

## 6. CONCLUSION, RECOMMENDATIONS & FUTURE RESEARCH

The following discussion will base on the objectives of the research and key findings and limitations identified during the process. Also last section will suggest directions for future research to gain further information regarding the Sri Lankan mobile market.

The main objectives of the research study was to,

1. Do Value added services offered by the mobile operator have a higher influence of creating and retaining subscribers in Sri Lankan mobile industry?
2. Relatedness of VAS usage influencing factors and VAS influence?
3. Awareness of VAS and expectations of VAS

As stated in section 5.2 hypothesis state that the significance of value added services on the market effective is high, therefore it can be concluded that in creating and retaining subscribers, value added services offered by the network play a significant role. This was clearly in contradicts to the preliminary finding from interviews and opinion surveyed, throughout the industry implying that, VAS has very little or no influence even at all in the lead market segments. Although the research doesn't represent the population itself, using the assumption that technology diffusion to mass market will not be possible without the lead market accepting it, mass market is reflecting the same opinion as the lead market or will be in the near future.

From the general findings it was observed that the sample consisted mainly of males. Although a definite conclusion cannot be arrived from this fact, it can be speculated that, the sample was inefficient with poor representation of the female mobile subscribers or in Sri Lankan context the lead market contains more males than females in Sri Lanka. In case if the sample was such that it represents fewer females, the market potential that can be gained from females has not been fully explored in the research. With the Sri Lankan male to female population ratio being close to 49:51, clearly the larger portion of the population is female and it is a high potential market where VAS can be

promoted. The likelihood of promoting technology that will be easier to use among the female subscribers will need to be further inspected.

The comparative analysis of the influence coverage, price and VAS have on selection of the network, has shown that VAS has a higher influence than price among the lead market. Even though the perception about price of handset and VAS listed is considered “*High/Expensive*” by the participants (even to the extent of comments stating that they are willing to use the services, but the prices are high), VAS influence on network selection was considered high compared to price. *This signifies that the influence of price is slowly diminishing as stated in the literature survey regarding European countries.* But compared to coverage, this figure is low. Since coverage is not uniformly distributed throughout Sri Lanka, the expectations and the influences it has is high. Comparison of influence between price and VAS was a significant finding, which indirectly shows the maturity of the lead market. The lead market consisting of early adopters and trendsetters are evaluating and experimenting on value added services, even if it means they have to pay a higher price.



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Therefore the investment network operators are currently devoting to value added services is justified. Sri Lankan mobile market is now achieving its maturity and growing further. Even within the lead market sample 37% of the subscribers are added to the network as new users, an additional connection or migrated from another network. With the maturation of the market, VAS can be used as a tool to influence migrations between network operators.

Considering the VAS usage factors, it was observed that social factors play a significant role for the participants who were influenced by VAS. The economical factors are such that, participants who are more influenced by the VAS, were expecting cheaper solutions. Obviously consumers in general will want cheaper value added solutions, but the demand from the mobile subscribers should be noted.

As stated social influence on the usage of VAS is high, especially the primary analysis of the data collected has shown that “keeping up with technology” is considered highly as much as the influence “Friends” will have on the usage of VAS. This may be attributed to the fact that majority of the participants are

connected to the DialogGSM network, which promotes “Future technology”. Therefore the importance of the influence “Keeping up with technology” will have upon the subscribers in this case is clearly visible. Consequently, it is necessary that the trend should be maintained in order to create influence on VAS usage and thereby to increase market effectiveness among the Sri Lanka consumer market. Of all the social factors, “Usefulness and Convenience” is highly correlated to VAS influence and the mean value is higher than other social factors. *Hence, to increase the usage of VAS, the social influence can be exploited.* For example, services such as SMS Chat involve virtual social interactions, which will raise SMS Chat usage.

*Another key finding is that the awareness of services among the participants is low for MMS, GRPS and SMS based services.* According to the correlation analysis even if the subscribers were influenced by value added services, the awareness doesn't relate. It was expected that lead market participants should be more conversant with technology than the mass market. Even though the above case was expected, the awareness level for each of the services is low (less than 75%). This may be due to poor communication and advertising, or the fact that the network itself does not promote these services. In either case, unavailability of information about services such as these will be a concern for the network in the near future. In relation to the finding “Significance between price and VAS is diminishing”, the low level of awareness about VAS will hinder the growth of that particular VAS. Thus, information about VAS needs to be laid out clearly in an understandable way to the subscribers in general to derive the future potential as well as the present usage of VAS, thereby creating a positive correlation between VAS influence and awareness as well as VAS usage.

The expectations of the sample are mostly towards information services. The reason for this maybe that,

- The existing services doesn't provide adequate information
- The awareness about information services is low
- More information services are needed than the existing info services

In concluding the mobile subscriber market in Sri Lanka is reaching its maturity, and value added services will play an important and significant role in the future.

### **6.1. FUTURE RESEARCH**

The same research can be used in the future to determine the level of significance VAS has on the subscribers/lead market. The above approach can be used in evaluating the market effectiveness in the future (6 months) and compare the results to this reports to resolve if there is a significant change in the state of affairs. Even introduction of recommended options can be evaluated to have any effect on the market effectiveness. For example, after a marketing campaign to increase awareness of value added services, the theory and the questionnaire can be applied again to evaluate the new state of the sample and the market population. This research study was a preliminary attempt in order to understand value added services and marketing effectiveness in Sri Lanka. The researcher attempted to cover a wide area encompassing the mobile industry.

This research is restricted due to natural constraints associated with this kind of student research project and other constraints such as confidentiality of business information etc. Further comprehensive analysis could be performed in all identified areas in order to derive a more comprehensive and complete model for value added services and mobile industry. Also the model presented by the researcher is a general model and the model could be varied depending on the target market. Hence more focused research could be performed in the identified target markets in order to derive a more complete and focused theoretical model. For example teenage and female markets were not considered in the research, which have to be investigated in order to assess the whole of Sri Lankan mobile market.

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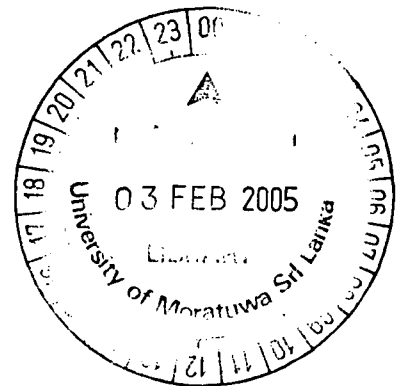
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## 8. ANNEXTURE

### 8.1. ANNEXTURE I: SURVEY QUESTIONNAIRE

#### SURVEY ON MARKET EFFECTIVENESS OF MOBILE VALUE ADDED SERVICES

##### Introduction

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This research questionnaire is a part of the postgraduate research project carried out by the University of Moratuwa. The research is focused on the effectiveness of value added services (VAS) offered by the Sri Lankan mobile industry and the expectations of VAS by the consumer.

*Research project* : MBA in IT, University of Moratuwa

*Researcher* : W.K.C. Wickramaratne

##### Confidentiality

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We assure you that the information you provide will be treated in strictest confidence. There is nothing on the form that will allow us to identify you and there is no requirement to identify your self by name or address. Any quotations made will not be attributed in any way that is identifiable.

##### Instructions

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- Questions in this survey are answered either by putting ticks on check boxes or circling the answer.
- **SMS Based services** refer to applications based on SMS. (Cricket via SMS, Stock information via SMS, exam results via SMS..etc)

##### 1. General Info

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1. Are you  female or  male?

2. Which age group do you belong to? (Select only one)

- |                                  |                                  |                                  |
|----------------------------------|----------------------------------|----------------------------------|
| <input type="checkbox"/> 16 – 18 | <input type="checkbox"/> 19 – 25 | <input type="checkbox"/> 26 – 35 |
| <input type="checkbox"/> 36 – 44 | <input type="checkbox"/> 45 – 55 | <input type="checkbox"/> 56 – 65 |

66 – 75       76 and over

3. What is your education level?

- O/L
- A/L
- Degree
- Masters
- N/A

4. What is your occupation?

5. What industry are you related to? (Click only one)

- Agriculture
- Arts, Entertainment & media
- Information Technology
- Civil and construction
- Education and training
- Financial
- Legal
- Telecommunication
- Other

6. What your network operator? (Click only one)

- DialogGSM
- Mobitel
- Celltel
- Hutchison

## 2. Influence of value added services

7. Have you obtained a new connection within the last 6 months?  Yes  No

8. If **yes** to question 7,

- Totally new to mobile industry
- New connection only
- Migrated from another network
- No change

How much influence the following attribute had on your selection of network operator?

	Very high	High	Moderate	Low	Very low
9. Coverage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Value added services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. If value added services was important your selection of the network operator, what service will play an important role in that selection?

- SMS
- SMS Based services
- MMS
- WAP & GPRS
- Other

### 3. VAS Usage and Quality



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#### 3.1 Usages

How often you use the following value added services?

	Daily	Weekly	Once a week	Occasionally	Never
13. SMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. SMS Based services (Eg SMS by Cricket)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. MMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. WAP-GPRS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#### 3.2 Quality

Please describe the quality of service experience by you

	Very high & reliable	High	Moderate	Low	Very low
17.SMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18.SMS Based services (Eg SMS by Cricket)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19.MMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20.WAP-GPRS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#### 4. VAS influencing factors

##### 4.1 Technological

21. Technology used by value added services are,

- Too advance & complicated
- Advance, but can manage it
- Moderate
- Easily & simple

##### 4.2 Economical

22. What do you think of the price of VAS compatible mobile phone?

- Too expensive
- Expensive
- Moderate
- Cheap
- Very cheap

What do you think about the charge of value added services by the network operator?

	Very expensive	Expensive	Moderate	Cheap	Not used
23.SMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.SMS Based services (Eg SMS by Cricket)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.MMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26.WAP-GPRS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

##### 4.3 Social

I am/will be using VAS because,

	Very High	High	Moderate	Low	No influence
27. Most of my friends use VAS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. Work related	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. Keep up with technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30. Useful and convenient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#### 4.4 Awareness

How much you know about the following products offered by the mobile industry?

	Know it and used it	Using it	Heard about it	None what so ever
31. SMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32. SMS Based services (Eg SMS by Cricket)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33. MMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34. WAP-GPRS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35. 3G	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

36. What value added services are you interested in?

- Information services
- Games and Entertainment
- Sports
- Finance

37. What are the barriers you have face in using VAS? (Please fill according to the level: 10 – high barrier, 0 – No barrier)

Language	
Knowledge about VAS	
Price of Handset	
Cost of Service	

Other

38. Your phone is,

- SMS enabled

WAP enabled

GPRS enabled

MMS enabled

**Comments:**

**Thank you for your time**



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**ජංගම දුරකතන අමතර සේවාවන්ගේ බලපෑම පිළිබඳ සමීක්ෂණය**

**හඳුන්වාදීම**

මෙම සමීක්ෂණ ප්‍රේමාදායක, මොරටුව විශ්ව විද්‍යාලය මගින් පවත්වනු ලබන පශ්චාත් උපාධි පර්යේෂණ විකාශනයේ කොටසක් වේ. මෙහි අරමුණ වනුයේ, ශ්‍රී ලංකාවේ ජංගම දුරකතන කර්මාන්තයේ දෙනු ලබන අමතර සේවාවන්ගේ බලපෑම සහ අමතර සේවා සඳහා පරිභෝගීකයන්ගේ ඇති බලාපොරොත්තු හඳුනා ගැනීමයි.

**රහස්‍යභාවය**

ඔබගෙන් ලබාගන්නා තොරතුරු වල රහස්‍යභාවය මෙයින් තහවුරු කරන අතර එම තොරතුරු මෙම විකාශනය සඳහාම පමණක් භාවිතා කරන බව තහවුරු කෙරේ.

**- වන්දිමාලි විකුමරත්න -**

**උපදෙස්**

- අදාළ ස්ථානවල "✓" ලකුණ යොදන්න
- මෙහි සඳහන් වන ජංගම දුරකතන අමතර සේවාවන් යනු,
  - SMS : කෙටි පණිවිඩ සේවාව
  - SMS Based Services : කෙටි පණිවිඩ පදනම් වූ සේවාවන්
    - උදා - SMS වලින් ක්‍රිකට් තොරතුරු
  - MMS : ඔහු විදු මාධ්‍ය පණිවිඩ සේවාව
  - WAP - GPRS : ජංගම දුරකතන අන්තර්ජාල සේවාව

1. ඔබ  ස්ත්‍රී  පුරුෂ?

2. ඔබගේ වයස?

- 16 - 18       19 - 25       26 - 35
- 36 - 44       45 - 55       56 - 65
- 66 - 75       75 වැඩි

3. ඔබගේ අධ්‍යාපන මට්ටම?

- O/L
- A/L
- උපාධි
- පශ්චාත් උපාධි
- අදාළ නැත

4. ඔබගේ රැකියාව?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11. මිල
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. අමතර සේවා
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. ඇවරණය
ඉතා පහසුයි	පහසුයි	සාමාන්‍යයි	ඉහළයි	ඉතා ඉහළයි	

මෙහි සඳහන් කර ඇති කරුණු සඳහා සහතික කරන්නේද? (සහතික කරන්නේ නම් ඔබගේ පිටුවේ)

- නව ප්‍රදේශයකට සිටින අය සඳහා සේවාව
- නව සම්බන්ධතාවයක් සමඟ
- මෙහි මාගේ ප්‍රධාන අභියෝගයක් සඳහා සේවාව

8. 7 වන ප්‍රශ්නයට පිටුවේ "ඔව්" නම්,

නැත

7. මෙහි සඳහන් කර ඇති කරුණු සඳහා සහතික කරන්නේද? (සහතික කරන්නේ නම් ඔබගේ පිටුවේ)



2. අමතර සේවාවන්ගේ බලපෑම

- හරිසන්
  - සේවාවේ
  - මොනවද
  - ප්‍රසාරය
6. මෙහි සඳහන් කර ඇති කරුණු සඳහා සහතික කරන්නේද?

- වෙනත්
- සංවිධානය
- නිවස
- මිලදී ගත් සේවා
- අවබෝධය සේවා
- ඉංජිනේරු
- නොදන්නා තාක්ෂණය
- නව සම්බන්ධතාවයක් සහ පිටුව
- නිවස

5. මෙහි සඳහන් කර ඇති කරුණු සඳහා සහතික කරන්නේද? (සහතික කරන්නේ නම් ඔබගේ පිටුවේ)



12. ඔබට අමතර සේවා වැදගත් වේ නම්, පහත සඳහන් කුමන සේවාව ඔබගේ තේරීමට වැඩි දායකත්වයක් වේද?

- SMS
- SMS සම්බන්ධ සේවා
- MMS
- WAP & GPRS
- වෙනත්

**3. අමතර සේවා භාවිතය සහ ප්‍රමිතිය**

**3.1 භාවිතය**

ඔබ පහත සඳහන් අමතර සේවාවන් කොපමණ වාරයක් භාවිතය කරන්නේද?

	දිනපතා	සතිපතා	සතියකට වරක්	කලාතුරකින්	කෙසියේත් නැත
13. SMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. SMS Based	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. MMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. WAP-GPRS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



**3.2 ප්‍රමිතිය**

පහත සඳහන් අමතර සේවාවන්ගේ ප්‍රමිතිය පිළිබඳ ඔබගේ අත්දැකීම කෙසේද?

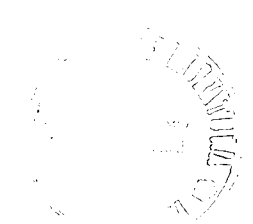
	ඉතා ඉහලයි	ඉහලයි	සාමාන්‍යයි	පහලයි	ඉතා පහලයි
17. SMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. SMS Based services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. MMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. WAP-GPRS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**4. අමතර සේවාව සඳහා බලපාන සධක**

**4.1 තාක්ෂණික සාධක**

21. අමතර සේවාවන් සඳහා භාවිතය කරන තාක්ෂණය,

- ඉතාමත් සංකීර්ණයි සහ තේරුම් ගැනීමට අපහසුයි
- සංකීර්ණ නමුත් තේරුම් ගැනීමට හැකියි
- මධ්‍යස්තයි
- සරල සහ පහසුයි



**4.2 ආර්ථික සධක**

22. අමතර සේවාවන් ලබා ගත හැකි ජංගම දුරකතනයක මිල,

- ඉතාමත් මිල අධිකයි
- මිල අධිකයි
- මධ්‍යස්ථ මිලක්
- මිල අඩුයි
- ඉතාමත් මිල අඩුයි

පහත සඳහන් අමතර සේවාවන්ගේ මිල පිලිබඳ ඔබගේ අදහස කෙසේද?

	ඉතාමත් මිල අධිකයි	මිල අධිකයි	මධ්‍යස්ථයි	මිල අඩුයි	අදාළ නැත
23. SMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. SMS Based services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. MMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. WAP-GPRS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**4.3 සමාජීය සධක**

මම අමතර සේවාවන් භාවිතය කරන්නේ of Moratuwa, Sri Lanka.

	ඉතා ඉහලයි	ඉහලයි	සාමාන්‍යයි	පහලයි	අදාළ නැත
27. මගේ මිත්‍රයන් භාවිතය කරන නිසා	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. රැකියාවට අදාලයි	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. තාක්ෂණය සමග ඉදිරියට යාමට	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30. ප්‍රයෝජනවත් සහ පහසුයි	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**4.4 දැනුවත්භාවය**

පහත සඳහන් අමතර සේවාවන්ගේ මිල පිලිබඳ ඔබ කොතෙක් දුරට දැනුවත්ද?

	මනා දැනුමක් ඇතිව භවිතා කරයි	භවිතා කරයි	අඛා ඇත	කිසිවක් නොදනිනි
31.SMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32.SMS Based services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33.MMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

34.WAP-GPRS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35.3G	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

36. පහත සඳහන් කුමන අමතර සේවාවන් සඳහා ඔබගේ වැඩි කැමැත්තක් තිබේද?

- තෝරතුරු සේවාවන්
- විනෝදජනක සේවාවන් සහ ජංගම දුරකතන ක්‍රීඩා
- ක්‍රීඩා
- මූල්‍ය සේවා

37. අමතර සේවාවන් භාවිතයේදී ඔබ මුහුණපා ඇති අපහසුතාවයන් 0 සිට 10 දක්වා ලකුණු සටහන් කරන්න

0 යනු නිසිම අපහසුතාවයක් නොමැත

භාෂාව	
දැනුම	
ජංගම දුරකතන මිල	
සේවාවන් මිල	

වෙනත්



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38. ඔබගේ ජංගම දුරකතනයේ,

- SMS
- WAP
- GPRS
- MMS පහසුකම් ඇත.

ඔබගේ අදහස් :

**ස්තූතියි**