

GROUP CONSUMER

Singapore Consumer

SingTel Investor Day

3 June 2014

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Strategic Focus Areas

Accelerating Data Monetisation

- › Address data needs of different customer segments
- › Drive customers to use more data locally
- › Ensure 'no bill shock' and increase number of countries for unlimited data roaming packages to increase data roamers

Winning In The Home

- › Strengthen bundles and drive fibre adoption
- › Promote ARPU growth for current customer base
- › Leverage on mioTV and other innovative services as important differentiators

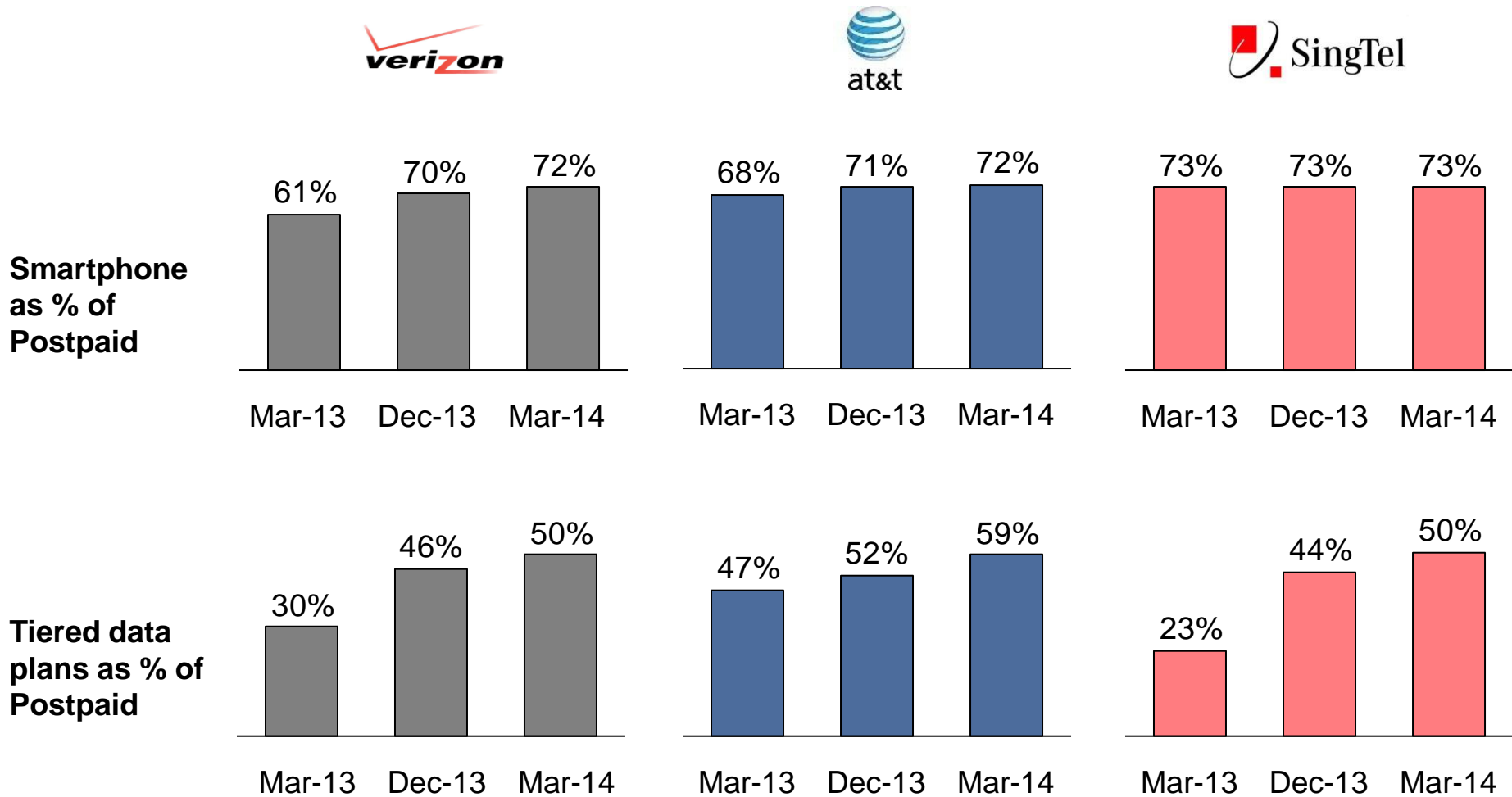
Transforming Cost Base

- › Drive towards self-help to improve customer experience while revamping existing cost structure
- › Push sales transactions online
- › Increase efficiency of network design and spend

Maintaining Network Lead

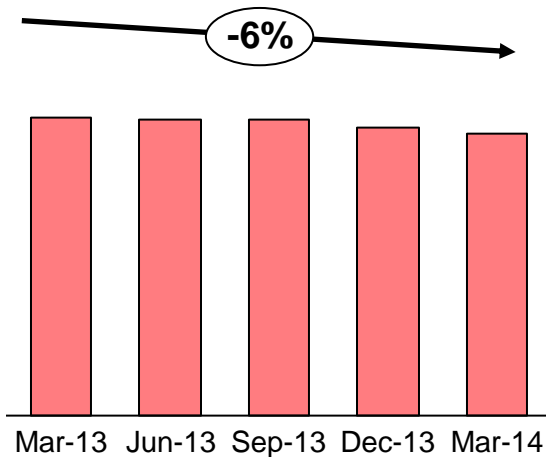
- › Invest in market-leading speed technologies
- › Develop an intelligent network

Good progress in driving smartphone penetration and tiered data plans

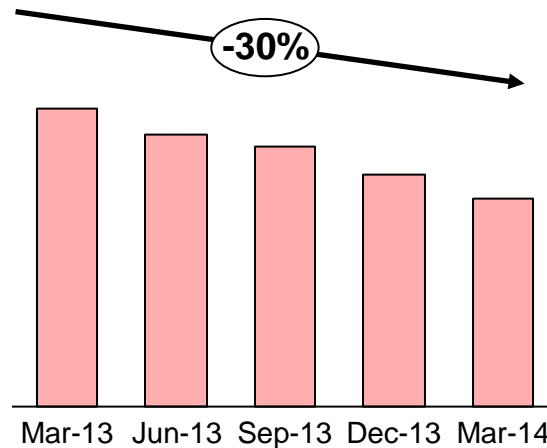


Data usage growing steadily to mitigate decline in voice and SMS

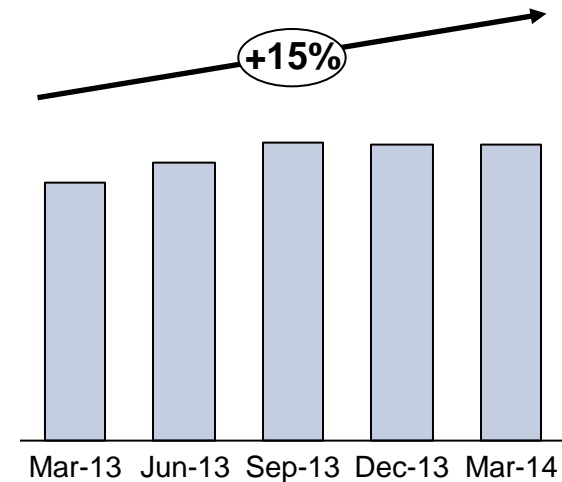
Minutes of use
per subscriber per month



SMS volume
per subscriber per month

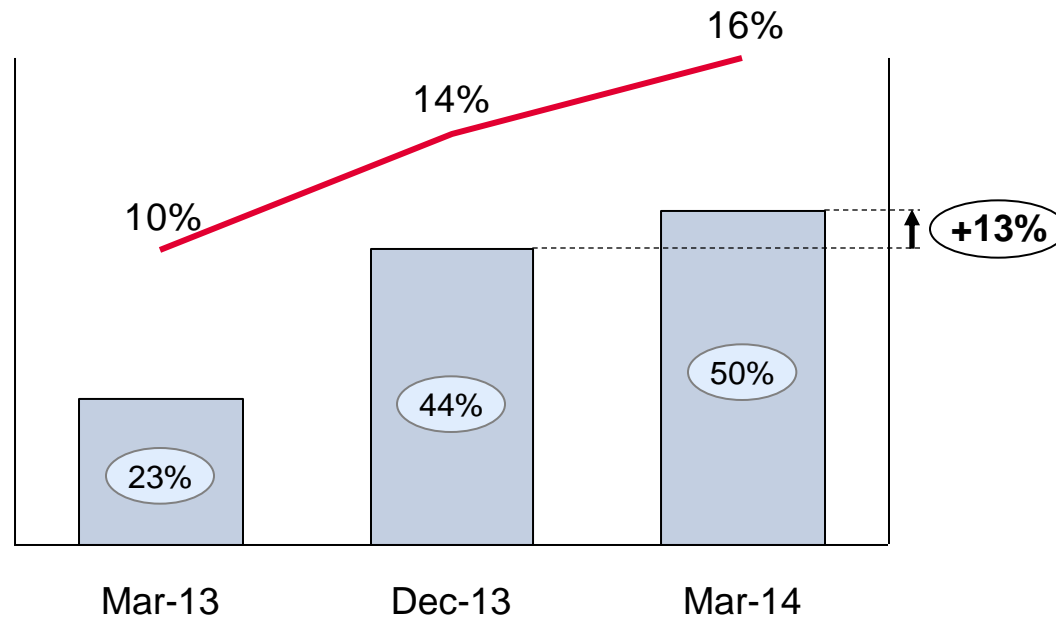


Data usage (GB)
per subscriber per month



Data monetisation efforts gaining traction since introduction of tiered data plans in Jul-12

Postpaid customers on plans with tiered data bundles



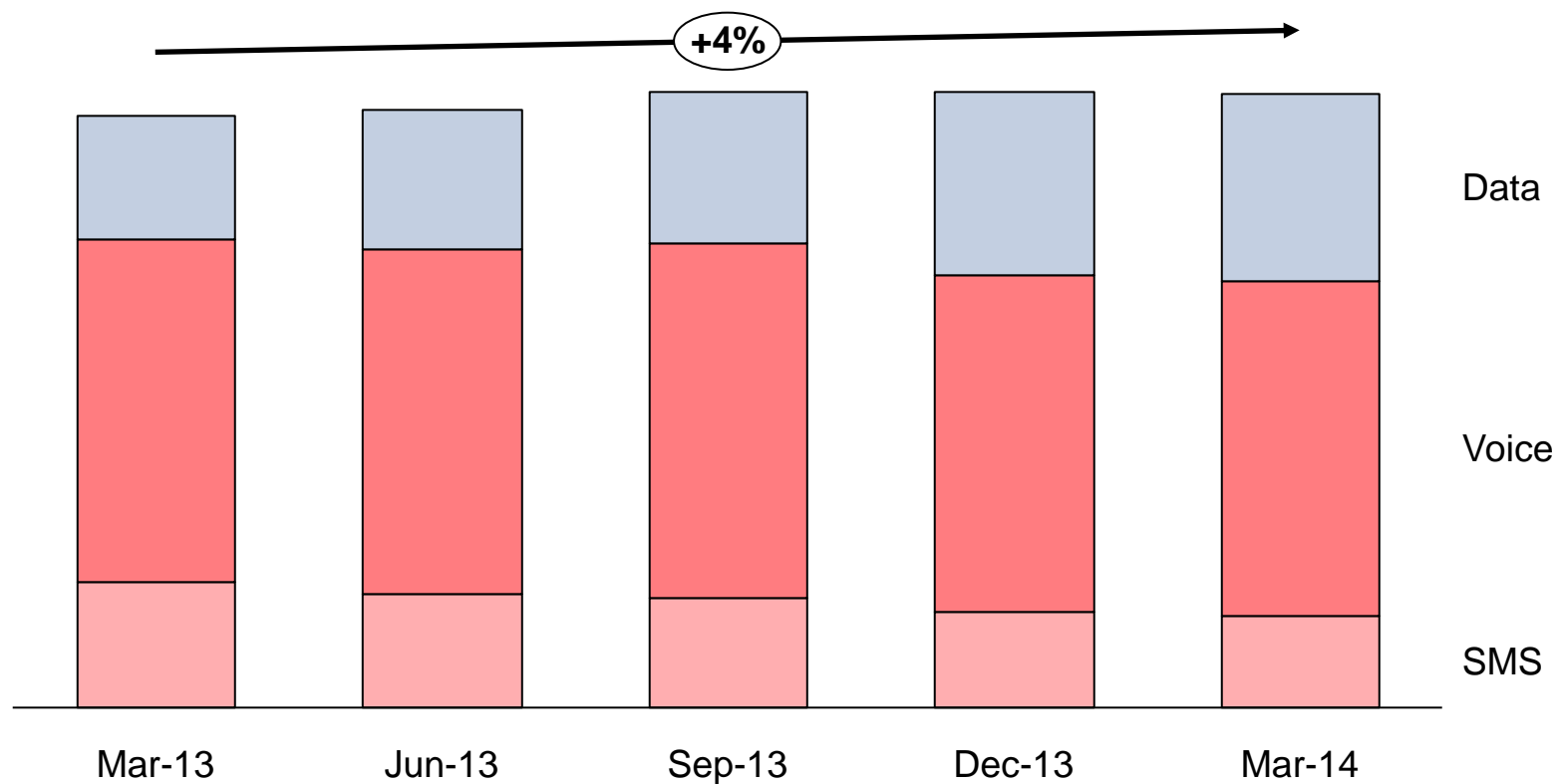
— % of lines exceeding data bundle

■ % subscribers on plans with tiered data bundles

○ X % of Postpaid base

Data revenue is now the main contributor towards overall mobile growth

Mobile Revenue (ex Roaming)
S\$b



More initiatives are being implemented to help accelerate growth in data revenue

Partnerships with OTT players



- › Prepaid plans for access to popular Social Networking Apps

Optimising data pricing

- › Increased data rate from \$5.35/GB to \$10.70/GB for excess usage



- › DataMore VAS to supplement data bundle

Worry-free roaming



- › Network lock to protect data roamers from unintended charges on non-partner network

Reaching out to Silver segment



- › First discounted mobile data plans for seniors

Winning in Consumer Homes

Executing a Differentiation strategy

Consumer home revenue S\$127m, up 6%

Strengthening the bundle

Households on bundles

> Up 6%

368,000

Driving fibre adoption

Fibre Customers

> approx. >50% market share

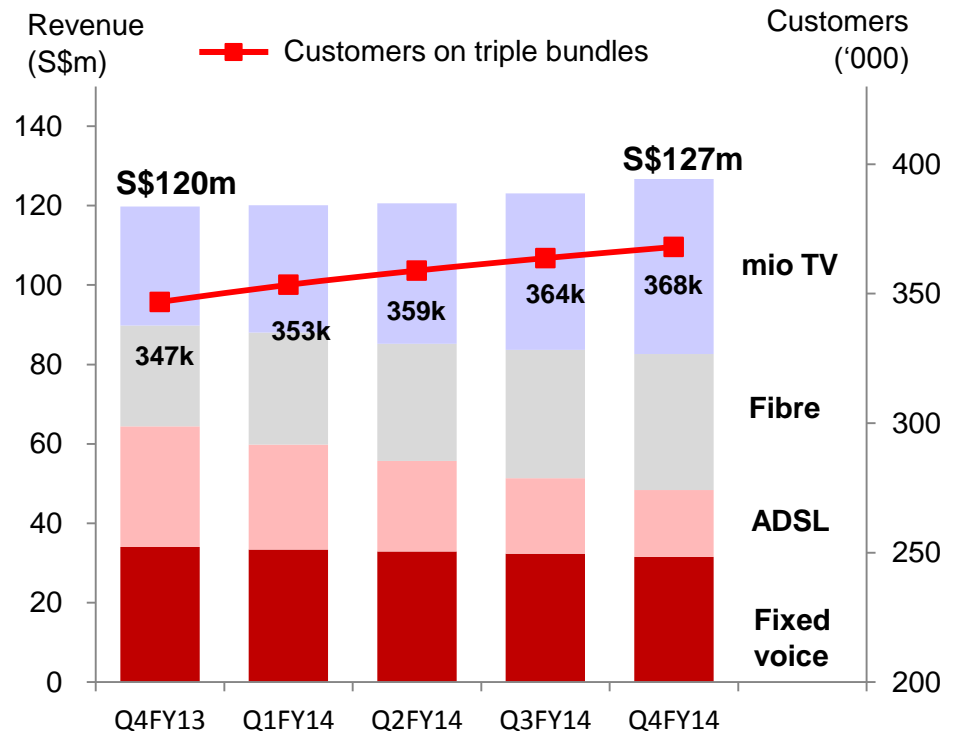
289,000

Growing household spend

Household ARPU

S\$58

> Up 9%



miotV – A Key Differentiator To Home Strategy

miotV is now serving more than 418,000 customers



We will continue to...

Strengthen our content suite

New channels added:



Differentiate through the experience

- › Fully harness synergies with Internet and Voice services to drive home leadership
- › Provide On-the-Go functionality & convenience through companion app, mioTV GO, topping it off with new, exciting features for World Cup
- › Invest in original production that resonates with the customers and their everyday life

Enhancing customer experience while transforming cost structure

Solution: Encourage Self-Service

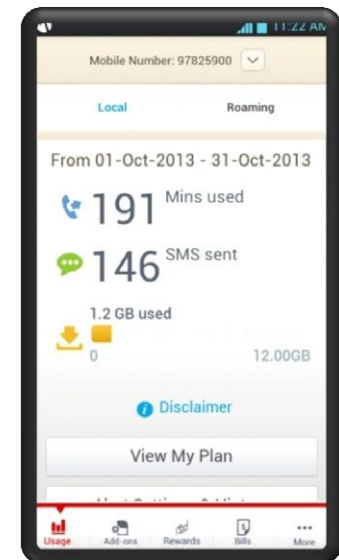
- › Simplified Self-Help Kiosk – customers can obtain a queue ticket at SingTel Shop in 3 quick steps
- › Enhanced MySingTel app capabilities and user-friendliness
e.g. Purchase of daily unlimited data roaming plans
- › Self-help videos launched on Youtube to address common issues
e.g. How to Check Android Connectivity Settings

Solution: Push Sales Transactions Online

- › Enhance our eShop experience and provide more services options online

Outcome

- › Revamp of existing cost structure
- › Customers are able to solve their problems faster and easier, thus improving their experience with us

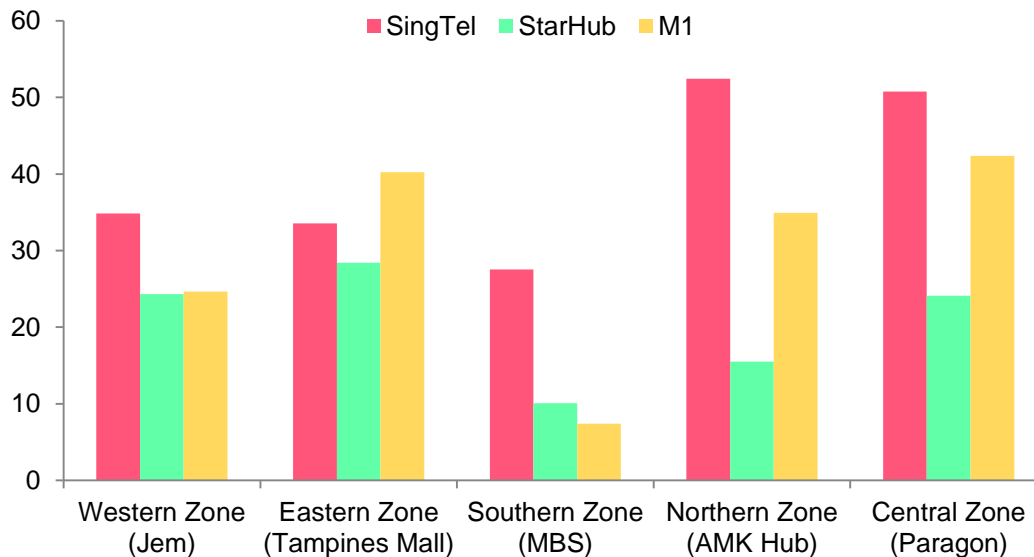


Investing in market-leading speed technologies to maintain network leadership

Mobile

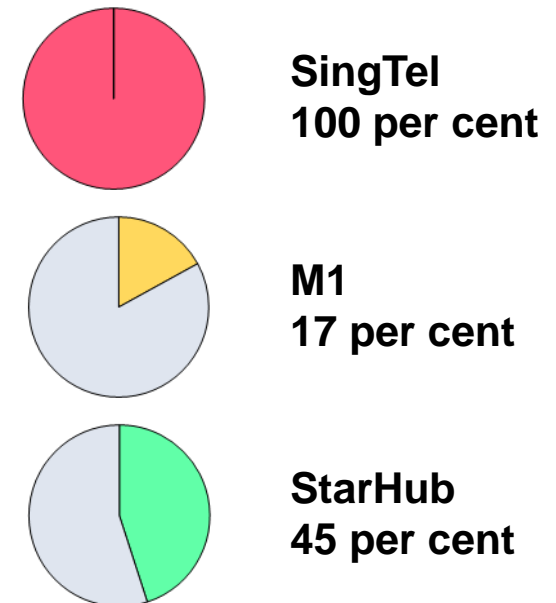
Download speed test of Singapore telcos

Download Speed (Mbps)
Indoor test unless otherwise stated



Google Play Download speed on 4G @ Circle Line MRT

Progress of Plants vs. Zombies 2:
Downloaded within 2 mins (File size: 214MB)

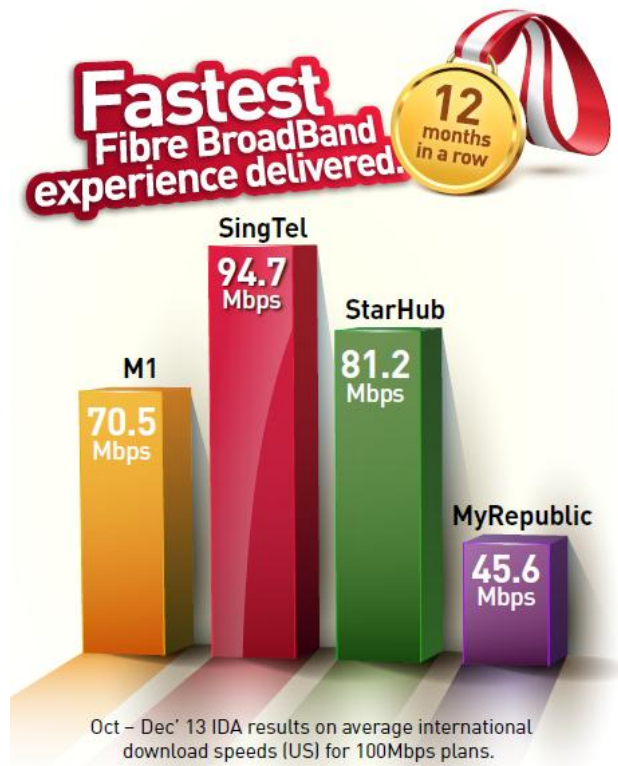


Source: [ST Digital Life on 22 Jan 2014](#)

Source: [HardwareZone.com.sg](#)
2013 Year-End (Dec) Review of 4G LTE Networks in Singapore

Investing in market-leading speed technologies to maintain network leadership

Fibre Broadband



READERS' CHOICE

The Readers' Choice Awards are given to products and services with the highest number of votes cast by our readers of HWM and HardwareZone.com.

| CATEGORY | WINNER |
|--|---------|
| Best 4G Network (Singapore) | SingTel |
| Best Telco (Singapore) | SingTel |
| Best Fibre Broadband Service (Singapore) | SingNet |



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