

3 June 2015

CONSUMER AUSTRALIA

SINGTEL INVESTOR DAY



Allen Lew
CEO Consumer Australia

OPTUS yes

FY15 HIGHLIGHTS

**TOTAL
REVENUE:**

**UP
5%**

**EBIT
UP 5% ↑**

**EBITDA
UP 5% ↑**

**MOBILE
SERVICE
REVENUE:**

**UP
3%**

CUSTOMER GROWTH

- 167K POSTPAID HANDSETS
- 78K PREPAID HANDSETS



- 3.5M 4G HANDSETS
- 86% 4G NATIONAL POP COVERAGE¹
- 3,383 4G MOBILE SITES¹

- MY PLAN PLUS
- MY PREPAID MONTHLY
- UNLIMITED FIXED BB
- NETFLIX BUNDLES

CUSTOMER EXPERIENCE

ONLY TIER 1 TELCO
WITH POSITIVE NPS



OPTUS *yes*

¹ As at 30 April 2015

OUR STRATEGIC FOCUS WILL CONTINUE, BUT WITH SOME FUNDAMENTAL SHIFTS



Brand, People and Culture

Truly **differentiate** our brand, by leading in customer experience to become
Australia's most loved, recommended and **Innovative** service provider

Make Optus the best place to work

SIMPLE PRODUCTS

- **Entertain** our customers with video/entertainment bundles
- Evolve plans to focus on Family plans
- Unlimited broadband plans

GREAT NETWORKS

- **Enhance** our customers' network experience to take network off the table where it matters to our customers

BRILLIANT SERVICE

- **Engage** customers through greater personalisation and continue to improve our market NPS

Building a sustainable Future

Continue to reduce traditional operating costs while investing in Networks and **driving efficiencies**

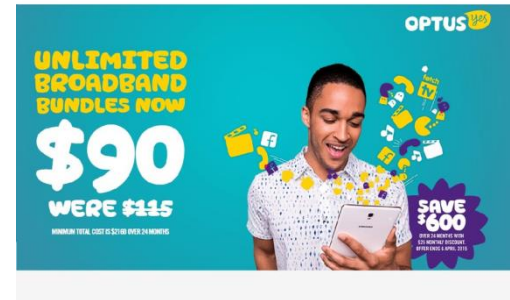
DELIVERING WHAT CUSTOMERS WANT, IN A SIMPLE WAY



FAMILY DATA SHARING



UNLIMITED BUNDLES



DIGITAL CONTENT



OPTUS yes

MAJOR AREAS OF FOCUS:



1. NETWORKS

IN MOBILE

1 - Coverage



2 - Capacity

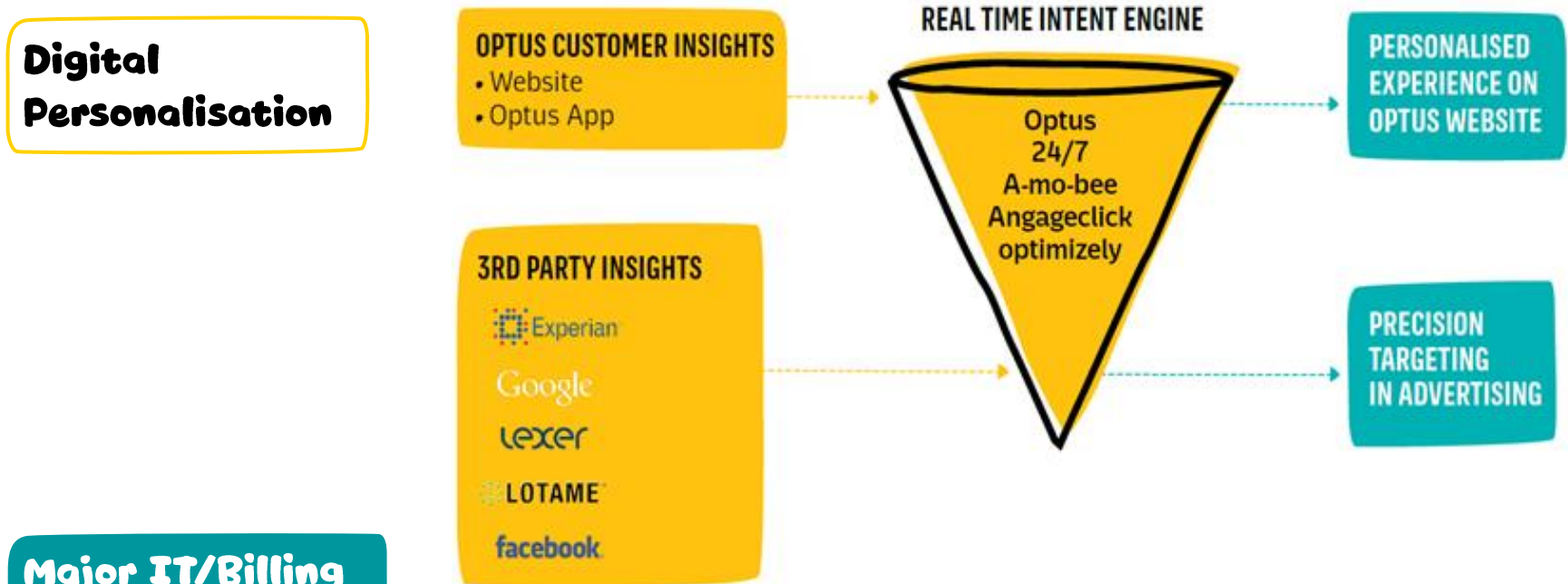
- Trialling small cell technology
- Upgrading capacity on public sites
- 1800MHz and 2300Mhz for 4G capacity
- 3G capacity upgrades

IN FIXED

Investing with a clear objective by network type



2. DELIVERING BRILLIANT SERVICE THROUGH A DIGITAL FIRST STRATEGY AND ENHANCED PERSONALISATION



Major IT/Billing transformation

Single platform

- ✓ Replaces 54 systems for Consumer Australia with one integrated platform
- ✓ Greater productivity with reduced info transfers between systems

Digital first

- ✓ Increased online capability for sales and service
- ✓ Social media integration
- ✓ Greater process automation

Simpler products

- ✓ Simplify rate plans
- ✓ True bundling of products and services on one bill

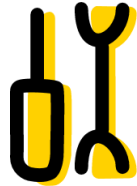
One view of the customer

- ✓ No matter what touch point

3. COST OPTIMISATION AND ENHANCING EFFICIENCY IN THE ORGANISATION



DRIVE ONLINE



- ✓ Increase self serve transactions
- ✓ Increase digital bill take-up
- ✓ Increase online sales mix for Mobile, Fixed and Prepaid recharge

RETAIL STORES



- ✓ Improved productivity with use of technology
- ✓ Implementation of labour management systems and tools

CUSTOMER CARE



- ✓ Reduction in average handling time
- ✓ Eliminate calls

SAVINGS



- ✓ Short term savings driven by rent, energy, vendor support and warehousing
- ✓ Long term reduction in cost per subscriber

4. DRIVING INNOVATION INTO OUR MARKET POSITIONING



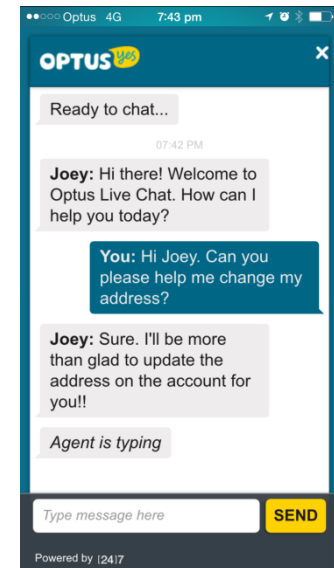
ENHANCING MY OPTUS APP



2300MHZ WBB



IVR TO CHAT



5. TRANSITIONING INTO LOCAL AREA EXECUTION, ESPECIALLY OUTSIDE CAPITAL CITIES



ALIGNED APPROACH ACROSS OPTUS

- Assessing the potential at a local-market level
- Aligning with Mobile and Fixed network rollouts
- Understanding and leveraging key customer buying behaviour and socio-demographics in the local market

LOCALISED MESSAGES AND EXECUTION

The image is a screenshot of a Facebook post from Optus, marked as 'Sponsored'. The post promotes 'FetchTV World Packs' and features a vibrant graphic with a colorful paisley pattern. The graphic prominently displays '19 HINDI CHANNELS WITH FETCH TV'. In the bottom right corner of the graphic, the 'OPTUS yes' and 'fetch tv' logos are visible. Below the graphic, the text reads: 'No more FOMO. Choose great world packs like Hindi & Pinoy after you've signed to our Entertainment Bundle, incl. Optus TV & Fetch.Broadband plan.' At the very bottom, the URL 'OPTUS.COM.AU/LANDINGPAGE' is provided. The top right of the post shows a 'Like Page' button.