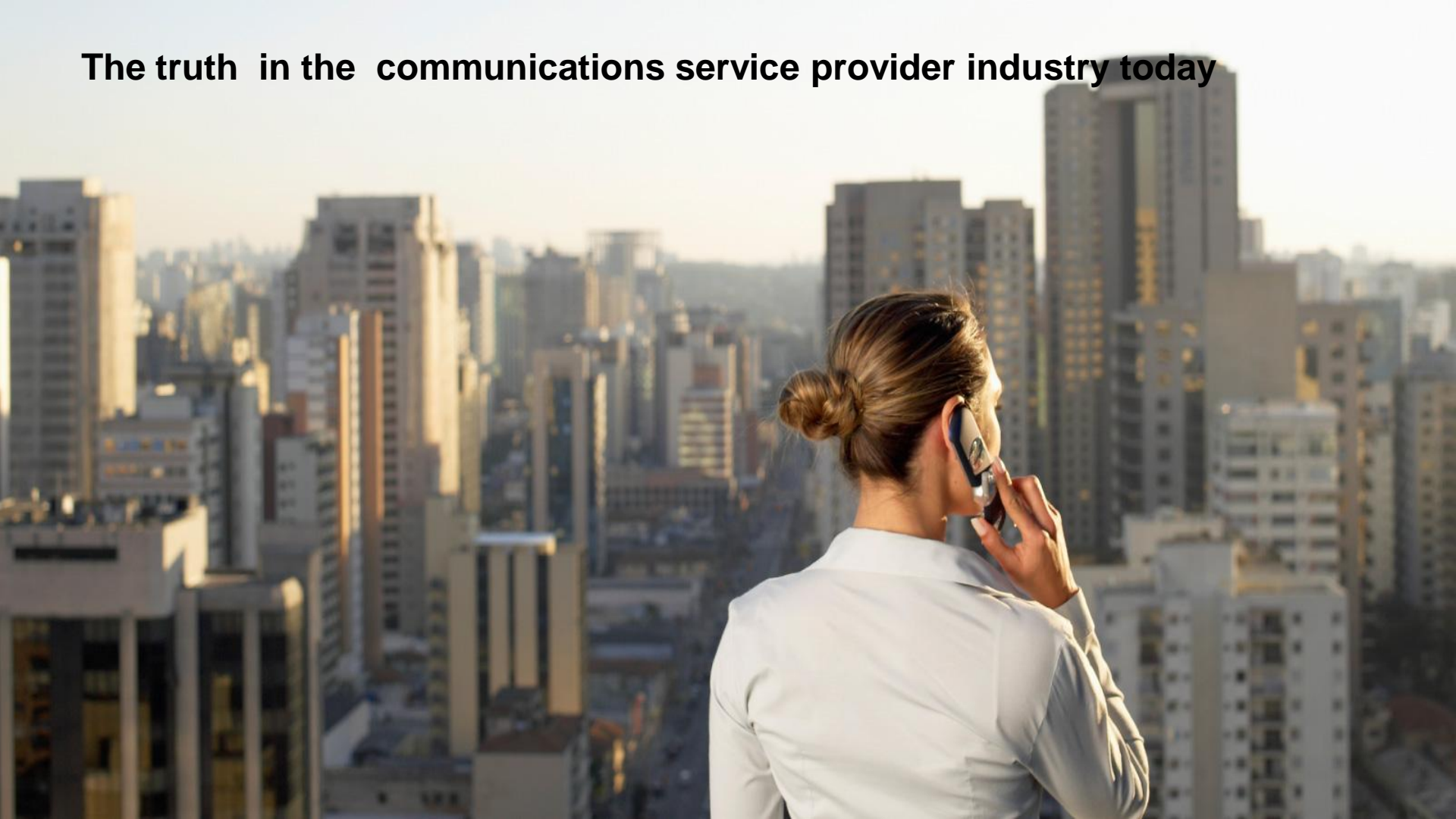


What Influences trust in a brand: Communications vs Customer Experience

Subho Mukherjee


World Communications Forum Davos, March 11th 2015

The truth in the communications service provider industry today



Communication about mobile telephony is all around us

Data, Talk & Text
MONTHLY ACCOUNT ACCESS



Our Most Popular Monthly Access Plans

250MB	\$15 NEW!	500MB	\$30 NEW!	1GB	\$40
1GB	\$50	2GB	\$60	4GB	\$70
6GB	\$80	8GB	\$90	10GB	\$100
12GB	\$110	14GB	\$120	16GB	\$130
18GB	\$140	20GB	\$150	30GB	\$225
40GB	\$300	50GB	\$375		

All data access plans include Shared Data and Unlimited Talk & Text



AKCIJA

+2 GB interneta INTERNETS TELEFONĀ
lietotājiem vienam mēnesim Latvijā BEZ
MAKSAS

Apple iPhone 5S 16GB

Ar skatu tālāk.

35.00
€/mēn

Mobilu telefonu pasaules stila ikona atgriežas vēl izsmalcinātākā veidolā un ar plašākām iespējām nekā jebkad agrāk! iPhone 5s – satricēošas tehnoloģijas plānā, vieglā un elegantā korpusā. Tas atkal rāda cilvēcei, KĀDAM JĀBŪT viedtālrunim.

UZZINĀT VAIRĀK

35.00 €/MĒN*
Ar Atvērto līgumu

840.00 € **lmt**
Pērkot uzreiz

Smart 4 Mini



vodacom

R69 per month x24
On uChoose Flexi 50

[View plan details](#)

Select colour:



Buy on contract

Upgrading?

[Login and see your upgrade options](#)

[Terms and conditions apply](#)

Share

Chat



Tarifs "Nr. 3"

TELE2

Bez limita Sarunas un SMS

5 MB

Katri nākamie
100MB € 1.99

SOCIAL20 1Day

MAIL20 Plus

FUN20

Globe

airtel

Introducing
**oneTouch
Internet**

The simplest way to go online.

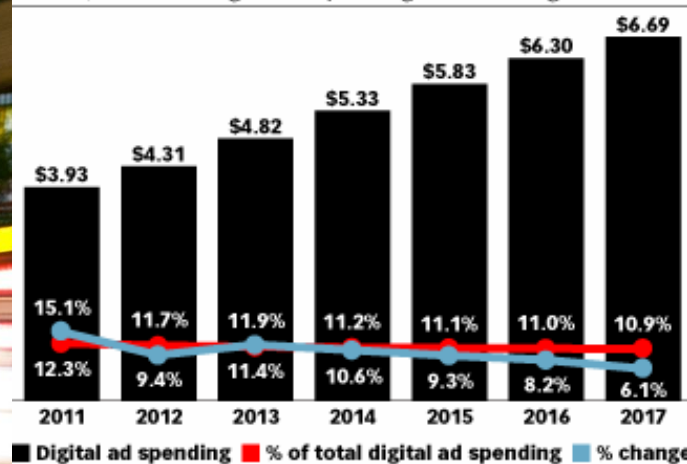
Your one stop destination for mobile internet tutorials and trial packs now just a touch away at zero data charges.

NOKIA



US Telecom Industry Digital Ad Spending, 2011-2017

billions, % of total digital ad spending and % change



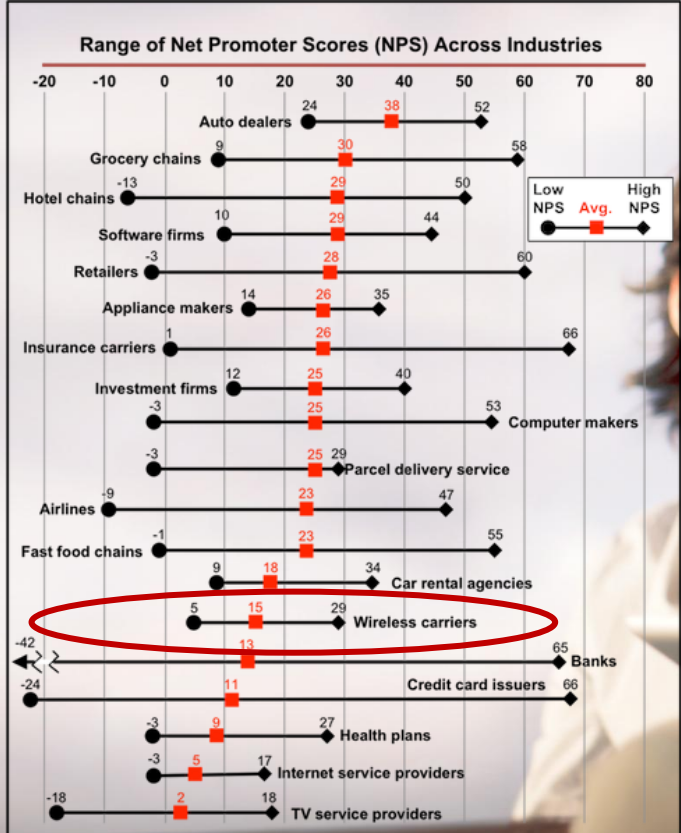
Note: CAGR (2012-2017)=9.2%; includes advertising that appears on desktop and laptop computers as well as mobile phones and tablets, and includes all the various formats of advertising on those platforms; data through 2012 is derived from IAB/PwC data

Advertising & marketing costs to acquire new subscribers are increasing

- in US over \$300 for a single subscribers.

- In India operators spend \$2 billion/ year

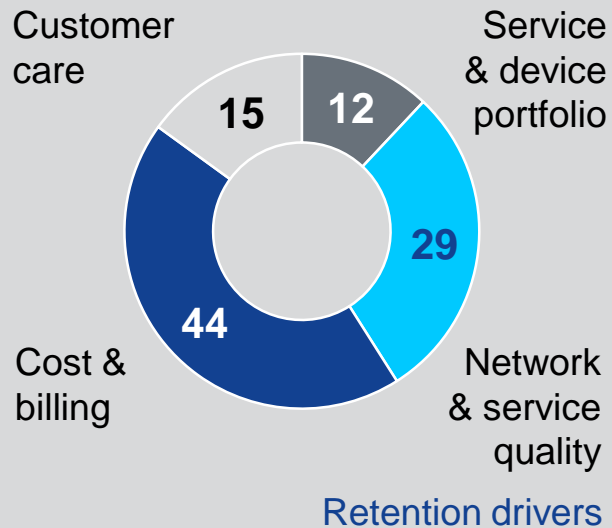
But are the consumers impressed?



What really get mobile telecom consumers loyal

A Customer Experience worth remembering

Loyalty leaders excelling in network and service quality



41% think an operator must offer excellent network quality even if it cost more

Messaging and internet service quality continues to be important to subscribers with 60% having problems with data usage



40% thinks they should leave their operator

Source: Nokia 2014 Acquisition and Retention Study across ~12,000 interviews in 11 countries

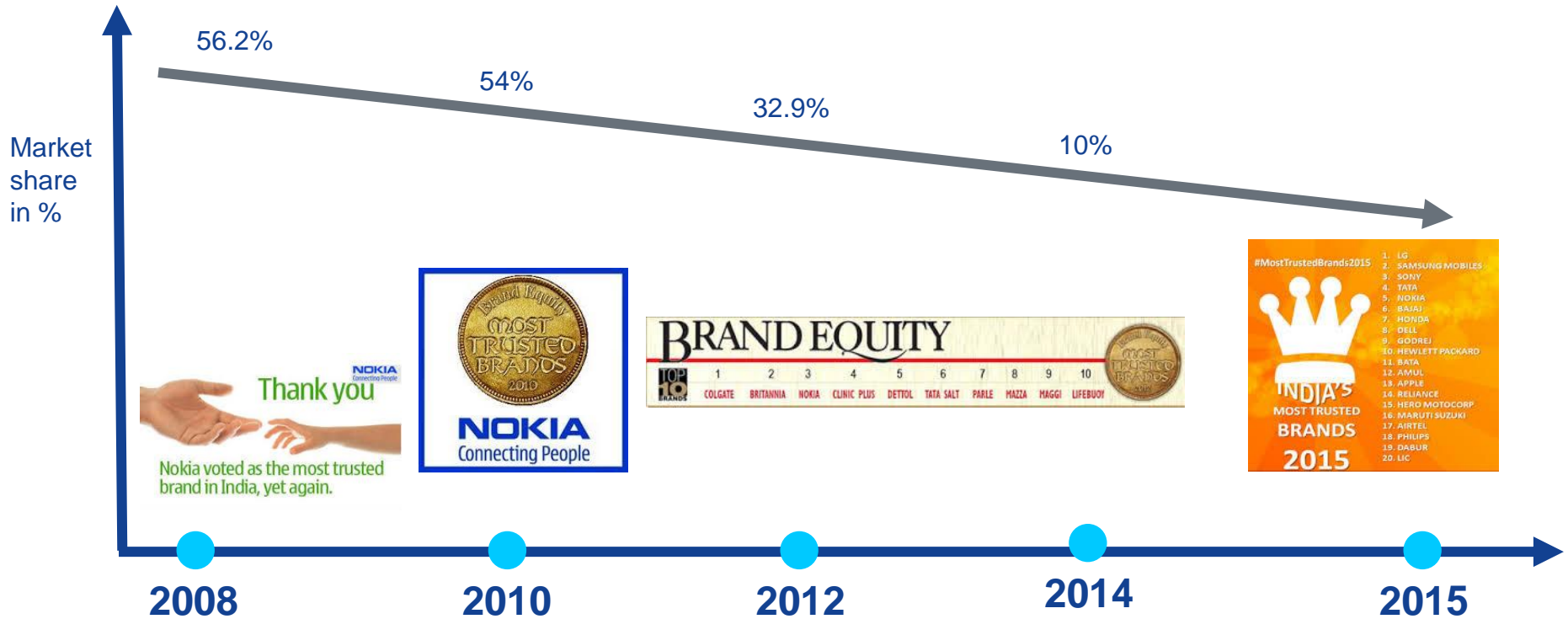
Reflecting on challenges of communication vs longevity of customer experience

A photograph of a person's legs in bright pink rubber boots stepping on a dark, wet asphalt surface, creating a large puddle. The person's reflection is visible in the water. Overlaid on the puddle is the word "NOKIA" in a large, semi-transparent, light-colored sans-serif font. The overall scene suggests a reflection on the company's long history and current challenges.

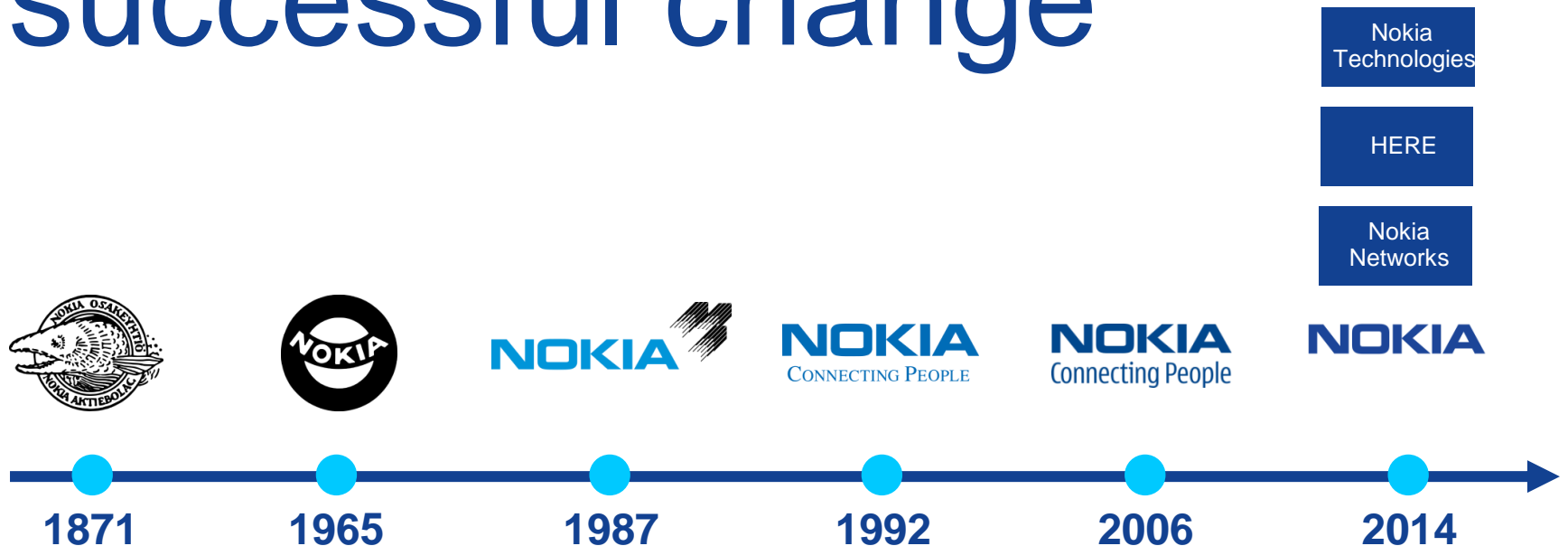
NOKIA

Story of Nokia mobile phones in India

dichotomy of market share vs. trust in brand



A long history of successful change



Reliability and quality are positive associations, but the link to mobile phones is no longer relevant

US  UK[illegible][illegible]

10

NOKIA

What builds trust in Nokia brand in today's environment

Integrity of design and execution in mobile networks

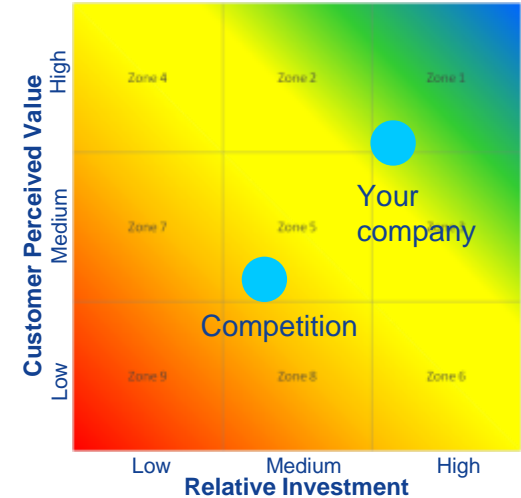
Busan Fireworks Festival in
Korea

1 km length, 1.5 million people,
all LTE (4G) network
100% LTE network availability,
99.4% Voice over LTE calls



In B2B Customer Perceived Value is the strongest driver for trust

	Features	Quality	Time	Price	Relationship
Marketing & communication	Image / brand				
Account management	Contractual expectation	Quality expectation	Delivery expectation	Price negotiations	Local relationship
Services & support	Delivered functionality	Delivered quality	Support cycle time	Support costs	Customer engagement
Operations & supply chain	Third party partnership	HW delivery & returns	Product delivery	Warranty & repair cost	
Development & roadmap management	Feature content	Design defects	Roadmap execution	Development costs	Integrated support
Central functions	Business processes		Dynamic response	Pricing structure	
Strategy & vision	Solution focus	Business culture			Business strategy



A unique moment of opportunity



NOKIA