



Singtel Investor Day Consumer Singapore

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Changing Industry Landscape

A

Data centricity

- Data is the most important growth engine
(Non-SMS data as % of ARPU increased from 35% in FY15 to 40% in FY16 to 46% in FY17)

B

Pressures on telco industry

- Accelerating shift from voice to data services
- Content cost remains high
- Increased spectrum cost

C

Evolving consumer behaviour

- Easy access to pirated content
- 'Cord cutters' from Pay TV subscription
- Consumers expect free and immediate service

D

Heightened competition

- Erosion of industry value from competition (new entrant, MVNO, RSPs)
- Global OTT players offering services in Singapore

Singtel will lead and shape the market in Singapore

1

Deliver a differentiated network experience

2

Enhance customer experience through digitalisation

3

Innovate with new products, services and content

Safeguard Our Core

Drive New Growth

Invest to deliver a seamless network experience

1

Mobile

WiFi / HetNet

In the Home

With new spectrum

#1

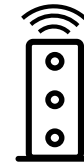
4G Coverage & Speed

Widest 4G outdoor and in-building coverage;
Fastest 4G throughput



Singtel WiFi

>1,000 hotspots now available for Mobile and Broadband users



Faster fibre broadband

Home broadband to support customer usage



Better Customer Experience

Increased capacity
→ less congestion
→ high speed



Heterogeneous Network (HetNet)

Small cells location enhance 4G speed



Singtel WiFi Mesh Solutions

Complete WiFi coverage at any part of the home

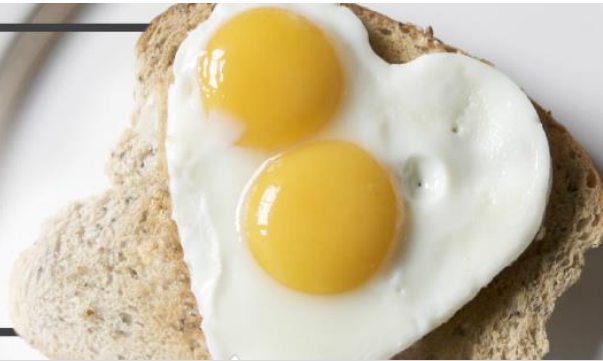


Getting Ready for 5G

Investing in 4.5G, in preparation for 5G

DATAx2

DOUBLE THE MOVIES.
DOUBLE THE MUSIC.
WITH DOUBLE THE DATA.



Say more, see more, hear more
with Singtel's new SIM Only plan.
Starting at \$20 for 5GB.

DATAx3

TRIPLE THE DATA
FOR EVERYTHING YOU
LOVE, LOVE, LOVE.



Average data usage
per postpaid subscriber

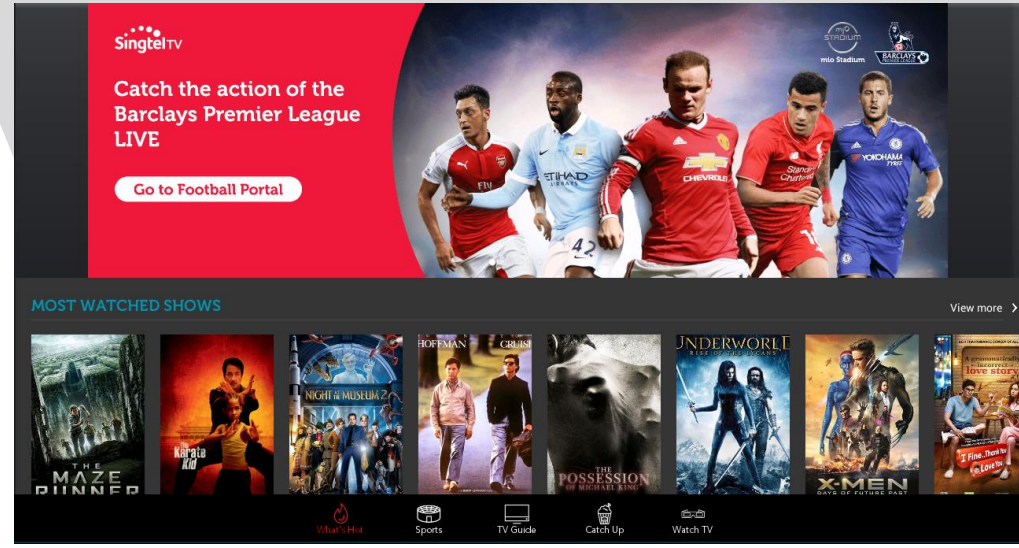
1.9GB
(March 2015)

2.4GB
(March 2016)

3.5GB
(March 2017)

To meet customer appetite for video content

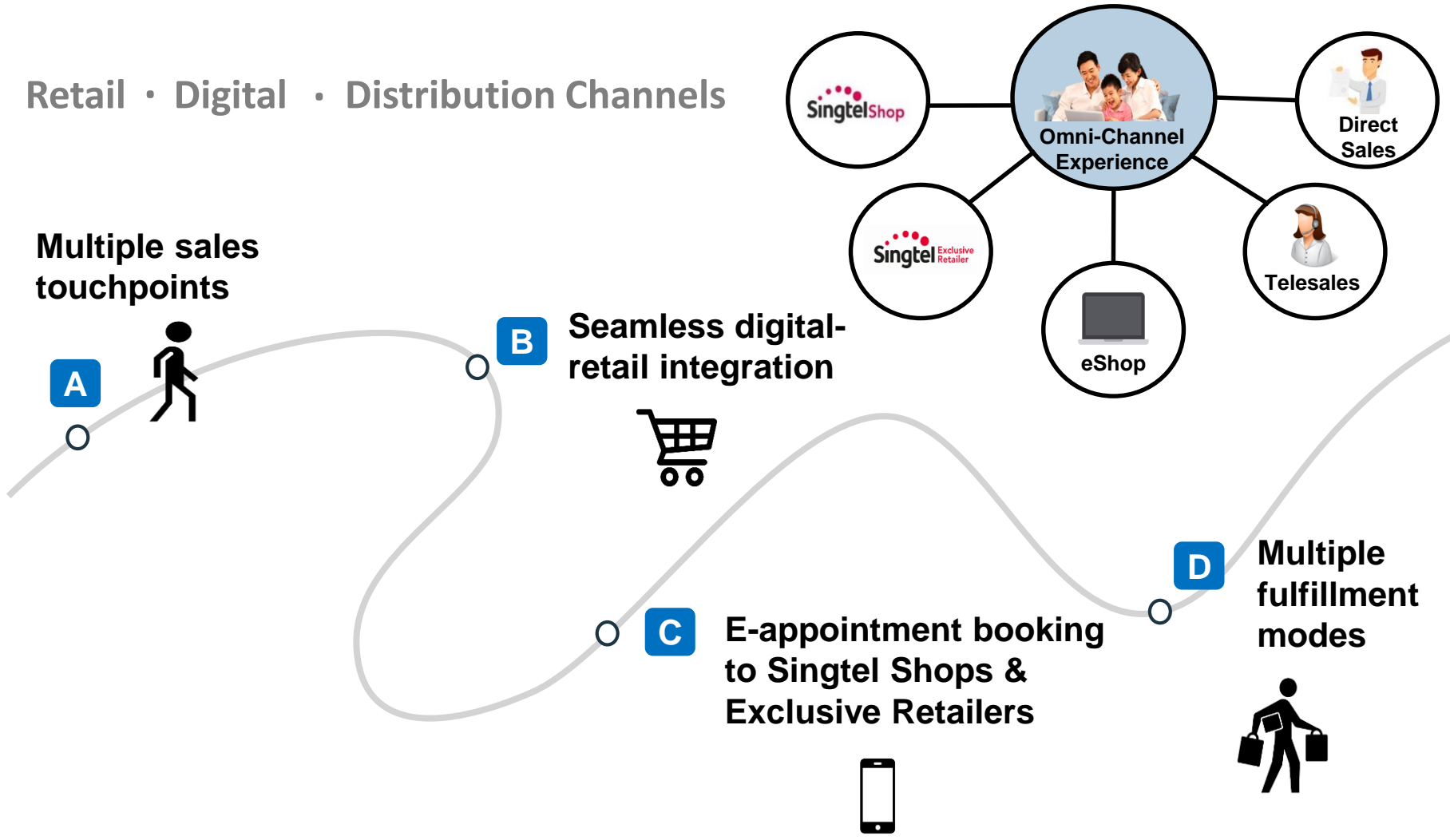
1



Deliver a complete omni-channel customer experience

Retail · Digital · Distribution Channels

Multiple sales touchpoints

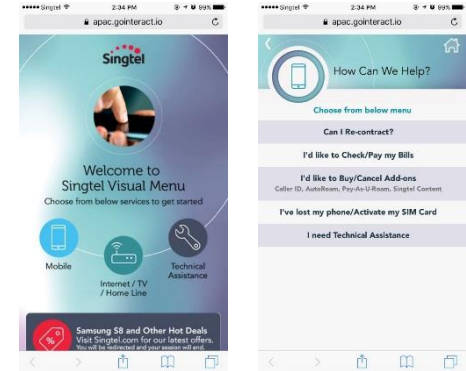




Hotline

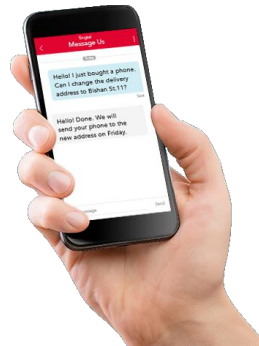
Visual IVR

Traditional voice IVR in visual form on mobile, aids customer navigation and selection of services



MySingtel app

Check usage, pay Singtel bills, purchase roaming plans, top-up prepaid account and more



Message Us on My Singtel app

Drop a note and interact via the Message Us feature

Virtual Agents



Hi, I'm Shirley
Let me help you.

Ask

&

Online Chat Agents

Chat online without waiting on the phone or in line



Enhanced Singtel Circle

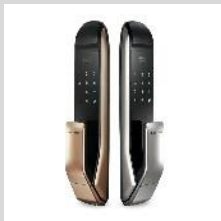


With Singtel Circle's \$350 annual handset upgrade fee waiver, a fall into the sea could mean a new phone.



-  Annual Handset Upgrade
-  Free Local Data on Sundays
-  Mobile Multi-Line Discount

More services for the home



Smart Home



Family Protection



Security Suite *and more...*

Innovate to provide consumers with digital content & lifestyle solutions

Digital Content

SINGTEL MUSIC



HOOQ



SINGTEL NEWSSTAND



and more...

Mobile Wallet



Singtel Dash



- Pay on buses, trains and taxis



- Tap and pay at >20,000 locations



- Send money to friends instantly



- Remit money overseas



- Top-up from any bank account in Singapore or your Singtel bill

Dining



Deals, reservations, deliveries and more...

Smart Living



Assured+

Drive Towards Digitalisation And Self-Help

- My Singtel app >800k active users
- Enhanced digital capabilities with new billing system

Networks Rationalisation

- Successful 2G network shutdown
- Towards ADSL (copper) network shutdown



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