



Miscellaneous

* Asterisks denote mandatory information

Name of Announcer *	SINGTEL
Company Registration No.	199201624D
Announcement submitted on behalf of	SINGTEL
Announcement is submitted with respect to *	SINGTEL
Announcement is submitted by *	Chan Su Shan (Ms)
Designation *	Company Secretary
Date & Time of Broadcast	15-Mar-2013 07:12:13
Announcement No.	00007

>> Announcement Details

The details of the announcement start here ...

Announcement Title * SingTel Investor Day 2013 - Group Digital Life

Description

Attachments

SingTelInvestorDay2013-GroupDigitalLife.pdf

Total size = **1504K**
(2048K size limit recommended)

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Group Digital L!fe

SingTel Investor Day

15 March 2013

Allen Lew

CEO, Group Digital L!fe

GROUP
Digital L!fe

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Critical trends which drive opportunities for GDL



1

Mobile at the centre of communication/ media activities



CUSTOMERS

3

More **price sensitive** and **time poor**



2

From infinite choices on the internet to **personalised** and **targeted** information



We have adapted our value propositions to cater to consumer needs and preferences in the digital space

*Moving from being an **efficient** and **effective** provider of communication services...*

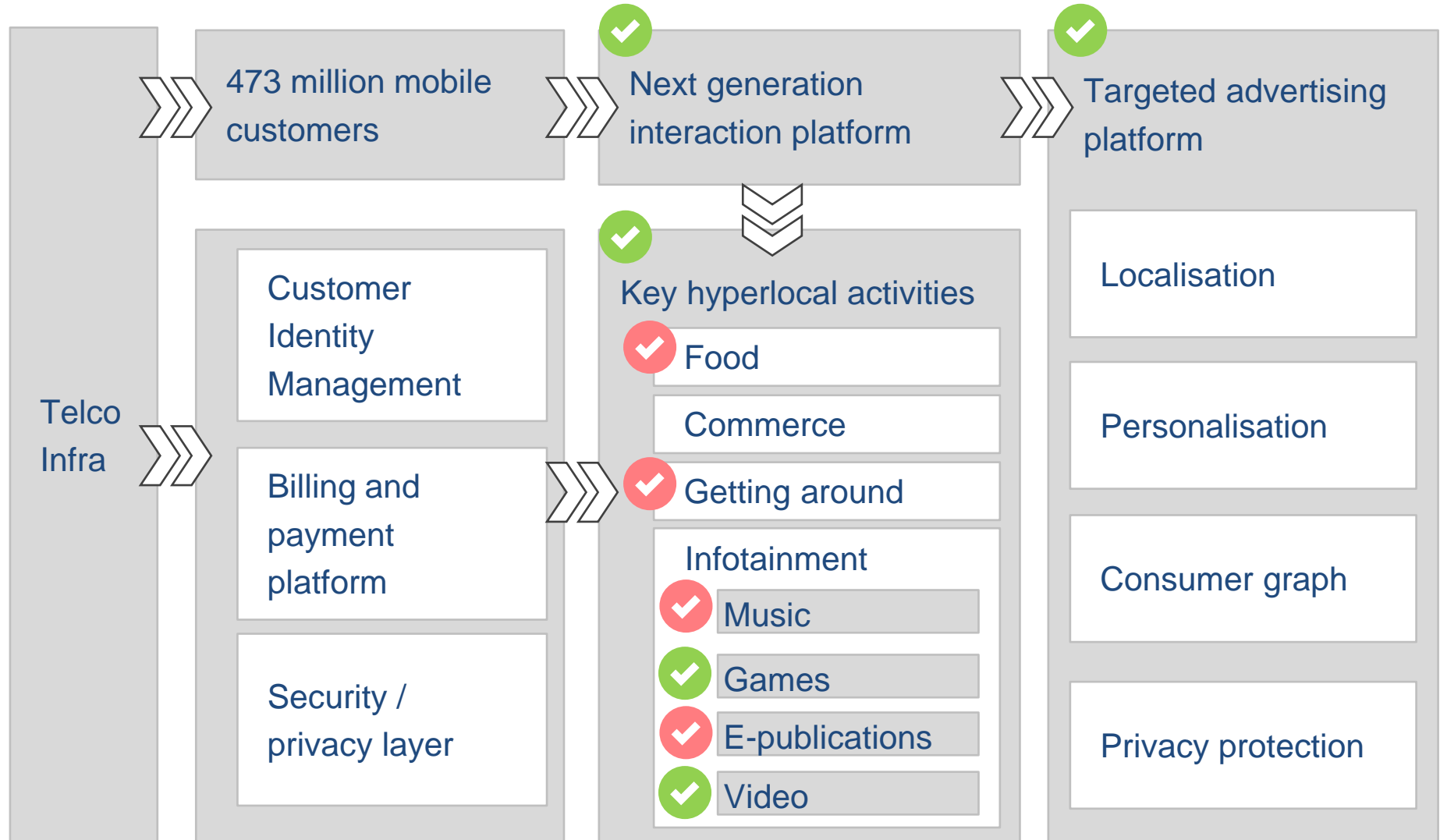


*... To **engaging** customers through a **better experience** that links them to their friends and the world around them*



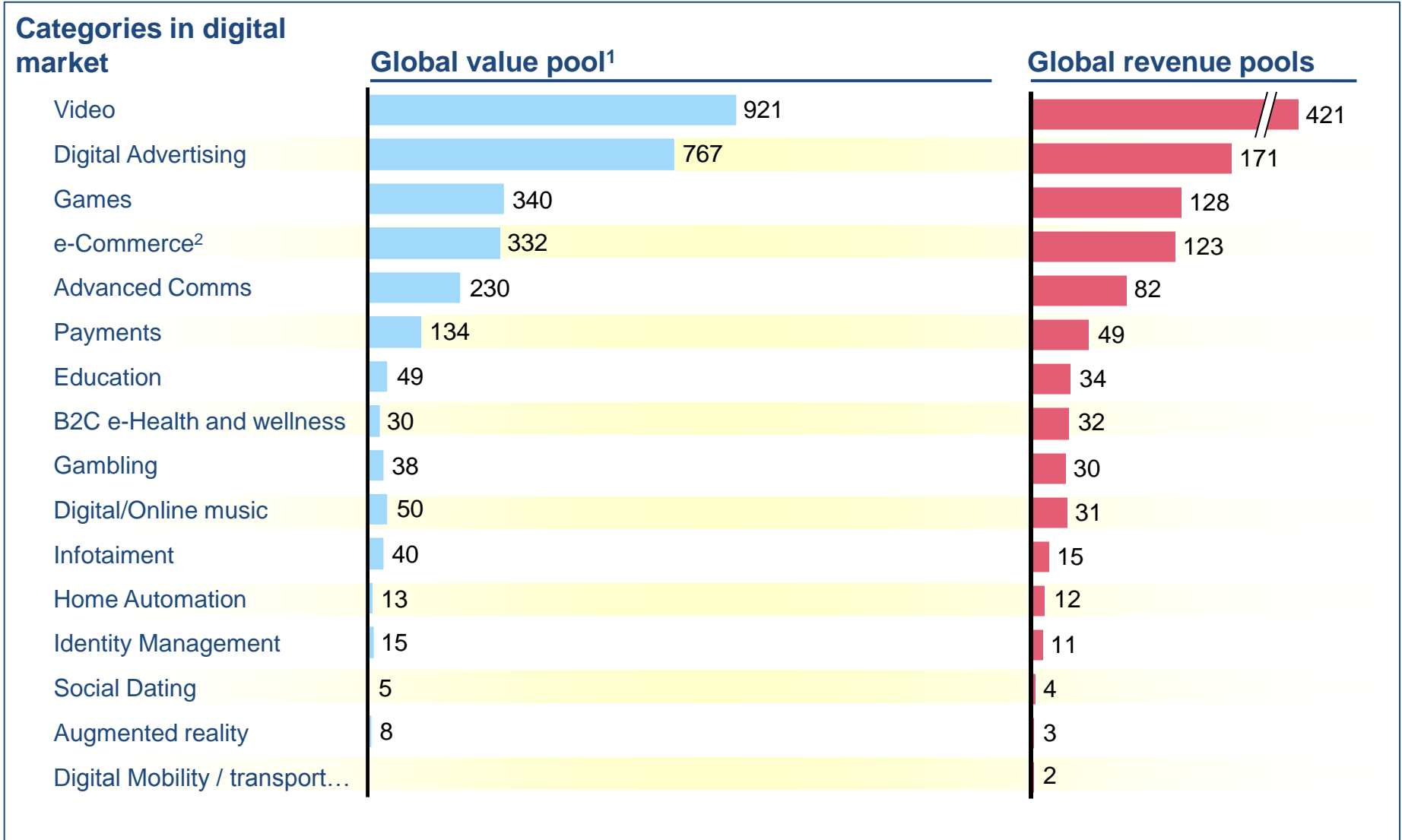
To fulfil our customer promise we are enhancing our digital platforms

- ✓ Core focus
- ✓ Partnerships



We want to target the most relevant value & revenue pools...

USD billions, 2017



1) EV/Rev multiples benchmarked using companies that operate primarily in that segment. Mean multiples is used to calculate value pool

2) Not included 1.5 trillion of additional ecommerce of physical goods

SOURCE: PWC, Goldman Sachs, Pyramid, Gartner, IDC, McKinsey Global Banking pools database, Capital IQ, Press search

... and select the areas in which we have assets that can help us win

Customer base /
relationship



473
million
mobile
customers

Rich data (and
deeper customer
knowledge)



Location,
true social
graph,
ID...

Multiple payments
mechanisms

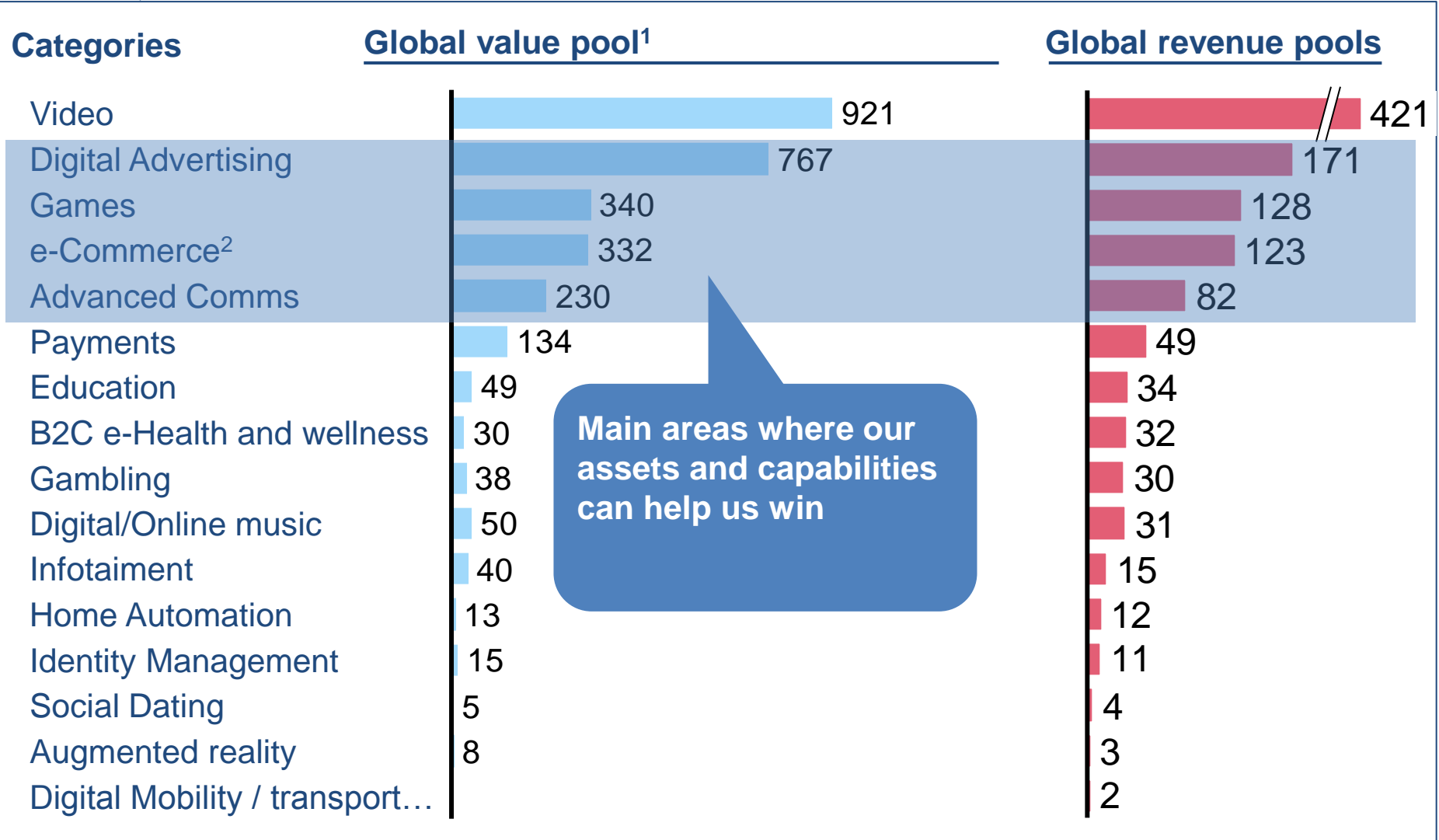


Pre-pay,
post-paid,
OTT...

Note: Other relevant assets such as our network or our reach with our point of sales can also help us win

This is why we are only playing on what we called “our vital few”

USD billions, 2017



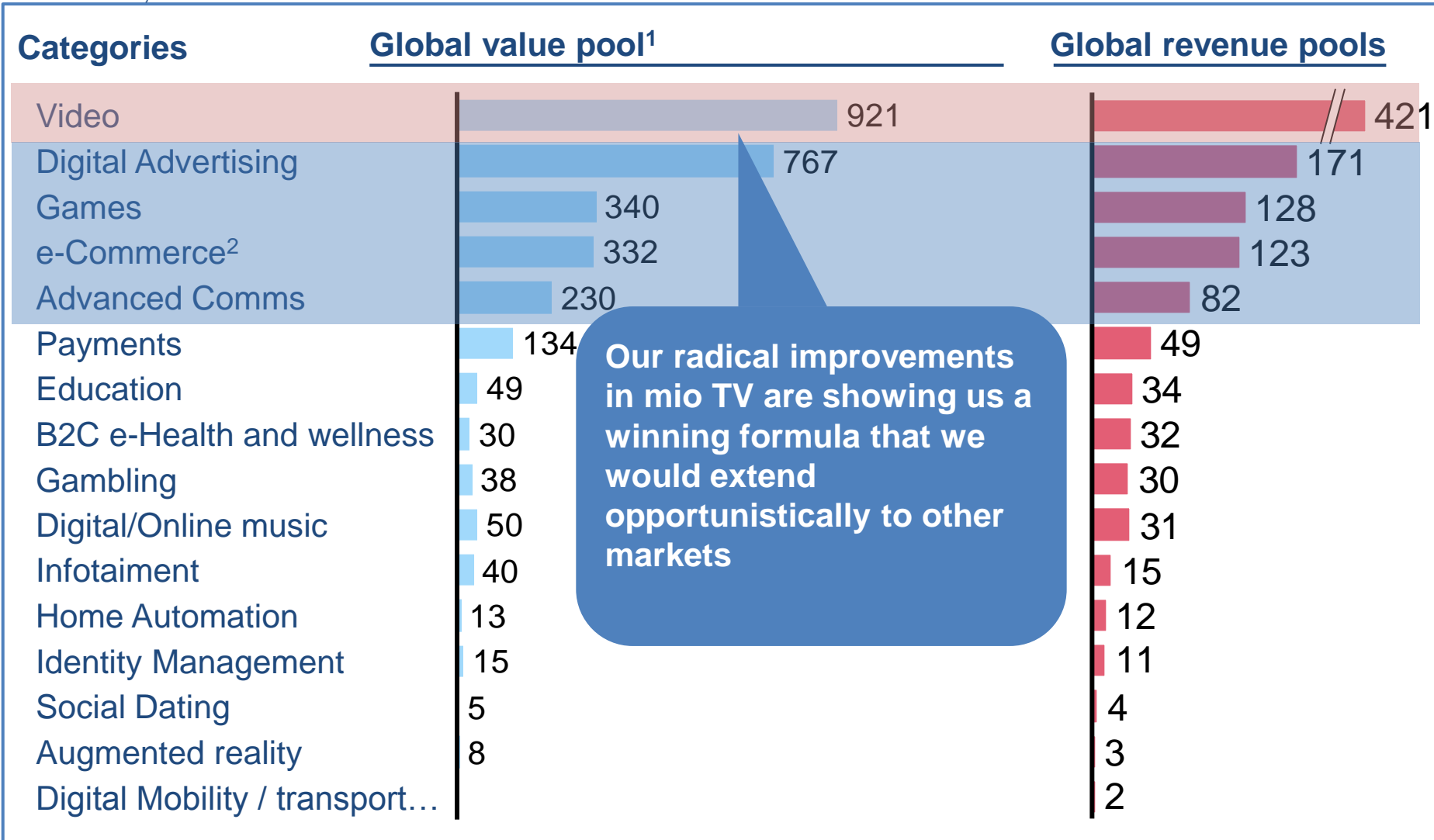
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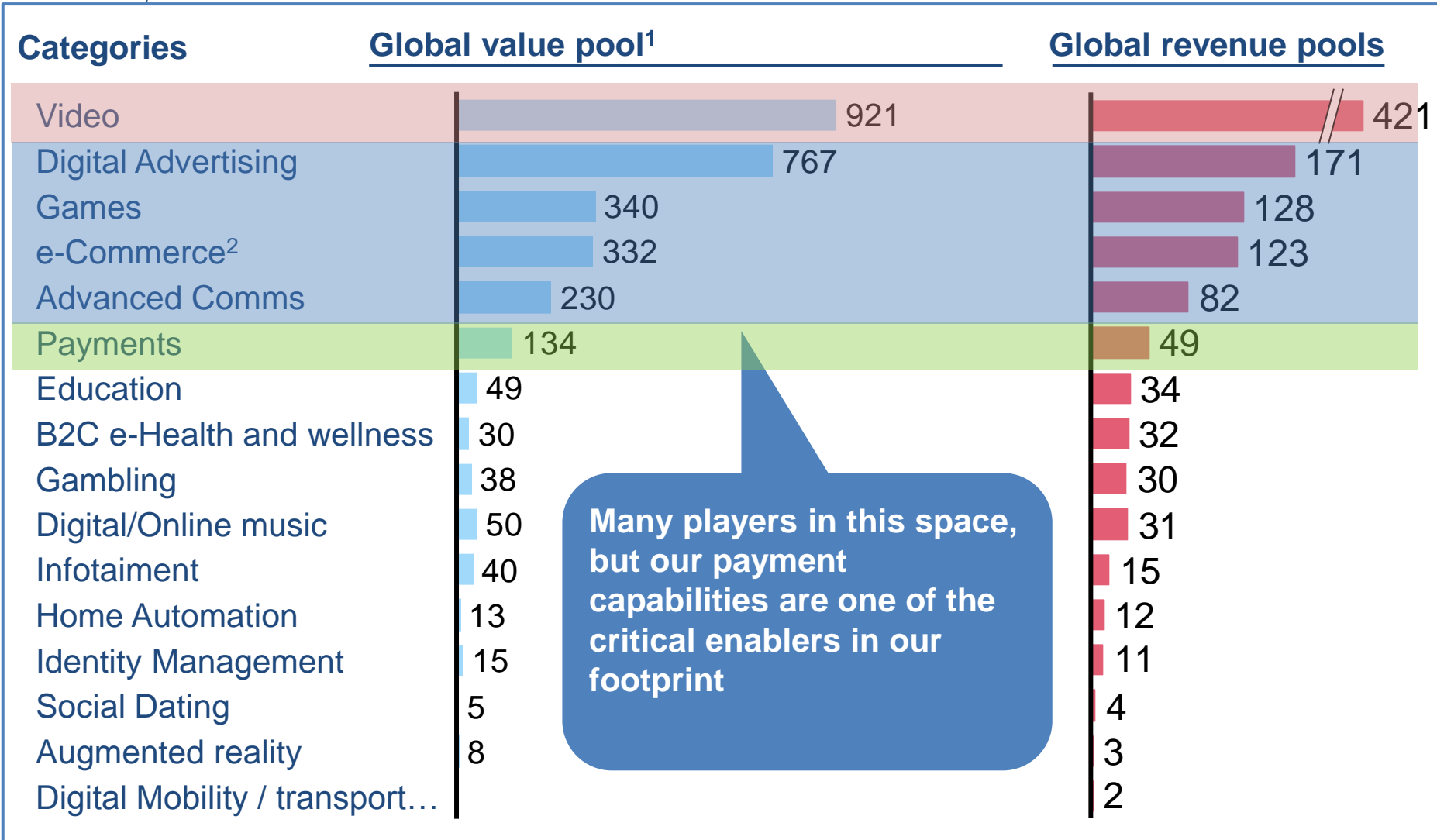
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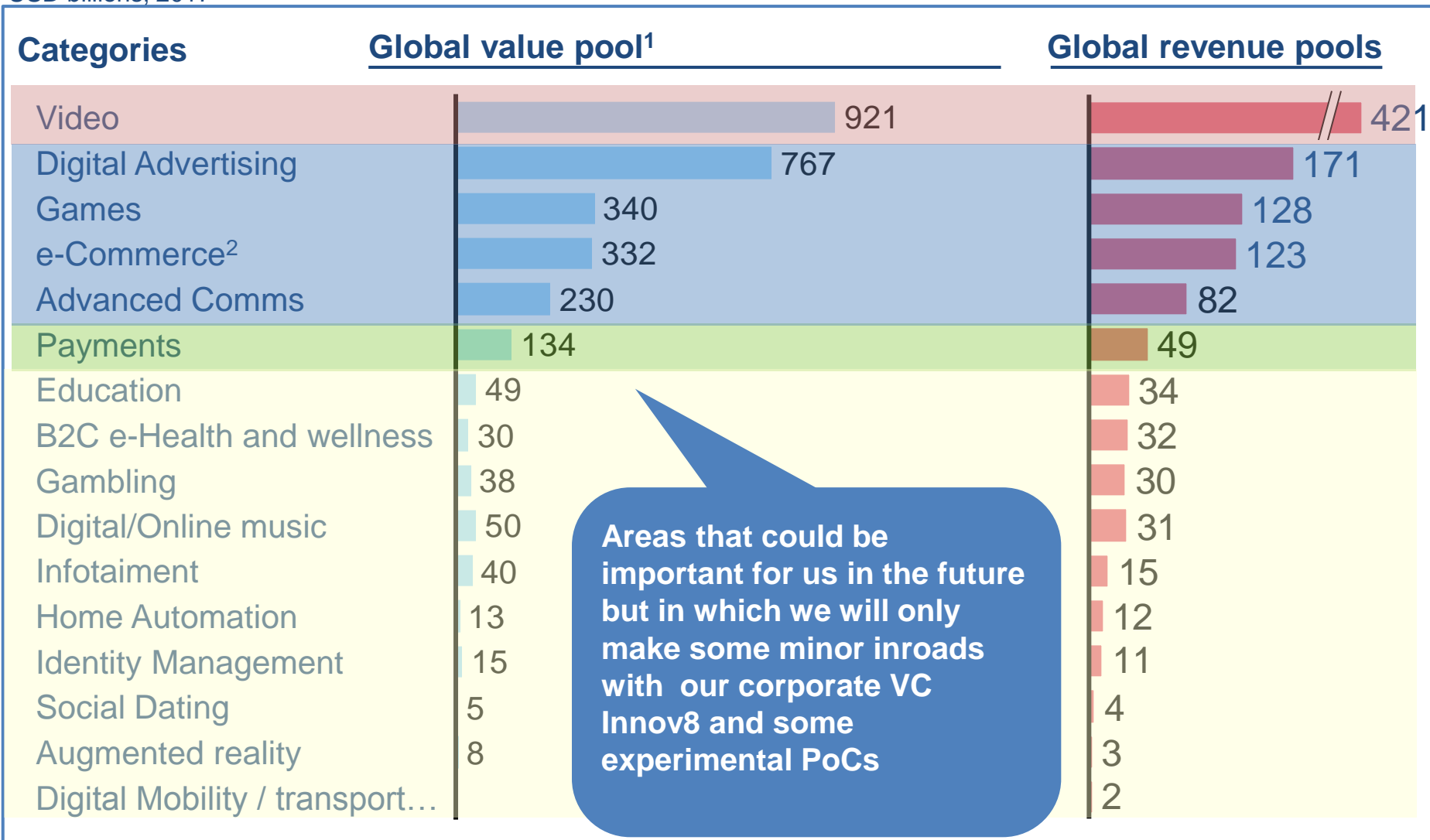
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USD billions, 2017



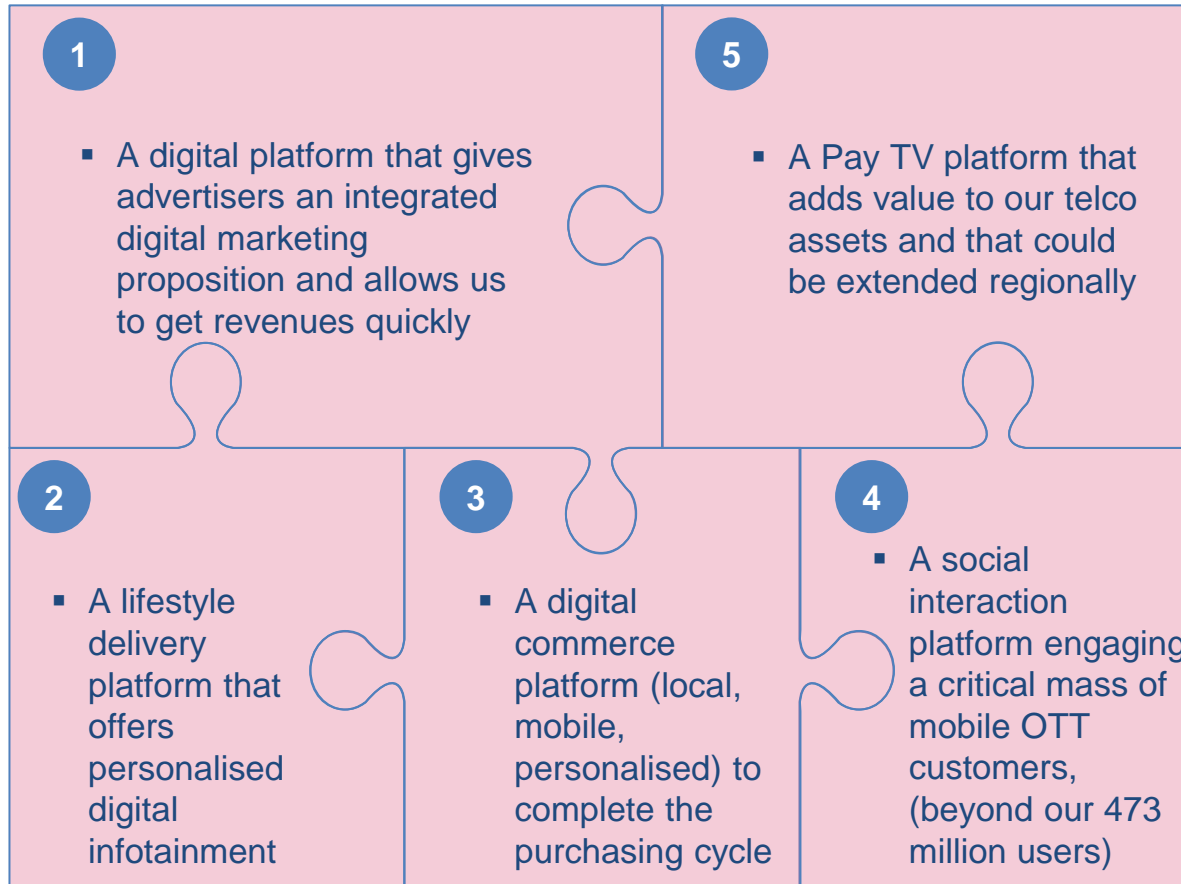
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We have a clear strategic plan towards becoming a digital player

Vital opportunity areas for GDL



Our play

- 1 Leading and shaping the global digital advertising revolution
- 2 Doubling down our successful plays in infotainment
- 3 Participating in the upside of the mCommerce growth
- 4 Owning the social and digital interactions space
- 5 Consolidating our TV Play in Singapore and explore opportunistic options within our footprint

1

In digital marketing, we have a clear execution path with key milestones

Aspiration

Become the leading digital advertising player in Asia and one of the top three globally, providing value for both consumers and advertisers while building loyalty for SingTel



We want to deliver end-to-end Digital Marketing solutions for customers, advertisers, and publishers

1

We have developed techniques to harness location data that is highly attractive to advertisers while protecting consumers' privacy

From

Single-point location information

- **Messy** and sometimes inaccurate
- **Less meaningful** – we can't tell if a person is passing by or visiting the place, why, or if he/she is likely to visit again
- **Limited advertising opportunities** – here-and-now

Mon, 8pm, April 5th, 2012



To

Multi-point location patterns

- Stable **repeated behaviour**
- Allows for **prediction** of future behaviours and destinations
- **Premium advertising opportunities**

Monday to Friday
10am to 6.30pm



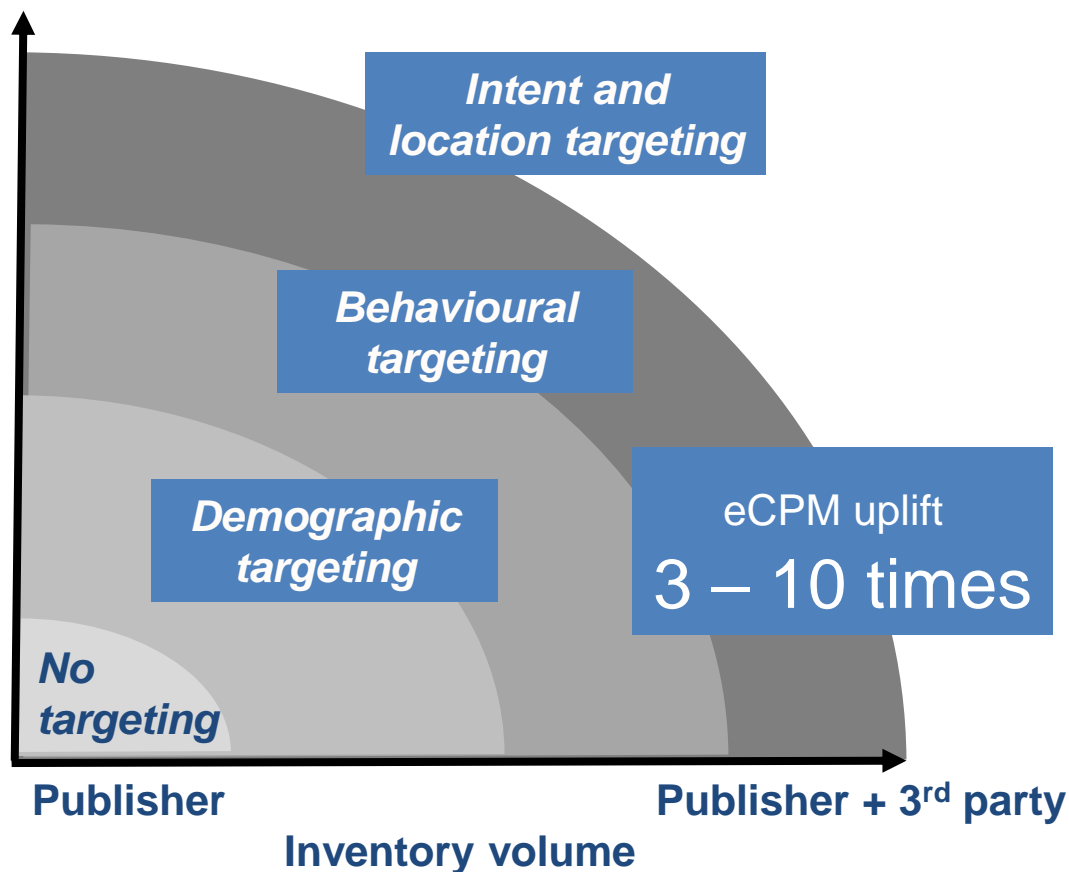
Friday
9pm to 11.30pm



1 Our ability to tailor our delivery and understanding of consumer preferences will empower consumers to truly “own” their consumer graph

Value to advertisers

Value to consumers



Opt in model:

- Empowering consumers to own their social graph and their location graph
- Making users aware of their data and making transparent to them who use what data

1 We are leveraging the Group's assets to enhance our play

Leveraging our Assets

473 million subs

- Bringing our platform to all our telcos (speed to market) and to other telcos

Location, true social graph, ID...

- Improving value of existing inventory leveraging our data
- Enriching third-party inventory with our data

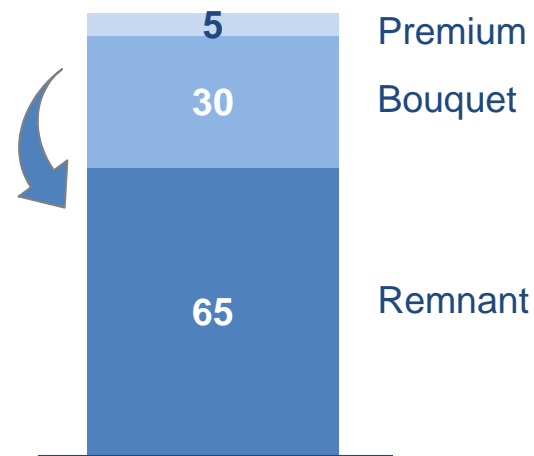
Pre-paid, post-paid, OTT...

- Completing the transaction cycle with coupons and loyalty programs

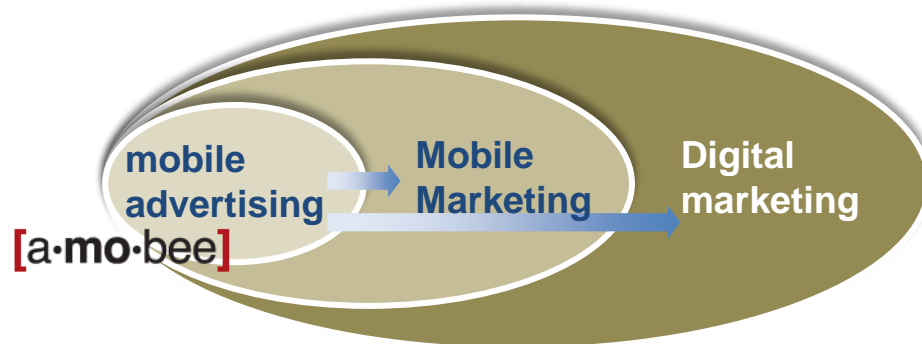
Extending into new inventory types and services

[a·mo·bee]

- Converting bouquet and remnant inventory into premium by adding value with enriched data info



- Expanding across the digital marketing value chain



2

In the hyper-local business, we have a track record of delivering state-of-the-art services to delight our customers starting with Singapore and Indonesia

Music

Lead the shift in consumption of digital music service through integrating social interactions and gamification in our offerings

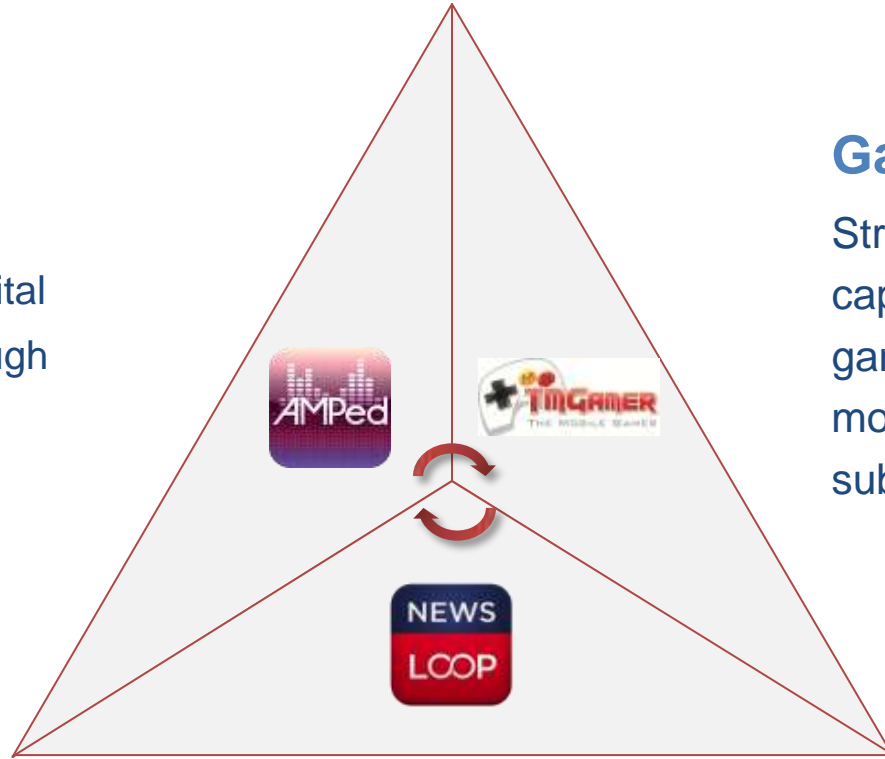


Games

Strengthen key capabilities to scale a gaming platform and monetise our subscribers

News

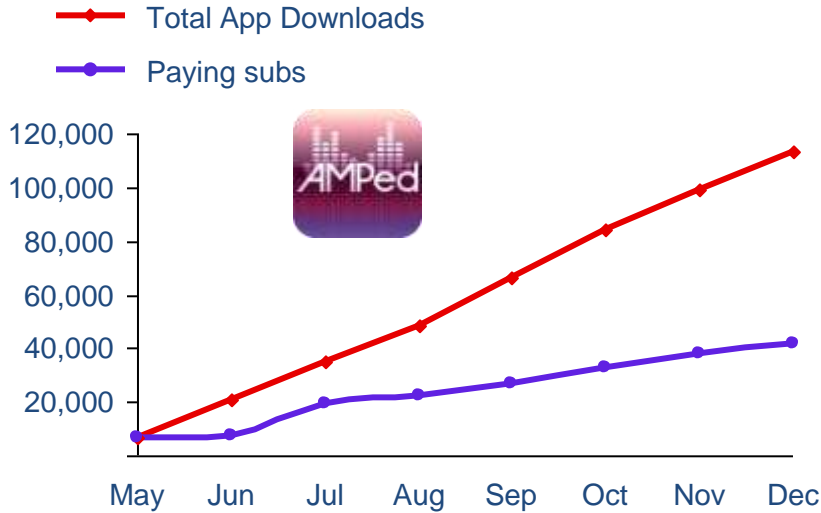
Solidify position as the leading aggregator of local news and lifestyle content in Asia Pacific



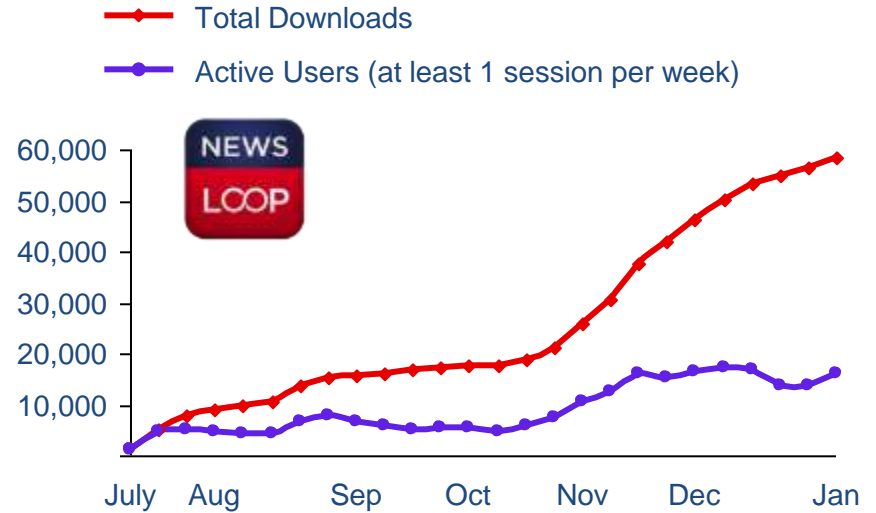
2

We are gaining momentum in key strategic categories and now plan to take the critical ones regionally

AMPed 2.0 Engagement



NewsLoop Engagement



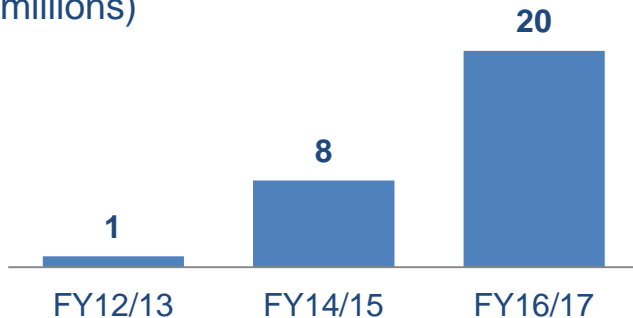
2 We are redoubling our efforts in games – one of the largest monetisation opportunities in the digital space

Partnering and making strategic investments

- Strategic partnership with a knowledgeable player in games to understand trends in hit games and development platforms
 - Softbank (50/50 ownership).
- Tapping initially into the feature phone opportunity



Expected evolution of MAUs* (millions)



*MAUs: monthly active users

Leveraging our assets

473 million subs

- Creating community of gamers across our customer base

Consumption patterns, social graph,

- Advanced recommendation engine to recommend the most attractive games

Pre-paid, post-paid, OTT...

- In-app billing engine that leverages both our prepaid and postpaid capabilities

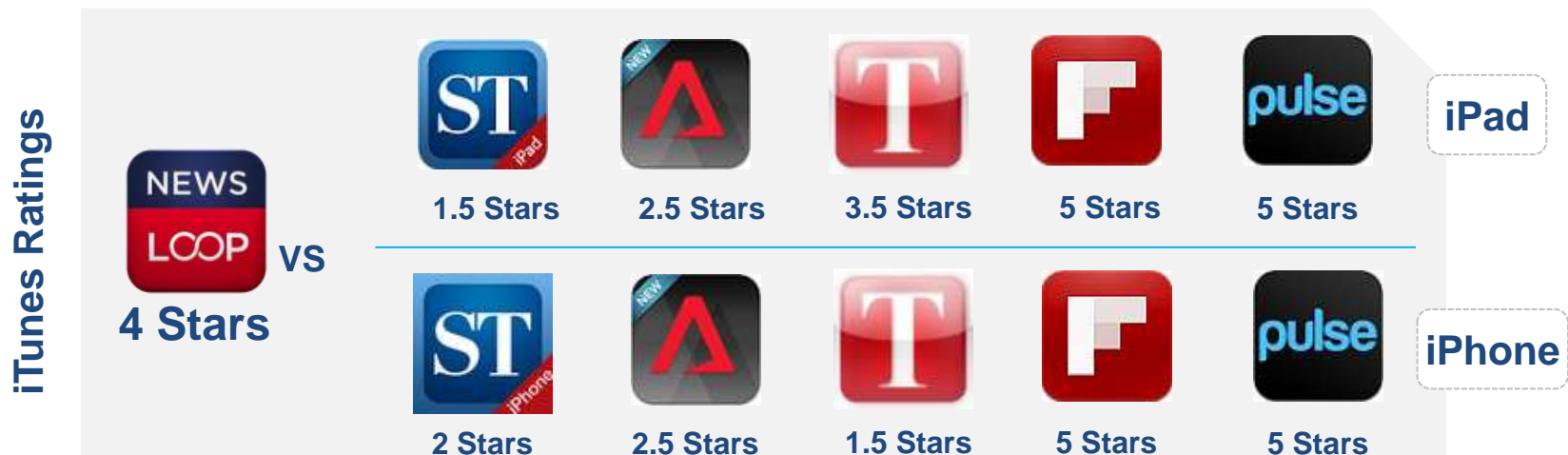


Leading aggregator of local news and lifestyle content in Asia Pacific

- NewsLoop is a rich media app **available on iPad and iPhone**, with Android versions to follow.
- NewsLoop editors **handpick content** from established media houses to the long tail of bloggers.
- Our business model is built around **revenue share with content providers** on display advertising
- Continue to build on local presence and targets to extend the readership internationally



NewsLoop has generated strong user engagement since its launch. A well received app rewarded with 4 star ratings and earned rave reviews on iTunes



3

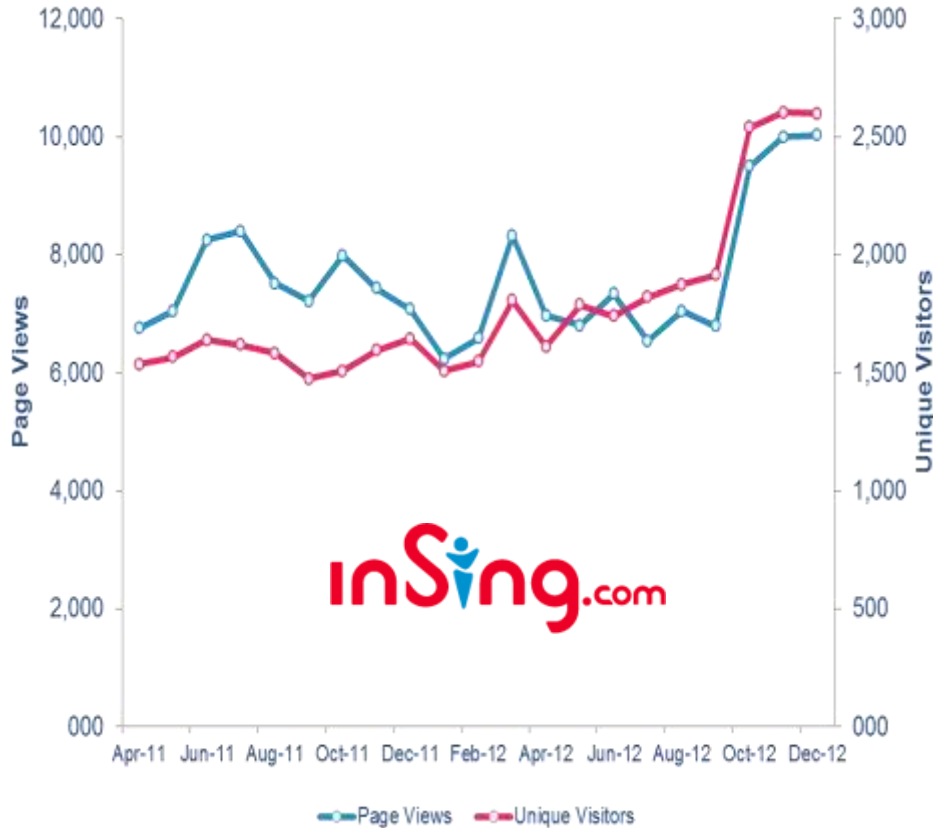
We made some targeted acquisitions to reinforce our positioning in key local verticals that drive engagement



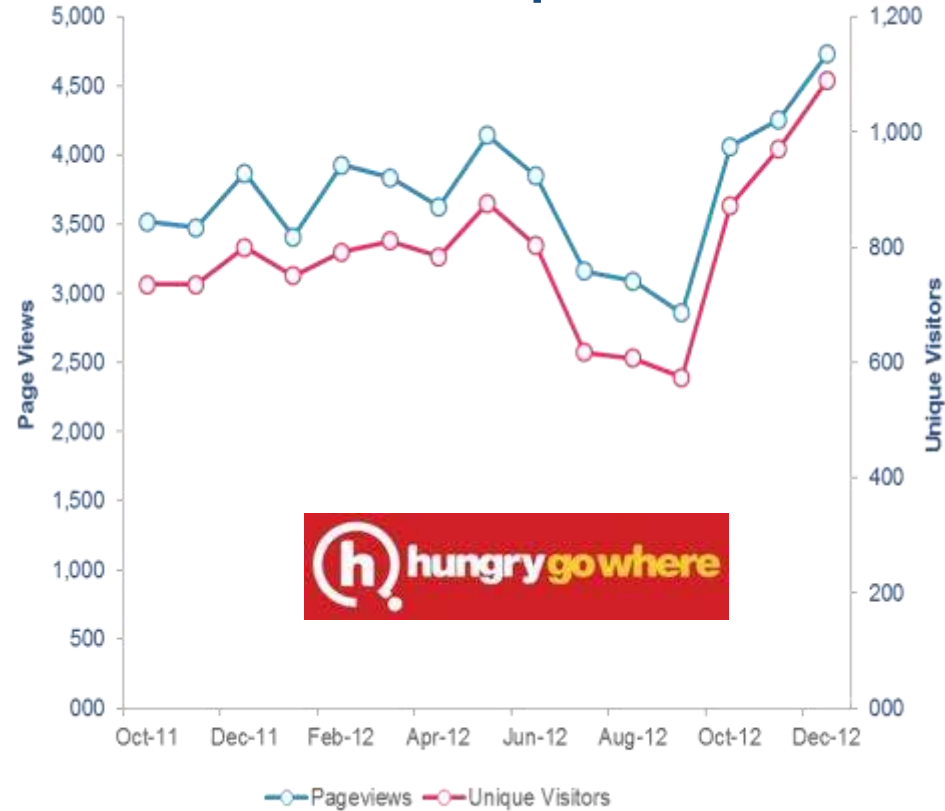
3

With more focus and a revitalised strategy we have been gaining traction in the digital local play

58% YoY growth



Increased more than 1.1 million unique visitors



Overtaken competition as Number 1 restaurant booking service in Singapore in only 6 months

3

Anchoring leadership in the food / restaurant vertical, we can quickly move to other countries and adjacent verticals...

80% market share in Singapore



- We can extend our model quickly to other markets (organically and through selected acquisitions)



- We can extract value from location patterns and user behaviours, and offer users a serendipitous experience while increasing our revenues for better targeting



3

In the mean time, we have started positioning ourselves in the local marketplace space by partnering with global players to strengthen our value proposition

Partner with leading international players that bring the know-how



Leverage our assets

473 million subs

Pre-pay, post-paid, OTT...

Location, true social graph, ID...

B2B sales-force

Allow merchants to create marketplaces with ready-to-use templates / platforms

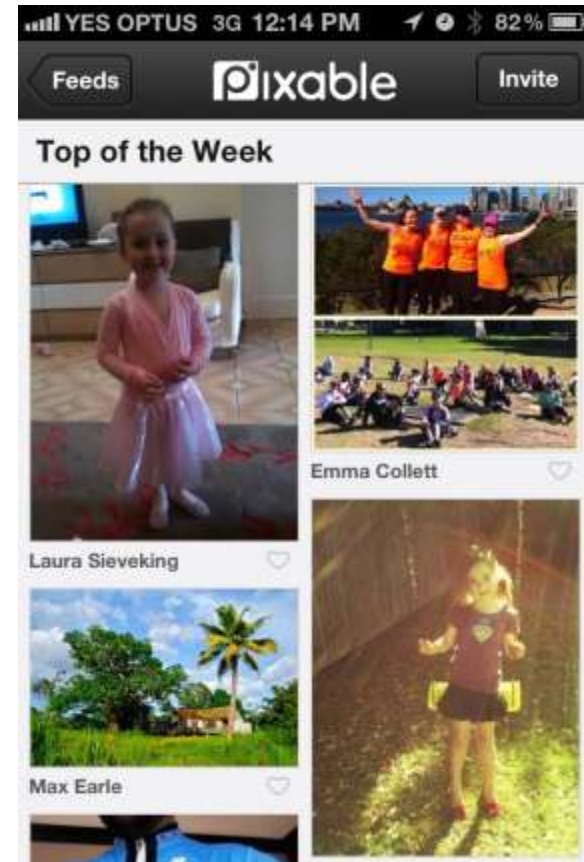
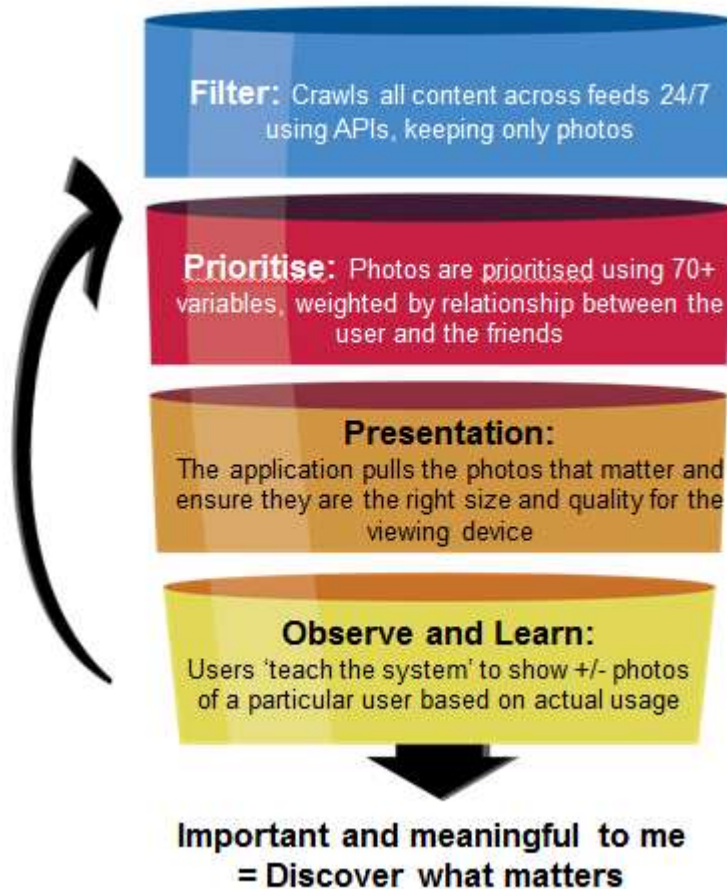


Combine physical, virtual / artificial reality; we can create a new digital and physical shopping experience



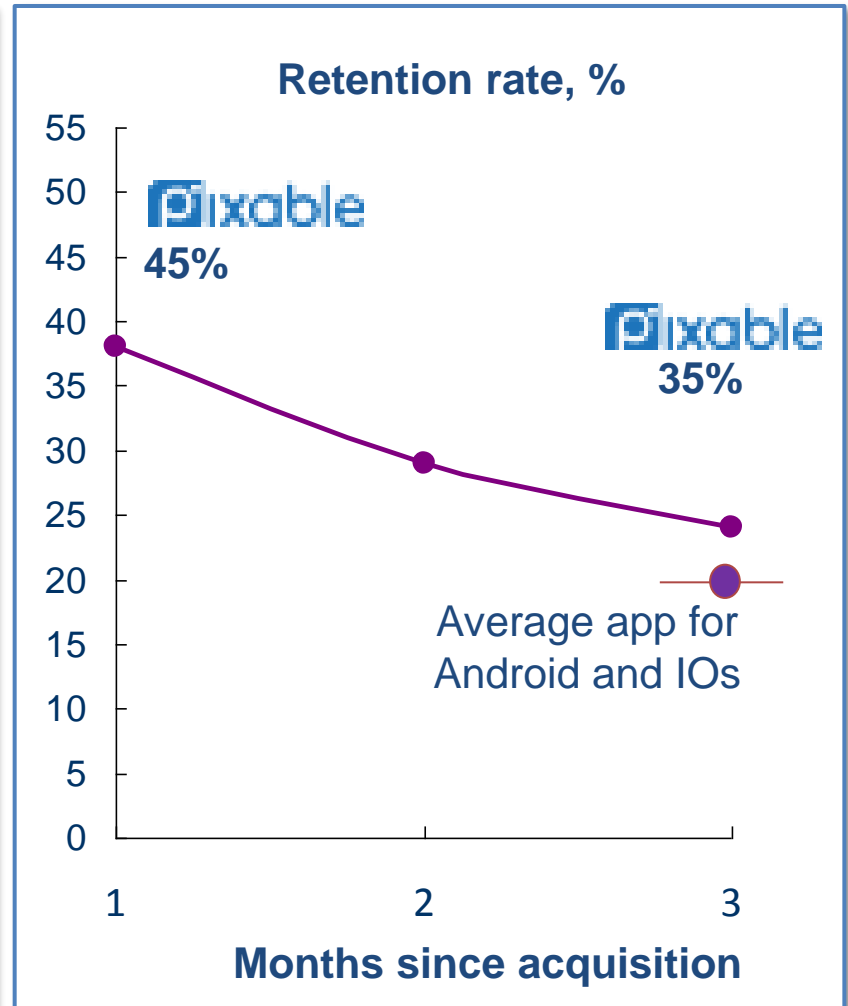
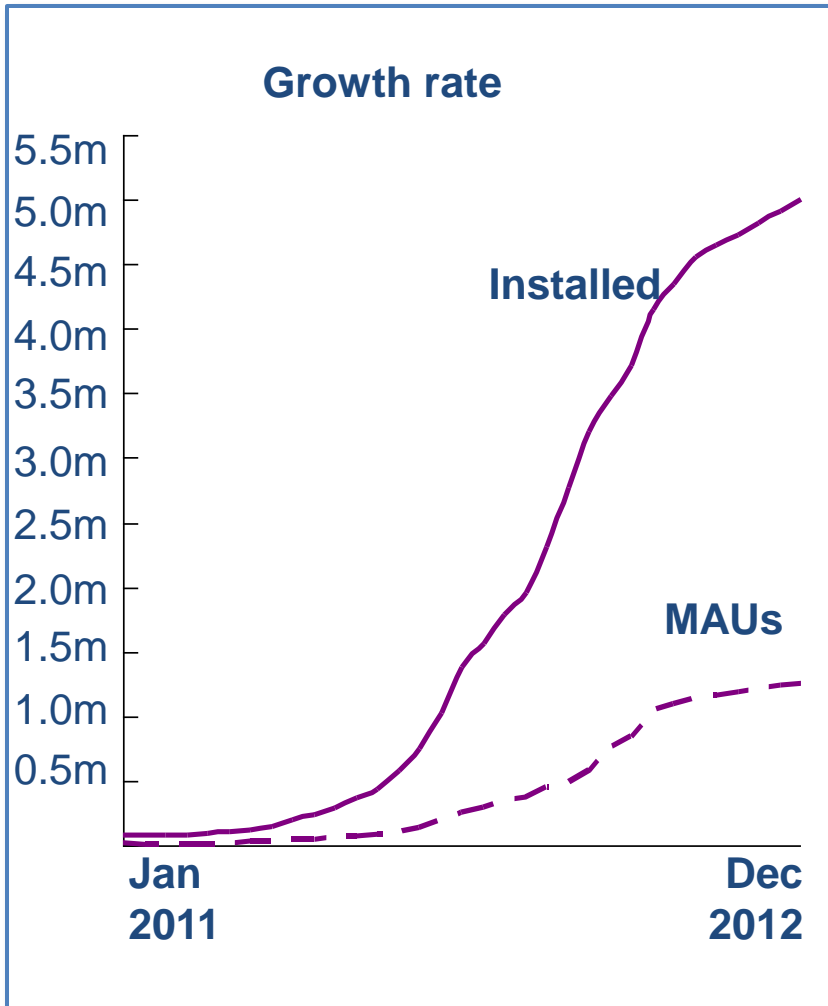
4

In next generation interactions, we have acquired Pixable, a key shaper in the emerging landscape of social and digital interactions



4

Pixable has grown steadily over the past 2 years and we will help them grow even faster



4

And Pixable is building businesses aggressively in the digital interaction space

Step 1

Step 2

Step 3

Next steps

More to come...



Pixable aggregates and ranks photos across different online photo repositories



Photofeed keeps all of your photos from all of your devices in one place safe and sound.



Contactive is a free solution to call, text or email all your contacts across different platforms from a single point

Finally in the pay TV business, mio TV is moving from the living room, and extending its services to whenever and wherever customers want it



Bringing what
you **Love**
to life



We are bringing more exciting content to our customers...

Exciting Kids' content coming very soon!

More exciting entertainment to come!

Local content tailored to our audience

We are creating a set of next generation audio-visual experiences for mobile devices that offer our customers the opportunity to get their content anytime, anywhere.

And giving them a more immersive TV experience



Recommendations



Sports Multi-view



Interactive data

5

We are winning with a superior combination of content, technology, marketing and deep customer understanding



Most advanced experiences with companion devices: your content, anytime, anywhere



Anticipation and discovery leveraging our big data capabilities



Low-cost local content production that can give us an additional edge

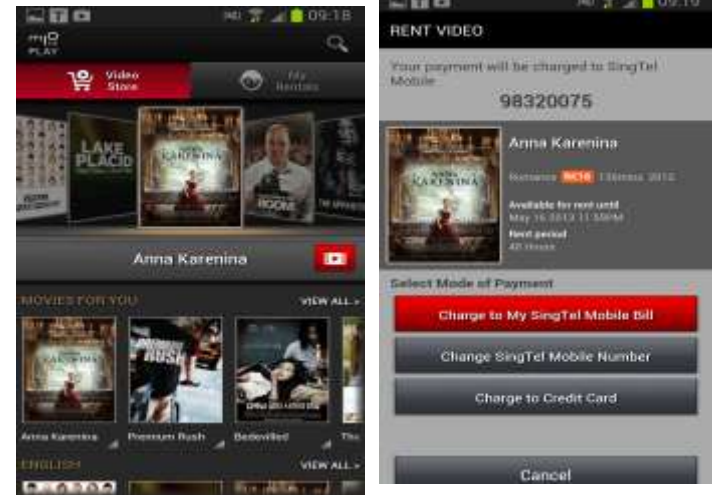


Partnership with selected verticals to enhance our services beyond the traditional TV content

5

We are winning with a superior combination of content, technology, marketing and deep customer understanding

- OTT video services available in connected TV, Android Tablets and Phones with operator and credit card billing



- Tablets and phones version allow download to rent

- Personalised and recommendation
More viewing → more personalised recommendation



To compete, we are complementing our capabilities with digital talent and leveraging our scale

To complement our strengths and capabilities ...

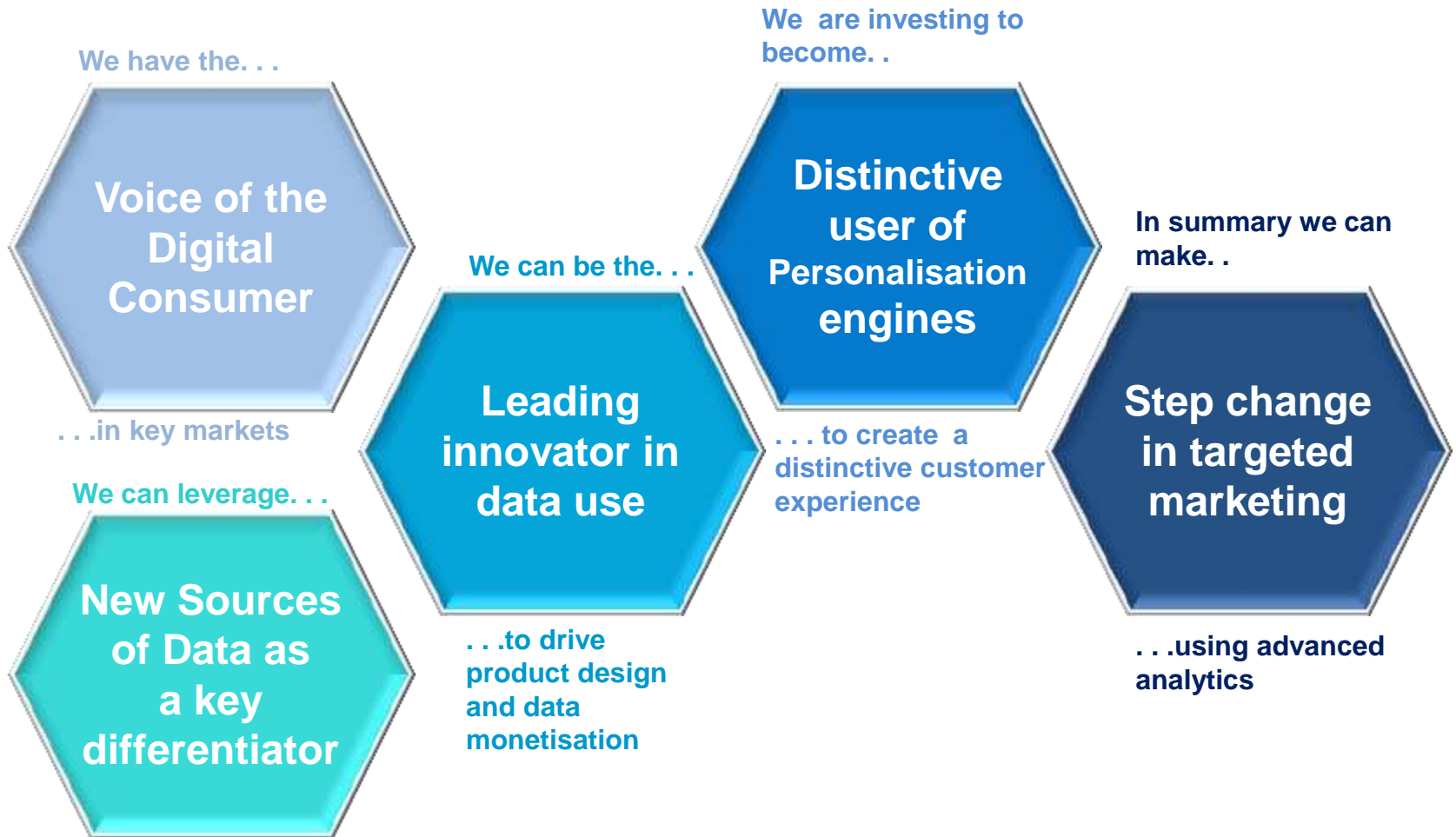
- A** We are doubling down on strategic capabilities that will help us extract more value from our distinctive assets; e.g., scientific marketing / big data / living analytics
- B** Acquisitions and partnerships that are helping us bring the talent, know-how and IP required

To take full advantage of our scale ...

- C** We have developed our digital strategy in conjunction with all our associates and we are working very closely with them to grow in the digital space
- D** We are working with other international telcos to get global reach and compete with the OTT giants

A

We are investing into big data and living analytics to extract superior insights from our information and data



B In addition to market positions and new technologies, our acquisitions are bringing necessary new talent

We are acquiring critical talent and capabilities that we use as pillars to our growth strategy

We are investing through ^{SingTel}innov8 in companies that can complement our capabilities

~\$500m invested in past 12 months

32 investments in 7 countries

[a·mo·bee]

pixable

TMGAMER
THE MOBILE GAMER

eatability
eat shop play share!

h hungrygowhere

massiveImpact
CUSTOMER DISCOVERY SOLUTIONS

121CAST

InGame AD

tempo

关系
Guanxi.me

vuclip

Moment.me

flocations

QUAVUS

bubblemotion

EVIVO

idealised

STREAMMEDIA

uniClick

mig

Baynote

BRANDSCREEN

Venuemob

ness

乐看
Lekan.com

NEXAGE

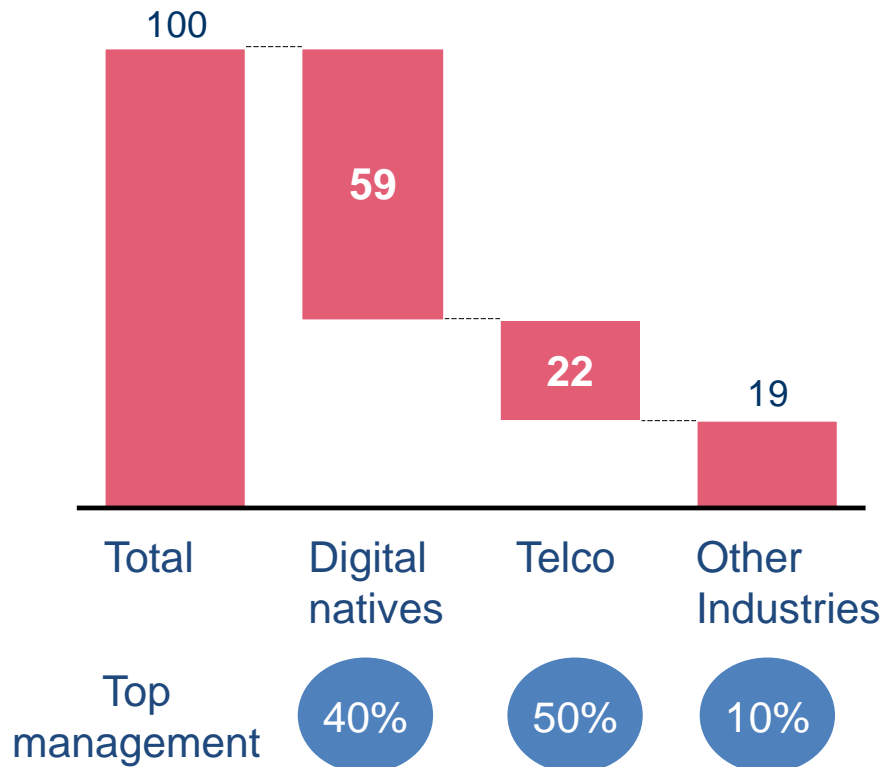
everything.me

We use these investments to create differentiation and better execution

B And we are changing the profile of our work-force as we need to attract, retain, and nurture different talent to complement our core

Breakdown GDL personnel in Jan 2013

n = 548, Percentage



New metabolic rate injected in the company.

An example ...

- Social calendar Photofeed ... Planned, built and launched in less than three months



B

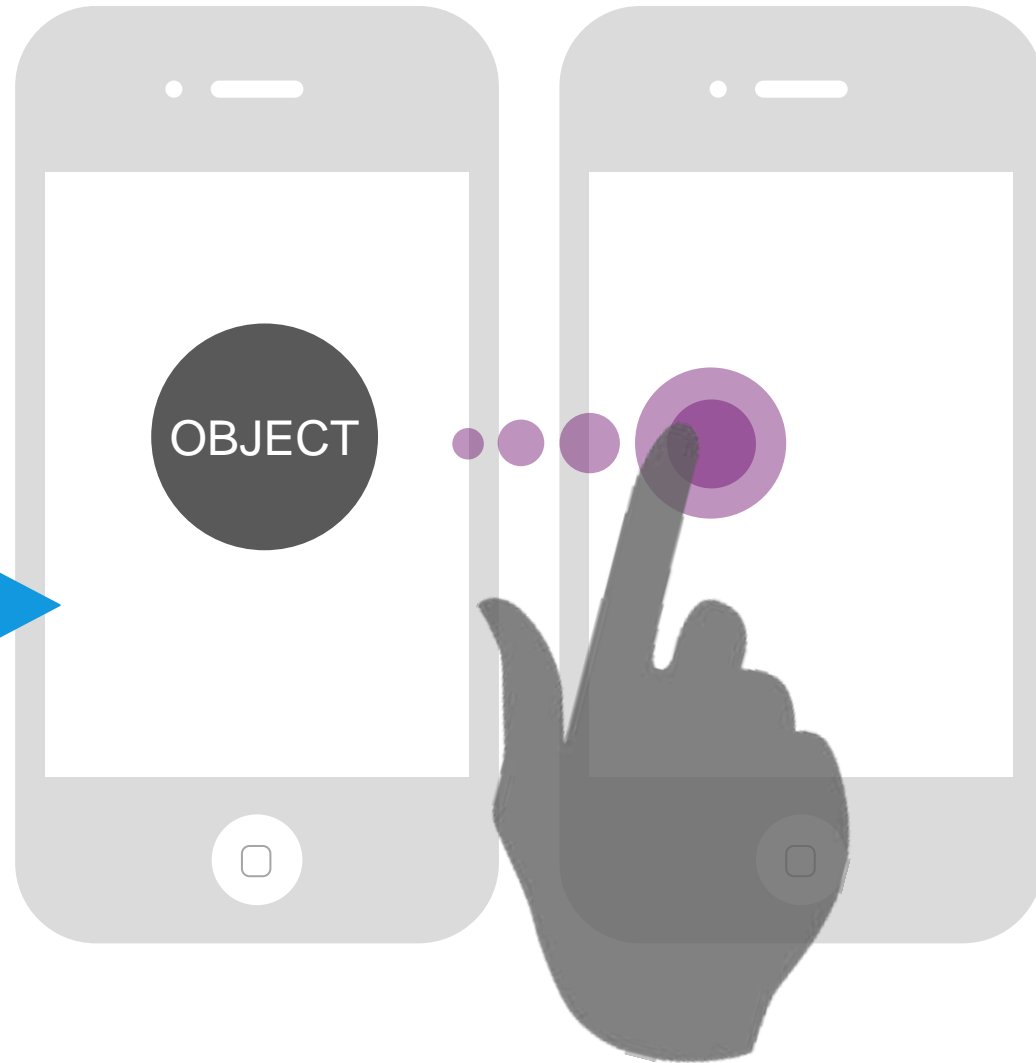
Another example: “Bfly” technology makes transferring data between phones seamless and engaging

Recently completed the acquisition of a team that created an unique technology that matches two phones based on their geographic proximity and time stamp.

Phones are “paired” with a single continuous swipe across devices.

Once paired, an object can be transferred from one to another. This could be used to:

- Transfer money (payments)
- Transfer multimedia files (games, music, photos)
- Create a private channel to communicate or exchange data like contact cards



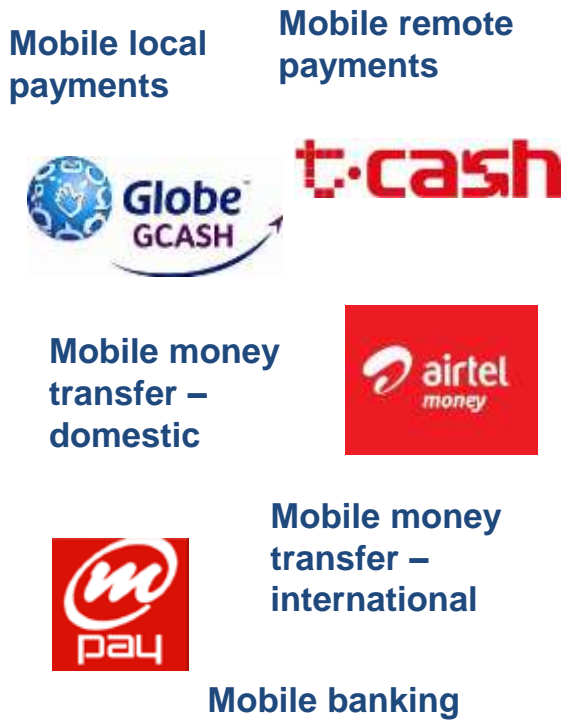
C We are bringing additional value to our associates to make the most out of critical mass and superior local knowledge

Our strategy was developed in conjunction with our Associates



We are leveraging some of our key assets within the Group

Illustration: Payments



We are bringing our new digital assets to the Group

For e.g., we are bringing [a.mo.bee] to all our OpCos



- We are differentiating thanks to our data... extracting more value from inventory



D We are seeking partners both in the telco and non-telco space to strengthen our delivery

Global telecom player

- Through our Joint Venture Innoventures we are making investments in games, where SoftBank has extensive assets and know-how

Global telecom player

- We just made a parallel investment in Everything.me as we both share the importance of HTML5 solutions for our digital ecosystem

Technology start up

- We signed an exclusive contract for our territories to customise their commerce platform to our needs, and we will be responsible for the go-to-market

Global e-commerce player

- Telkomsel launched an initial partnership in Indonesia to leverage their digital commerce platform

In summary, we have the foundations to accelerate our pursuit of digital opportunities in which we can have the right to compete through our track record, partnerships and telco assets

