

Progress is

change + diversification



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STARHUB INVESTOR DAY 2020
CBG Re-Invent Strategy

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FORWARD-LOOKING STATEMENTS



The following presentation may contain forward-looking statements by StarHub Ltd (“StarHub”) relating to financial trends for future periods.

Some of the statements in this presentation which are not historical facts are statements of future expectations with respect to the financial conditions, results of operations and businesses, and related plans and objectives. These forward-looking statements are based on StarHub’s current views, intentions, plans, expectations, assumptions and beliefs about future events and are subject to risks, uncertainties and other factors, many of which are outside StarHub’s control. Important factors that could cause actual results to differ materially from the expectations expressed or implied in the forward-looking statements include known and unknown risks and uncertainties. Because actual results could differ materially from StarHub’s current views, intentions, plans, expectations, assumptions and beliefs about the future, such forward-looking statements are not and should not be construed as a representation, forecast or projection of future performance of StarHub. It should be noted that the actual performance of StarHub may vary significantly from such statements.



CBG ECOSYSTEM

Connectivity, Customer Satisfaction, Branding, Product Simplification,
Digital Journey as Core



StarHub Brand: #BeTheChange

Customer Lifecycle Management

Mobile Transformation

Home Transformation

Channel & Service Transformation: Digitalisation

New Ways of Working

Customer centric mindset

Cost-effective execution

Simplified systems & processes



KEY STRATEGIES

Driving Revenue Growth & Streamlining Costs



DIFFERENTIATE

CHALLENGE

DIGITAL FIRST

SIMPLIFY

Achievement:

- Mobile: Hello Change
- StarHub TV+

Next steps:

- Mobile Transformation
- Pay TV Transformation

Achievement:

- Giga!
- 3rd party content/OTT partnership

Next steps:

- Grow Giga! market share
- Garner more 3rd party content partnerships
- Enhance & increase adoption of digital touchpoints

Achievement:

- First to launch 5G & cloud gaming
- Fastest Network (IMDA, 2019)

Next steps:

- Review operating model for enhanced cost efficiencies

Achievement:

- Digital Rewards
- Homehub Plus
- Refreshed retail experience (*Plaza Singapura flagship store*)

Next steps:

- 5G new possibilities & opportunities



5G ON SINGAPORE FASTEST NETWORK

Network differentiation with content and gaming partnerships



Hello 5G

Hello Mobile+.

Bigger, better plans with FREE entertainment and more.

+ Be the first to enjoy 5G service.

| | | |
|---|---|---|
| Mobile+ \$65 <small>2-year plan</small> 30GB +200 mins +200 SMS | Mobile+ \$95 <small>2-year plan</small> 60GB +600 mins +600 SMS | Mobile+ \$155 <small>3-year plan</small> 120GB +1000 mins +1000 SMS |
|---|---|---|

Enjoy these benefits with our Mobile+ plans.

- Free 12-month StarHub TV+ for endane shows & movies.
- Free 1-month Antstream with 1000s of classic games.
- Free Caller Number Display.

Sign up to a Mobile+ plan now!

← Integrated 5G Experience →

Content

Gaming

2020



FREE 12-month StarHub TV+ with Mobile+ plans



Antstream 1000+ classic arcade cloud gaming

Future

New partnerships

PAY TV TRANSFORMATION



Why choose when you can have it all?

Hello StarHub TV+
Your favourite streaming services, apps and TV shows, in one place.

From **\$15**/month

- + Enjoy 12 months HBO Pak on us
- + Trial without commitment for first 2 months

NETFLIX HBO GO ANYWHERE +
BBC iPlayer and more...

DREAM RAIDER
HBO
Ch 161
Dream Raider
Every Sat, 10pm

EXPERIENCE

- Simplified products (IPTV + OTT) with unified pricing
- Unified experience across big and small screens
- Plug-and-play

COST STRUCTURE

- Completed cable-to-fibre migration; transformed to variable cost model
- Converted most content providers to variable fee model

THE FUTURE OF BROADBAND

Carving A Niche – Gaming

- Performance Differentiation
- Lower ping times; reduced latency



New Technologies

- 5G Fixed Wireless Access & WiFi6
- Enhanced experience
- Plug-and-play; no installation lead time



Mesh Solutions

- Plug-and-play; easy installation via mobile app
- Enhanced WiFi coverage



RE-IMAGINE CHANNEL DISTRIBUTION

Differentiated customer experience & cost effective operating model



ONLINE

- Core sales channel
- Simplified one click journey



RETAIL DNA

- Experiential retail
- Effective footprint across Singapore

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An aerial photograph showing three business professionals (two women and one man) running along a diagonal path that separates a dark asphalt surface from a green grassy area. The path is marked with a dotted line. In the upper right, there are several green icons: a star with the number '1', a person running, a three-way arrow, and a computer monitor with data points.

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