

# user's choice

INDIA'S BEST MOBILE  
PHONE OPERATORS

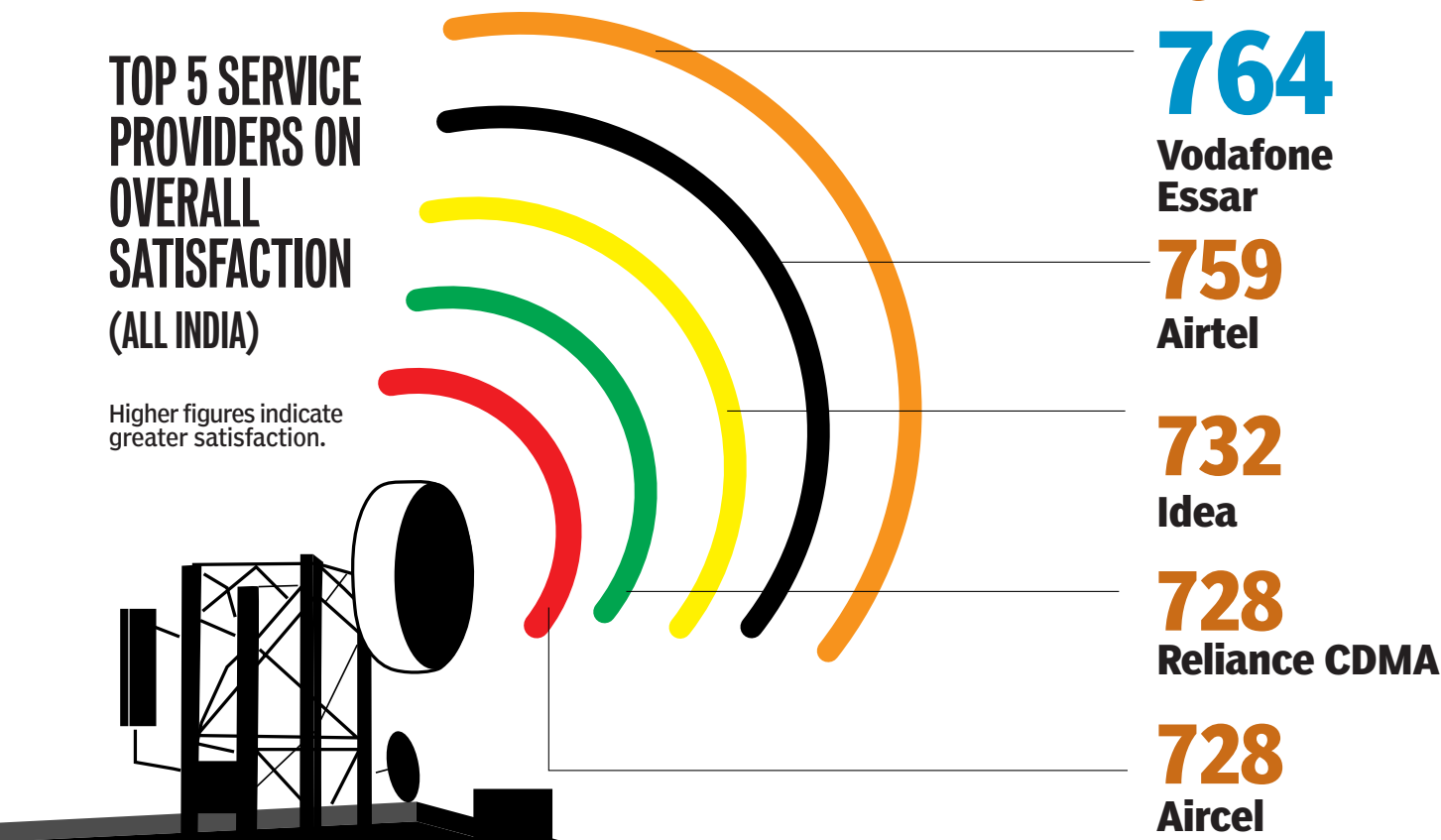


A HINDUSTAN TIMES-MaRS CONSUMER SATISFACTION SURVEY

# And the talk of the town is ...

## TOP 5 SERVICE PROVIDERS ON OVERALL SATISFACTION (ALL INDIA)

Higher figures indicate greater satisfaction.



## KNOW THY CUSTOMER

Vodafone's focus is on sharply segmented customer offerings and differentiated products

HT Correspondent  
letters@hindustantimes.com

Vodafone Essar is among the top three largest telecom service providers in India with a subscriber base of 139 million. It has one of the largest telecom networks in the country and covers about 80% of the country's population.

The company is now expanding into rural areas. By the end of December 2010, Vodafone had nearly 48 million rural wireless subscribers, second only to Bharti (61 million).

The company has its 3G footprint in 10 circles — Delhi, Mumbai, Chennai, Kolkata, Maharashtra, Gujarat, Tamil Nadu, Haryana, Uttar Pradesh (E) and West Bengal — markets that we expect to form bulk of the demand for data services in the next few years.

With a retail footprint of 7,561 stores, the company has also the third-largest retail footprint in the country and is well equipped to serve the current and untapped rural subscriber base.

Vodafone has more than 1.3 million retail sales and service outlets with more

than 50% of these in rural areas.

"As a customer-obsessed company, one of the key aspects of our business approach has been to sharply segment our customer offerings and deliver differentiated products and services to be relevant," said an official spokesperson of the company.

"We employed high-end business analytics to identify homogeneous customer segments and then created a product and distribution strategy to meet the requirement effectively."

The company believes it has grown only because customers have faith in its business and brand proposition, backed by the good quality of network and customer service.

"We have made considerable investments in our quality of network and customer service and are geared up with the technology to enable us service our customer base across the country," said the spokesperson of the company.

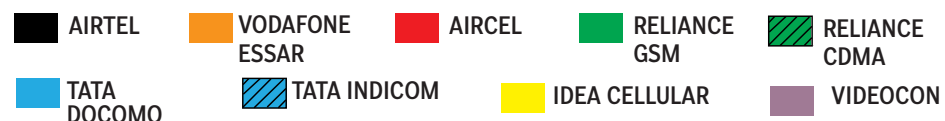
"We develop our services and products on the basis of a deep understanding of our customer needs and constantly aim to provide them with superior and innovative offerings," the spokesperson added.



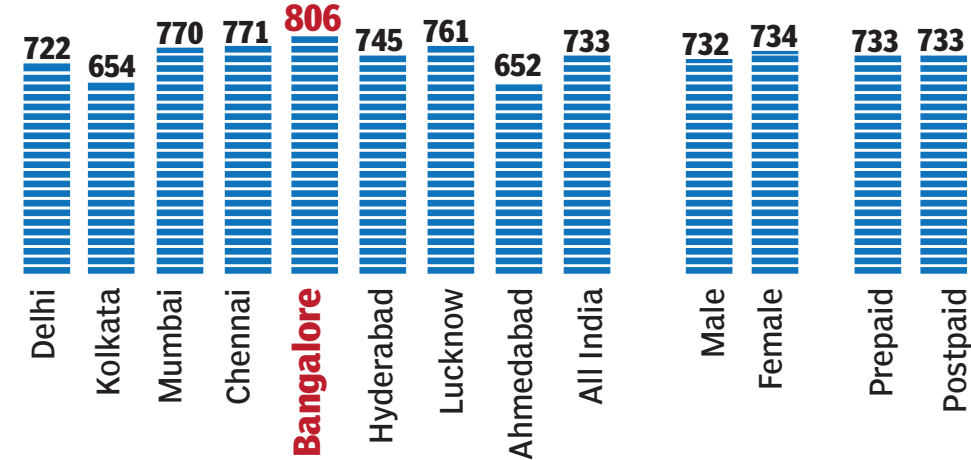
Companies believe quality of network determines growth.

THINKSTOCK

## OVERALL SATISFACTION

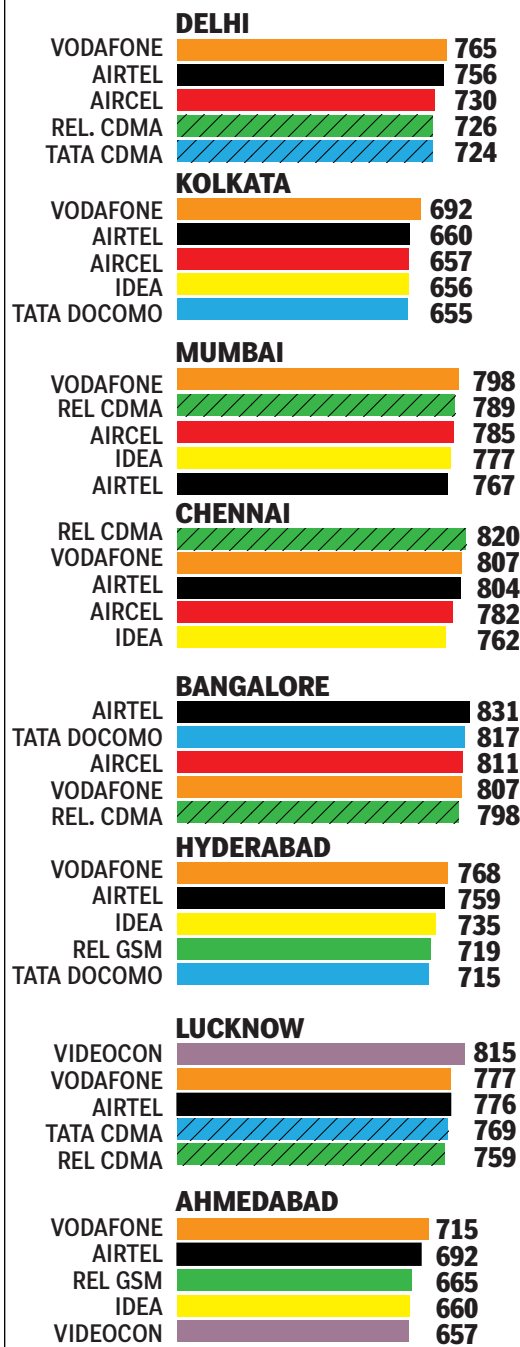


## INDUSTRY AVERAGE OVERALL SATISFACTION



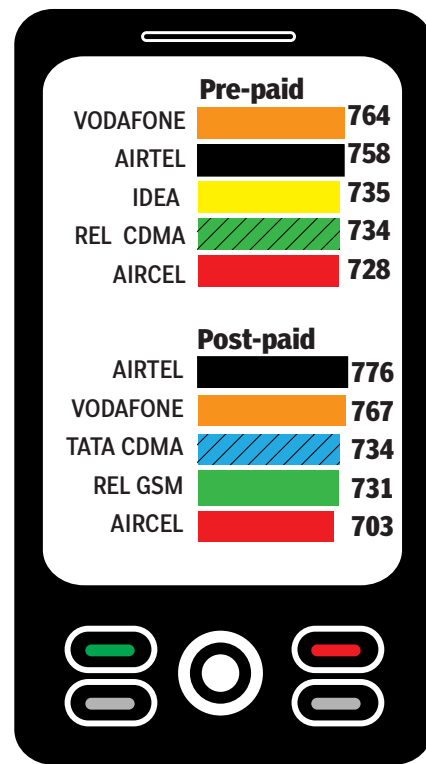
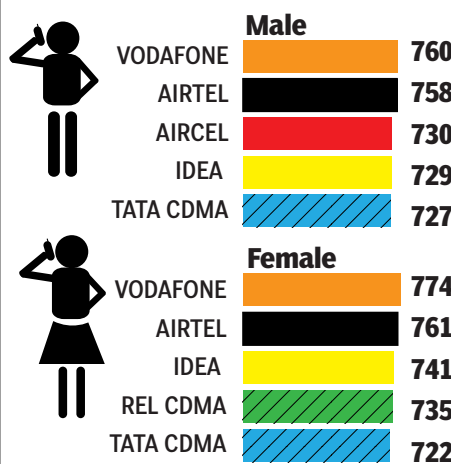
Higher figures indicate greater satisfaction.

## TOP 5 SERVICE PROVIDERS ON OVERALL SATISFACTION FOR EACH TOWN



Higher figures indicate greater satisfaction.

## TOP 5 SERVICE PROVIDERS ON OVERALL SATISFACTION



GRAPHICS: PRASHANT CHAUDHARY

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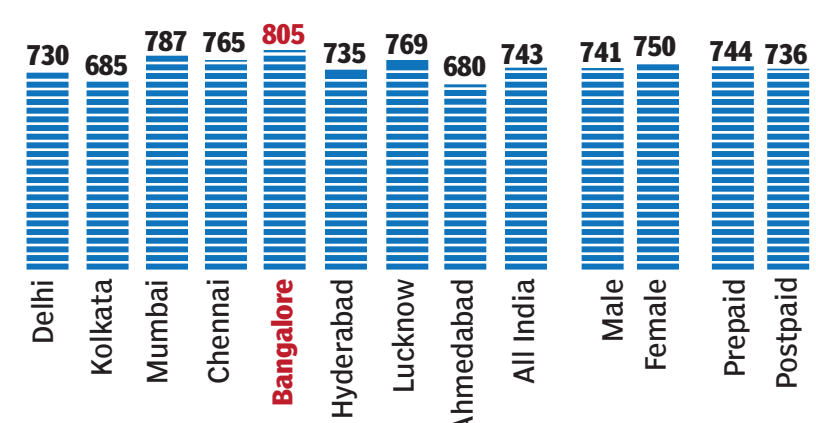


# Airtel leads race with 167 million subscribers

## HOME NETWORK

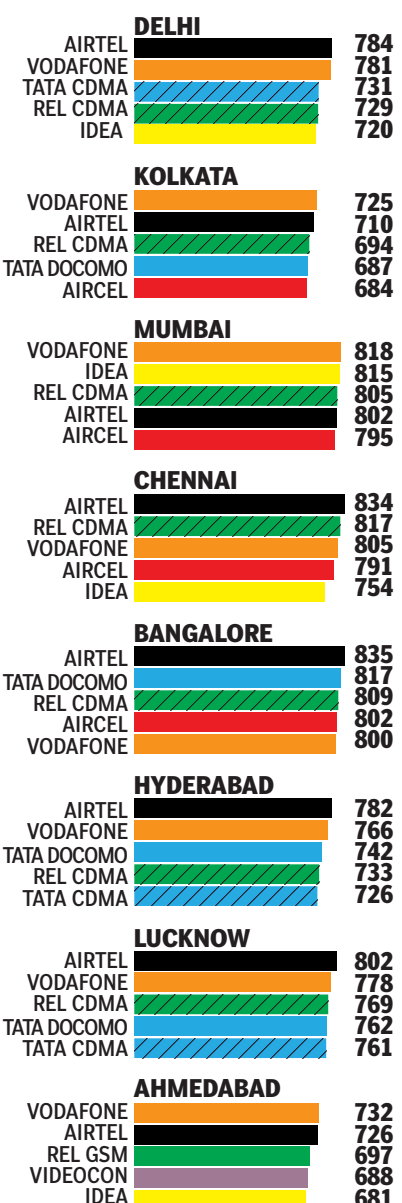


## INDUSTRY AVERAGE SATISFACTION WITH HOME NETWORK



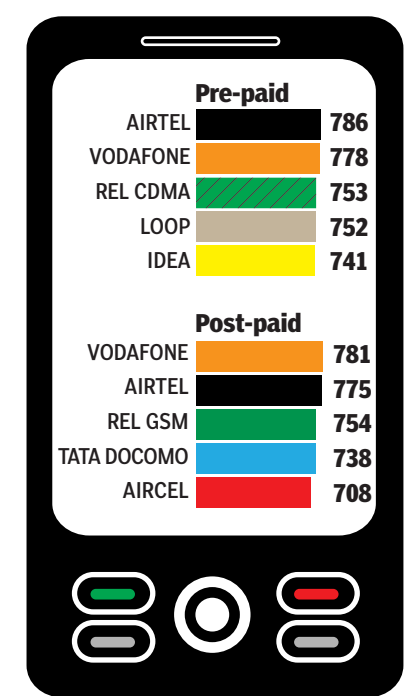
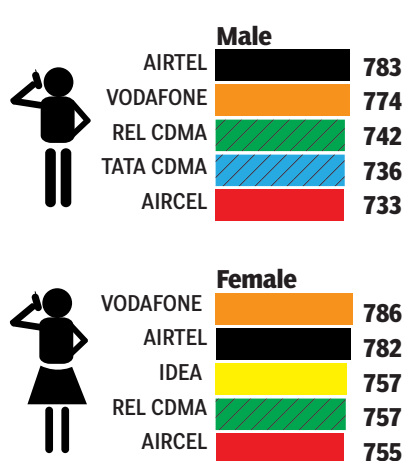
Higher figures indicate greater satisfaction.

## TOP 5 SERVICE PROVIDERS ON HOME NETWORK SATISFACTION IN METROS



Higher figures indicate greater satisfaction.

## TOP 5 SERVICE PROVIDERS ON HOME NETWORK SATISFACTION



## GROWTH MANTRA For the leading player, service is really about sustaining relationships

HT Correspondent  
letters@hindustantimes.com

With more than 167 million subscribers as on May 31, 2011, Bharti Airtel is India's largest mobile service provider.

The company's Africa operations make it the fifth largest mobile operator in the world, with a subscriber base exceeding 220 million.

The Indian telecom multinational has operations in 19 countries across Asia and Africa. It offers mobile, broadband, fixed line, IPTV, DTH, international long distance and enterprise services to subscribers.

With a strong customer focus, the company has emerged in second position in the HT survey.

The company has 1,000 relationship centres across the country. The customers can walk in for assistance.

For 3G support, Bharti Airtel has 380 centres. It also has a dedicated BlackBerry support centre, including field engineers.

The company also has a dedicated support system for customers who own

high-end devices like iPhones.

"We take the business of customer satisfaction very seriously," said Abhilasha Hans, chief service officer, customer shared services, Bharti Airtel.

"For us it's not about customer service but about customer experience. Consequently, this is a significant part of our key results areas (KRAs) and performance linked incentive (PLI). Not just for customer facing people, but for everyone in the company."

The company launches a new product only after approval of the head of customer services.

Bharti Airtel is focusing on social media. "We cover over 70 websites — active on social media like Facebook, Orkut, LinkedIn, Twitter — where we track voices of customers. We also have a live chat service on Facebook and Orkut, where customers can come and chat with us," said Hans.

The company is also focusing on rural customers. It has set up a dedicated helpline or call centre in each state to provide real-time backup support to customers. This service has allowed it to overcome the challenges posed by languages and dialects.



Bharti Airtel also uses social media to interact with customers. HT PHOTO

## Fastest-growing Idea catching on

HT Correspondent  
letters@hindustantimes.com

Idea officials love describing their company as the fastest-growing Indian telecom operator. With a subscriber base of 95 million, the company has become the third-largest service provider in the country.

This is despite the fact that it was a late entrant in nearly half of the country. It started its services in 11 out of 22 service areas in the last four years.

The company has also launched its 3G services and by the next financial year, its services will be available in 3,000 towns. As an integrated telecom player, Idea has its own national long-distance and international long-distance operations, and ISP licence.

In order to provide a high-quality net-

## AMONG ALL TELECOM COMPANIES IT HAS THE HIGHEST SHARE OF RURAL SUBSCRIBERS

work, the company has set up more than 70,000 cell sites throughout the country. The company has more than 3,000 service centres and 340 special experience zones for 3G.

"Idea's service delivery platform is ISO 9001:2008 certified, making it the only operator in the country to have this standard certification for all 22 service areas and the corporate office," said an official spokesperson of Idea.

This shows the commitment that Idea has for customers.

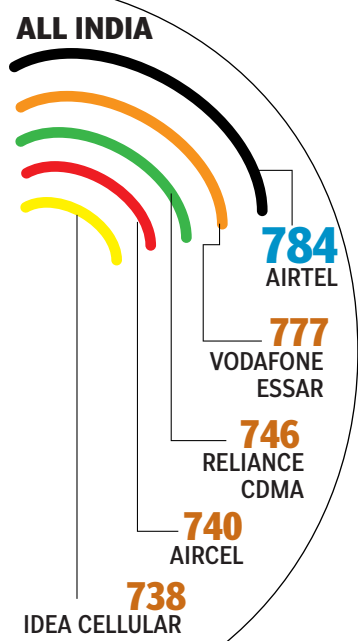
The company is now penetrating non-urban and rural markets. Among all tele-

com companies, it has the highest share of rural subscribers as a percentage of the subscriber strength.

In fact, two out of every three new Idea subscribers come from rural and semi-urban India.

Thus, the company provides the same high quality of customer services to its rural subscribers available to its urban subscribers. The company also finds mobile number portability an opportunity. "Idea's RMS rise has been on a continuous growth trajectory for the last three years consecutively.

"This razor sharp improvement in the competitive ability of Idea is a result of Idea's focus on five parameters to strengthen its position — gross revenue, active subscribers, minutes of usage, cash profits and mobile number portability," said the spokesperson of Idea.



## Methodology

Hindustan Times commissioned research agency MaRS to carry out this survey across eight cities — Delhi, Lucknow, Kolkata, Mumbai, Ahmedabad, Chennai, Hyderabad and Bangalore — from May 25 to June 7 this year. The sample size: 5,674 mobile users from 12 operators — Airtel, Airtel, BSNL, Idea Cellular, Loop Mobile, Reliance GSM, Reliance CDMA, Tata Docomo, Tata Indicom, Uninor, Videocon and Vodafone.

Sample respondents were selected using random start and systematic sampling.

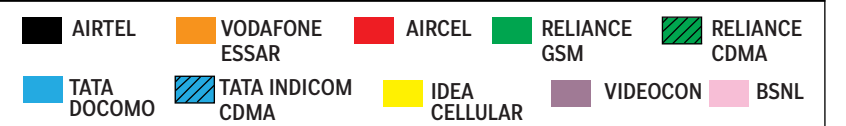
Customer satisfaction ratings were obtained on 28 service attributes grouped in 6 dimensions — satisfaction with network performance at home town (8 attributes), roaming, service center (7 attributes), call centre (5 attributes), tariff plan (4

attributes) and value added services (4 attributes).

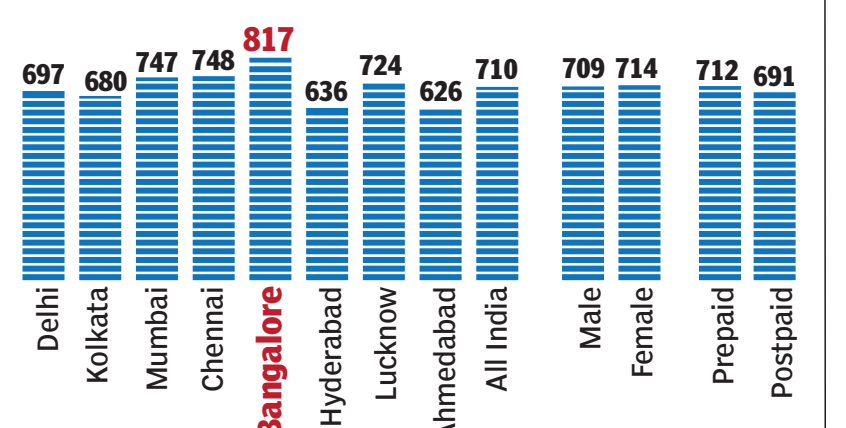
The home network attributes were general signal strength and clarity, clarity of the signals in closed settings (basements, garages, etc), uniform availability at all parts of town, call drops, call success, time taken to connect and network congestion. Home network satisfaction ratings were obtained as un-weighted averages of scores of these eight attributes.

For determining overall satisfaction ratings, a factor rating exercise was carried out for the five main dimensions. The resultant weights that were used are home network (0.39), customer care at service centre (0.14), customer care at call centre (0.14), tariff plans (0.23) and value added services (0.1).

## ROAMING

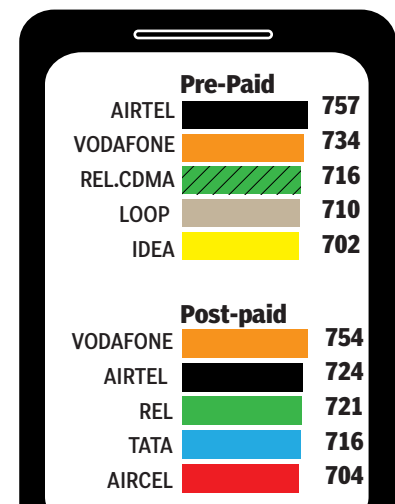
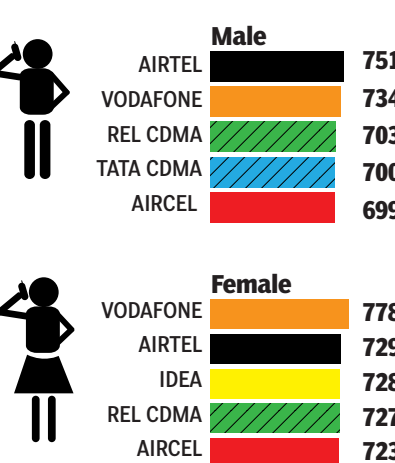


## INDUSTRY AVERAGE SATISFACTION WITH ROAMING



Higher figures indicate greater satisfaction.

## TOP 5 SERVICE PROVIDERS ON SATISFACTION WITH ROAMING



Higher figures indicate greater satisfaction.

## 3G services pioneer RCOM corners 16% market share



RCOM is targeting a national footprint of 3G services. HT PHOTO

HT Correspondent  
letters@hindustantimes.com

With a subscriber base of 140 million and a 16% market share, Reliance Communications (RCOM) is the second-largest telecom service provider in the country. It provides both GSM- and CDMA-based mobile telecom services.

On the CDMA platform, it offers broadband services in more than 500

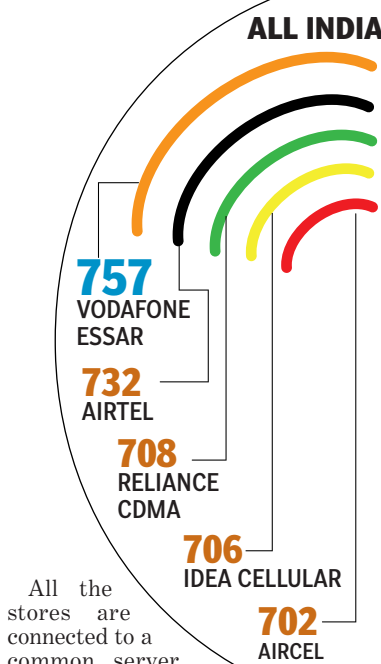
cities. This service will soon be made available in 400 more cities.

It has about 10 call centres, all outsourced to its partners. However, there are two dedicated call centres for its premium customers.

"We are the only telecom service provider to have our own dedicated customer care centre. This is the reason we are able to provide better services to our premium customers," said Anurag Parashar, president, corporate and wireless customer service, RCOM.

One of the important measures of the quality of service is the number of calls a call centre receives every month. In general, across industry this figure varies between 0.3 and 1.0 calls per customer per month. "We are towards the lower end of this band," said Parashar.

The company also owns 1,200 stores. There are many customers who do not like to call the call centre. They prefer walking to the Reliance store and file a complaint. These stores are spread over 400 cities.



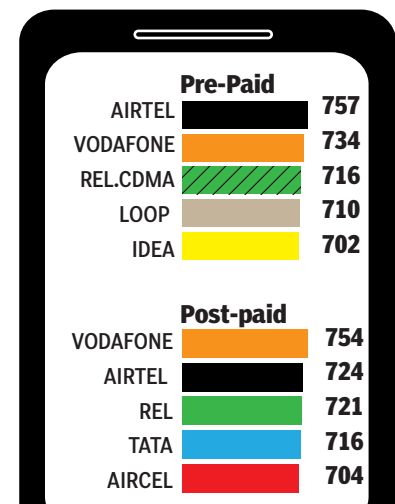
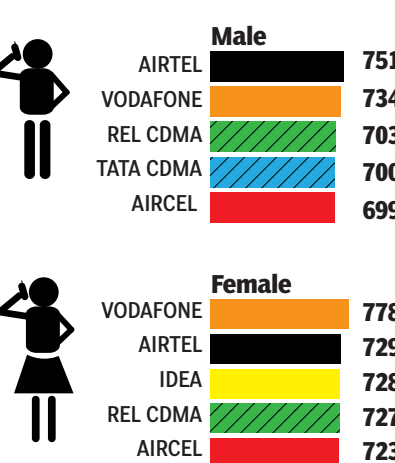
All the stores are connected to a common server and the customer can see the status of his or her report from anywhere in the country. For example, if there is a billing complaint from a Varanasi customer and it is to be resolved in Mumbai, the customer can see the status of the complaint wherever he or she may be.

RCOM was the first operator to launch 3G services in India. It launched services in Chandigarh last year, in a record time of 100 days of receiving 3G spectrum.

To date, RCOM has rolled out 3G services in all circles where it won 3G spectrum, covering more than 330 towns. The company is targeting a national footprint of Reliance 3G services through associations with like-minded operators.

RCOM HAS ABOUT 10 CALL CENTRES, ALL OUTSOURCED TO ITS PARTNERS. THERE ARE TWO DEDICATED CALL CENTRES FOR PREMIUM CUSTOMERS

## TOP 5 SERVICE PROVIDERS ON SATISFACTION WITH ROAMING



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