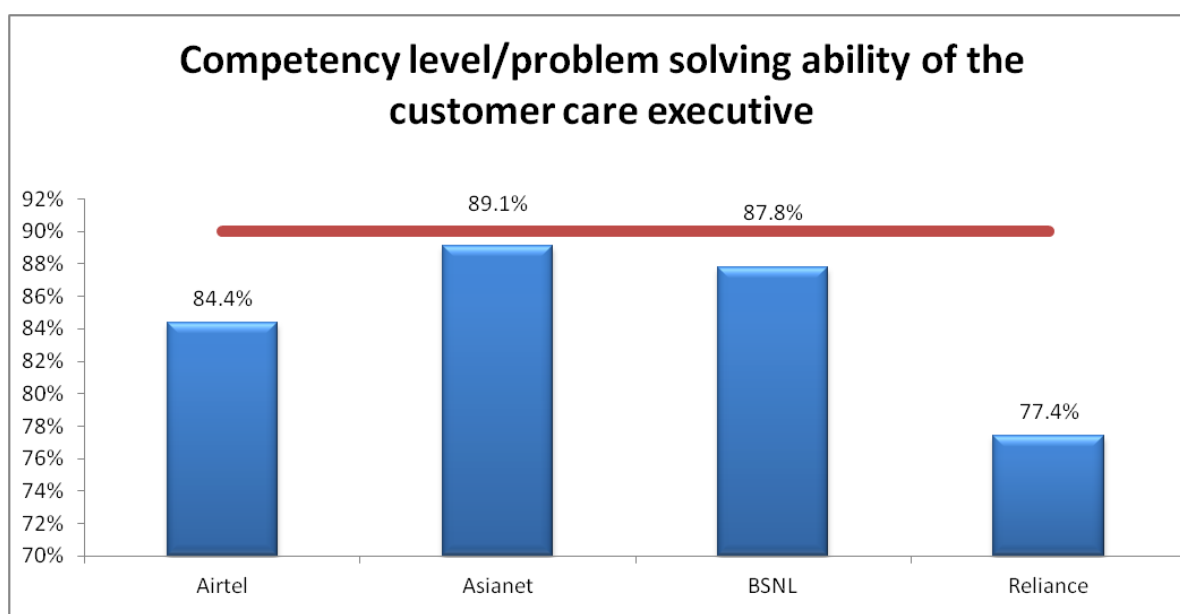
Asianet has the highest satisfaction score among all the operators on the aspect of 'Competency level/problem solving ability of the customer care executive'. No operator meets the benchmark of 90%.

5.5 Network Performance, Reliability and Availability:

This parameter captures the level of satisfaction of consumers with various technical parameters related to network performance, reliability and availability. As per the directive given by TRAI, more than 85% of the users should be satisfied on each sub-dimension in order to meet the benchmark. This dimension is further classified into three sub-dimensions:

5.5.1 **Availability of Signal of service provider in your locality:** This parameter measures the satisfaction level of the respondent with respect to the availability of signal of the service provider in the locality.

Availability of signal of your service provider in your locality
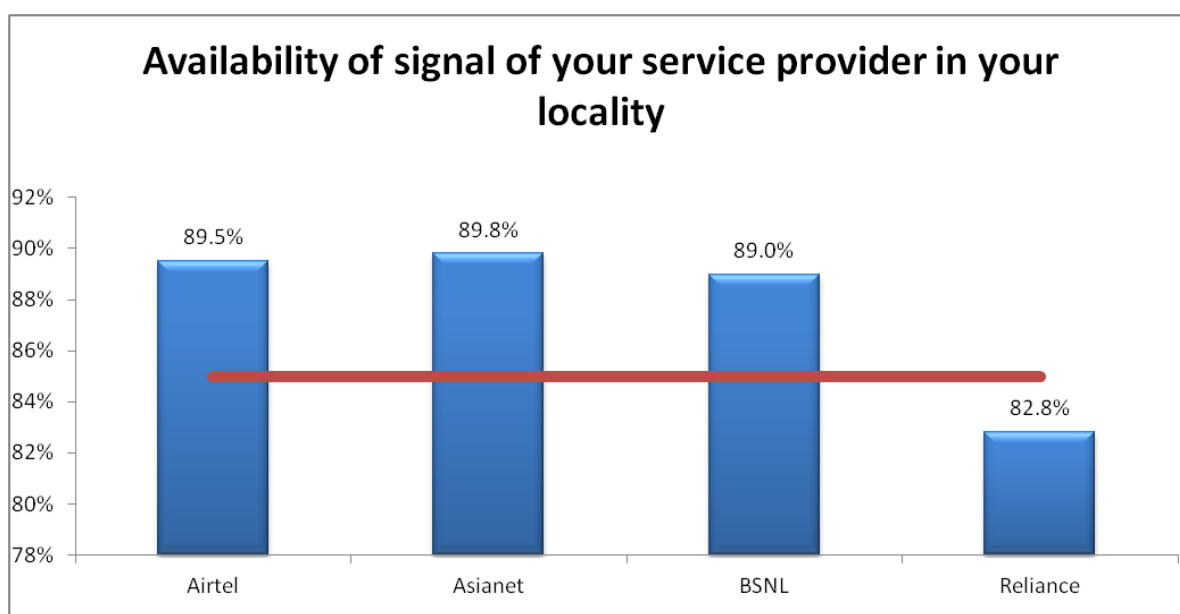
Asianet has the highest satisfaction score among all the operators on aspect of 'Availability of Signal of service provider in locality' closely followed by Bharti Airtel. Reliance is the only operator that does not meet the benchmark of 85%.

5.5.2 **Network of your service provider in terms of speed of broadband connection:** This parameter measures the satisfaction level of users with respect to the speed of the broadband connection.

Network of your service provider in terms speed of broadband connection
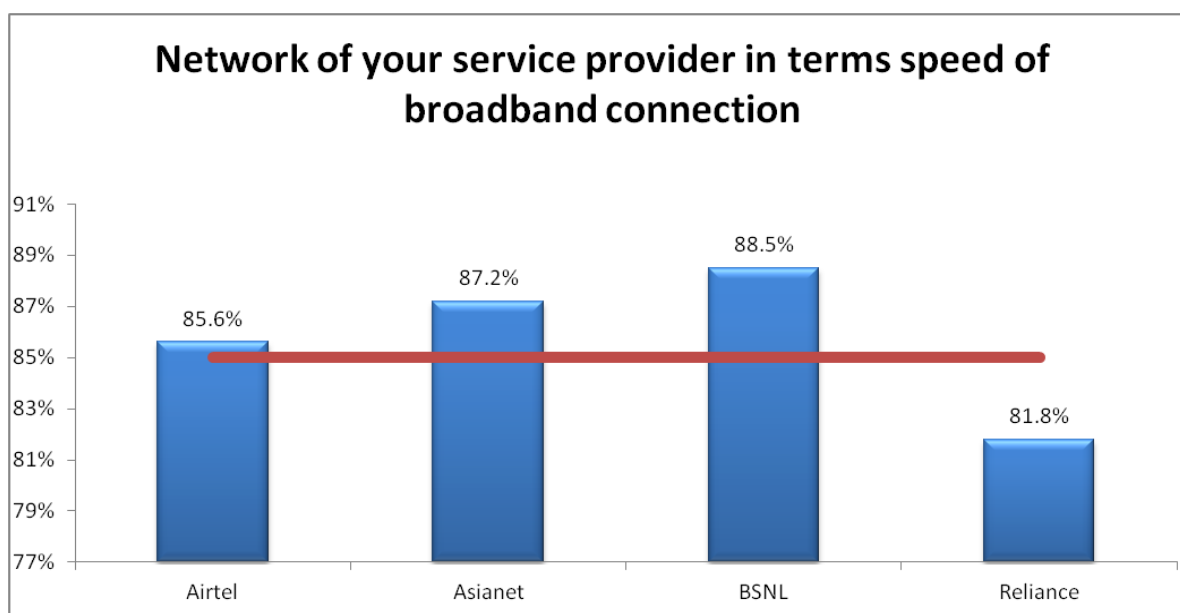
BSNL has the highest satisfaction score among all the operators on the aspect of 'Network of your service provider in terms of speed of broadband connection'. Reliance does not meet the benchmark of 85%.

5.5.3 **Time for which the service is up and running:** This parameter measures the satisfaction level of users with respect to uptime for which the service is up and running
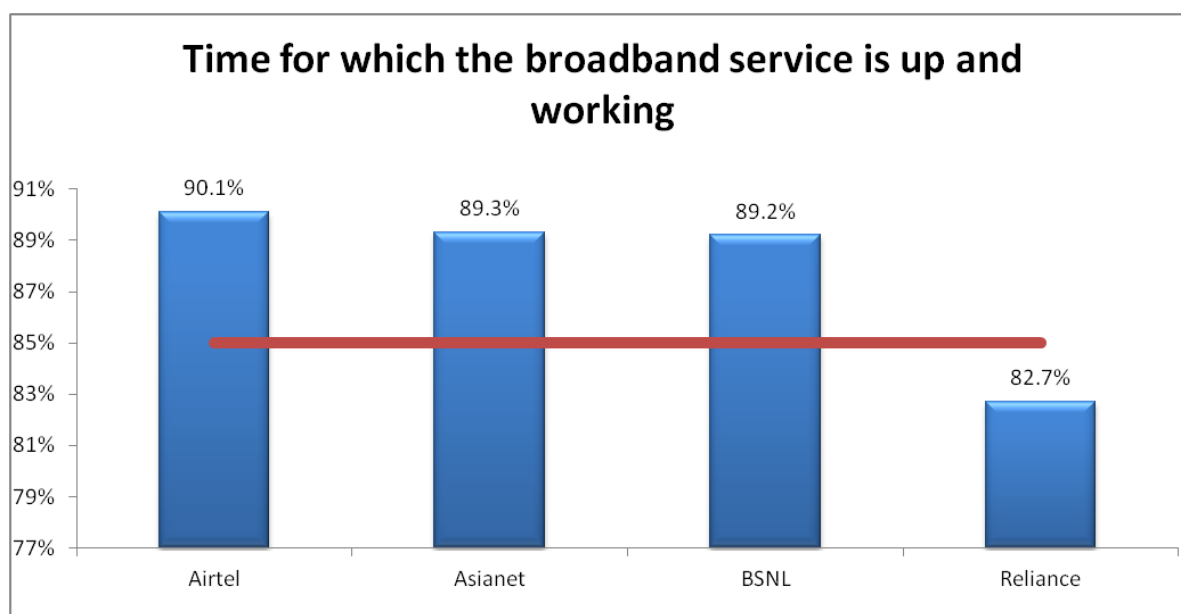
Airtel has the highest satisfaction score among all the operators on parameter of 'Time for which the service is up and running'. Reliance is the only operator that does not meet the benchmark of 85%.

5.6 Maintainability:

This aspect captures the level of satisfaction of consumers with various technical parameters related to maintainability which include troubleshooting in case of faults. As per the directive given by TRAI, more than 85% of the users should be satisfied on each sub-dimension in order to meet the benchmark. This dimension is further classified into one other sub-dimension.

5.6.1 **Effective handling of the network (signal) problems:** This parameter measures the satisfaction level of user with respect to the handling and resolution of the network/signal problems faced by the subscriber.

Effective handling of the network (signal) problems
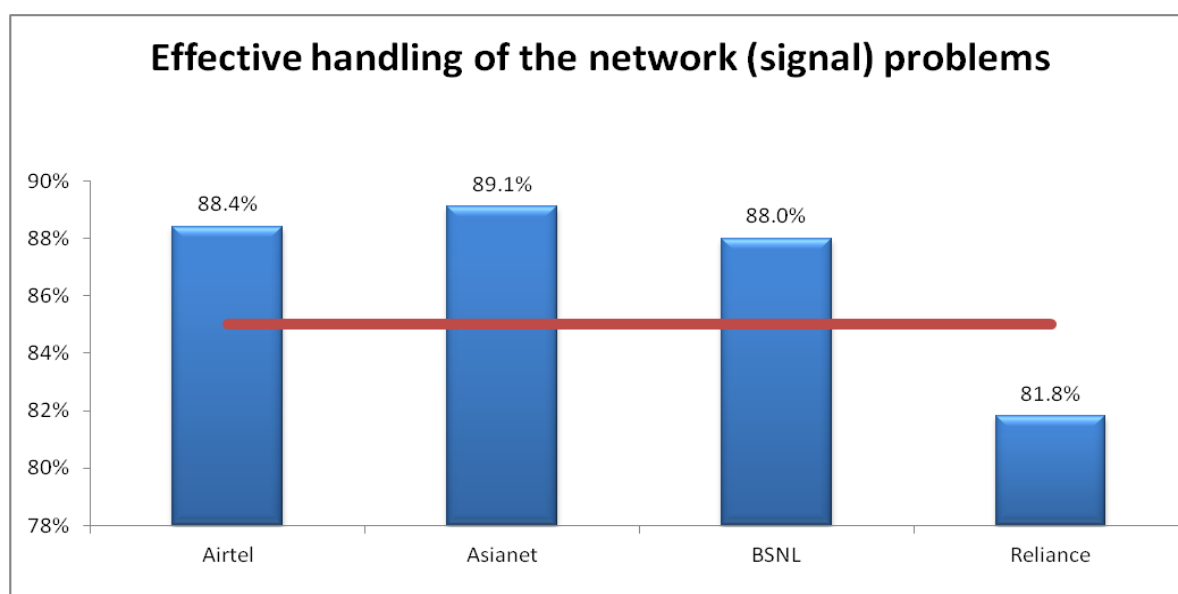
Asia net has the highest satisfaction score among all the operators on aspect of 'Effective handling of the network (signal) problems'. Reliance does not meet the benchmark of 85%.

5.7   Supplementary services and VAS:

This parameter captures the level of satisfaction of consumers with various technical parameters related to supplementary services and value added services like call waiting/forwarding, voice mail etc. As per the directive given by TRAI, more than 85% of the operators should be satisfied on each sub-dimension in order to meet the benchmark. This dimension is further classified into two sub-dimensions:

Usage of Supplementary/Value Added Services: Asianet has the highest percentage of its overall subscribers as users of supplementary services whereas BSNL & Reliance has the lowest percentage for the same.
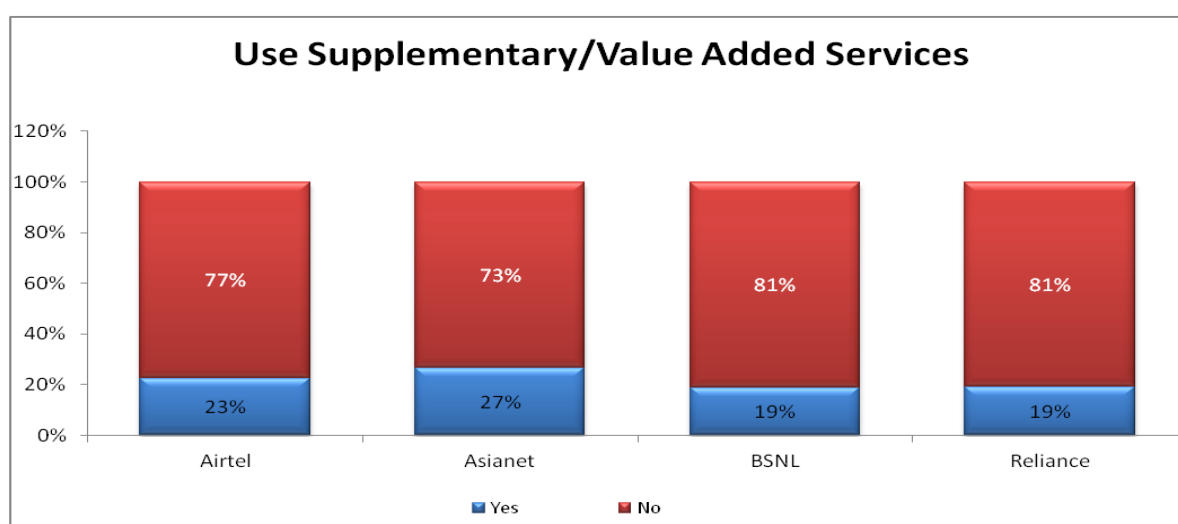
5.7.1 **Satisfaction with Quality of supplementary services / value added service provided including Static/fixed IP addresses, e-mail ids etc. etc.:** This parameter measures the satisfaction level of users with the quality of supplementary services/value added services which includes Static/fixed IP addresses, e-mail ids etc.
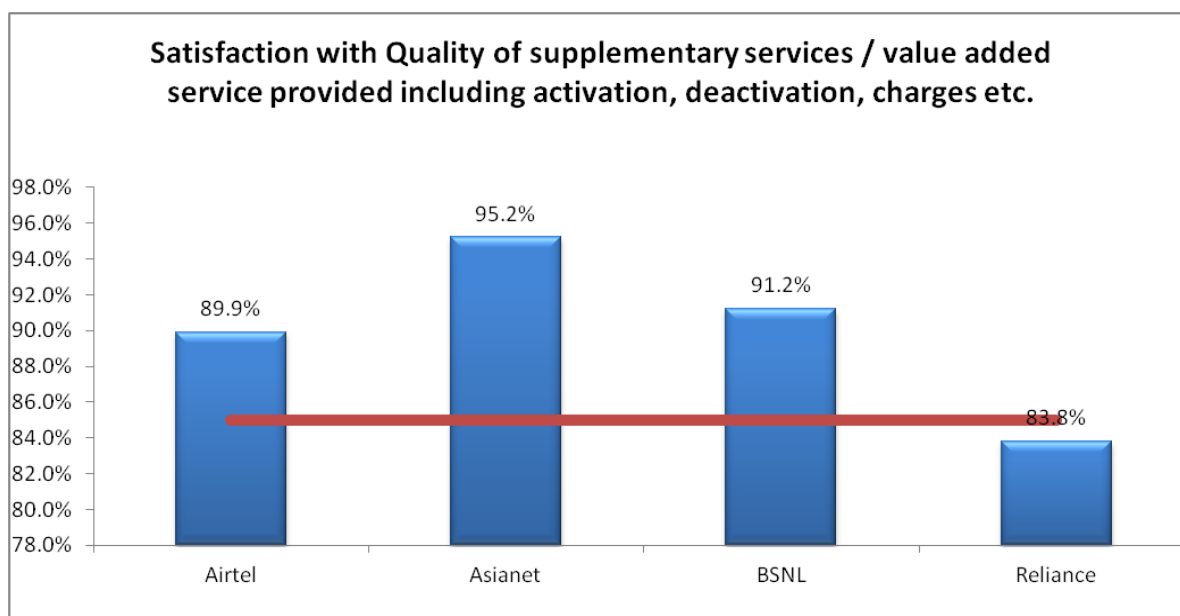
Asianet has the highest satisfaction score among all the operators on aspect of 'Satisfaction with Quality of supplementary services / value added service provided including Static/fixed IP addresses, e-mail ids etc.' All operators except Reliance meet the benchmark of 85%.

5.8   Awareness of grievance redressal mechanism:

This parameter measures the awareness level of the subscribers about the two stage grievance redressal mechanism set up by the telecom service provider based on the TRAI regulations.
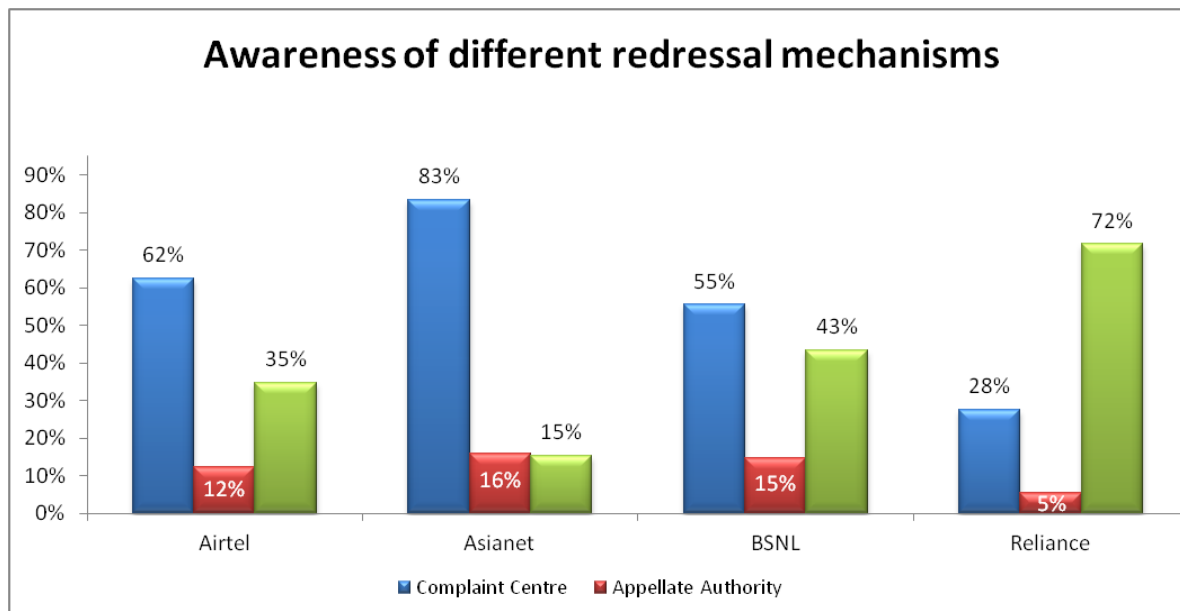
Complaint Centre: On an average 57.1% of the users are aware about the first stage of the grievance redressal mechanism. Subscribers of Asia net have the highest level of awareness while subscribers of Reliance have the lowest awareness level.

Appellate Authority: On an average 12.0% of the users are aware about the second stage of the grievance redressal mechanism. Subscribers of Asianet have the highest level of awareness whereas subscribers of Reliance have the lowest awareness level.

Unaware: On an average, in Kerala circle, 41.2% of respondents are not aware of any stage of the redressal mechanism.

5.8.1   **Complaint on Toll free number:** Users can complain on the toll free number in case of any problem. Below table indicates percentage of users who have availed such a service.

Complaint on Toll free number
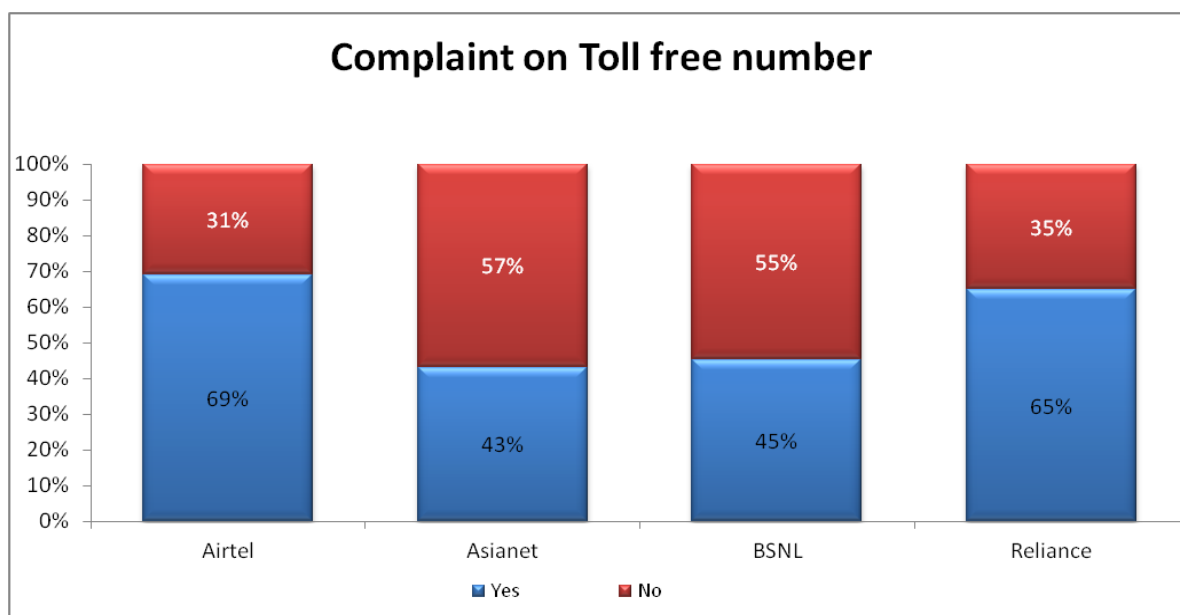
On an average, 55.7% of users have complained to the Appellate authority in Kerala circle. Airtel has the highest number of users who have made a complaint to the toll free number while Asia net has minimum.

5.8.2 **Satisfaction - Complaint on Toll free number:** This parameter captures the satisfaction level of the user on adressal of complaint by the telecom service provider.

Satisfaction - Complaint on Toll free number
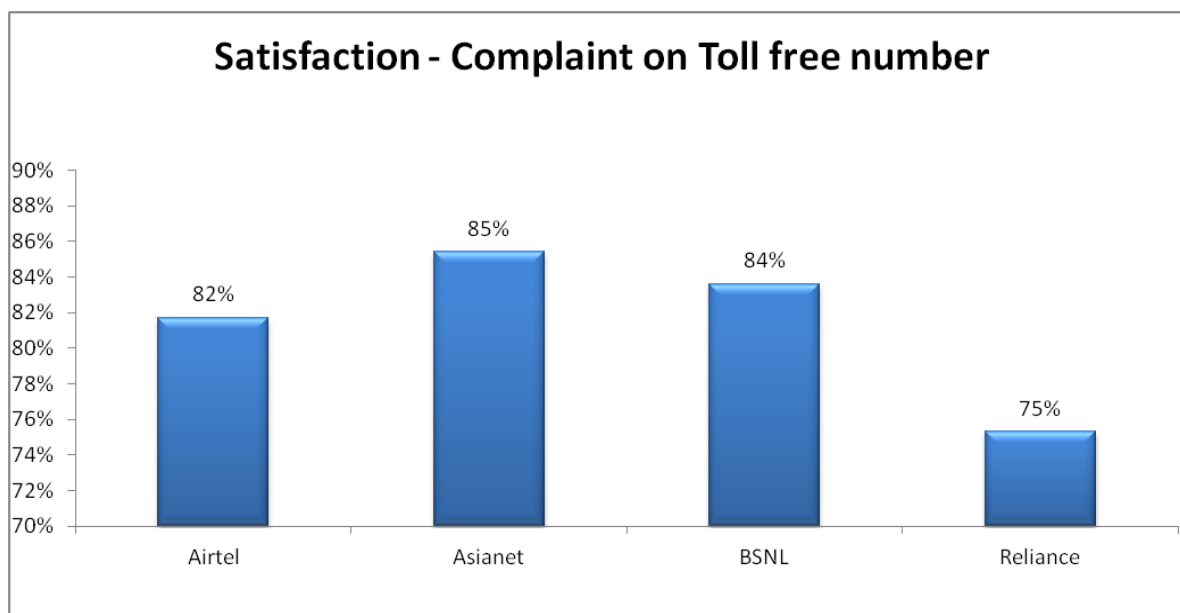
Asianet has the highest percentage of subscribers who are satisfied with the way their complaint was addressed; Reliance has the lowest.

5.8.3 **Complaint to Appellate Authority:** Complaining to the Appellate Authority is the second stage of the redressal mechanism. Below table indicates the percentage of users who have availed such a service.
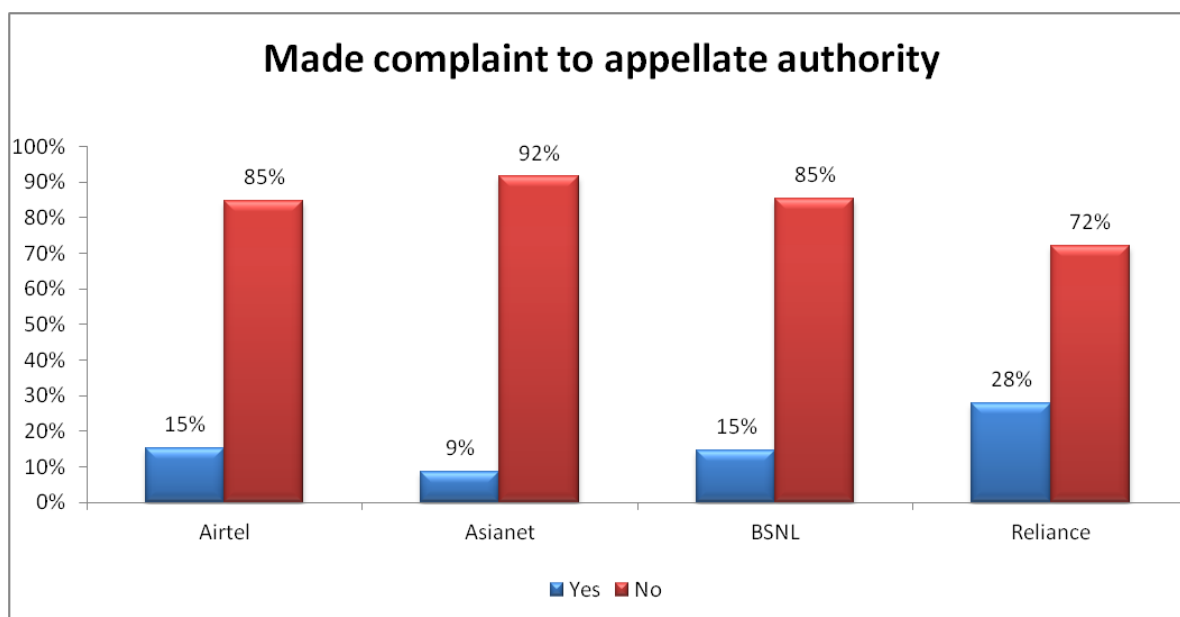
On an average, 16.6% of users have complained to the Appellate authority in Kerala circle. Reliance has the highest number of users who have made a complaint to the Appellate authority while Asianet has the minimum.

5.8.4 **Satisfaction on how the complaint was addressed by the Appellate Authority:** This parameter captures the satisfaction level of users on how the complaint was addressed by the appellate authority.

Out of the 12% users that were aware of the Appellate authority on an average only 17% have made complaint to the same.Given that this particular user base comes out to be lower than the minimum statistical base of 30 users required for any type of data representation, henceforth, we are unable to state the satisfaction scores for this section.

CHAPTER #6.0:- ANNEXURE

6.1 Service providers not covered during this round of Survey activity – Proof by Service Providers/IMRB

6.1.1 Wireless
- Etisalet: Not Present in Kerala Circle
- Videocon: Not Present in Kerala Circle
- Uninor: Not Present in Kerala Circle
- Aircel: More than 1000 telephonic attempts were made to get hold of a subscriber of Aircel; however IMRB was not able to generate even a single successful response. After lots of probing and market search we were able to establish the fact that Aircel is currently downsizing its operations in Kerala and operating with very few subscribers.

6.1.2 Wireline
- **Tata Teleservices:** This service provider does not provide services to individual wireline consumers in the Kerala Service area.

6.1.3 Broadband
- **Tata Teleservices:** This service provider does not provide services to individual wireline consumers in the KeralaService area.

Dear Mr Vijayanand,

As confirmed Tata Tele-services had not been selling broadband services to retail consumers or corporate customer Until July'13.

Only from August'13 we have started selling to retail customers.

Prior to Aug'13 broadband was sold only to SME Segment and our total subscriber base as of July'13 is only 117.

In case of any clarification pls feel free to call

Anwar A S

09037099399

From: Vijayanand Bhaktha (BNG\BIRD) [mailto:vijayanand.bhaktha@imrbint.com]
Sent: 23 September 2013 18:45
To: Anwar Azeez Sait
Cc: biswapriya.bhattacharjee@imrbint.com; nakul.dogra@imrbint.com;
anoop.kubba@imrbint.com; 'Muralidhara Krishnamurthy'; 'sibi mathew'; 'Latha H C';
'sreeni.krishnan'; santosh.kumar@imrbint.com
Subject: TRAI Survey 2013 : Tata does not offers services to Retail Customers

Dear Mr. Anwar,

It was a pleasure speaking to you a few minutes back.

As discussed in our call as well in one of your email communication (refer below), TATA tele-services does not sell broadband services to retail consumers or corporate customer. It caters only to the SME Segment and has a total subscriber base of 117 SMEs till date. Hope my understanding is the same.

It would be great if you could acknowledge the same with an reply email for our records.

Thanks & Regards,

Vijay Anand S Bhaktha

Insights Director | eTech : IT Hardware, Software & Enterprise Practice | IMRB International |

Direct: +91-80-40140901 | Mobile: +91-9986246958

Dear Sir,

In continuation of the discussion we had during the meeting this afternoon, the following are the action taken and details mentioned in respect of each operator.

Aircel: Contacted the Nodal officer Mr.Ashok (09809199567) and Ms. Kalpana, CSD head (09809199200) and regarding the sharing of d/b they have no issue and they are ready to give the d/b again. But they have also experienced the difficulty of getting the customer as the customer is using Aircel as 2nd Coneection or they are not in the coverage area. We have requested them to to give us the mail/letter accordingly.

Reliance: Spoke to Mr.Manoj Srinivasan of their Corporate office, Mumbai and he was not aware that the d/b had not been shared.He said he will instruct the concerned to share the d/b by tomorrow. Requested them to clearly mention the number of Corporate clients and retails customers so that the numbers should match with the numbers we have with us. However when I spoke to their Nodal officer Ms.Deepa suresh, she has sent me the d/b of wireline customers -4857 nos. and Broadband customers -2164 noa. Informed Mr.Geo to start working on this d/b as sufficient no. of customers are available in Ernakulam itself.

Airtel: Spoke to Modal officer Ms.Rekha Agarwal and she had given to understand by her team the d/b of about 49,000 (approx) - wireline has already been shared. Since Mr.Geo has not received the d/b, informed her to check with her team and make usre the d/b is sent before end of today.

Mr.Geo: Please get in touch with the people I have mentioned above in case if you need any clarification and keep me updated so that I can also remind them if need be.

Thanks and regards

--
K.Muralidhara

Senior Reseach Officer,

Telecom Regulatory Authority of India,

Regional Office, Bangalore

Tel: 9449005588

FAX: 080-22865004

6.2   Questionnaires used in this round of Survey activity:

6.2.1   Wireless

TRAI	TELECOM REGULATORY AUTHORITY OF INDIA CUSTOMER PERCEPTION STUDY (South Zone) (Cellular Service)	IMRB International

SR.No.		Interview Date		Interviewer's Name	
DISTRICT			**TOWN**		

Area	1	Urban	2	Rural

Mode of Interview	1	In Person	2	Telephonic

Centre	1	Tamil Nadu	2	Chennai	3	Kerala	4	Andha pradesh	5	Karnataka

Accompanied	Back checked		Scrutinized
	P T	

Accompanied		**Back checked**			**Scrutinized**	
TL	1	TL	1	5	TL	1
EIC	2	EIC	2	6	EIC	2
OFE	3	OFE	3	7	OFE	3
FM	4	FM	4	8	FM	4

Sign._____   Sign. _____   Sign. _____

   TL/EIC/OFE/FM   TL/EIC/OFE/FM   TL/EIC/OFE/FM

INTRODUCTION

Good_____ or Namaste! I am_____(MENTION YOUR NAME) from IMRB International, a leading market research organization. Before starting this interview, I wish to confirm that this interview complies with the Market Research Society of India (MRSI) and International code of ethics for market research. Please be assured that all information given by you will be kept strictly confidential and not revealed to our client with your name/contact details without your prior permission. The response collected will be added together with the responses of others before presenting the findings. Under no circumstance will this information be used for sales or any commercial purpose. Do you have any queries before I start the interview? For further clarification, you may also contact my senior at IMRB International at any point during this interview.

INTERVIEWER TO CLARIFY AND PROVIDE ASSURANCE.

TIME OF START: _____ TIME OF END: _____ TOTAL DURATION: _____

* The questionnaire shall be filled in using ink or ball point pen.

TRAI
Telecom Regulatory Authority of India
(IS/ISO 9001-2008 Certified Organisation)

IMRB International   eTech

CUSTOMER DETAILS											

A1) Respondent's Name | **A2) Gender** | 1 | Male | 2 | Female

A3) Age:(Record Verbatim) | _____(in completed years) | 1 | Less than 25 | 2 | 25-34 | 3 | 35-44 | 4 | >=45

A4) Occupation | 1 | Service | 2 | Business/Self Employed | 3 | Student | 4 | Housewife | 5 | Retired

A5) Tel. No. (Mobile)

A6) Registered Customer's Name (If different from respondent or else Same as A1)

A7) Address (Record Verbatim) | District | Pincode | | | | **A8) Landline No.)**

A9) Service Provider SINGLE CODING ONLY:
1	IDEA Cellular	2	Bharti Airtel	3	BSNL	4	Vodafone	5	Reliance CDMA
5	Reliance GSM	6	Aircel	7	Tata CDMA	8	Tata GSM	9	Videocon
10	Sistema shyam	11	Reliance Telecom	12	Unitech	13	Loop
14	Dishnet	15	Stel	16	Uninor	17	Others_____

A10) Usage Type SINGLE CODING ONLY | 1 | Residential | 2 | Commercial | **A11) User Type** SINGLE CODING ONLY | 1 | Post Paid | 2 | Pre Paid

In your opinion, how satisfied are you with your cellular services in terms of following dimensions, on a scale of 1 to 7

(1 = Extremely Dissatisfied, 7 = Extremely Satisfied)

Parameters and Attributes	Ratings
1. Provision of Service	
1a) How satisfied are you with the ease of taking a connection? SINGLE CODING ONLY	1 2 3 4 5 6 7
1b) How satisfied are you with the understanding of all relevant information related to tariff plans & charges? SINGLE CODING ONLY	1 2 3 4 5 6 7
1c) How satisfied are you with the availability of suitable plans/recharge offers as per your requirement? SINGLE CODING ONLY	1 2 3 4 5 6 7
2. Billing Related (Only for Prepaid Customers). Ask question 2a to 2d only to those respondents coding 2 in A11	

2a) How satisfied are you with ease of recharging process? SINGLE CODING ONLY	1	2	3	4		5	6		7		

2b) How satisfied are you with the availability of recharging cards of various denominations? SINGLE CODING ONLY		1	2	3	4	5	6	7

2c) How satisfied are you with the transparency of recharge offer i.e. talk time available on the recharge card? SINGLE CODING ONLY	1	2	3	4		5	6		7

2d) How satisfied are you with the charges deducted for every call i.e. amount deducted on every usage? SINGLE CODING ONLY	1	2	3	4		5	6		7

Billing Related (Only for Postpaid Customers) Ask question 2e to 2g only to those respondents coding 1 in A11

2e) How satisfied are you with the accuracy & completeness of the bills? SINGLE CODING ONLY	1	2	3	4		5	6		7

2f) How satisfied are you with the clarity of the bills in terms of transparency and understandability? SINGLE CODING ONLY	1	2	3	4		5	6		7

2g) How satisfied are you with the call charges levied per minute/second? SINGLE CODING ONLY	1	2	3	4		5	6		7

3.   Help Services

3a) In the last 6 months, have you contacted customer care/ helpline/call centre of your service provider? SINGLE CODING ONLY		1	Yes		2	No

3b) How satisfied are you with the availability of customer care services 24 X 7? SINGLE CODING ONLY	1	2	3	4		5	6		7

3c) How satisfied are you with the ease of access of call centre/customer care or helpline and contacting the customer care executive? SINGLE CODING ONLY	1	2	3		4	5	6	7

3d) How satisfied are you with the customer friendly approach of the customer care executive? SINGLE CODING ONLY	1	2	3		4	5	6	7

3e) How satisfied are you with the competency level/problem solving ability of the customer care executive? SINGLE CODING ONLY	1	2	3		4	5	6	7

4.   NETWORK PERFORMANCE, RELIABILITY AND AVAILABILITY

4a) How satisfied are you with the availability of signal of your service provider in your locality? SINGLE CODING ONLY	1	2	3	4		5	6		7

4b) How satisfied are you with the network of your service provider in terms of ability to make or receive calls easily? SINGLE CODING ONLY	1	2	3	4		5	6		7

4c) How satisfied are you with the voice quality of your service provider? SINGLE CODING ONLY	1	2	3	4		5	6		7

5.   Maintainability

5a) How satisfied are you with the effective handling of the network (signal) problems? SINGLE CODING ONLY	1	2	3	4	5		6	7

6.   SUPPLEMENTARY SERVICES AND VALUE ADDED SERVICES

6a) Have you subscribed to any supplementary services like call forwarding, call diverting, and value added services like ring tone, alerts, GPRS, e-mail, voice mail or any other such services, in the last 6 months? SINGLE CODING ONLY	1	Yes	2	No

Kindly ask Q6b only to respondents coding 1 in Question 6a								
6b) How satisfied are you with quality of supplementary services / value added service provided including activation, deactivation, charges etc? SINGLE CODING ONLY	1	2	3	4	5	6	7	
7. How satisfied are you with Overall Quality of the Wireless Service? SINGLE CODING ONLY	**1**	**2**	**3**	**4**	**5**	**6**	**7**	

8a) Have you registered your number for blocking unsolicited commercial calls / SMSs? SINGLE CODING ONLY	1	Yes		2		No	

Kindly ask Q8b only to respondents coding 1 in Question 8a							
8b) How satisfied are you with the obstruction of unsolicited commercial calls/SMS on your number? SINGLE CODING ONLY	1	2	3	4	5	6	7
8c) Have you ever registered a complaint, in case the unsolicited call/SMS have not had not stopped in spite of registration for the same? SINGLE CODING ONLY	1	Yes		2		No	

Kindly ask Q8d only to respondents coding 1 in Question 8c							
8d) If Yes, how satisfied are you with the action taken on your complaint? SINGLE CODING ONLY	1	2	3	4	5	6	7

Question Number 8e-8h are for respondents coding 2 in A11							
8e) How satisfied are you with the receipt of a SMS giving information such as amount charged, processing fee, taxes deducted, title of the plan, validity etc at the time of recharge? SINGLE CODING ONLY	1	2	3	4	5	6	7
8f) How satisfied are you with the receipt of a SMS giving information such as duration of call, call charges, balance in account etc after making a call? SINGLE CODING ONLY	1	2	3	4	5	6	7
8g) A pre paid customer can get an item-wise usage bill within 45 days of making such request. Have you ever requested for it? SINGLE CODING ONLY	1	Yes		2		No	

Kindly ask Q8h only to respondents coding 1 in Question 8g							
8h) How satisfied are you with the services related to receipt of item-wise usage bill on request? SINGLE CODING ONLY	1	2	3	4	5	6	7

8i) Which all stages of the two stage grievance redressal mechanism set up by your telecom service provider based on the TRAI regulations are you aware of? MULTIPLE CODING POSSIBLE

1	Complaint Centre	2	Appellate Authority	3	None

8j) Have you made any complaint to the toll free customer care number? SINGLE CODING ONLY	1		Yes	2		No	

Kindly ask Q8k only to respondents coding 1 in Question 8j							
8k) If yes, how satisfied are you with the manner in which your complaint was addressed to? SINGLE CODING ONLY	1	2	3	4	5	6	7

Kindly ask Q8l only to respondents coding 2 in Question 8i			

Telecom Regulatory Authority of India
(IS/ISO 9001-2008 Certified Organisation)

8l) Have you made any complaint to the appellate authority? SINGLE CODING ONLY		1	Yes		2		No	

Kindly ask Q8m only to respondents coding 1 in Question 8l

8m) How satisfied are you with the manner in which your complaint was addressed to? SINGLE CODING ONLY	1	2	3	4	5	6	7

8n) Have you utilized the service of Mobile number portability? SINGLE CODING ONLY	1	Yes		2		No	

Kindly ask Q8o only to respondents coding 1 in Question 8n

8o) Are you satisfied Mobile Number Portability service from your service provider? SINGLE CODING ONLY	1	2	3	4	5	6	7

Q9) How likely is it that you would recommend your service provider to your relatives or friends? (On scale of 0 to 10, where 10 means 'Extremely Likely' & 0 means 'Not At All Likely') SINGLE CODING ONLY	0	1	2	3	4	5	6	7	8	9	10

Signature of Respondent: _____

******** **Thank You** ***********

6.2.2 Wireline

TRAI	TELECOM REGULATORY AUTHORITY OF INDIA CUSTOMER PERCEPTION STUDY (South Zone) (Basic Telephone Service)	IMRB international

SR.No.		**Interview Date**		**Interviewer's Name**	

DISTRICT			**TOWN**	

Area	1	Urban	2	Rural

Mode of Interview	1	In Person	2	Telephonic

Centre	1	Andhra Pradesh	2	Karnataka	3	Kerala	4	Tamil Nadu	5	Chennai

Accompanied			Back checked			Scrutinized	
TL	1		TL	1	5	TL	1
EIC	2		EIC	2	6	EIC	2
OFE	3		OFE	3	7	OFE	3
FM	4		FM	4	8	FM	4

Sign._____   Sign. _____   Sign. _____

TL/EIC/OFE/FM   TL/EIC/OFE/FM   TL/EIC/OFE/FM

INTRODUCTION

Good_____ or Namaste! I am_____(MENTION YOUR NAME) from IMRB International, a leading market research organization. Before starting this interview, I wish to confirm that this interview complies with the Market Research Society of India (MRSI) and International code of ethics for market research. Please be assured that all information given by you will be kept strictly confidential and not revealed to our client with your name/contact details without your prior permission. The response collected will be added together with the responses of others before presenting the findings. Under no circumstance will this information be used for sales or any commercial purpose. Do you have any queries before I start the interview? For further clarification, you may also contact my senior at IMRB International at any point during this interview.

INTERVIEWER TO CLARIFY AND PROVIDE ASSURANCE.

TIME OF START: _____   TIME OF END: _____ TOTAL DURATION: _____

* The questionnaire shall be filled in using ink or ball point pen.

CUSTOMER DETAILS

A1) Respondent's Name				A2) Gender		1	Male	2	Female
									4

A3) Age: (Record Verbatim)	_____(in completed years)	1	Less than 25	2	25-34	3	35-44	House wife	>=45

A4) Occupation	1	Service	2	Business/Self Employed	3	Student	4		5	Retired

A5) Tel. No. (Mobile)

A6) Registered Customer's Name for landline service (If different from respondent)

A7) Address (Record Verbatim)		Pincode					A8) Landline No.)	

A9) Service Provider SINGLE CODING ONLY	1	BSNL		2	Tata	3	Reliance	Others_____
	4	Vodafone	5	Airtel	6	Others_____	7	Others_____

A10) Usage Type SINGLE CODING ONLY	1	Residential	2	Commercial	A11) User Type	1	Post Paid	2	Prepaid

PERFORMANCE PERCEPTION OF ATTRIBUTES RELATED TO SERVICE QUALITY PARAMETERS

In your opinion, how satisfied are you with your wireline services in terms of following dimensions, on a scale of 1 to 7

(1 = Extremely Dissatisfied, 7 = Extremely Satisfied)

Telecom Regulatory Authority of India
(IS/ISO 9001-2008 Certified Organisation)

Parameters and Attributes	Ratings						
9. Provision of Service							
1a) How satisfied are you with the ease of taking a connection? SINGLE CODING ONLY	1	2	3	4	5	6	7
1b) How satisfied are you with the provision and understanding of all relevant information related to tariff plans & charges? SINGLE CODING ONLY	1	2	3	4	5	6	7
1c) How satisfied are you with the availability of suitable plans/recharge offers as per your requirement? SINGLE CODING ONLY	1	2	3	4	5	6	7
10. Billing Related (Only for Prepaid Customers). Ask question 2a to 2d only to those respondents coding 2 in A11							
2a) How satisfied are you with ease of recharging process? SINGLE CODING ONLY	1	2	3	4	5	6	7
2b) How satisfied are you with the availability of recharging cards of various denominations? SINGLE CODING ONLY	1	2	3	4	5	6	7
2c) How satisfied are you with the transparency of recharge offer i.e. talk time available on the recharge card? SINGLE CODING ONLY	1	2	3	4	5	6	7
2d) How satisfied are you with the charges deducted for every call i.e. amount deducted on every usage? SINGLE CODING ONLY	1	2	3	4	5	6	7
Billing Related (Only for Postpaid Customers) Ask question 2a to 2d only to those respondents coding 2 in A11							
2e) How satisfied are you with the accuracy & completeness of the bills? SINGLE CODING ONLY	1	2	3	4	5	6	7
2f) How satisfied are you with the clarity of the bills in terms of transparency and understandability? SINGLE CODING ONLY	1	2	3	4	5	6	7
2g) How satisfied are you with the call charges levied per minute/second?	1	2	3	4	5	6	7
11. Help Services							
3a) How satisfied are you with the availability of customer care services 24 X 7? SINGLE CODING ONLY	1	2	3	4	5	6	7
3b) How satisfied are you with the ease of access of call centre/customer care or helpline and contacting the customer care executive? SINGLE CODING ONLY	1	2	3	4	5	6	7
3c) How satisfied are you with the customer friendly approach of the customer care executive? SINGLE CODING ONLY	1	2	3	4	5	6	7
3d) How satisfied are you with the competency level/problem solving ability of the customer care executive? SINGLE CODING ONLY	1	2	3	4	5	6	7
12. NETWORK PERFORMANCE, RELIABILITY AND AVAILABILITY							
4a) How satisfied are you with the availability of signal of your service provider in your locality? SINGLE CODING ONLY	1	2	3	4	5	6	7
4b) How satisfied are you with the network of your service provider in terms of ability to make or receive calls easily? SINGLE CODING ONLY	1	2	3	4	5	6	7
4c) How satisfied are you with the voice quality of your service provider? SINGLE CODING ONLY	1	2	3	4	5	6	7
13. Maintainability							
How satisfied are you with the effective handling of faults with the phone connection? SINGLE CODING ONLY	1	2	3	4	5	6	7
14. SUPPLEMENTARY SERVICES AND VALUE ADDED SERVICES							

6a) Have you subscribed to any supplementary services like call waiting/forwarding, voice mail / Value added services? SINGLE CODING ONLY	1	Yes	2	No			

Kindly ask Q6b only to respondents coding 1 in Question 6a

6b) How satisfied are you with quality of supplementary services / value added service provided including activation, deactivation, charges etc? SINGLE CODING ONLY	1	2	3	4	5	6	7
15. Overall Quality of the Wireline Telephone Service? SINGLE CODING ONLY	**1**	**2**	**3**	**4**	**5**	**6**	**7**

16. Implementation and Effectiveness of various Regulations and Directions issued by TRAI

8a) Have you registered your number for blocking unsolicited commercial calls / SMSs? SINGLE CODING ONLY	1	Yes	2	No			

Kindly ask Q8b only to respondents coding 1 in Question 8a

8b) How satisfied are you with the obstruction of unsolicited commercial calls/SMS on your number? SINGLE CODING ONLY	1	2	3	4	5	6	7
8c) Have you ever registered a complaint, in case the unsolicited call/SMS have not had not stopped in spite of registration for the same? SINGLE CODING ONLY	1	Yes	2	No			

Kindly ask Q8d only to respondents coding 1 in Question 8c

8d) How satisfied are you with the action taken on your complaint? SINGLE CODING ONLY	1	2	3	4	5	6	7

Question Number 8e-8h are for respondents coding 2 in A11

8e) How satisfied are you with the receipt of a SMS giving information such as amount charged, processing fee, taxes deducted, title of the plan, validity etc at the time of recharge? SINGLE CODING ONLY	1	2	3	4	5	6	7
8f) How satisfied are you with the receipt of a SMS giving information such as duration of call, call charges, balance in account etc after making a call? SINGLE CODING ONLY	1	2	3	4	5	6	7
8g) A pre paid customer can get an item-wise usage bill within 45 days of making such request. Have you ever requested for it? SINGLE CODING ONLY	1	Yes	2	No			

Kindly ask Q8h only to respondents coding 1 in Question 8g

8h) How satisfied are you with the services related to receipt of item-wise usage bill on request? SINGLE CODING ONLY	1	2	3	4	5	6	7

8i) Which all stages of the two stage grievance redressal mechanism set up by your telecom service provider based on the TRAI regulations are you aware of? MULTIPLE CODING POSSIBLE

1	Complaint Centre	2	Appellate Authority	3	None		
8j) Have you made any complaint to the toll free customer care number? SINGLE CODING ONLY	1	Yes		2	No		

Kindly ask Q8k only to respondents coding 1 in Question 8j

8k) How satisfied are you with the manner in which your complaint was addressed to? SINGLE CODING ONLY	1	2	3	4	5	6	7
Kindly ask Q8l only to respondents coding 2 in Question 8i							
8l) Have you made any complaint to the appellate authority? SINGLE CODING ONLY	1	Yes		2	No		

Kindly ask Q8m only to respondents coding 1 in Question 8l

8m) How satisfied are you with the manner in which your complaint was addressed to? SINGLE CODING ONLY	1	2	3	4	5	6	7

Q9) How likely is it that you would recommend your service provider to your relatives or friends? (On scale of 0 to 10, where 10 means 'Extremely Likely' & 0 means 'Not At All Likely') SINGLE CODING ONLY	0	1	2	3	4	5	6	7	8	9	10

Signature of Respondent:_____

******** **Thank You** ***********

6.2.3 Broadband

TELECOM REGULATORY AUTHORITY OF INDIA	
TRAI	CUSTOMER PERCEPTION STUDY (South Zone)	**IMR** internatio
	(Broadband Service)	

SR.No.		**Interview Date**		**Interviewer's Name**	

DISTRICT			**TOWN**	

Area	1	Urban		2		Rural

Mode of Interview	1	In Person		2		Telephonic

Centre	1	Andhra Pradesh	2	Karnataka	3	Kerala	4	Tamil Nadu	5	Chennai

Accompanied		**Back checked**			**Scrutinized**	
			P	T		
TL	1	TL	1	5	TL	1
EIC	2	EIC	2	6	EIC	2
OFE	3	OFE	3	7	OFE	3
FM	4	FM	4	8	FM	4
Sign._____		Sign. _____			Sign. _____	
TL/EIC/OFE/FM		TL/EIC/OFE/FM			TL/EIC/OFE/FM	

INTRODUCTION

Good_____ or Namaste! I am_____(MENTION YOUR NAME) from IMRB International, a leading market research organization. Before starting this interview, I wish to confirm that this interview complies with the Market Research Society of India (MRSI) and International code of ethics for market research. Please be assured that all information given by you will be kept strictly confidential and not revealed to our client with your name/contact details without your prior permission. The response collected will be added together with the responses of others before presenting the findings. Under no circumstance will this information be used for sales or any commercial purpose. Do you have any queries before I start the interview? For further clarification, you may also contact my senior at IMRB International at any point during this interview.

TRAI
Telecom Regulatory Authority of India
(IS/ISO 9001-2008 Certified Organisation)

IMRB International | eTech

INTERVIEWER TO CLARIFY AND PROVIDE ASSURANCE.

TIME OF START: _____ TIME OF END: _____ TOTAL DURATION: _____

* The questionnaire shall be filled in using ink or ball point pen.

CUSTOMER DETAILS

A1) Respondent's Name							A2) Gender	1	Male	2	Female

A3) Age: (Record Verbatim)	_____in completed years	1	Less than 25	2	25-34	3	35-44	4	>=45

A4) Occupation	1	Service	2	Business/Self Employed	3	Student	4	Housewife	5	Retired

A5) Tel. No. (Mobile)								

A6) Registered Customer's Name (If different from respondent or else Same as A1)	

A7) Address (Record Verbatim)		Pincode					A8) Landline No.)							

A9) Service Provider SINGLE CODING ONLY	1	BSNL	2	Airtel	3	TATA COMMUNICATION
	4	HATHWAY	5	YOU BROADBAND	6	SIFY
	7	RELIANCE	8	ASIA NET	9	ORTEL
	10	ALLIANCE	11	Beam Cables	12	Spectra Net
	13	D-Vois Broadband Pvt. Ltd.	14	Indusland Media & Communications Ltd	15	Five Network Solution(India) Ltd
	16	Zylog Systems India Ltd.	17	Softeng Computers Pvt Ltd.	18	Wishnet Pvt. L td
	19	Others_____		20	Others_____	

A10) Usage Type SINGLE CODING ONLY	1	Residential	2	Commercial	A11) User Type	1	Post Paid	2	Pre Paid

PERFORMANCE PERCEPTION OF ATTRIBUTES RELATED TO SERVICE QUALITY PARAMETERS

In your opinion, how satisfied are you with your broadband services in terms of following

dimensions, on a scale of 1 to 7 **(1 = Extremely Dissatisfied, 7 = Extremely Satisfied)**	
Parameters and Attributes	**Ratings**

17. Provision of Service							
1a) How satisfied are you with the ease of taking a connection? SINGLE CODING ONLY	1	2	3	4	5	6	7
1b) How satisfied are you with the provision and understanding of all relevant information related to tariff plans & charges? SINGLE CODING ONLY	1	2	3	4	5	6	7
1c) How satisfied are you with the availability of suitable plans/recharge offers as per your requirement? SINGLE CODING ONLY	1	2	3	4	5	6	7
18. Billing Related (Only for Prepaid Customers). Ask question 2a to 2d only to those respondents coding 2 in A11							
2a) How satisfied are you with ease of recharging process? SINGLE CODING ONLY	1	2	3	4	5	6	7
2b) How satisfied are you with the availability of recharging cards of various denominations? SINGLE CODING ONLY	1	2	3	4	5	6	7
2c) How satisfied are you with the transparency of recharge offer i.e. internet usage available on the recharge card? SINGLE CODING ONLY	1	2	3	4	5	6	7
2d) How satisfied are you with the charges deducted for internet usage? SINGLE CODING ONLY	1	2	3	4	5	6	7

Billing Related (Only for Postpaid Customers) Ask question 2e to 2g only to those respondents coding 1 in A11							
2e) How satisfied are you with the accuracy & completeness of the bills? SINGLE CODING ONLY	1	2	3	4	5	6	7
2f) How satisfied are you with the clarity of the bills in terms of transparency and understandability? SINGLE CODING ONLY	1	2	3	4	5	6	7
2g) How satisfied are you with the charges levied for internet usage? SINGLE CODING ONLY	1	2	3	4	5	6	7
19. Help Services							
3a) How satisfied are you with the availability of customer care services 24 X 7? SINGLE CODING ONLY	1	2	3	4	5	6	7
3b) How satisfied are you with the ease of access of call centre/customer care or helpline and contacting the customer care executive? SINGLE CODING ONLY	1	2	3	4	5	6	7
3c) How satisfied are you with the customer friendly approach of the customer care executive? SINGLE CODING ONLY	1	2	3	4	5	6	7
3d) How satisfied are you with the competency level/problem solving ability of the customer care executive? SINGLE CODING ONLY	1	2	3	4	5	6	7
20. NETWORK PERFORMANCE, RELIABILITY AND AVAILABILITY							
4a) How satisfied are you with the availability of signal of your service provider in your locality? SINGLE CODING ONLY	1	2	3	4	5	6	7
4b) How satisfied are you with the network of your service provider in terms speed of broadband connection? SINGLE CODING ONLY	1	2	3	4	5	6	7

4c) How satisfied are you with the time for which service is up and working? SINGLE CODING ONLY	1	2	3	4	5	6	7

21. Maintainability

How satisfied are you with the effective handling of the network (signal) or connectivity problems? SINGLE CODING ONLY	1	2	3	4	5	6	7

22. SUPPLEMENTARY SERVICES AND VALUE ADDED SERVICES

6a) Have you subscribed to any supplementary services such as Static/fixed IP addresses, e-mail ids etc.? SINGLE CODING ONLY	1	Yes	2	No

Kindly ask Q6b only to respondents coding 1 in Question 6a

6b) If Yes, how satisfied are you with quality of these supplementary services? SINGLE CODING ONLY	1	2	3	4	5	6	7
23. How satisfied are you with the Overall Quality of the Broadband Service? SINGLE CODING ONLY	1	2	3	4	5	6	7

24. Implementation and Effectiveness of various Regulations and Directions issued by TRAI

8a) Which all stages of the two stage grievance redressal mechanism set up by your telecom service provider based on the TRAI regulations are you aware of? MULTIPLE CODING POSSIBLE

1	Complaint Centre	2	Appellate Authority	3	None

8b) Have you made any complaint to the toll free customer care number? SINGLE CODING ONLY	1	Yes	2	No

Kindly ask Q8c only to respondents coding 1 in Question 8b

8c) If yes, how satisfied are you with the manner in which your complaint was addressed to? SINGLE CODING ONLY	1	2	3	4	5	6	7

Kindly ask Q8d only to respondents coding 2 in Question 8a

8d) Have you made any complaint to the appellate authority? SINGLE CODING ONLY	1	Yes	2	No

Kindly ask Q8e only to respondents coding 1 in Question 8b

8e) If yes, how satisfied are you with the manner in which your complaint was addressed to? SINGLE CODING ONLY	1	2	3	4	5	6	7

Q9) How likely is it that you would recommend your service provider to your relatives or friends? (On scale of 0 to 10, where 10 means 'Extremely Likely' & 0 means 'Not At All Likely') SINGLE CODING ONLY	0	1	2	3	4	5	6	7	8	9	10

Signature of Respondent: _____

******** **Thank You** ***********

6.3   Tables

6.3.1   Wireless

Name of Service Provider	Sample Size - Planned	Sample Size - Achieved	Reason for Variance
Bharti airtel	600	602	Not Applicable
BSNL	600	603	Not Applicable
Idea cellular	600	607	Not Applicable
Reliance	600	610	Not Applicable
Sistema shyam	600	602	Not Applicable
Tata Teleservices	600	602	Not Applicable
Vodafone	600	600	Not Applicable

Name of Service Provider	Total	Male	Female
Bharti airtel	602	73%	27%
BSNL	603	75%	25%
Idea cellular	607	73%	27%
Reliance	610	75%	25%
Sistema shyam	602	71%	29%
Tata Teleservices	602	75%	25%

Vodafone	**600**	**73%**	**27%**

Name of Service Provider	Total	Less than 25 years	26-34 years	35-44 years	Above 44 years
Bharti airtel	**602**	**35%**	**31%**	**17%**	**17%**
BSNL	**603**	**24%**	**24%**	**27%**	**25%**
Idea cellular	**607**	**31%**	**27%**	**25%**	**18%**
Reliance	**610**	**22%**	**25%**	**27%**	**27%**
Sistema shyam	**602**	**11%**	**31%**	**30%**	**28%**
Tata Teleservices	**602**	**45%**	**29%**	**14%**	**13%**
Vodafone	**600**	**33%**	**29%**	**21%**	**18%**

Name of Service Provider	Total	Service	Business/Self Employed	Student	Housewife	Retired
Bharti airtel	**602**	**42%**	**13%**	**27%**	**17%**	**1%**
BSNL	**603**	**47%**	**19%**	**19%**	**13%**	**2%**
Idea cellular	**607**	**47%**	**13%**	**22%**	**16%**	**2%**
Reliance	**610**	**51%**	**15%**	**16%**	**17%**	**1%**
Sistema shyam	**602**	**54%**	**15%**	**7%**	**22%**	**3%**
Tata Teleservices	**602**	**41%**	**9%**	**34%**	**15%**	**1%**
Vodafone	**600**	**46%**	**12%**	**26%**	**15%**	**2%**

Name of Service Provider	Total	Face to Face	Telephonic	Online
Bharti airtel	**602**	**97%**	**3%**	**Not Applicable**
BSNL	**603**	**97%**	**3%**	**Not Applicable**

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Idea cellular	607	99%	1%	Not Applicable
Reliance	610	81%	19%	Not Applicable
Sistema shyam	602	32%	68%	Not Applicable
Tata Teleservices	602	89%	11%	Not Applicable
Vodafone	600	97%	3%	Not Applicable

Name of Service Provider	Total	Postpaid (Percentage ownership)	Prepaid (Percentage ownership
Bharti airtel	602	5%	96%
BSNL	603	4%	96%
Idea cellular	607	3%	97%
Reliance	610	11%	89%
Sistema shyam	602	20%	80%
Tata Teleservices	602	3%	97%
Vodafone	600	4%	96%

6.3.2 Wireline

Name of Service Provider	Sample Size - Planned	Sample Size - Achieved	Reason for Variance
Bharti Airtel	600	600	Not Applicable
BSNL	600	615	Not Applicable
Reliance	600	601	Not Applicable

Name of Service Provider	Total	Male	Female
Bharti Airtel	600	83%	17%
BSNL	615	69%	31%
Reliance	601	82%	18%

Name of Service Provider	Total	Less than 25 years	26-34 years	35-44 years	Above 44 years
Bharti Airtel	600	2%	33%	45%	21%
BSNL	615	11%	18%	29%	43%
Reliance	601	3%	26%	44%	27%

Name of Service Provider	Total	Service	Business/Self Employed	Student	Housewife	Retired
Bharti Airtel	600	39%	57%	1%	3%	0%
BSNL	615	45%	19%	8%	22%	5%
Reliance	601	36%	47%	2%	12%	3%

Name of Service Provider	Total	Postpaid (Percentage ownership)	Prepaid (Percentage ownership
Bharti Airtel	600	99%	1%
BSNL	615	99%	1%
Reliance	601	98%	2%

6.3.3 Broadband

Name of Service Provider	Sample Size - Planned	Sample Size - Achieved	Reason for Variance

Airtel	**600**	**878**	**Online activity resulted in greater than expected response**
Asia net	**600**	**619**	**Not Applicable**
BSNL	**600**	**601**	**Not Applicable**
Reliance	**600**	**611**	**Not Applicable**

Name of Service Provider	Total	Male	Female
Airtel	**878**	**87%**	**13%**
Asia net	**619**	**83%**	**17%**
BSNL	**601**	**78%**	**22%**
Reliance	**611**	**89%**	**11%**

Name of Service Provider	Total	Less than 25 years	26-34 years	35-44 years	Above 44 years
Airtel	**878**	**6%**	**31%**	**32%**	**32%**
Asia net	**619**	**15%**	**33%**	**26%**	**27%**
BSNL	**601**	**10%**	**22%**	**27%**	**41%**
Reliance	**611**	**4%**	**35%**	**42%**	**20%**

Name of Service Provider	Total	Service	Business/Self Employed	Student	Housewife	Retired
Airtel	**878**	**31%**	**58%**	**3%**	**3%**	**5%**
Asia net	**619**	**42%**	**36%**	**12%**	**6%**	**5%**
BSNL	**601**	**41%**	**30%**	**9%**	**9%**	**11%**
Reliance	**611**	**24%**	**66%**	**3%**	**4%**	**2%**

Name of Service Provider	Total	Postpaid (Percentage ownership)	Prepaid (Percentage ownership
Airtel	878	99%	1%
Asia net	619	72%	28%
BSNL	601	94%	6%
Reliance	611	98%	2%

THANK YOU

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