

STRONG PARTNERSHIPS IN TURBULENT MARKETS

Mobile Services Research for Nokia

Summary

Situation

The market for mobile services has changed radically since 2008. During this time, we have worked in partnership with Nokia to build an in-depth knowledge and understanding of this turbulent market and to support strategic decision-making.

Approach

We conducted a tracker to monitor changes in mobile services as the smartphone market grew from 2008 to 2010, created a portfolio planning exercise which helped to re-imagine services for future smartphone consumers, and developed a concept-testing project which supported the launch of new services in emerging markets.

Outcome

The research has informed Nokia's strategy and supported decision making. Nokia has used the portfolio planning work to identify opportunities and build business cases, with the concept testing being used to support the launch of new services.

"I consider the GfK team as highly valuable consultants"

Tarik Ahmet,
Head of Location and
Commerce Insights,
Nokia



Situation

Over the past 150 years, Nokia has evolved from a riverside paper mill in south-western Finland to a global telecommunications leader connecting over 1.3 billion people. Nokia is well rehearsed in the challenge of thriving in fast-changing market conditions.

The market for mobile services has changed radically since 2008. Competitors such as the iPhone and Android devices have changed the way that customers discover, access and use mobile services. During this time, we have worked in partnership with Nokia to build an in-depth knowledge and understanding of this turbulent market and to support strategic decision-making. This case study covers a series of mobile services research projects that we conducted for Nokia during this time of market change.

Approach

From tracking customer satisfaction to driving strategy

We conducted a mobile services customer satisfaction tracker for Nokia from 2008 to 2011. The main feature of any continuous tracking study is that it is consistent; however, the volatile nature of the market meant that the tracker had to adapt in order to stay relevant.

We worked closely with Nokia to ensure that the tracker evolved in line with the rapid changes in the market whilst still providing consistent

metrics. Our researchers toured Nokia and were invited to meet with product developers and product marketing teams at a senior level. One of our researchers went on secondment and worked within Nokia during the project.

Customer satisfaction trackers often contain detailed information. Sometimes the large volume of data can make the findings seem inaccessible. We designed deliverables that were linked with Nokia KPIs making them relevant and easy for stakeholders to action.

Over time, the tracker study became increasingly important and senior stakeholders within Nokia began to use it to support strategic planning of the service portfolio. We developed a programme of qualitative research to supplement the tracker and to gain a deeper understanding of mobile service customers. By bringing together the qualitative insights with a global roundup of more than two years of tracker data, Nokia gained a truly in-depth understanding of the rapidly changing market and of their performance.

A new statistical approach to portfolio planning

In addition to the tracker, Nokia asked us to review their services portfolio strategy to prioritise areas for development, and to identify any immediate opportunities or gaps on the roadmap.

"It's been an absolute pleasure working with a team that have such a wealth of knowledge about the market we operate in and the products and services we offer and are developing. I rarely use the term with research agencies but I consider the GfK team as highly valuable consultants that go way beyond the standard deliverables of a typical research agency. They have an intricate understanding of how our business operates and I can trust them unequivocally with my stakeholders. I can't speak highly enough of them."

Tarik Ahmet,
Head of Location and
Commerce Insights,
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The sheer number of services which could potentially be included in the portfolio made this project complex and challenging. Furthermore, the research was designed to cover the full breadth of Nokia's consumer base, from high-end smartphone consumers in Western markets, to low-end mobile users in rural locations in emerging markets. This would ensure that Nokia's services offering could be adapted and positioned to remain relevant across the portfolio of devices and customer base.

Reviewing existing propositions, our Marketing Sciences team devised a new statistical methodology to compare these, and built a simulator that would enable Nokia to model different portfolio scenarios.

New concept development, testing and post-launch satisfaction

Nokia also asked us to test some specific concepts which had been identified for further development in emerging markets. We worked with Nokia at every phase of the process, from developing and storyboarding the concepts for a consumer audience, through testing, to informing the development of a roadmap for product launch.

We then conducted post-launch satisfaction research to assess the products which had come to market as a result of the concept testing. We ensured that key metrics in this study were aligned with the main satisfaction tracker, despite being in different markets and with different respondents.

Outcome

Our long relationship with Nokia, years of experience in mobile services, and in-depth knowledge of other research vehicles meant that we were uniquely placed to conduct this research.

Nokia started to use the tracker not just to fine-tune its performance, but to understand how to do business in a fast-changing world. Ultimately, the research has delivered the voice of the customer, informing Nokia's strategy, and supporting decision making. Nokia has used the portfolio planning work to identify opportunities and build business cases for service development. The concept testing has supported the launch of new services in emerging markets.

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