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Title

**A STUDY RELATED TO CUSTOMER SATISFACTION ON
THE MOBILE SERVICE OPERATORS IN INDIA**

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Abstract:

In today's scenario the customer acquisition cost has increased whereas the retention cost is relatively cheaper, it's important for every service industry to understand its consumer and cater to its needs in order to survive in this competitive market. With the emergence of so many mobile telecom networks and the mantra being "customer satisfaction", it is important to know which mobile telecom network has the most favourable image and whether the customers are actually satisfied with the service quality provided.

Customer satisfaction has gained a lot of importance in the last three decades. In the earlier days, this concept was not very popular because companies thought it was more important to gain new customers than retain the existing ones. In present times, organisations have gained better understanding of the importance of customer satisfaction (especially service producing companies) and adopted it as a high priority operational goal.

This study aims at investigating the overall customer satisfaction of the mobile telecoms industry in India with reference to some of the telecom players such as Airtel, Vodafone, Tata Indicom, Reliance, and Idea.

This survey is done with the intention of understanding the customer expectations from the mobile service operators, with the coming in of 3G technologies the demand of the customers are increasing.

Through this study we have found that the customers are progressing towards wanting more and better facilities but still seem to have grievances with the quality of the basic features such as Network availability, connectivity, customer care services resulting in high switching cost. We in India are still price sensitive in nature therefore a reduction in the call charges and tariffs are always demanded.

INTRODUCTION:

India's telecom sector has shown commendable growth in the recent years with respects to industrial growth. From being a state monopoly with very limited growth, it has grown in to the level of an industry. Telephones, whether they are fixed landline or mobiles, is of great necessity

to the people of India. A change in the phase came about with the economic development that followed the process of structuring the economy in the capitalistic pattern. Relaxation on the restrictions on foreign capital investment and industrial de-licensing resulted in faster growth of this sector. The current country's telecom industry has achieved a growth rate of 14 per cent. The fixed land lines played a very important role even till 2000 though the cellular companies existed they had not taken over the fixed landlines.

Today the telecom industry offers services such as fixed landlines, WLL, GSM mobiles, CDMA and IP services to customers. With the increasing competition among players there has been a drastic slash in the prices making the mobile facility accessible to the urban middle class population and to a great extends in the rural areas. Today even for small shopkeepers and factory workers a phone connection is not an unreachable luxury. Dominant players in the sector are BSNL, MTNL, Bharti Teleservices, Vodafone, BPL, Tata, Idea, etc. With the growth of telecom services, telecom equipment and accessories manufacturing has also grown in a big way. Not only have the telecom services improved, there is also an improvement in manufacturing. Initially, there were only the Siemens handsets in India but now a whole series of new handsets, such as Nokia's latest N-series, Sony Ericsson's W-series, Motorola's PDA phones, etc. have come in with a great number of features and facilities. Some of the popular facilities are the touch screen, Radio services have also been incorporated in the mobile handsets, along with other applications like high storage memory, multimedia applications, multimedia games, MP3 Players, video generators, Camera's, etc. The value added services provided along with these features contribute to more than 10% of the total revenue of the mobile service operator.

Key Players in Indian Telecom Industry:

The telecom industry of India has registered manifold growth in the recent years. Both Public and Private Players are enhancing their technologies and taking the telecom industry to a much higher growth state. Service providers as well as handset manufacturers are contributing significantly to the industry and economy of India.

The top players in the industry are:

- 1) Reliance Communications Limited
- 2) Bharti Airtel Limited
- 3) BSNL
- 4) MTNL
- 5) Vodafone
- 6) Ericsson
- 7) Nokia
- 8) Siemens Communications
- 9) Idea Cellular Limited
- 10) Tata Teleservices

3G Technology In India:

From the time of telegraphs Indian telecom sector has witnessed an immense growth and has diversified into various segments like, Fixed Line Telephony, mobile telephony, GSM, CDMA, WLL etc. The service operators and handset providers are also coming up with newer value added services and advance technology cell phones with multimedia applications.

Bharat Sanchar Nigam Limited launched its 3 G technology by December 2007. The network providers and the handset providers in India are waiting eagerly for the launch of 3G technology to earn very high revenues from the value added services provided by the technology.

The technology will be launched on the CDMA platform initially. Currently the technology is being tested over various platforms and cellular networks

INVESTMENT AND GROWTH:

In 2005-2006, the telecom industry witnessed a growth of 21% with total revenue of Rs. 86,720 crores, and the total investment rising to Rs. 2, 00,660 crores. It is foreseen that the telecom industry will be enjoying over 150% growth in the next 4-6 years. . Bharti Airtel is planning to invest about \$8 billion by the year 2010.

REVIEW:

Customer satisfaction has been an important concept of marketing for over three decades. As early as 1960, Keith (1960) defined marketing as “*satisfying the needs and desires of the consumer*”. It was reported that by the 1970s, interest in customer satisfaction had increase to such an extent that over 500 studies were published. This trend continued and by 1992, it was estimated that the amount of academic and trade articles on customer satisfaction to be over 15,000.

Studies have shown that it costs about three times to gain a new customer as it does to keep an existing customer and this result into more interest in customer relationships. Thus, most of the companies are adopting customer satisfaction as their main goal with a carefully designed framework. Companies now have big investment in database marketing, relationship management and customer planning to move closer to their customers”.

DEFINITION:

Customer satisfaction is defined as *an evaluation between what was received and what was expected emphasizing the perceptual, evaluative and psychological processes that contribute to customer satisfaction*.

CLEAR UNDERSTANDING OF CUSTOMER NEEDS AND EXPECTATIONS :

The achievement of a strong customer satisfaction is related to the understanding customer needs and expectations. As per the Kano Model customer needs can be divided into:-

Basic needs – the main needs of customers and if not met, he is dissatisfied, however meeting this needs may not be enough for customer satisfaction. The satisfaction results in “*must be quality*”.

Expected needs – these are the important needs that customers are completely aware of therefore satisfaction is expected in every purchase; their satisfaction creates “*expected quality*”.

Excitement needs – these are unconscious and unspoken needs of customers. On identifying and satisfying these needs, the companies add large value to customers and can win loyal customers. This satisfaction creates “*attractive quality*”.

Therefore it is to be noted that customers purchase services based on their needs and have expectations that the purchased services will meet their needs

PERCEIVED VALUE:

Perceived value is defined as “*the benefits customers receive in relation to total costs (which include the price paid plus other costs associated with the purchase) or the consumers' overall assessment of what is received relative to what is given*”.

It was found that customers who perceive that they receive value for money are more satisfied as compared to customers who do not perceive they receive value for money.

SERVICE QUALITY:

Another factor that adds to satisfaction is service quality. Service quality means “*the difference between customer expectations and perceptions of service*” or “*as the customers' satisfaction or dissatisfaction formed by their experience of purchase and use of the service*”.

It was reported that service quality is a casual antecedent of customer satisfaction, due to the fact that service quality is viewed at transactional level and satisfaction is viewed to be an attitude, it is reported that the service quality divisions are related to overall service quality and or customer satisfaction.

INTERNAL SATISFACTION:

It has been shown the importance and the link of internal (employee) satisfaction to the external (customer) satisfaction. There is a positive relationship between satisfied employees and customer satisfaction and this is achieved in companies that practice employee motivation and loyalty. They reported that “*employees that are more driven to achieve customer satisfaction*”

tend to be more flexible in their approach to their work, make fewer mistakes and use more initiative". Thus, it is suggested that employee motivation and loyalty can be achieved through:

- Daily leadership – Top management officials motivate others through their performance.
- Top management communicates their expectations to the employees.
- Development of competencies – feedback on employees performance, work efforts, opportunity for development and improvement of competencies.
- Corporation and employee retention, and
- Good working conditions

COMPLAINT MANAGEMENT:

Albrecht and Zemke found that of the customers who register complaints, between 54% and 70% will again do business with the company if their complaints are resolved. This figure increases further to 95% if the customer feels that the complaint was resolved promptly and efficiently. A very important fact is customers who have complained to a company and had their complaints satisfactorily resolved tell an average of five people about the good treatment they received. As reported that when the service provider accepts responsibility and resolves the problem when customers complain, the customer becomes "bonded" to the company.

CUSTOMER LOYALTY:

Coyne (1989) stated that customer satisfaction has measurable impact on customer loyalty in that when satisfaction reaches a certain level; on the high side, loyalty increases dramatically; at the same time, when satisfaction falls to a certain point, loyalty reduces equally dramatically. Yi (1990) expressed that the impact of customer satisfaction on customer loyalty by stating that "*customer satisfaction influences purchase intentions as well as post-purchase attitude*". In other word, satisfaction is related to behavioural loyalty, which includes continuing purchases from the same company, word of mouth recommendation and increased scope of relationship.

CUSTOMER RETENTION:

Several studies and research works have shown that there is positive relationship between customer satisfaction and customer retention; customer satisfaction has a direct effect on customer retention; customer satisfaction is positively related to customer retention; to retain a customer, it is necessary to satisfy him. A satisfied customer is most likely to return and stay with a company than a unsatisfied customer who can decide to go elsewhere

CUSTOMER PROFITABILITY:

Research studies conducted by Gale (1992) and Fornell (1992) showed that higher customer satisfaction results into higher than the normal market share growth, also the ability to charge a higher price, lower transaction costs, and a strong link to improved profitability. It was also demonstrated that customer satisfaction is related to higher profitability and proved his findings statistically. It stated that shareholder value is highly elastic with respect to customer satisfaction. Fornell et al., 1996, found that customer satisfaction is significantly related to an organisations' financial performance.

PROBLEM DEFENITION:

- A consumer as of today is a very important part of any industry, therefore it is equally important to know what they think and how their needs vary from time to time.
- In mobile telecom sector with the number of upcoming telecom networks it is important to know whether they are catering to the utmost important goal of an organisation which is customer satisfaction.
- We can also notice over a period of time the consumers choices are expanding as a result making it difficult for the companies to retain their customers.
- What are the customer's needs and how can they be fulfilled

RATIONALE BEHIND THE STUDY:

In today's scenario the customer's acquisition cost has increased whereas the retention cost is relatively cheaper, it's important for every service industry to understand its consumer and cater to its needs in order to survive in this competitive market. With the emergence of so many mobile telecom networks and the mantra being "customer satisfaction", it is important to know which mobile telecom network has the most favourable image and whether the customers are actually satisfied with the service quality provided.

METHODOLOGY:

Primary objective:-

1. Overall customer satisfaction of the Indian mobile telecoms industry
2. Factors influencing customer satisfaction.
3. The link between certain demographic variables (age, gender, type of employment) and customer satisfaction in the Indian mobile telephone industry.
4. Using the results of the study to provide strategies to improve the mobile telecoms industry.

Secondary Objective:-

On the basis of the consumer's insights over their satisfaction with the different mobile telecom networks, improvising on the suggestions and helping the organisations to reduce the churning of customers.

For this I evaluated various factors which are important in customer satisfaction such as network availability, price, customer care service, billing, validity period etc.

Research Methodology:

The research design used is a descriptive research; the major objective of descriptive research is to describe something – usually market characteristics or functions

Data Collection Method:

It is based on primary data collected through the survey conducted in Delhi where the target market is divided on the basis of their profession.

- 1) Service
- 2) Business/ Self- employed
- 3) Students
- 4) Others/Professionals

Primary Data Collection:

Interviewing the General public with the help of Questionnaire, for conducting the study we developed a questionnaire. The aim of the questionnaire was to evaluate the consumer satisfaction level of the mobile service operators in India. The questionnaire has 15 questions which were based on following categories:

- 1) Demographics
- 2) Consumer choice
- 3) Consumer perception
- 4) Consumer suggestions

Secondary Data Collection:

- Internet reviewing the various articles on Customer satisfaction on the mobile operators in India and reviewing the projects done on customer satisfaction and its importance, in order to understand them better.

Sampling method:

- Quasi Random sampling method

Under certain conditions, largely governed by the method of compiling the sampling frame or list, a systematic sample of every n th entry from a list will be equivalent for most practical purposes to a random sample. This method of sampling is sometimes referred to as **quasi-random sampling**.

Quasi Random Sampling Technique:

In this technique the target market is divided into quotas and then the survey is conducted on the quotas. In this survey the quotas are defined on the basis of the target markets professions in order to know their perception about the customer satisfaction on the mobile service industry.

- The survey was conducted over a period of 4 days, with a target of getting 50 questionnaires filled each day.
- The survey was conducted in the markets, apartments, distributed among offices etc. The Sample size used is 200

SUGGESTIONS & CONCLUSIONS:

Suggestions by the youth

- 1) Provide good network all around the country not just state specific is of utmost importance.
- 2) Better reach to customer care services, no false impressions to be created by the service operators.
- 3) More youth concentrated offers/schemes
- 4) High speed data transfer for VOIP
- 5) To reduce service charges on pre-paid connection
- 6) Efficient billing
- 7) Std call charges to be reduced(Vodafone)
- 8) Free sms

- 9) Reduce call charges (local)
- 10) Offer value added services at low charges
- 11) Have schemes for STD calling services.
- 12) Less waiting time on calling customer care
- 13) Easy documentation for getting a connection
- 14) Easy process for getting a duplicate Sim card
- 15) To educate the masses about the new technology and facilities
- 16) To introduce new top-up recharges of full talk time
- 17) Efficient customer care service attendant should listen to the problem and act immediately.

Important facts :

Airtel Live is a youth/ business class targeted GPRS service that Airtel has come out with as a differential strategy gaining a competitive edge over and above the other mobile service telecom players. It is a web page which gives you an opportunity to take access to the internet through your handset; you can take access to your Email, listen to music, get updates, ringtones, news etc.

The youth of today is educated and is always looking for more in terms of the services that the service providers have to offer. They want:-

- 1) Faster data transfer and uninterrupted connectivity, with the coming in of 3G (Third Generation technology) where the data transfer speed will be 72 mbps(mega bite per second),the youth looks forward to faster access of data transfer, therefore resulting in higher utility of the internet via the handsets.
- 2) On faster access provided by the service operators to the web pages on the handsets the youth will be able to have better access to the web portals such as Facebook, Orkut, Yahoo, Gmail. Making their handsets like mini palm tops where the whole world is accessible via a small device.

- 3) Photo sharing is another attractive feature that captures this segment. Quick data transfer will help in capturing the picture and sending it to a friend just at the touch of a button.

Suggestions by the Business /Self-employed segment:

- 1) Better quality of connectivity as usually the call drops/breaks in the middle of important conversations, being a complete time waster for this segment.
- 2) Commitment to customer issues
- 3) Better services
- 4) Cheaper 3G services.
- 5) Voice clarity is very important as important deals are made on the phones.
- 6) Good network coverage all around the country, not state specific as the business/self-employed segment has a lot of travelling to do.
- 7) Attractive STD plans.
- 8) Avoid the unwanted customer care calls.

Important facts:

- 1) Push email facility: - aims at targeting the service/ Self- employed /business class segment where once the person leaves his /her workstation, and in the meanwhile receives a mail in his Inbox, he will be intimated via a message on his cell phone.
- 2) The business class also looks for security in terms of data transfer which the service provider should emphasise on as a lot of top secret data's of their respective line of business will be transferred , therefore there shall be no way of hacking of information during the path.
- 3) This segment is a huge revenue generator for the Service operators therefore they should concentrate on the needs of this segment and encash on them as they are most likely to stay loyal with the service provider if they provide them with efficient services.

- 4) The availability of Voice mail facility , as this segment usually is on the go and does not really have time to keep calling the person time and again therefore this facility will help the customer save his time.
- 5) E- Billing:- The business class billing payment should be made simpler as payments should be made via email, ATM's places of quick access.
- 6) Easy web pages to be made for accessibility.

Suggestions by the Service class:

- 1) Improve network connectivity.
- 2) The customer complaint process involves a lot of time.
- 3) Good network facility all over the country.
- 4) Restrict commercial sms.
- 5) Restrict commercial calls of banking loan facilities.
- 6) With the reduction in call charges reduce the tariffs as it would increase the usage.
- 7) Timely offers on the lifetime offers
- 8) Simple explanation of the schemes and better understanding of its application
- 9) Should give special attention to loyal and revenue generating customers.
- 10) Clarity in the billing they should be more self explanatory.
- 11) Reasonable 3 G facilities.
- 12) Customer care attendants number should be separate from the other services
- 13) No deduction of charges without prior intimation.
- 14) Lower call rates local and STD.

Important facts:

- 1) This segment of the society is very price sensitive and wants value for money.

- 2) They want the cheap and low offers.
- 3) They mainly emphasise on Voice clarity, Phone connectivity, sms facility.
- 4) Sim card bundling: - Here the mobile service providers tie up with the companies that make the handsets and provide them with handsets on purchase. This facility is usually adopted for the handsets between Rs 3000- Rs 4000 as it is assumed that the people who purchase these handsets are usually inexperienced with the handsets and networks, therefore increasing their customer base. E.g. Airtel's tie- up with Nokia, Vodafone and Nokia, Idea and Nokai.

Some important facts about the customer care services and its importance:

- 1) Churn management: - As we know customer retention has become the prime focus of the service operators in today's day as said it takes Rs 3000/- to acquire a new customer therefore it is a cheaper process to maintain the existing customer base.

In order to do so the service operators provide their loyal post paid customers with special offers .E.g. Vodafone is currently giving away table alarm clocks, which are red in colour, this way they also make visibility of their brand and promote their network.
- 2) Location of the customer care service station should be at a place where there is easy accessibility and locations that encounter a high foot fall, e.g. Markets.
- 3) The space layout of the service stations should provide with systematic computer operation in order to register the complaint or query of the customers and maintain their records in order to maintain their flow of conversation.
- 4) The attendants shall be given training and shall be motivated to deliver excellent services. They shall be polite and patient in handling their customers and shall try handling the problem at their level before forwarding the problem to a senior.
- 5) The call attending system shall be quick through a digitalisation process.

CONCLUSIONS:

- 1) In all the segments what has been noticed of utmost importance has been the quality of network and connectivity usually in basements, under passes etc.
- 2) People using any service operator face problems with call drops where the call gets disconnected mid way of a conversation usually after an hour or so.
- 3) The customers want quicker solution to their problems
- 4) They look forward to value for money in the form of better schemes/ offers.
- 5) Faster transfer of data
- 6) Proper education on the upcoming of the 3G technology so there can be better utility of the facility.
- 7) It has been observed that Airtel is the most dominant service provider followed by a very close competition by Vodafone.
- 8) People usually prefer Airtel as their main connection followed by Vodafone, and then they usually prefer Reliance or Tata Indicom as their second or third connection due their positioning as value for money service provider and cheap offers.
- 9) Main players and their main subscribers as per the survey:-
 - Airtel - Business /Self- employed
 - Vodafone: - Students
 - Reliance: - Professional
 - BSNL/VIRGIN/MTNL: - Service class
 - Idea: - students/ professionals
 - Tata Indicom: - Business/ self-employed
- 10) Customer loyalty the service providers varies between the following:-
 - Airtel varies between 1-2yrs as well as more than 6 yrs
 - Vodafone varies between 1-2 yrs, and 4-6 yrs

- Reliance varies between 2-4 yrs and 4-6 yrs
- Idea varies between less than one year and 2-4 yrs
- MTNL/BSNL/VIRGIN:- 2-4 yrs

Some of the reasons for customer loyalty:

- Retaining the number as it has been circulated among a lot of people (official/personal). Therefore switching might be the loss of some contact.
- Good network and services.
- Some customers also maintain their loyalty as the connection is given by their organisation therefore they have to keep the number till they are with the organisation.
- Good schemes offering free sms and calls to friends having similar network or offer of free call minutes.
- Good tariff plans.
- Reliability on the brand to provide with the best.

11) We also noticed that Reliance would incur a high churning cost as 63% of the customers on being unsatisfied with the services switched their network services.

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