

# Markets

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Nokia Capital Markets Day 09

**Nokia Connecting People**

Espoo December 2nd

# Markets 2009 and beyond

**NOKIA**  
Connecting People

# Markets overview

## Nokia in 2009

- Top 5 global brand
- ~60 million smartphones sold to date
- Over 75 million active service users
- Over 4 million developers

## 2010 industry estimate

- Improving industry conditions
- Volume growth
- More normal seasonality

1.



2.



3.



4.



5.



7.



19.



20.



63.



# Manufacturing



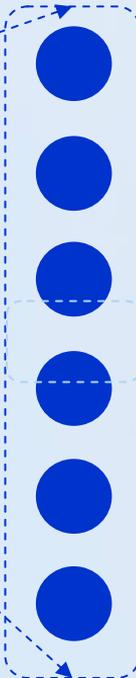
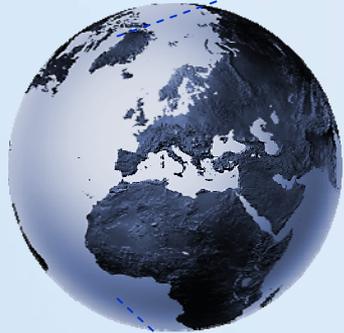
# Creating value through consumer relationships & partnerships

**NOKIA**  
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# From insight to solutions...

Consumer perspective

Consumer behaviors



**Brand strategy**



**Solutions**



**CX/UX**



**Design**

Solutions portfolio/  
Unit portfolio

**Market optimization**

**Proposition definition**

Concepting

**Ranges/  
categories/  
R&D**

**Service lines**

**Campaign creation/  
brand identity**

Launch

**Loyalty & retention**

# Consumer Lifetime Value



# Engage with consumers through our own media

**1.1 billion  
consumers with  
Nokia devices**

**65 million visitors  
to nokia.com per  
month**

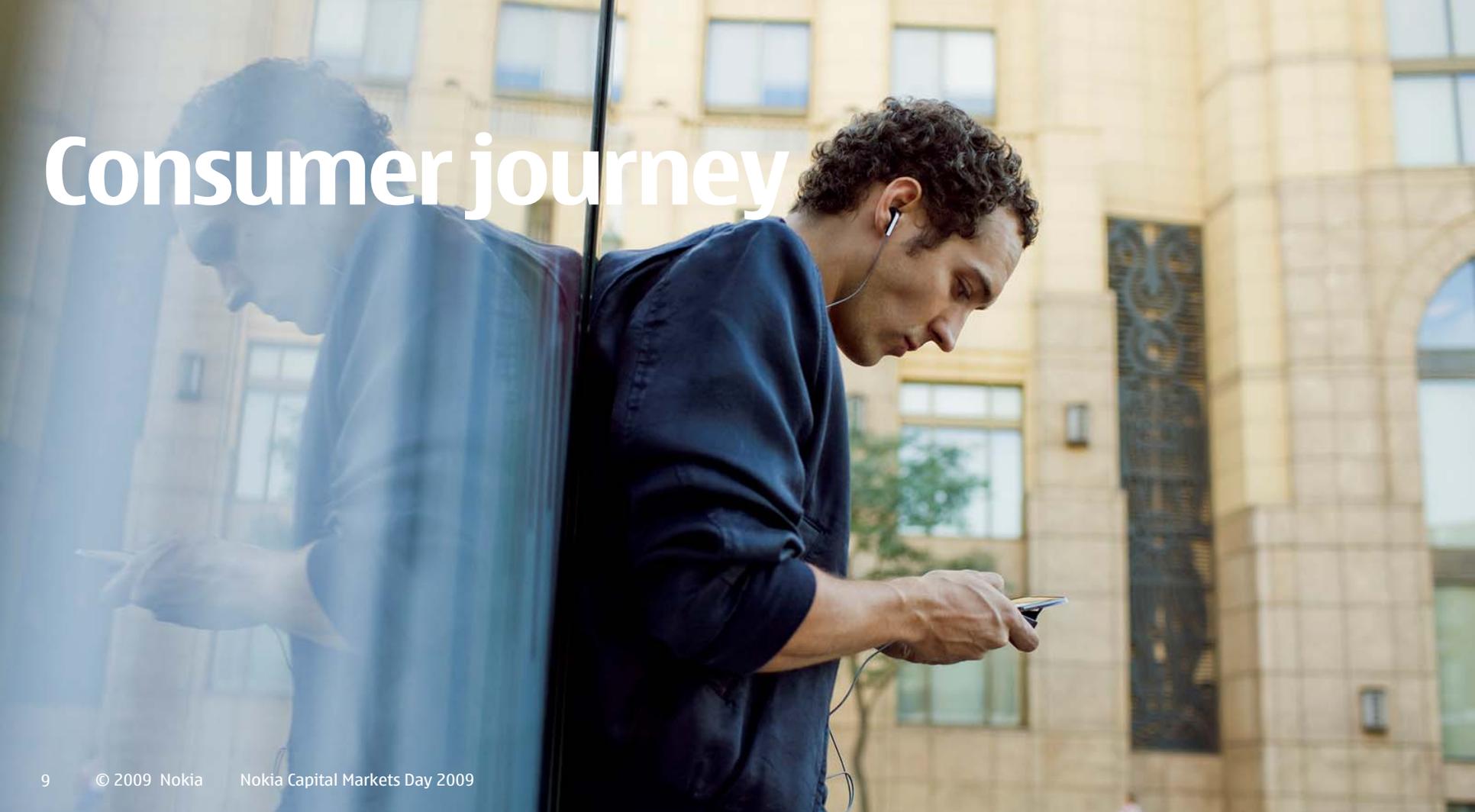
**230 million visitors  
to nokia.mobi per  
month**

**Sales boxes:  
468 million in 2008**

**Retail: 650K outlets  
speak volumes**

**10 consumer  
interactions per  
second in Care**

# Consumer journey

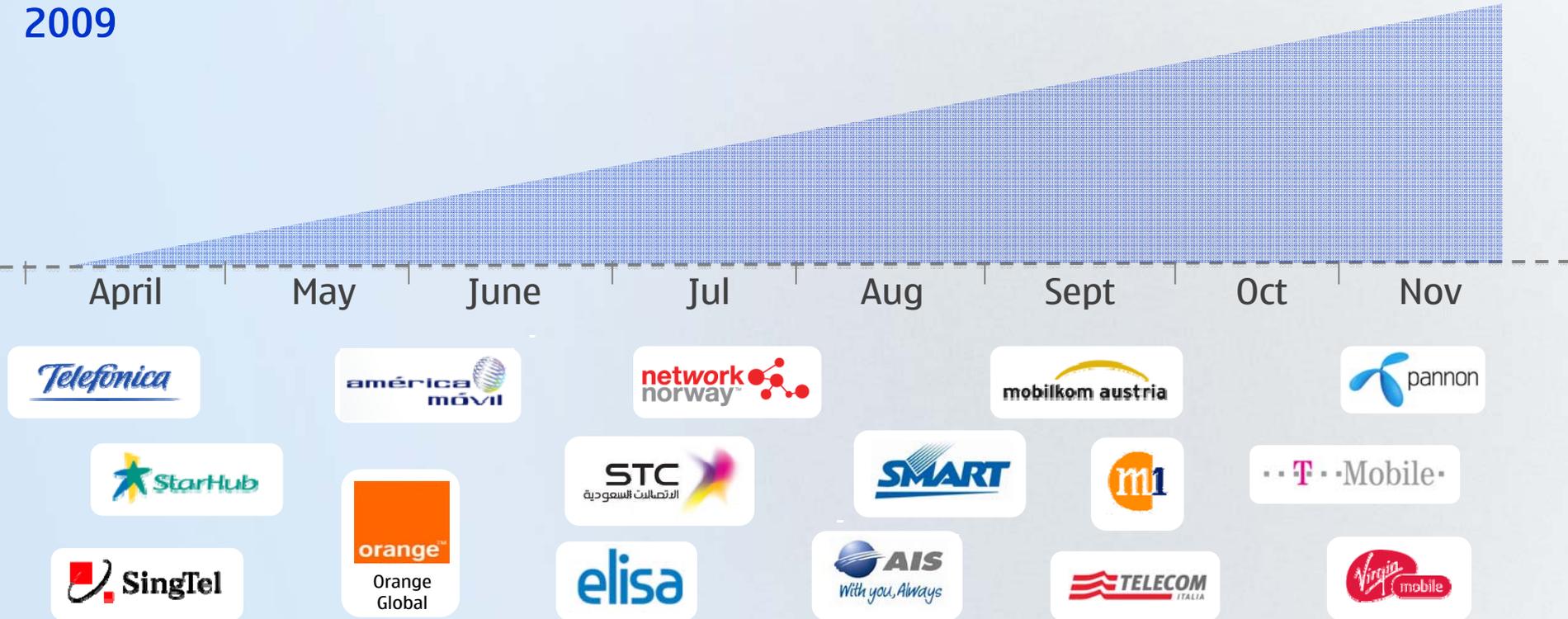
A man with curly hair, wearing a dark blue long-sleeved shirt and earbuds, is looking down at a mobile phone in his hands. He is standing in front of a large glass window that reflects his image. The background shows a multi-story building with yellowish-tan stone or brickwork and several windows. The overall scene is brightly lit, suggesting daytime.

A young woman with long, dark, wavy hair and bangs is looking down at a mobile phone in her hands. She is wearing a grey polo shirt with a dark horizontal stripe across the chest and a brown cardigan. A necklace with a circular pendant is visible. In the background, other people are partially visible, including a man in a dark jacket and a woman in a blue top smiling. The scene appears to be an indoor event or conference.

# A continuous relationship

# Nokia Messaging – Success in partnering

2009

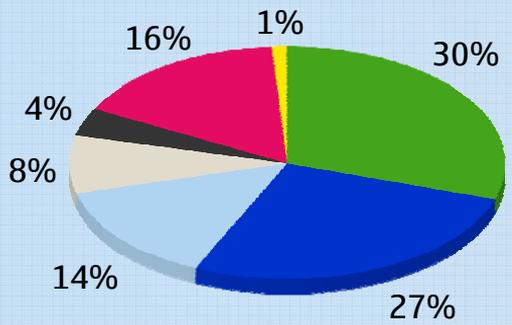


# Marketing transition & Efficiency

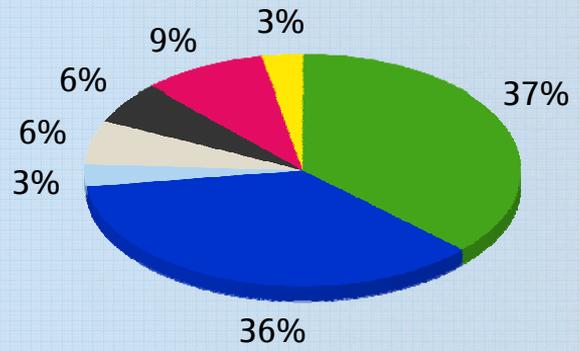
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# Focus on fewer, bigger marketing campaigns

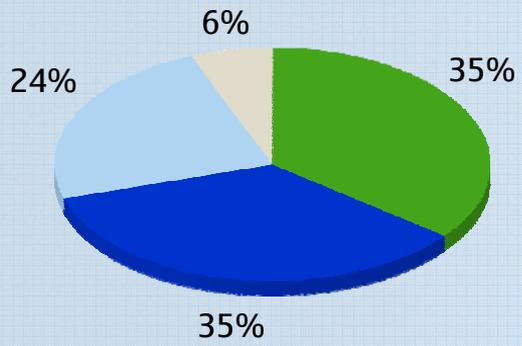
2H 2008  
% of total



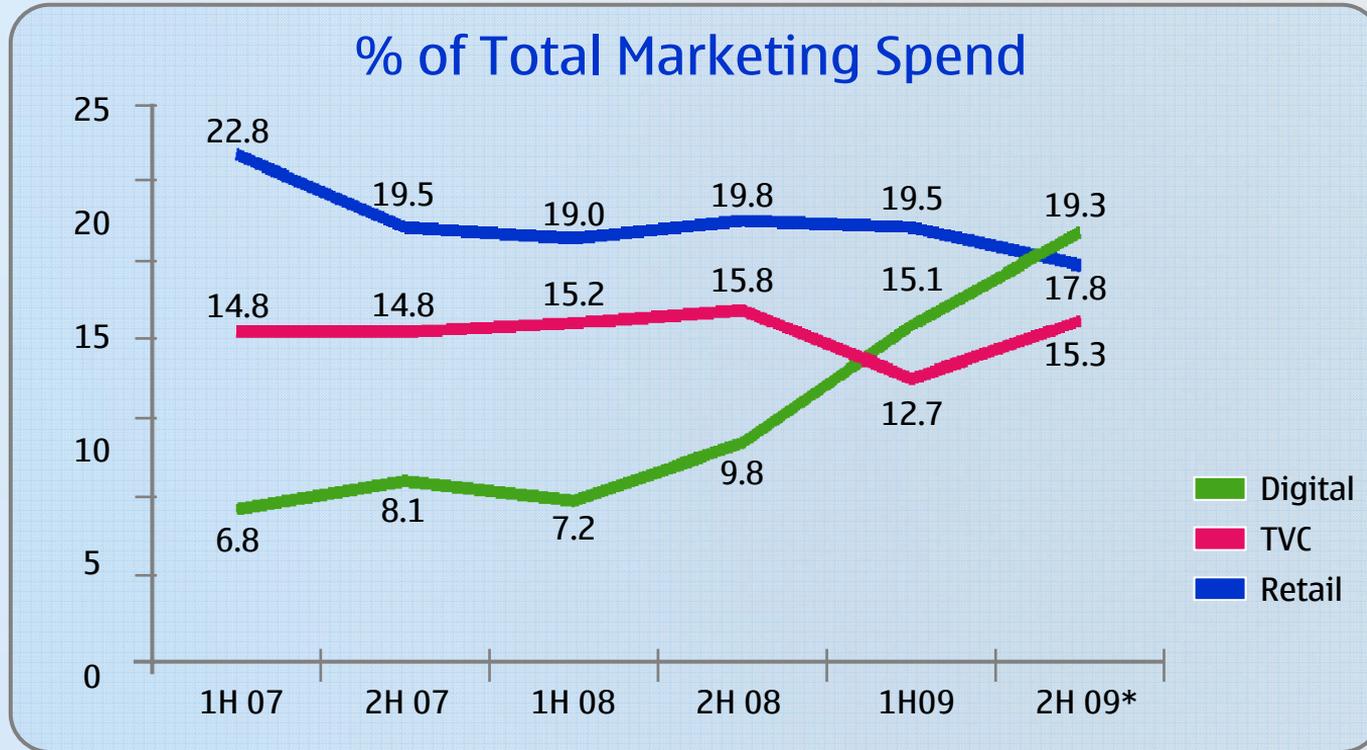
2009 plan  
% of total



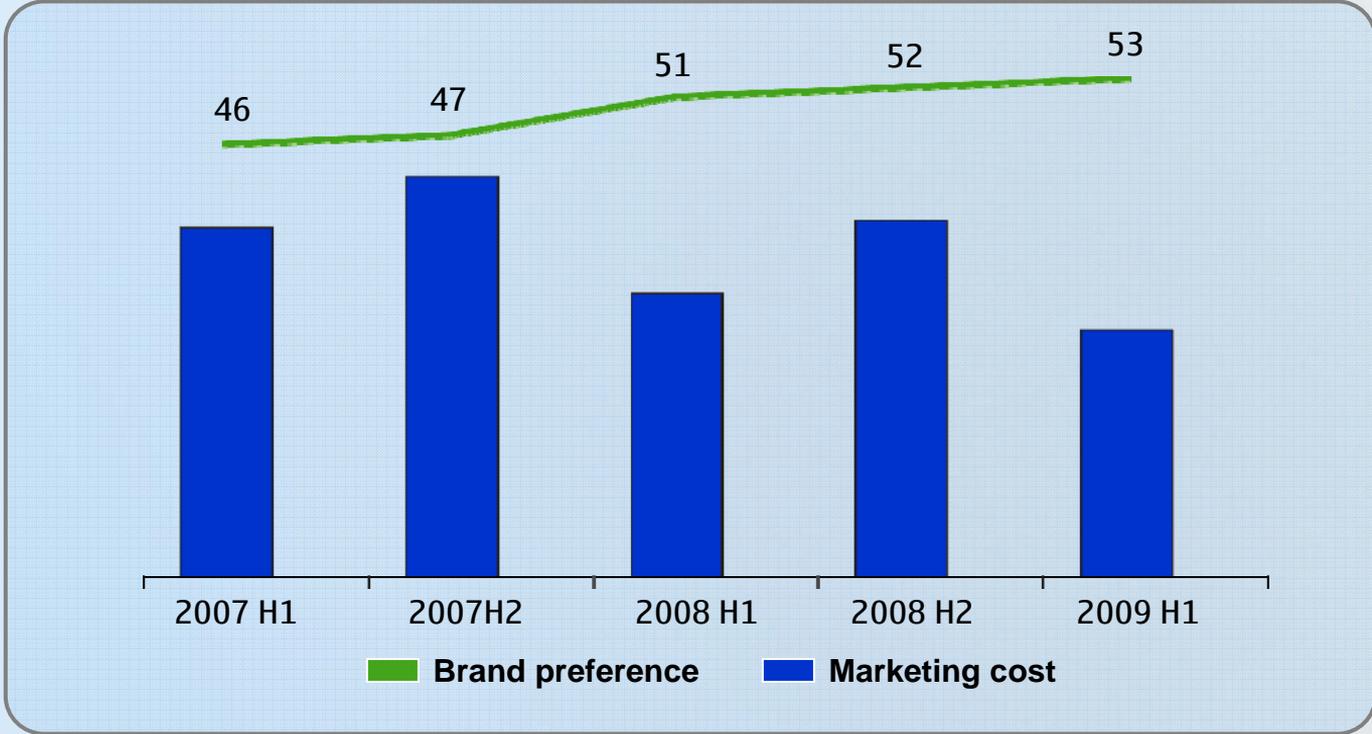
2010 plan  
% of total



# Nokia's digital marketing spend will surpass TVC spend in 2009

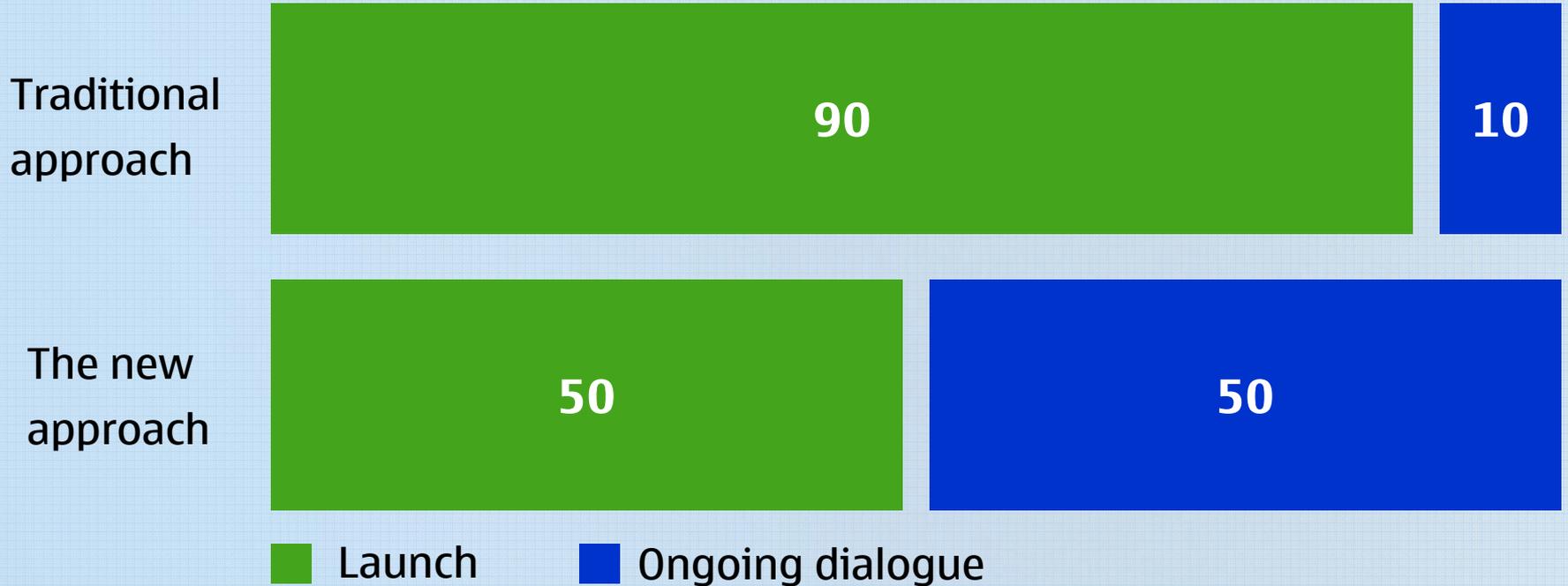


# Positive brand preference trend despite decreased marketing spend



# Changing the way we invest

## Marketing spend – product launch to continuous dialogue



# Print



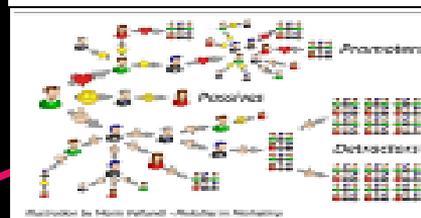
# Digital



# PR



# Word of mouth



# Developer

Forum **Nokia**  
Driving mobile innovation



# Retail



**World's best infrastructure**

**Building blocks in place**

**Thriving ecosystem**

**Unparalleled reach**

**NOKIA**