



**Amazing things  
happen when we  
dream big.**

**Group Consumer**

**SingTel Investor Day**

3 June 2014

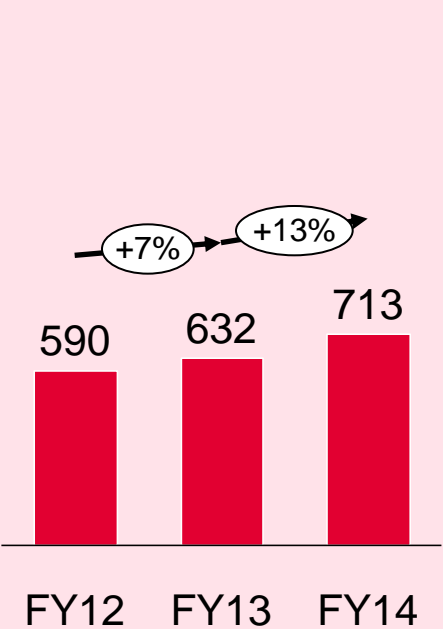
**Paul O'Sullivan**

CEO, Group Consumer

# Our core businesses have generated strong profitability over the last 3 years

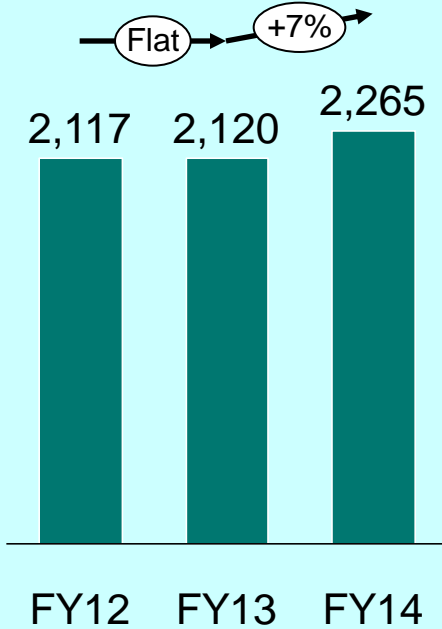
## Singapore Consumer

EBITDA  
S\$ M



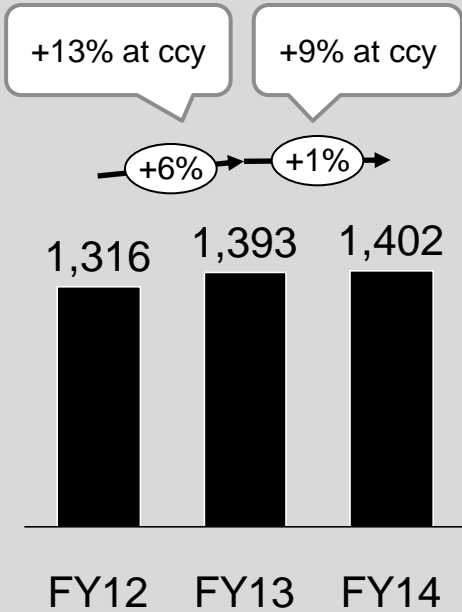
## Australia Consumer

EBITDA  
A\$ M



## Regional Mobile Associates

Share of Assoc. NPAT  
S\$ M



However, changes in our external environment demand we urgently transform to future-proof our business – OTTs are redefining and improving traditional telco tasks

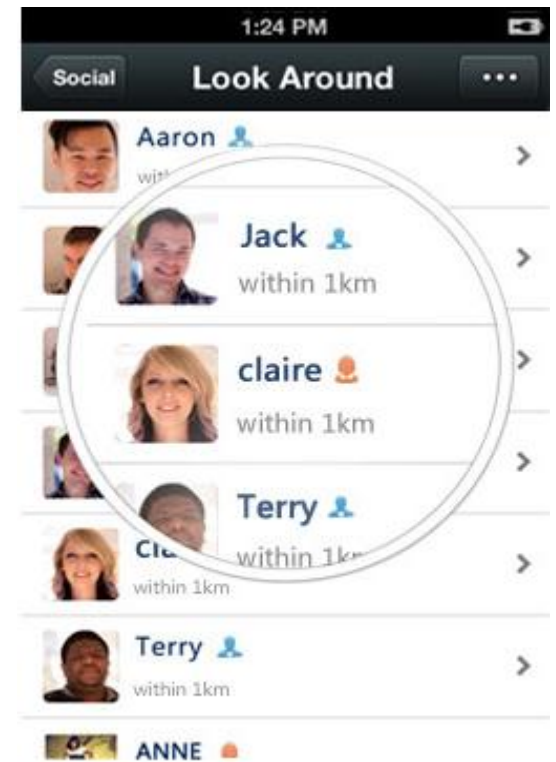
## Messaging



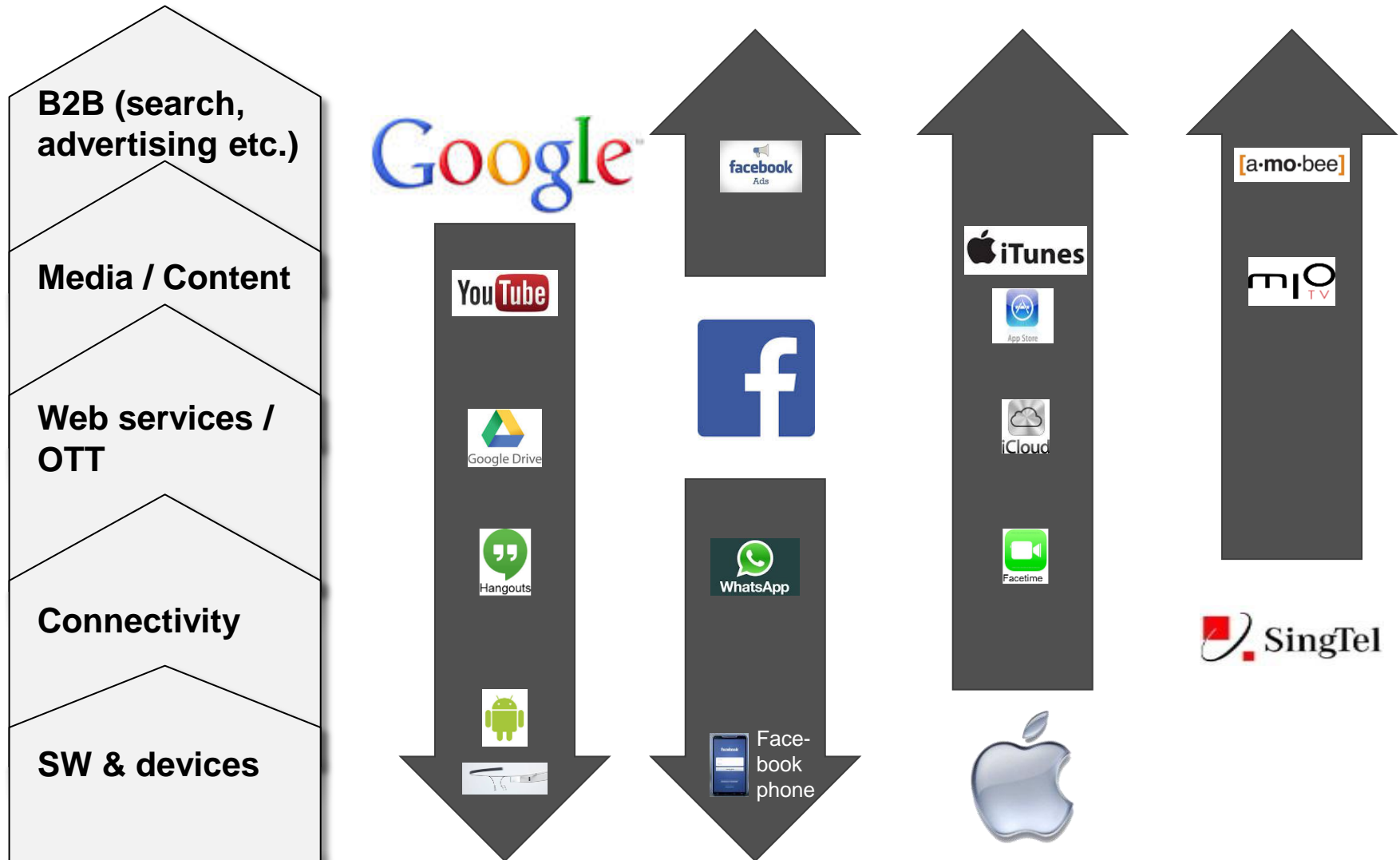
## Collaboration



## Social Networking

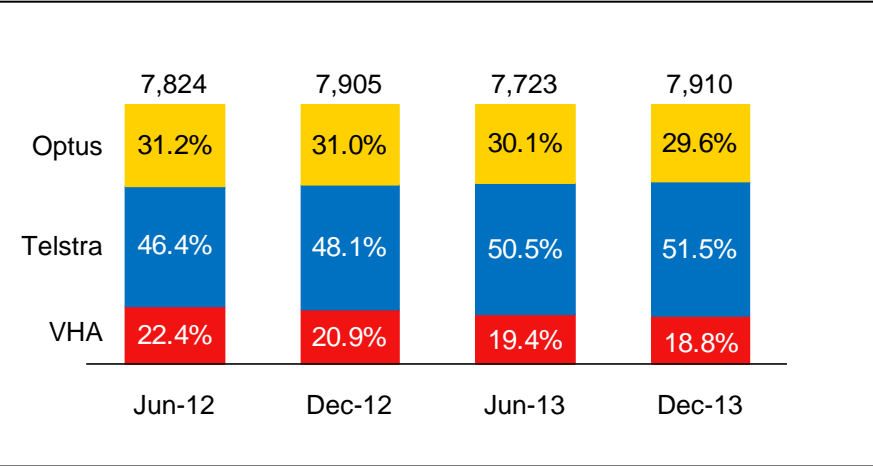


# A handful of tech giants are emerging, each expanding their reach across the value chain and building up their respective ecosystems

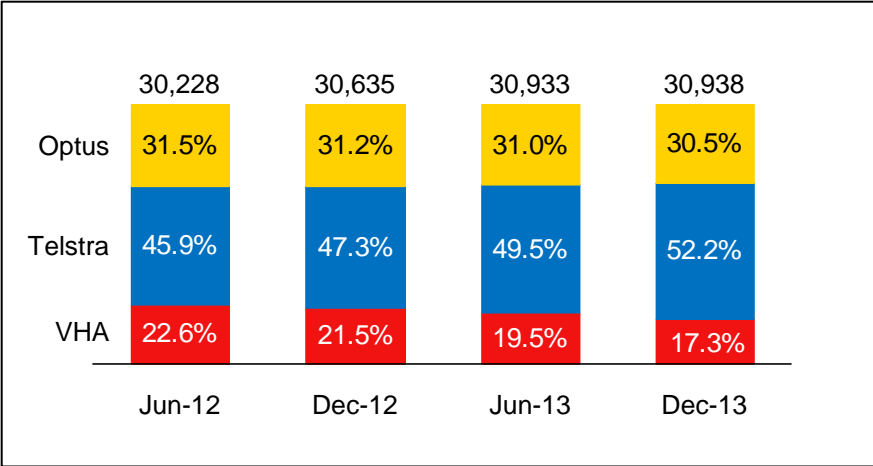


# In Australia, we have the added challenge of needing to regain trading momentum and market share in mobile and fixed

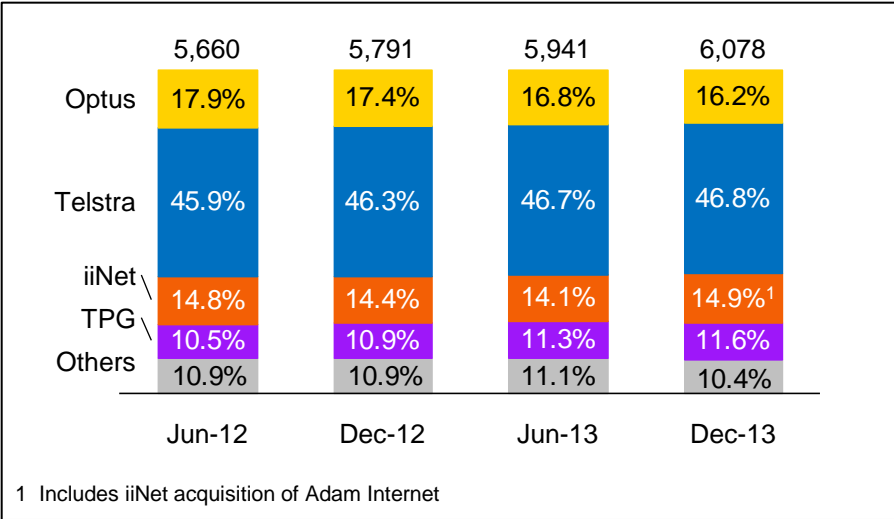
**Mobile market service revenue**  
A\$ M, %



**Mobile subscribers**  
'000



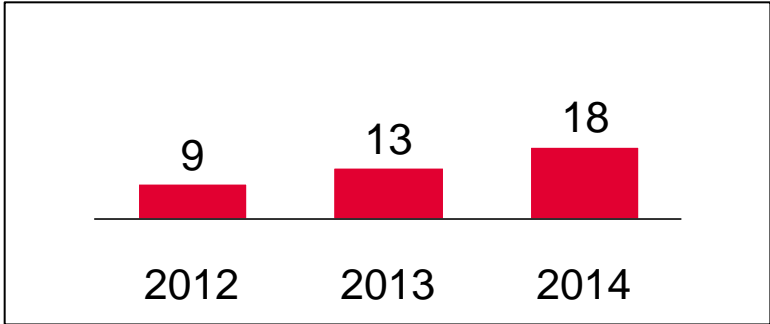
**Fixed BB subscribers excluding WBB**  
'000



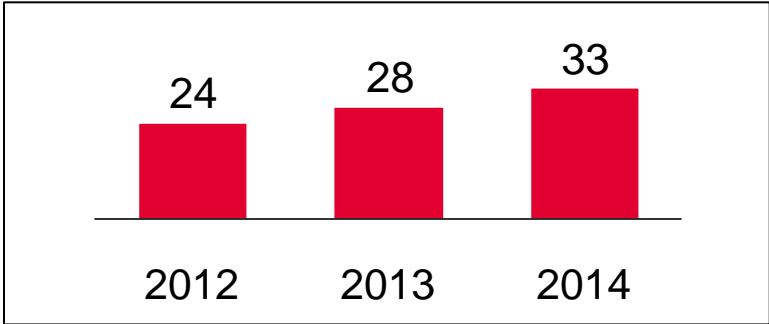
# The same shifts affecting our SG & AU markets are similarly hitting our Associate markets

## Aggregated across Associate markets

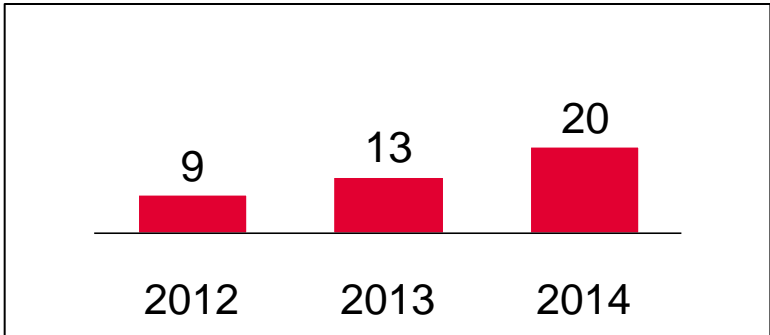
**Data as % of revenue**



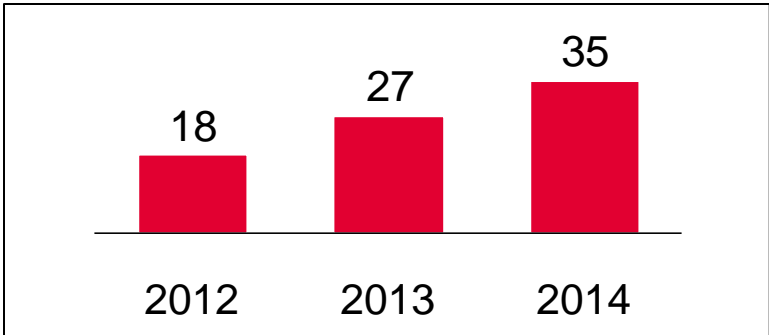
**% data users**



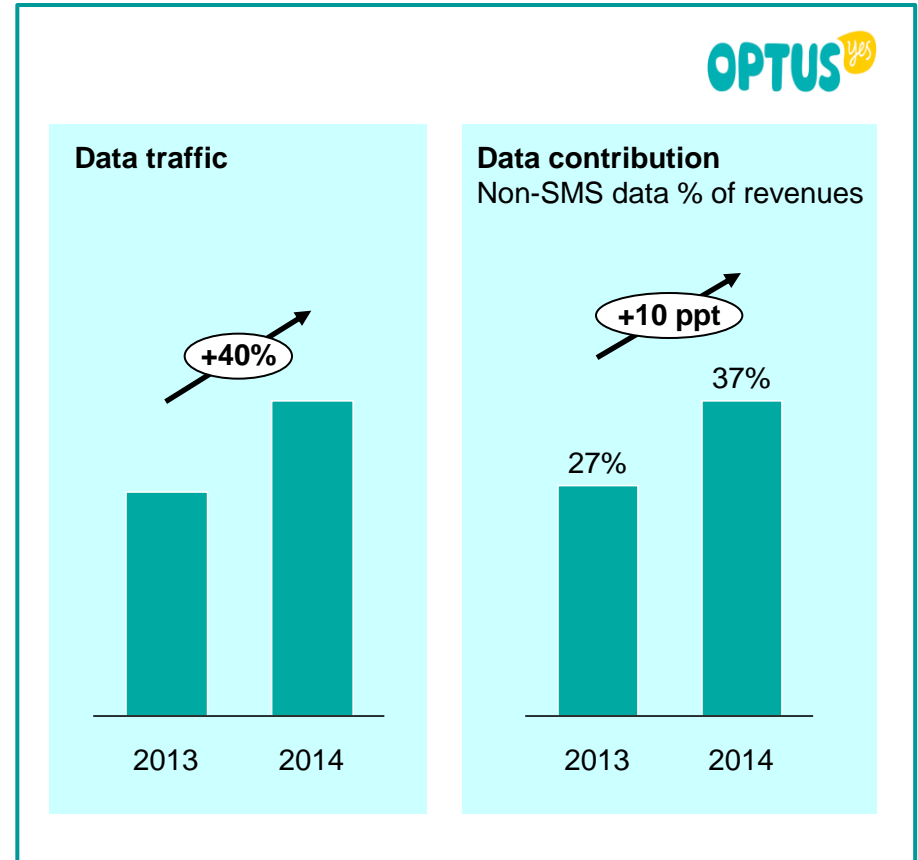
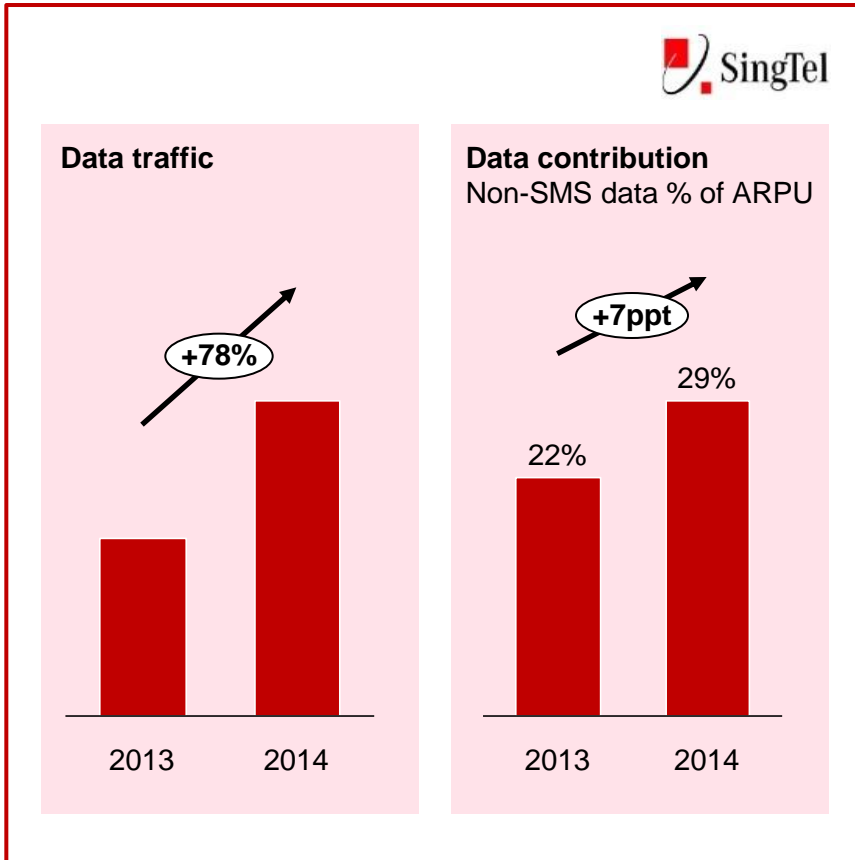
**% smartphone uptake**



**3G NW roll-out  
(3G BTS as % of 2G + 3G BTS)**



# We are retooling our business to capitalise on one thing that is certain: Data growth



## Data Monetisation initiatives

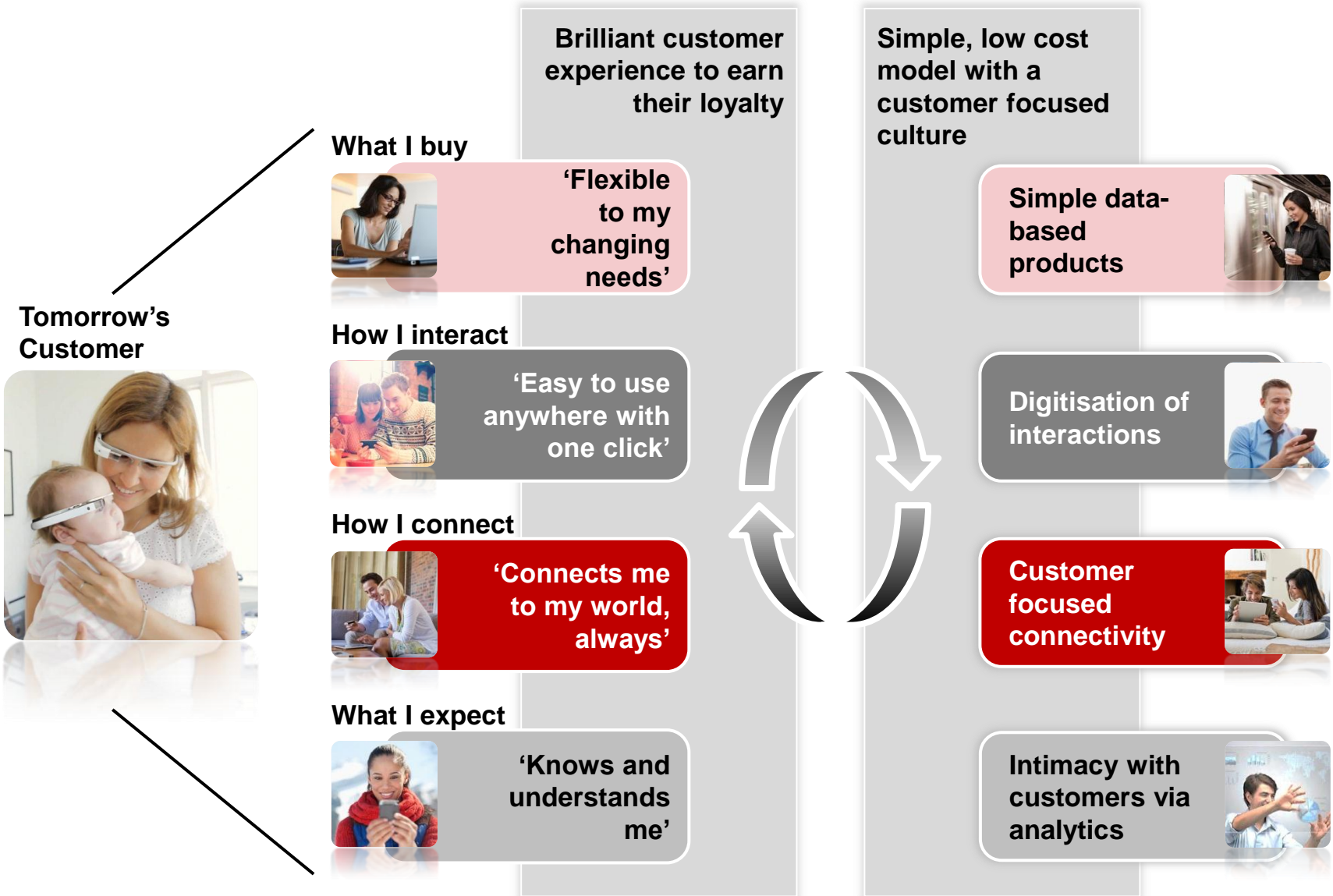
- Shift to tiered data plans
- Re-pricing data
- Data sharing
- Pre-paid 4G
- Co-bundling with OTT
- Wi-Fi as new mode of access



**Our vision :  
Data Leader**



# We have a 3-year plan to change the business



# We are making major shifts in our operating model to cater to the customer of the future : 4-S strategy

## Examples

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### Product



- Deliver highly simplified modular products with a focus on data
  - “Mix-and-match” constructs that provides flexibility to increase data allowance vis-à-vis traditional Voice / SMS
  - Data Sharing
  - BYO plans

**“Simplify”**

### Service & Sales



- Digitise interactions
- Drive self-service through easy “one-click” access

**“Self-serve”**

### Network



- Build and design to anticipate data growth
- Consolidate and virtualise our core
- Develop self-healing / self-optimising network
- Leverage advanced analytics tools to enhance NW management

**“Self-optimising”**

### Analytics



- Use Big Data analytics to better target micro-segments
- Care for customers intelligently, anticipating issues and proactively triggering resolutions

**“Smart”**

# Key transformation metrics we will be tracking

## Product



- Data % of ARPU
- ARPU

## Service & Sales



- NPS
- Online % of sales / care transactions
- Call-center volume reduction

## Network



- Network NPS
- Mobile Data Capacity Headroom

## Analytics



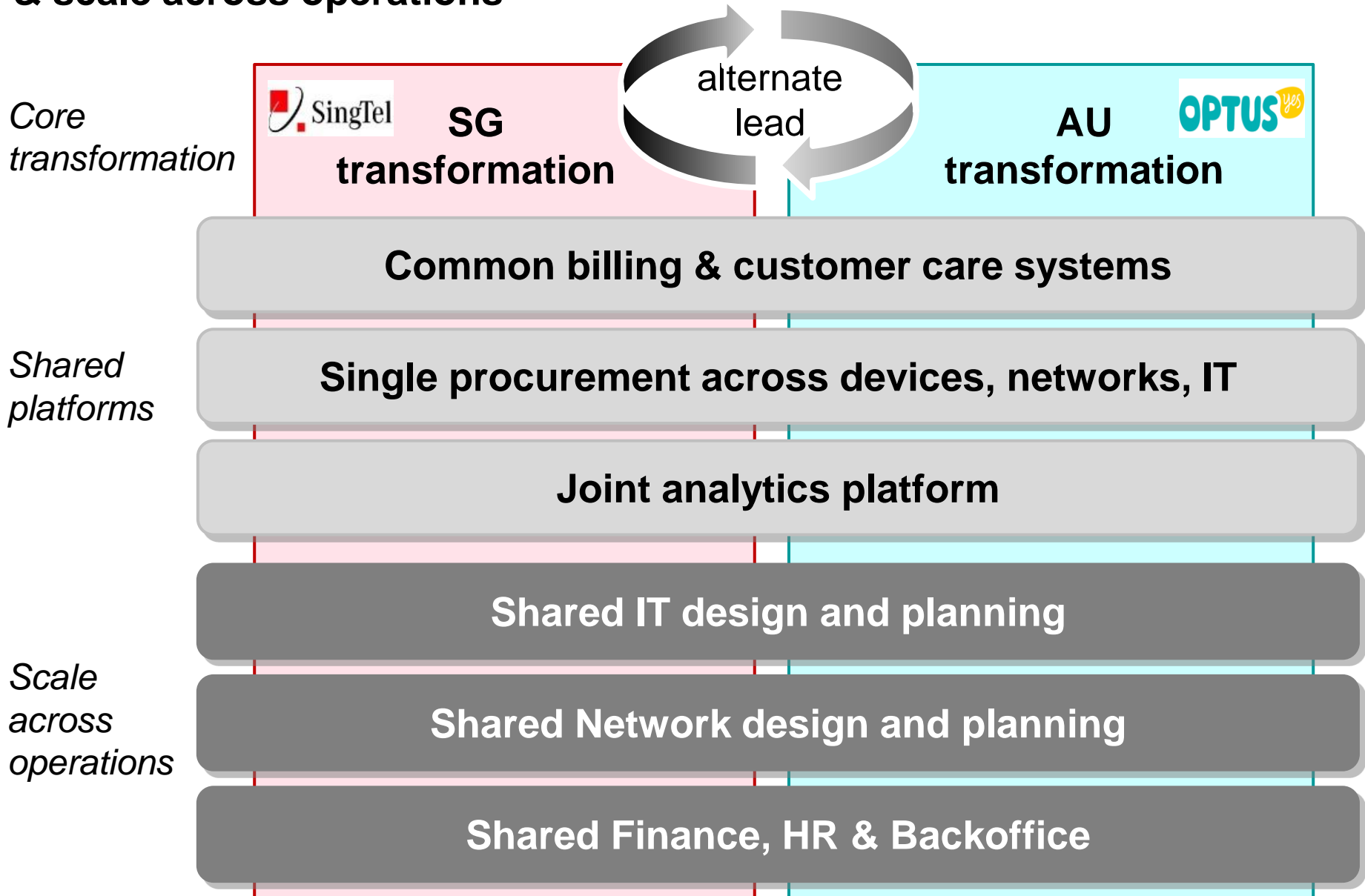
- Churn reduction
- Upsell / cross-sell improvements

## Costs



- Opex savings
- Capital efficiency

# We are underpinning our SG & AU transformation with shared platforms & scale across operations



# **In parallel, we are implementing a strong turnaround initiative focused on rebuilding AU market**

In FY15, this includes :

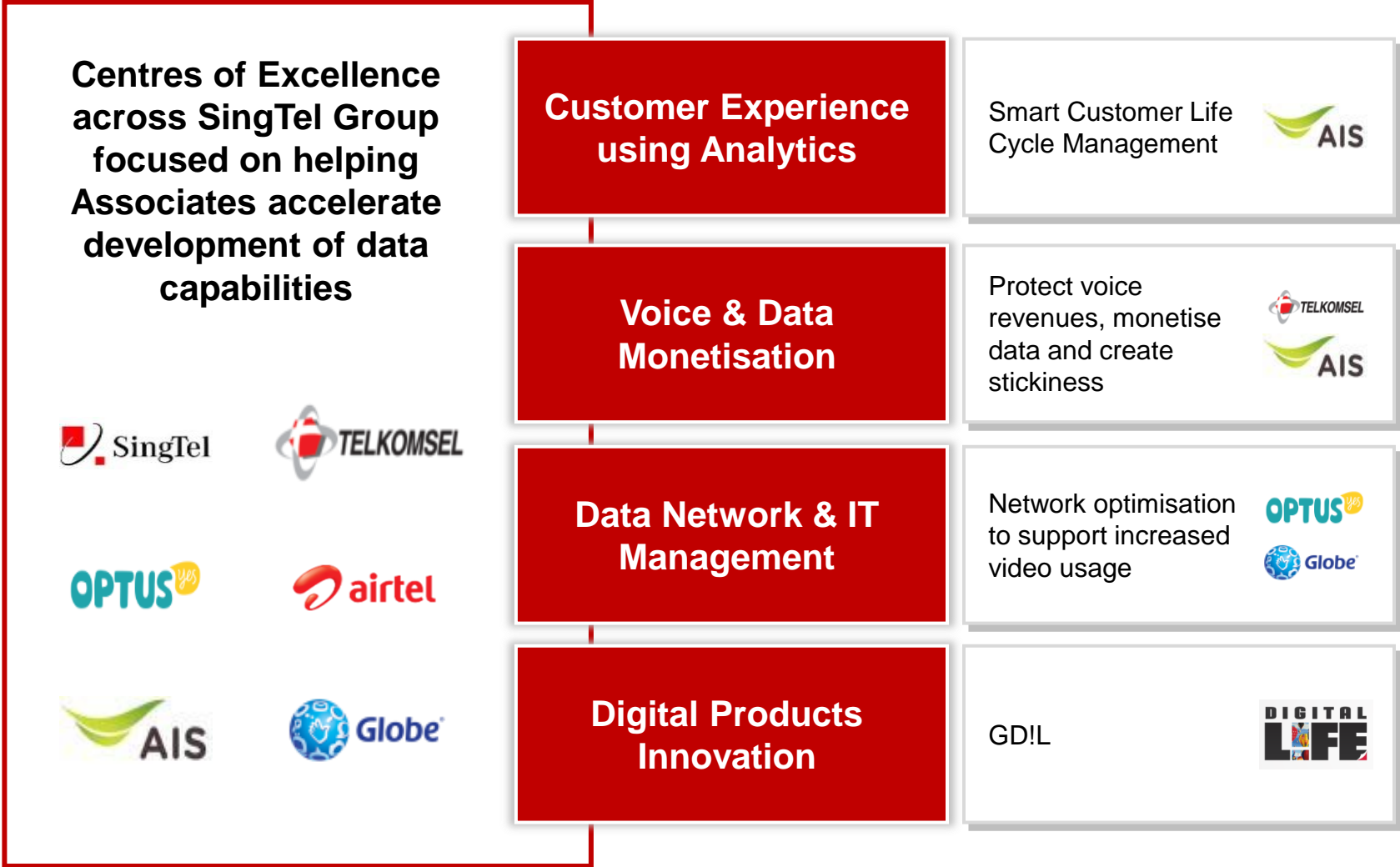
**Reinforcing our brand positioning**

**Launching breakthrough products to attack Data Sharing & BYO**

**Doubling our Share-of-Voice in the market**

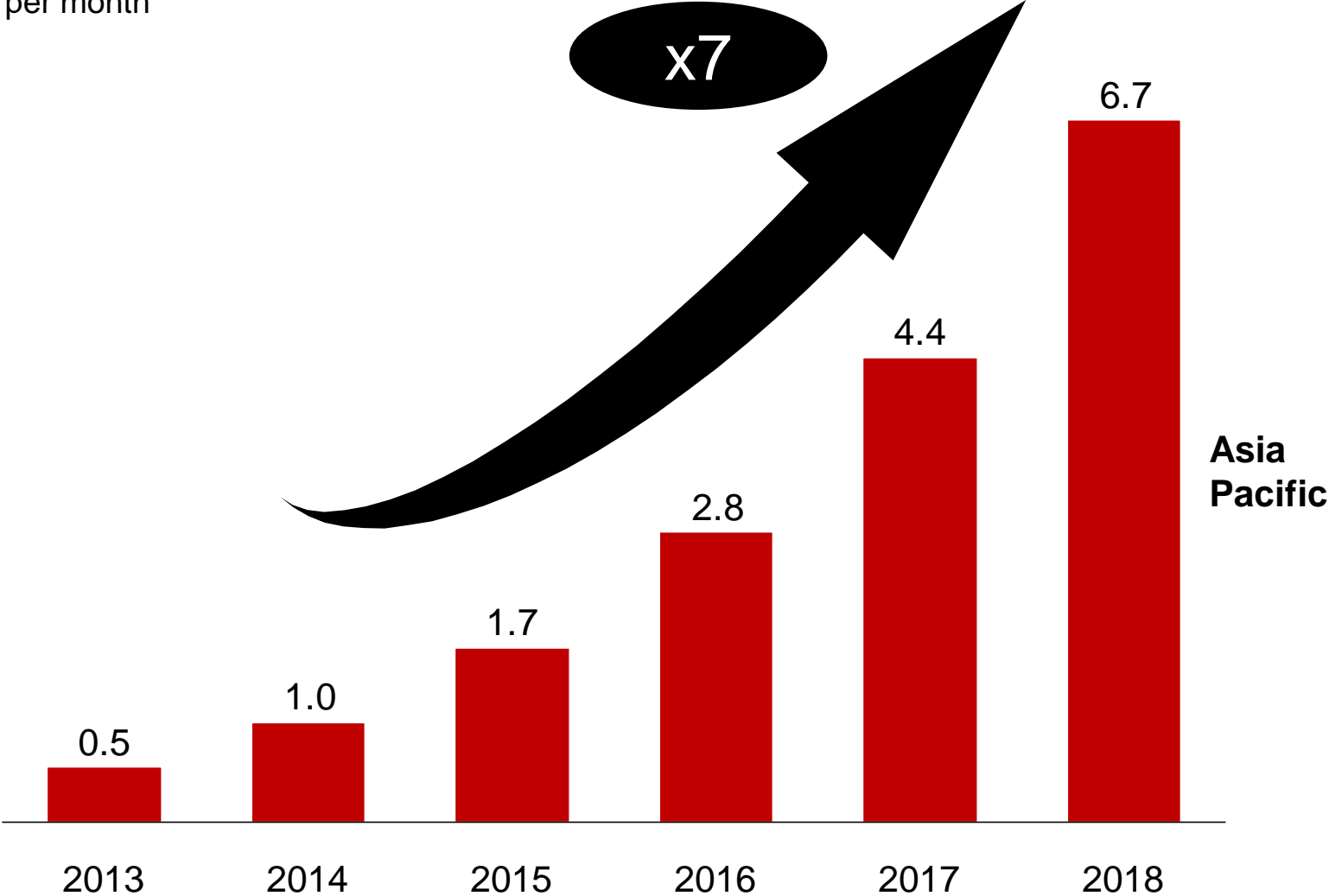
**Aggressively addressing customer growth in Mobile & Fixed**

# To unlock further value at our Associates, we will be increasingly leveraging Group synergies and scale



# With data growth set to explode, our 4-S strategy will serve us well for the future

Mobile Data Traffic  
Exabytes per month



Source : CISCO VNI Jan 2014 (ITU)



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