



CLSA Singapore Ecommerce Access Day 2021

8 June 2021

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CapitaLand Digital Platforms

CapitaStar CapitaVoucher CapitaCard
eCapitaMall Capita3Eats



Transforming 'Land as a service' model to 'Retail as a service'

MEGA TRENDS impacting mall operators

FUTURE MODEL highlights



Digital adoption & funding at peak

\$S500 Mil

Government grants for small and medium-sized enterprises' digital transformation in Singapore in 2020



Innovation ecosystem boom

> 2,500

Investments made into Southeast Asia tech start-ups in last 5 years → ~\$40 Bil in value



Tenants and infra-readiness stepping up

> 45%

Of retailers indicated online as priority channel



Dramatic change in consumer behaviour

74%

Increase in average online transaction value in Singapore compared to 2019



STRATEGIC O2O¹ EQUILIBRIUM:
Elevate shopper experience through symbiotic O2O¹



TENANT PROPOSITION REDEFINITION:
Digitally lease → service → support

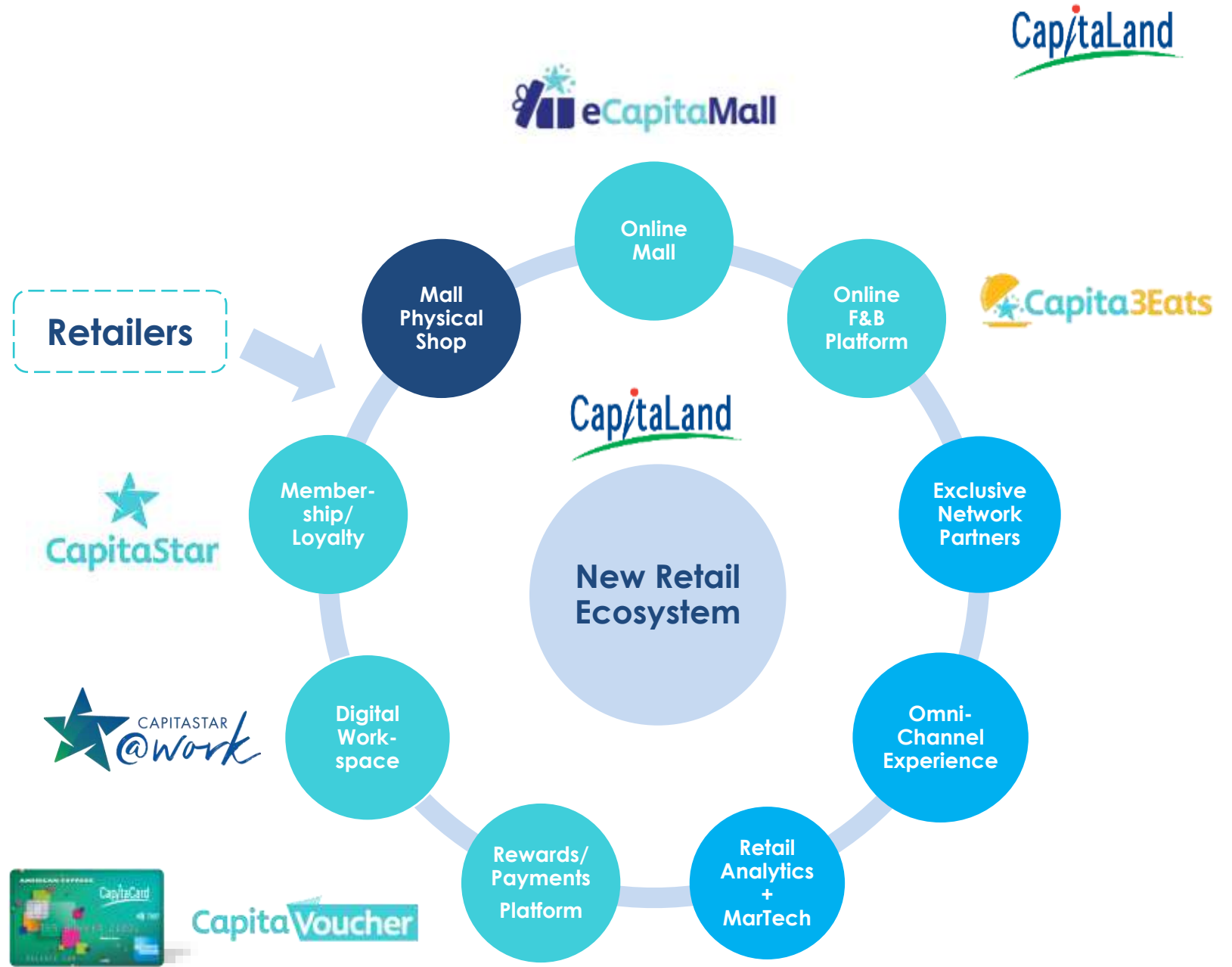


ECOSYSTEM ORCHESTRATION:
Partner network to do it faster and mitigate competitive risks

¹Refers to Online to Offline

CapitaLand Digital Ecosystem: A Platform of Digital Enablers

- ✓ Extending **Alternative Digital Sales Channels** for retailers
- ✓ Creating **retention** tools and **stickiness with retailers**
- ✓ Enabler to create **diversification of tenant base** for business sustainability



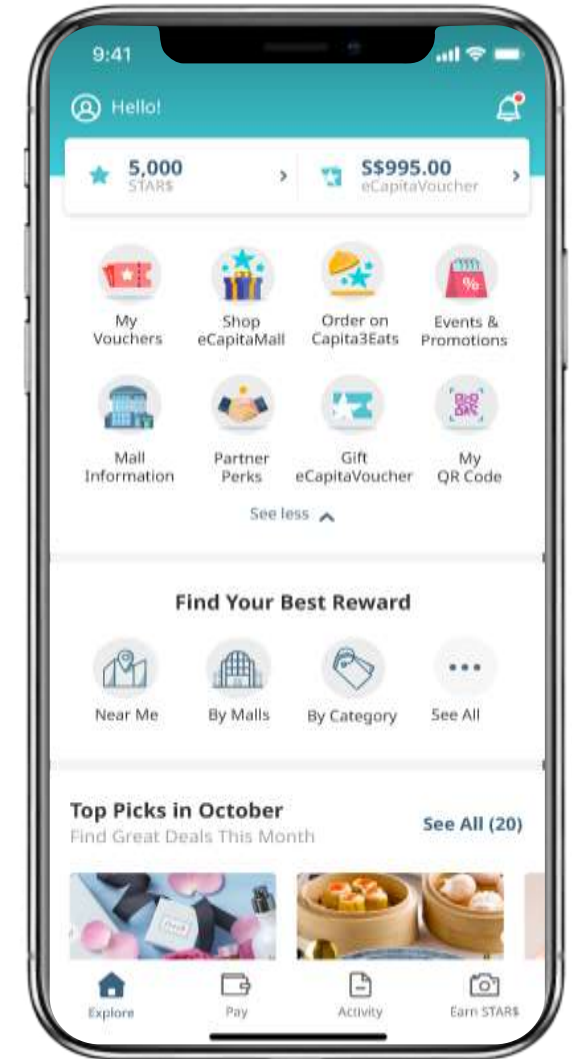
A NEW CAPITASTAR EXPERIENCE

New Look,
New Features,
More Excitement!

- ✓ Reinvigorated brand visual identity and positioning for higher mass appeal + resonance with millennials & centennials
- ✓ Introduced more app features aside from rewards- utility, community engagement, curated content + eCommerce capabilities
- ✓ Customer Experience is key - optimizing omni-channel touchpoints



Rebranding

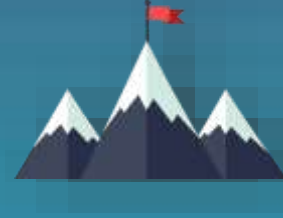


App Redesign

CAPITASTAR – SINGAPORE'S LEADING LIFESTYLE AND SHOPPING REWARDS PROGRAM



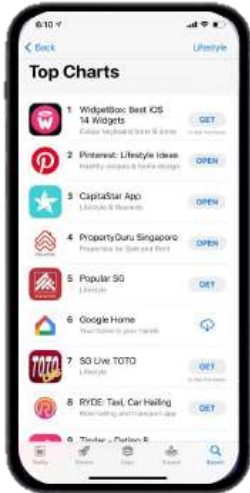
More than
1.1 Million
CapitaStar Members



Average Monthly App Traffic
> 3.5 Million

1.2 Million App Installs

Ranked amidst Top Charts for
Lifestyle Category in App Store



More than
3,000
Retailers onboard



17
participating malls
(incl. Jewel Changi Airport)

Favourite Brands

- BHG
- Hai Di Lao
- Sephora
- Uniqlo
- Watsons



Popular Malls

- Bugis Junction
- IMM
- Plaza Singapura
- Raffles City
- Westgate



Total Value Given To
Customers in 2020

> S\$9,135,844

*Cashback in the form of
eCapitaVouchers and STAR\$®



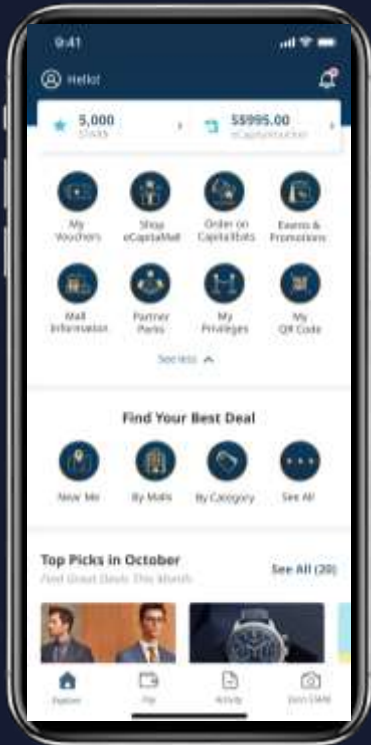
Total number of eDeals
Redeemed in 2020

> 13,755,298

- Figures are as of April 2021 unless otherwise stated
- Numbers represent CapitaStar Singapore only



By Invitation Only



Resonating with luxury/discretionary spend shoppers



1. Luxury



2. Fashion & Jewelry



3. Beauty & Health



4. Restaurants & Cafes



5. Art

Privileges for Raffles Prestige members



Accelerated earn rate:
2X across all spend



Complimentary parking



Shopping & Dining in-store and birthday privileges



Partners Privileges:
BMW, Ascott, Raffles Medical



Exclusive invites to events / launches

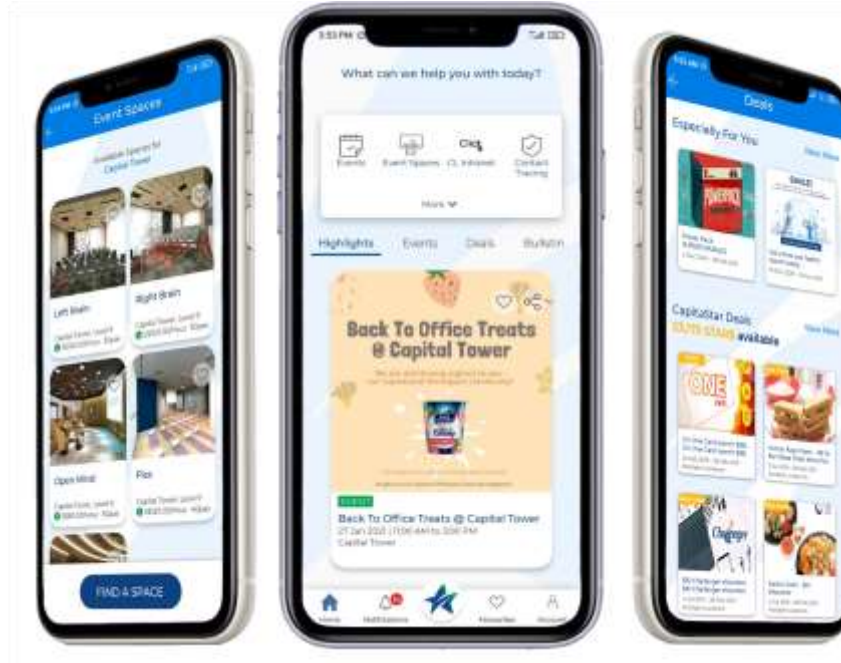


OVERVIEW

A tenant experience app and platform to transform the experience of CapitaLand Workspace Community

Notable Features

- Reskinnable Solution^
- Link with CapitaStar, eCapitaMall & Capita3eats
- Self Facial Recognition Enrolment
- Visitor Invitation



- Safe Management Feature (Pulse Survey, Declaration and Contact Tracing)
- Deals
- Events
- Space Booking

Launched on 1 July 2020



↑ 7x User Base

~4,500 users which is a 7x increase of user base since pilot in 2019



8 Premises Onboarded

Launched at 6 office buildings and 2 Bridge+ co-working spaces in Singapore



> 10,000 Visitors

Invited visitors at Capital Tower to enter the turnstiles directly without the need to register



\$\$3.1 Mil Cost Avoidance

Consolidated multiple mobile apps into a single front end supported by backend systems and services for cost efficiency

- ^Bridge+ Mobile App is implemented based on a reskinnable solution
- Figures are as of May 2021

eCAPITAVOUCHER OVERVIEW

Going digital through our real estate footprint to drive **sustainability** and a **superlative customer checkout experience** both offline and online where payments are frictionless and hassle-free.



~\$96 Million
CapitaVoucher +
eCapitaVoucher
Purchased Yearly

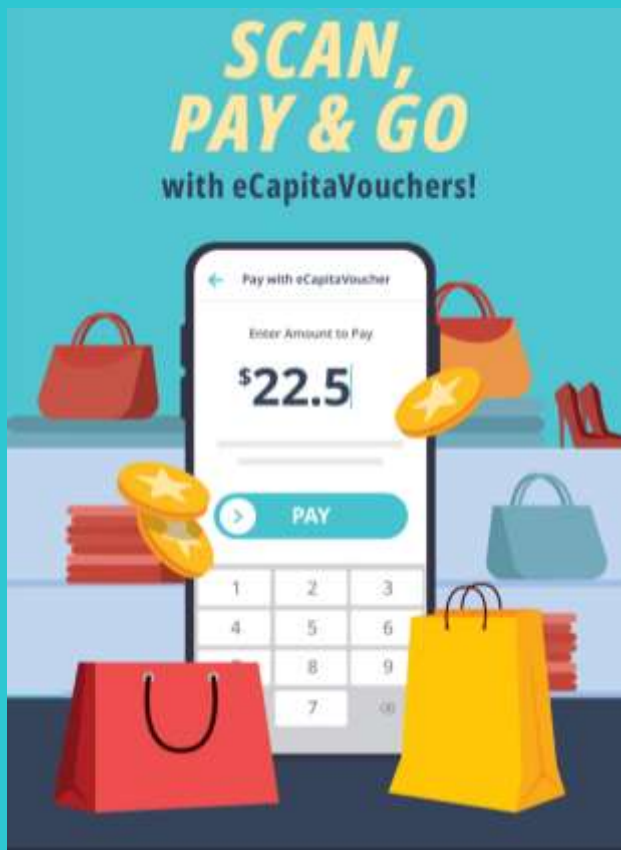


Added Convenience
Gift, purchase, redeem and pay
24/7 with eCapitaVoucher via the
CapitaStar App




Seamless Reimbursement
Increase productivity and efficiency
at no added costs

CapitaStar members can now seamlessly **pay with eCapitaVoucher** using the CapitaStar App for all shopping and dining at more than 3,000 stores across 17 CapitaLand malls islandwide and online at eCapitaMall and Capita3Eats






3.7X Growth
in eCapitaVoucher
Sales from
2020 – 2021
(as of Apr 21)




4.5X Growth
in eCapitaVoucher
Usage from
2020 – 2021
(as of Apr 21)



>95%
retailers accept
eCapitaVoucher
(as of Apr 21)
including eCapitaMall &
Capita3Eats and Jewel
Changi Airport + Ion
Orchard

Scan QR code
wobbler to pay with
eCapitaVoucher



More than 560 brands

are now onboard eCapitaMall and Capita3Eats since launch in June 2020



BEST	JD Sports	Pedro	Hurom
MUJI	SK Jewelry	iStudio	SharkNinja
L'Occitane	LEGO	Lenovo	

Most Popular Brands

- Clarins
- Muji
- Gamemartz
- Lego
- Lenovo
- Grafunkt



Nando's	Ajisen	Paris Baguette
MUJI	Coco Ichibanya	Paradise Dynasty
Dian Xiao Er	Swensen's	Soup Restaurant

Most Popular Brands

- Nando's
- Dian Xiao Er
- Paris Baguette
- Red House Seafood
- Teahouse by Soup Restaurant
- Coco Ichibanya

ROBUST GROWTH SINCE LAUNCH

15x Growth in GMV

13x Growth in Volume of Transactions

2.5x Growth in GMV

3x Growth in Volume of Transactions

GROWTH SINCE PHASE 2 (HEIGHTENED ALERT)

2.5x Growth in GMV

2.3x Growth in Volume of Transactions

2.8x Growth in GMV

2.9x Growth in Volume of Transactions



ECAPITAVOUCHER UTILISATION : **44%** of total GMV



ECAPITAVOUCHER UTILISATION : **36%** of total GMV

O2O Shopper vs Offline Shopper



S\$408

O2O Shopper

vs



S\$284

Pure Offline Shopper

→ O2O shopper (online shopper) are relatively younger than pure offline shopper.



O2O Shoppers are younger than pure offline shoppers



~S\$51.7 Million

Total GTO Contribution for O2O shoppers from June 2020 – April 2021

Key insights:

- ❑ The pandemic situation has caused a further shift in shopper's behaviour towards O2O as the average monthly spend captured for O2O shoppers vs pure offline shoppers **increased** from 28% in Feb 21 to **44% in Apr 21**.
- ❑ O2O shoppers are mostly **younger than pure offline shoppers** with higher percentage aged **26-45 yrs**.
- ❑ This ascertains that the digital platforms are **vital in future proofing our retail business** by **evolving with consumer needs** and **capturing younger consumers** spend from eCommerce competitors.

Retail – Singapore & Malaysia



Malaysia Malls:

CAPITALAND NEW RETAIL

Leveraging
CapitaLand's Network
for extended reach

Commercial

Capital Tower	CapitaGreen	Asia Square Tower 2	Six Battery Road	Bugis Village
Raffles City Tower	One George Street	21 Collyer Quay	CapitaSpring	
Nexus @ one-north	Changi Business Park	International Business Park	Singapore Science Park I&II	

Partners

Passion	Maybank	SP Group	DBS	FWD
AXA	UOB	Great Eastern	Etika	DirectAsia Insurance
AMEX	AIA	Manulife	Atome	Chubb
Citibank	Standard Chartered Bank	NTUC Income	BlueSG	Aviva

Strategic Partnerships with Industry Leaders



SP GROUP

Powering the GreenUP sustainability programme with lifestyle rewards



AMEX

Co-brand card to provide shoppers with **accelerated rewards & parking privileges** to drive in-mall spend

DBS

Seamless integration for automatic issuance of STAR\$ & eCapitaVouchers upon spend



SIA

An instant 2 ways conversion of points for an **expanded rewards experience**



A large, irregular watercolor splash in shades of grey and white, serving as a background for the text.

2021 & BEYOND

A seamless omni-channel CapitaLand experience by enabling meaningful connections between people and spaces

Three teal circles of varying sizes arranged in a diagonal line from the bottom left towards the center.

CAPITALAND DIGITAL PLATFORMS

Digitalising interactions with your customers





Thank You

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