



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 07:16:35
Announcement No.	00010

>> Announcement Details

The details of the announcement start here ...

Announcement Title * SingTel Investor Day 2013 - Consumer Singapore

Description

Attachments

SingTelInvestorDay2013-ConsumerSingapore.pdf

Total size = **698K**
(2048K size limit recommended)

Close Window

A person in a yellow shirt and brown pants is performing a handstand on a grassy field. The sun is low in the sky, creating a bright, hazy background. In the distance, there are trees and a house. A concrete path leads from the bottom right towards the person.

Consumer Singapore

SingTel Investor Day

15 March 2013

Yuen Kuan Moon

CEO, Consumer Singapore

Amazing things
happen when we
dream big.

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Consumer Singapore

Key Focus

Vision:

Be the leading provider of next generation communication, info-tainment and technology services to individuals, homes and small businesses in Singapore

Monetising mobile data	Winning the homes	Maintain network lead
<ul style="list-style-type: none">› Shift customers onto tiered data plans› Step up investment in LTE to drive cost efficiency› Re-capture revenue from roaming services	<ul style="list-style-type: none">› Winning the homes through bundles, and fibre adoption› Drive ARPU growth for existing customer base› Leverage strong TV position	<ul style="list-style-type: none">› Invest in networks to maintain lead in coverage and quality

Capturing mobile data revenue growth with a shift to tiered plans

Introduction of tiered data plans provides opportunities to monetise data growth

Previously: 12GB across all plans

	Lite	Value	Plus	Premium
Monthly	\$39.90	\$59.90	\$99.90	\$205
Voice	100mins	200mins	500mins	2000mins
Data	12GB			



Now¹: Tiered price plans (with LTE)

	Lite	Value	Plus	Premium
Monthly	\$39.90	\$59.90	\$99.90	\$205
Voice	100mins	200mins	500mins	2000mins
Data	2GB	3GB	4GB	12GB

17% of postpaid subs have moved to tiered data plans
Of these, 9% exceed their data allowance

Next step: revising pricing for excess data usage in April 2013

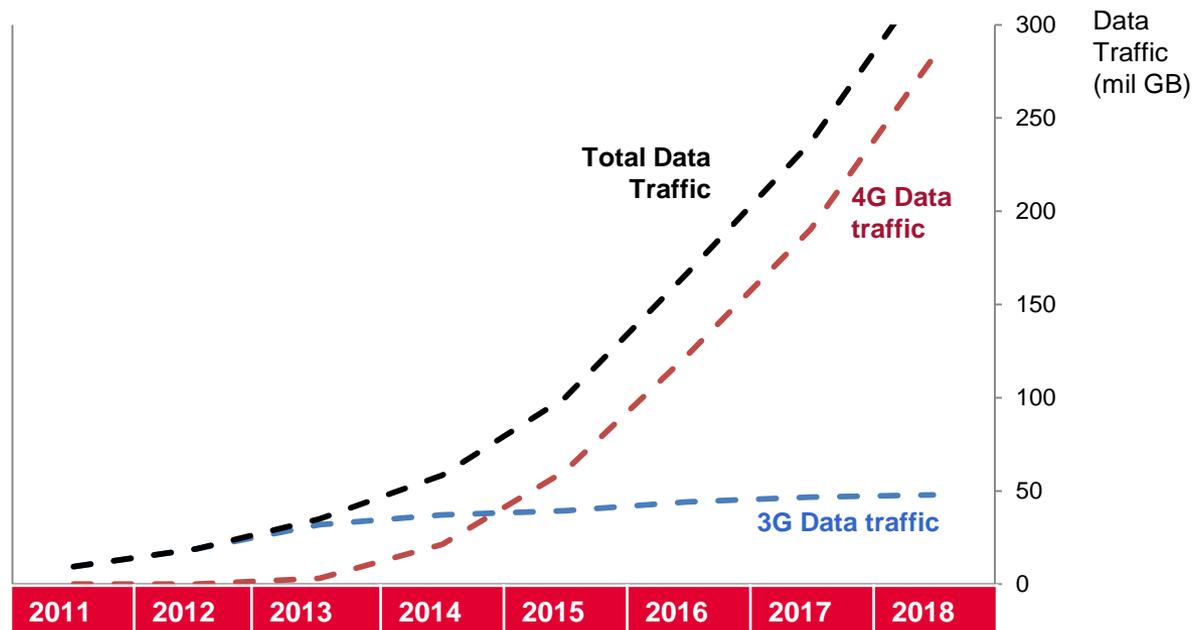
NOW	LTE coverage ~80%
	Excess usage: S\$5.35 per GB



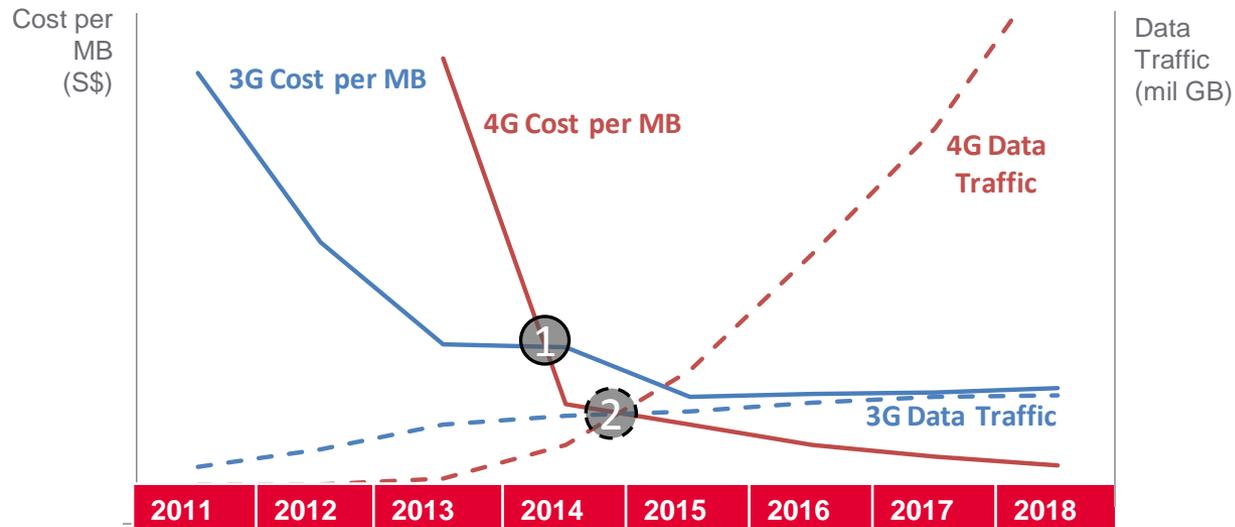
APRIL 2013	LTE coverage islandwide
	Excess usage: S\$10.70 per GB

1. With effect from 1 July 2012

Singapore mobile data traffic expected to grow strongly over next 5 years



Migration to LTE (4G) helps lower costs and network load



Sweet spot ①

Per MB cost to deliver 4G to fall below 3G by 2014

Sweet spot ②

Total 4G data traffic to exceed 3G by 2015

Managing mobile roaming revenues & margins through data packages

Challenge

- › Customers are substituting roaming voice and SMS with data, using 'free' OTT services and Wifi

Solution: Partner international operators to offer data roaming packages

- › Launched roaming packages with partners for a fixed fee eg. Daily unlimited data roaming in UK with Telefonica at S\$30/day

Outcome

- › Provides customers with peace of mind to continue using data overseas
- › Allows SingTel to recapture data revenue
- › Margin neutral (compared to standard roaming rates) as inter-operators costs are negotiated



Winning in Consumer homes

Executing a winning strategy

Consumer home revenue S\$118m, up 6%¹

Leading in bundling

Customers on bundled plans **338,000**

> up 18%

Driving fibre adoption

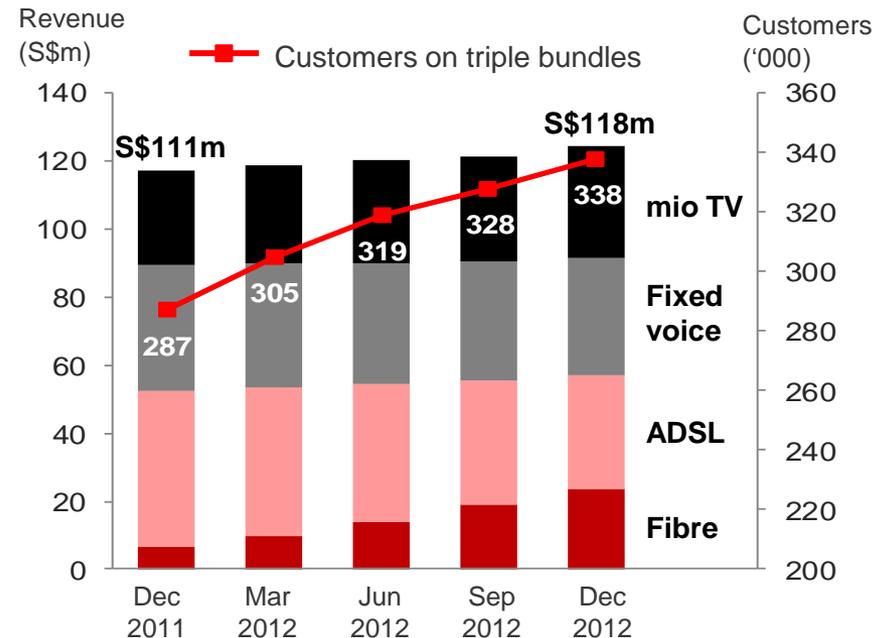
Fibre customers **167,000**

> approx 60% market share

Growing household spend

Household ARPU **S\$50**

> up 10%



1. All figures for the quarter, or as at 31 Dec 2012. % growth denotes year-on-year comparison

mio TV: gaining scale, growing content and household spend

mio TV has grown
to more than
400,000 customers



We will...

Continue to strengthen our content suite

New channels added:



Content renewed:



Leverage strong TV position

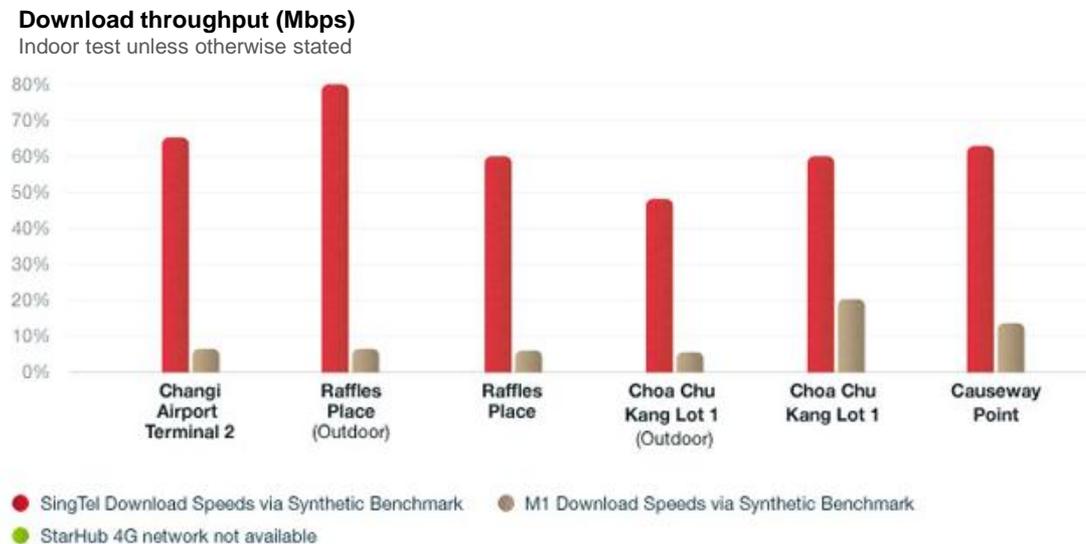
- › fully harness synergies with TV to drive home leadership
- › up-sell content packs and price up triple/quad play bundles with more compelling content
- › create stickiness and reduce churn

Investing in Networks to deliver high-quality, reliable experience

Mobile: maintain network superiority to deliver desired customer experience

- › Expand LTE coverage, and enhance 3G & LTE coverage
- › Build capacity and develop capabilities to support new digital services
- › Cell site upgrades and offload options to relieve site traffic

Download speed test of SG telcos



Source: HardwareZone.com.sg 10 September 2012

SingTel 4G network is dualband LTE1800/LTE2600 network

Investing in Networks to deliver high-quality, reliable experience

Fibre: maintain leadership for speed & reliability, in particular international bandwidth

