

user's choice

INDIA'S FAVOURITE
DTH OPERATORS



A HINDUSTAN TIMES-MaRS CONSUMER SATISFACTION SURVEY



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Viewer has the remote control

HOME RUN DTH operators need to invest in innovative technology and be sensitive to customer needs to stay ahead

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The Hindustan Times-MaRS consumer satisfaction survey on 'India's favourite DTH Operators' reveals that the Indian consumer knows her mind, and direct-to-home satellite television providers will have to work extra hard to ensure that customers don't switch loyalty to smarter rivals.

While Tata Sky has topped the survey overall (scoring 839 points), followed by Bharti Airtel (833 points) and Big TV (816 points), regional variations have thrown some surprising results.

Tata Sky leads in Bangalore, Kolkata, Chennai, Lucknow and Mumbai. But it trails Bharti Airtel in Delhi, is behind Airtel and Sun Direct in Hyderabad, and is not even in the top four in Ahmedabad.

"Contrary to our expectations, the study exhibited significant variations in satisfaction levels across towns," said Raghu Roy, managing director, MaRS, HT's knowledge partner for this initiative.

A parameter-wise break-up shows Tata Sky and Airtel sharing the honours. Tata Sky leads in 'buying experi-

ence', 'audio and video quality', 'channel choices and features', and 'interaction with service persons'.

On the other hand, Airtel has the highest levels of customer satisfaction in 'availability of other payment options', 'innovative services' and — crucially — 'uninterrupted services' and 'complaint redressal'.

Clearly, however, Tata Sky is listening to what its customers want — which has propelled it to the number one spot in the survey.

As Vikram Kaushik, managing director and CEO of Tata Sky, put it, the firm "had institutionalised the whole business of customer satisfaction" since its services were launched in August 2006.

Explaining why Tata Sky ranks behind Airtel in complaint redressal, Kaushik said Tata Sky's large customer base (5.5 million), means the volume of calls is huge. "When a subscriber makes a call to a call centre, there may be traffic at peak hours."

But the company is in the process of expanding its helplines.

Investing in innovative technologies

and being sensitive to customer needs are crucial for DTH operators to stay ahead in the race for subscriber loyalty.

Reliance Communications' Big TV, which has nearly 3 million subscribers, uses the parent company's call centres for customer complaints and interactions (offering services in 13 languages), and provides regular training to peo-

ple who install the DTH equipment in customers' homes.

Bharti Airtel, though a relatively late entrant in the DTH space it launched its services in 2008, has invested heavily in technologies such as DVBS2 (digital video broadcasting-satellite (second generation) and the latest compression technology, MPEG4. "We are investing (in technology) so that we can provide the best experience to our customers," said Ajai Puri, CEO, DTH, Bharti Airtel.

One of the problems with DTH services is that rain or bad weather can disrupt the picture quality, at times making the picture disappear completely. Airtel says it ranks best in providing

'uninterrupted services' because it uses state-of-the-art technologies like DVBS2.

Kaushik, however, disagrees, saying that the lack of disruption in services did not depend on such technologies.

Tata Sky also claims it's the only DTH player that changes set-top boxes in case customers have problems with them.

Companies are conscious of the importance of services remaining uninterrupted. "We have an uplinking facility in Bangalore, and another in Mumbai," said Sanjay Behl, CEO of Big TV. "If there are disturbances in one location, the other is protected."

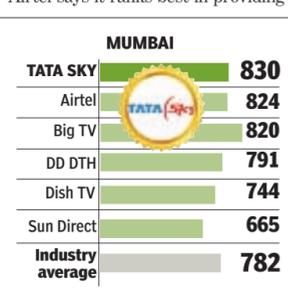
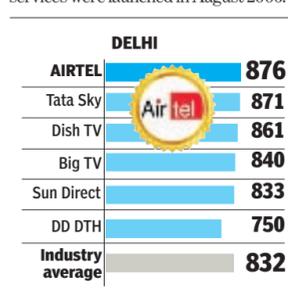
Overall, customers enjoy the DTH advantage, which has radically altered the television-viewing experience in the country by giving subscribers who were at the mercy of cable operators greater control over what they watch.

"An overall satisfaction score of 806 out of a possible 1,000 is quite good," Roy said. "So while people may not be ecstatic, generally they do not appear to be unhappy about the service providers."

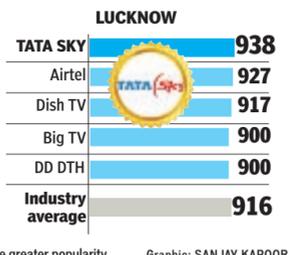
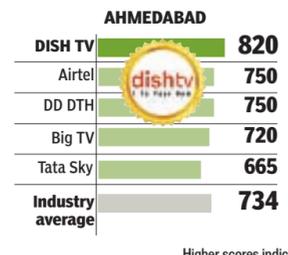
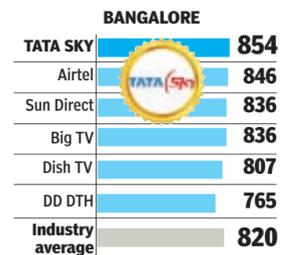
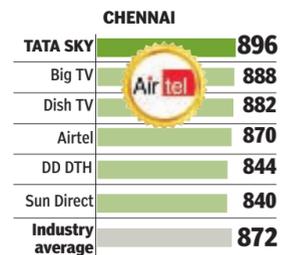
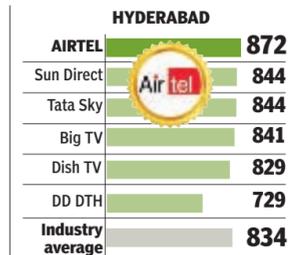
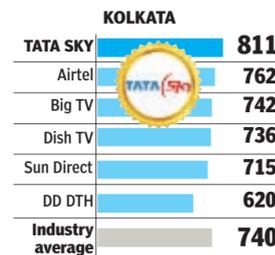
But, as the survey has shown, today's customers are savvy and expect nothing but world-class services from their DTH operators.

PEOPLE'S PREFERENCE

Tata Sky edged out Airtel to emerge as India's favourite DTH operator, but its rivals were ahead in some cities



Sample size is 2,011, maximum possible index score = 1,000



Higher scores indicate greater popularity

Graphic: SANJAY KAPOOR

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VIEW FROM THE TOP

While Tata Sky and Bharti Airtel have come out on top in four parameters each, Tata Sky, being the older player, is ahead overall

Buying experience

TATA SKY	807
Airtel	797
Big TV	781
Dish TV	778
Sun Direct	744
DD DTH	700
Industry average	770

Channel choices and features

TATA SKY	814
Airtel	810
Big TV	785
Dish TV	773
Sun Direct	743
DD DTH	610
Industry average	768

Complaint redressal

AIRTEL	772
Tata Sky	765
Big TV	739
Dish TV	725
Sun Direct	714
DD DTH	583
Industry average	728

Innovative services*

AIRTEL	728
Tata Sky	719
Big TV	700
Dish TV	687
Sun Direct	680
DD DTH	533
Industry average	684

Audio-video quality

TATA SKY	818
Airtel	816
Big TV	789
Dish TV	779
Sun Direct	759
DD DTH	693
Industry average	778

Interaction with service persons

TATA SKY	781
Airtel	780
Big TV	759
Dish TV	740
Sun Direct	717
DD DTH	596
Industry average	742

Uninterrupted services

AIRTEL	790
Tata Sky	783
Big TV	754
Dish TV	733
Sun Direct	730
DD DTH	626
Industry average	745

Other payment options**

AIRTEL	763
Tata Sky	749
Big TV	723
Dish TV	707
Sun Direct	691
DD DTH	430
Industry average	718

Higher scores indicate greater popularity

Sample size is 2,011, maximum possible index score = 1,000/ *Like ordering pizza and job search, **Net banking, credit card, etc

HOW WE DID IT

The Hindustan Times-MaRS survey on India's Favourite DTH Operators interviewed 2,011 respondents across Delhi, Lucknow, Kolkata, Mumbai, Ahmedabad, Chennai, Bangalore and Hyderabad. For the purposes of sampling, each sample town was divided into sampling zones, the number of zones ranging from 10 to 30, depending on the size of the town. Each sampling zone was allocated a number of starting points. From each starting point upto six households were selected using random start and systematic sampling. If the household used DTH, it was considered a respondent household and the housewife was selected as the respondent. The study team was led by Gaurav Panakel.

Customer satisfaction was then measured using 22 parameters grouped into eight main criteria. The main criteria are buying experience, audio-video quality, channels, service interaction, uninterrupted service, complaint redressal, payment options and innovative offerings.

SAMPLE SIZE OF DTH USERS

DELHI	312	AHMEDABAD	193
LUCKNOW	150	BANGALORE	245
KOLKATA	311	CHENNAI	252
MUMBAI	309	HYDERABAD	239
TOTAL			2011

Early bird Tata Sky leads DTH pack, but only just

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Tata Sky, the country's second-largest DTH service provider, has emerged on top in the customer satisfaction survey conducted by Hindustan Times and MaRS. The company scored the highest points — 839. The industry average was 806 points.

In five of the eight cities where the survey was conducted, it was ranked number one.

"We had institutionalised the whole business of customer satisfaction ever since we launched the services," said Vikram Kaushik, managing director and CEO of Tata Sky.

The company, which launched its services in August 2006, also has the first mover's advantage.

"Every six to 12 months, we get a national survey on customer satisfaction conducted by AC Nielsen. It has a large sample and is spread throughout the country," said Kaushik. "We have found that Tata Sky has been reaching global benchmarks."

The company has topped with 807

points on 'buying experience', while Airtel, at number 2, has 797 points. Tata Sky also scores the highest in 'audio and video quality'.

When it comes to channel choices and features, and service interactions, it is again the leader.

However, in complaint redressal, Tata Sky is behind Airtel (though with 765 points, it is much above the industry average of 728).

"We have 5.5 million subscribers and hence the volume of complaints is very high," said Kaushik. "When a subscriber makes a call to a call centre, there may be traffic at peak hours. This may be the reason for being at number two position (in complaint redressal)."

But Tata Sky is expanding its helplines. It has five call centres, with 1,100 people attending calls in 11 languages. "We are meeting the quality of service norms prescribed by the Telecom Regulatory Authority of India."

"Once a complaint is registered at the call centre, the subscriber will receive a message on his registered mobile number of the date, time and

the contact details of the service engineer visiting the subscriber's premises to resolve any technical issues," Kaushik said. "All complaints have a completion rate of over 85 per cent across the country."

Tata Sky is second also when it comes to payment options. More than 75 per cent of its total recharges is through mobile phones and the Internet. The rest are via vouchers. "We pioneered payment business for DTH," Kaushik said. "We're confident our billing system is working very well."

The company is behind Airtel in 'uninterrupted services'. DTH services are often disrupted by bad weather.

Expressing surprise at not leading the pack in this, Kaushik claimed that the lack of disruption had nothing to

TATA SKY CLAIMS IT'S THE ONLY DTH OPERATOR THAT CHANGES SET-TOP BOXES IN CASE CUSTOMERS HAVE PROBLEMS WITH THEM

do with the MPEG4 or DVBS2 technologies, as claimed by competitors. "They are basically compression technologies," he said.

The company claims it is the only DTH player that has a policy of changing set top boxes in case customers have problems with them (Tata Sky set top box failure rate is only 3 per cent).

"In situations where there is a power supply failure, Tata Sky formally replaces the subscriber's set top box with a new one during the warranty period," said the company spokesperson. All complaints pertaining to Tata Sky set top boxes are looked into "within 24 hours or a maximum of 48 hours, depending on the location", he added.

Tata Sky was the second private operator to launch DTH services in the country. In terms of subscriber base it is the second largest private operator after Dish TV.

The challenge for Tata Sky is to minimise disruption of its services because of rain or bad weather, and make its response to customer complaints more efficient.



Bharti Airtel has technological edge

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Bharti Airtel may be a new kid on the DTH block, but it's giving bigger boy, Tata Sky, a run for its money.

In the Hindustan Times survey, it is very close to Tata Sky in most parameters, and leads in uninterrupted services, complaint redressal, payment options and innovative services.

Bharti Airtel, which launched its services in October 2008, already has 3.3 million customers.

"It (the result of the survey) is not very different from our internal surveys, conducted through outside agencies," said Ajai Puri, director and CEO, DTH, Bharti Airtel. "Though our survey shows that we are slightly ahead of Tata Sky in all important parameters."

Bharti's willingness to invest in technology has also helped. It uses the latest compression technology — MPEG4. (Tata Sky uses MPEG2 technology.) For the operator, this translates into greater efficiency. For subscribers, it means better picture quality.

In the HT survey, it scored 816 points (two points behind Tata Sky) for video and audio quality, and ranked second.

One of the major problems with DTH service is that rain often disturbs the picture quality, and sometimes the pic-

ture altogether disappears.

In order to keep the picture smooth during bad weather, Bharti uses DVBS2 technology (Tata Sky uses DVBS), which does a better job of retaining the signal, according to Bharti.

"This (DVBS2) means big investment," said Puri. "Our set-top box is about \$8 to \$10 (Rs 377 to Rs 471) costlier than other set top boxes."

Airtel's set top box costs about \$60 (about Rs 2,828).

Not surprisingly then, in the HT survey, Bharti got 790 points for 'uninterrupted services', and is ranked first. If the weather is bad at the company's main uplinking site in Manesar, Haryana, Bharti has the option of using its Bangalore site for uplinking the firm also uses larger, 72-cm sized dishes in rain-prone areas for better signal.

Airtel's DTH service comes via ISRO's powerful INSAT4 C-R satellite.

The company also provides high quality (Dolby) sound to subscribers. "We are investing in technology so that we can provide the best experience to our customers," said Puri. "We added the largest number of customers last year. Every fourth new customer is on our platform."

It also helps that the DTH service provider is a part of India's leading telecom company. "We are leveraging that experience," Puri said.



Direct-to-home satellite television has given customers in cities greater choice over what they want to watch.

T.NARAYAN / HT PHOTO

Reliance Comm aims for a Big-ger market share

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Reliance Communications' Big TV is ranked number three in all parameters in the Hindustan Times customer satisfaction survey.

Big TV, which was launched in August 2008 — around the same time as Airtel — has close to 3 million subscribers.

"Our focus is on quality of services as it is the differentiating benchmark between two service providers," said Sanjay Behl, CEO of Big TV.

The company says it has carried out a number of customer-friendly innovations such as installing 86 per cent of booked connections on the same day. "This is the highest in the industry," said Behl.

Big TV has more than 600 channel partners and about 3,500 people working as 'installers', spread out across the country. Installers have to pass weekly automated-tests and are trained in new features introduced by the firm. The training is provided in multiple languages.

In 'channel choice and features' the company has 785 points, compared to Tata Sky's 814. "I'm surprised (at the result). We are number one in terms of choice of channels," Behl said. "We have 234 channels and are adding 20 more."

In 'uninterrupted services' the company has scored 754 points compared to Airtel's 790. "We have an uplinking facility in Bangalore, and another in Mumbai," Behl said. "If there are disturbances in one location, the other is protected."

He said the firm had done its own monitoring of quality of services and found it was "the best in the industry".

It uses Reliance Communications' call centres for customer complaints and interactions. It is a congestion-free network, the DTH firm says. "We offer

BIG TV HAS MORE THAN 600 CHANNEL PARTNERS AND 3,500 PEOPLE WORKING AS 'INSTALLERS' SPREAD OUT ACROSS THE COUNTRY

services in 13 languages," said Behl. Customers can use toll and toll-free numbers to make calls.

Recharging can be done through credit card, prepaid card, the Internet or vouchers.

Between 65 and 70 per cent of recharges are done electronically.

Big TV is also behind Tata and Airtel in complaint redressal. "Very soon we will improve on it," said Behl. About 80 per cent of complaints that the company gets are resolved on phone and the rest are passed to installers.

Though the company has 789 points in 'quality of audio and video', compared to Tata's 818 points and Airtel's 816, Behl said that there was no difference in the quality of video and audio between various service providers. "As far as technology is concerned, we have state-of-the-art technology for compression," said Behl.

Again, in 'innovation services', Big TV is at number three. "Tata Sky certainly has an advantage over us as it is an early entrant in the field," said Behl. "However, we have an advantage of being part of a telecom company, and install the best technology."



One of the problems with DTH service — and something operators need to tackle — is that rain can disrupt the picture quality.