



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 07:14:06
Announcement No.	00008

>> Announcement Details

The details of the announcement start here ...

Announcement Title * SingTel Investor Day 2013 - Consumer Australia

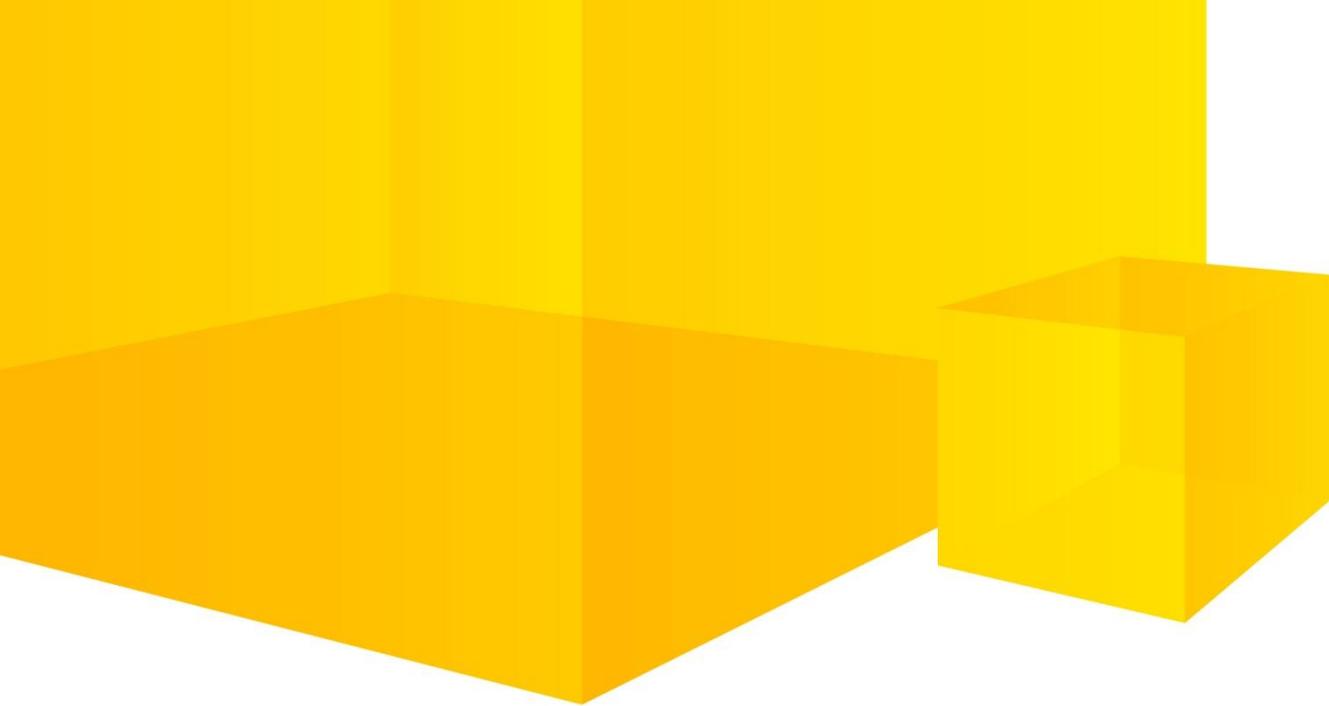
Description

Attachments

SingTelInvestorDay2013-ConsumerAustralia.pdf

Total size = **666K**
(2048K size limit recommended)

Close Window



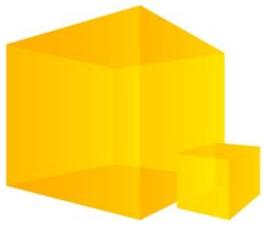
Consumer Australia

SingTel Investor Day

15 March 2013

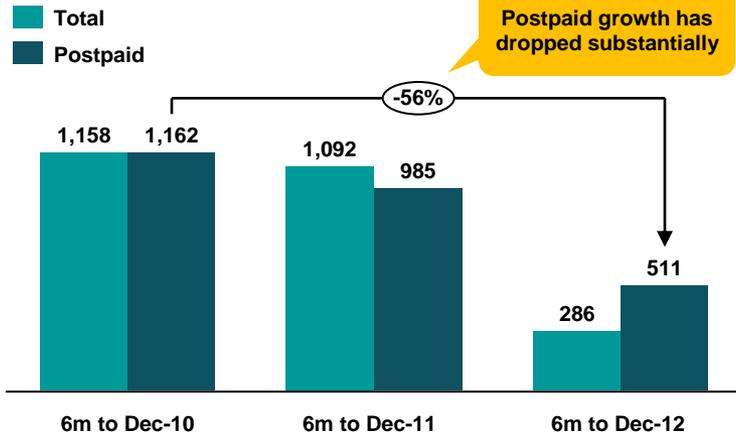
Kevin Russell
CEO, Consumer Australia



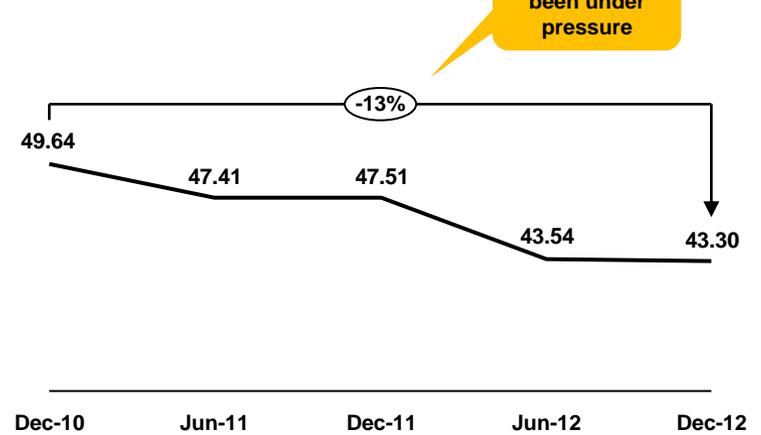


Mobile customer growth slowing and industry revenue growth is negative in 2012

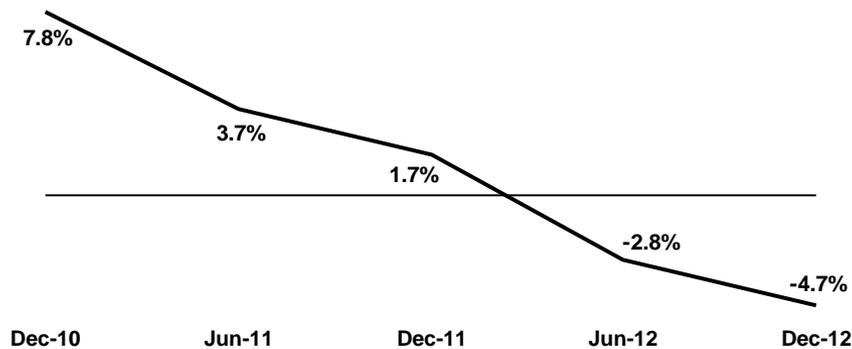
Mobile Market Net Adds
(‘000)

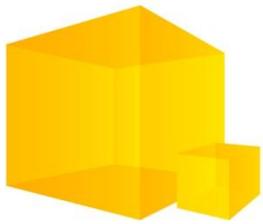


Mobile Market Blended ARPU
(A\$)



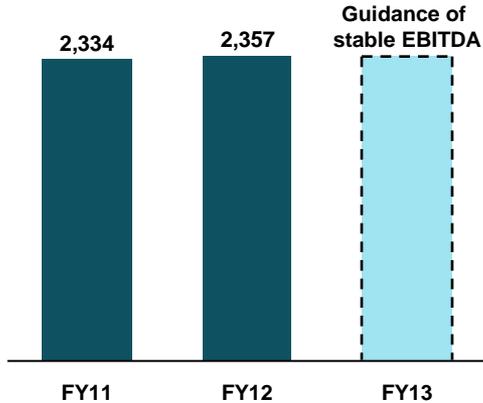
Mobile Market Reported Service Revenue Growth
(YoY % Growth)



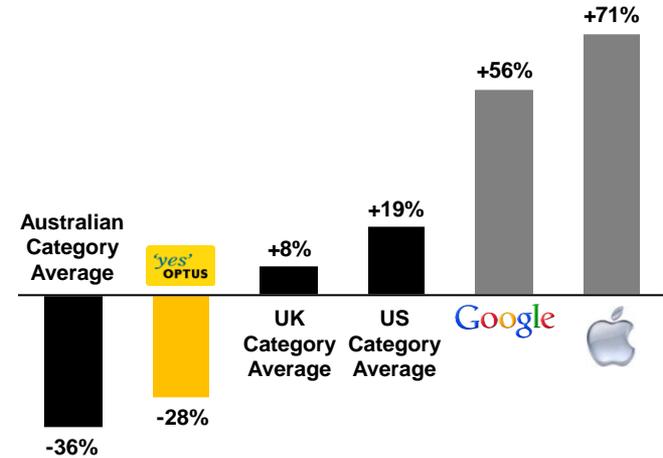


Consumer Australia has a clear focus on improving profitability and customer experience

Total Optus EBITDA (\$M)



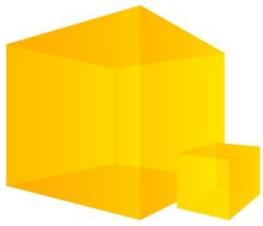
Customer Advocacy (Net Promoter Score®)



Sources: 2011 – 12 Mobile Network Provider Consumer Recommendation Loyalty Study; Satmetrix. Updated 2012 figures available for UK average (+20%) and US average (+24%) only.

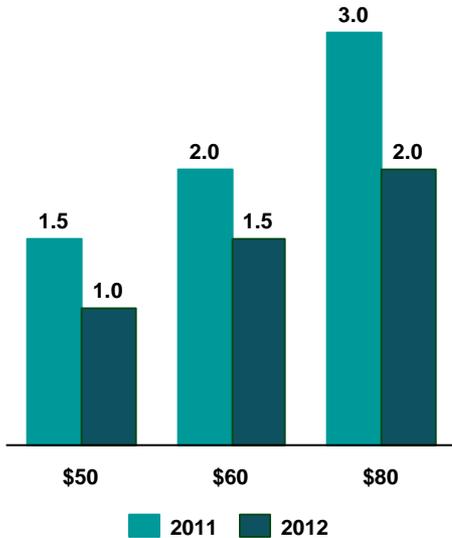
- Data revenues
- Cost efficiency and yield
- Improving customer loyalty



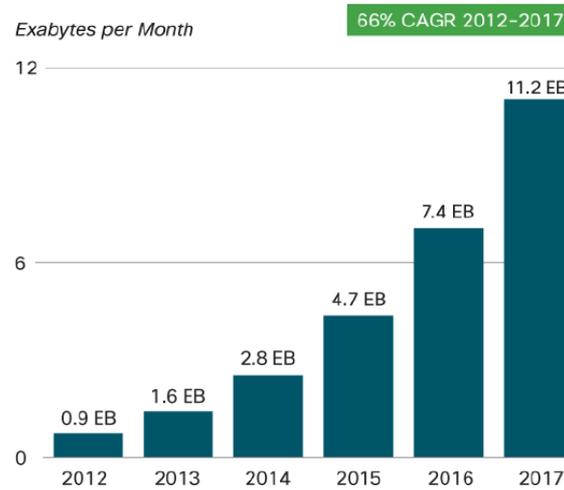


Data is a key revenue growth opportunity

Optus before vs after data allowances on postpaid plans (GB)



Global Mobile Data Traffic (2012 to 2017)

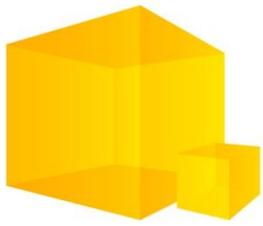


Source: Cisco VNI Mobile Forecast, 2013

4G Rollout Plans

- 1800MHz
- 2300MHz
- 700MHz - auction
- 2500 MHz - auction

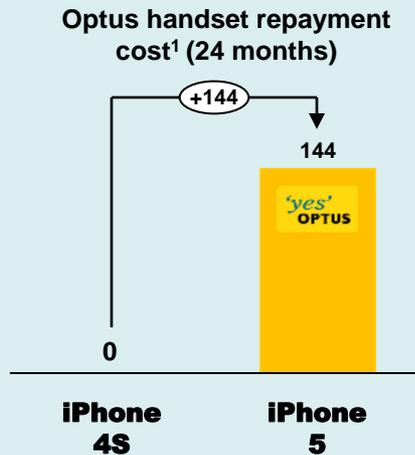




Driving cost efficiency and yield management

Optimising device subsidies

- Exited subsidy in prepaid and WBB
- Reduced subsidy in postpaid



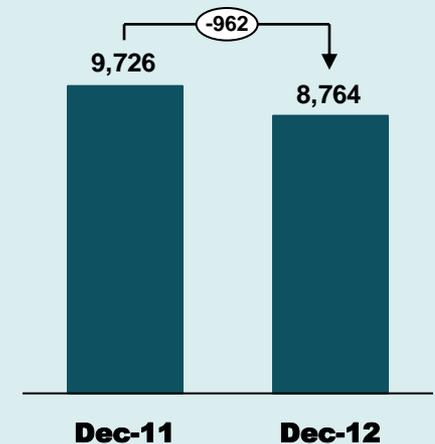
¹ Handset repayment cost on 16GB iPhone 4S / iPhone5 on \$60 postpaid plan (24 months)

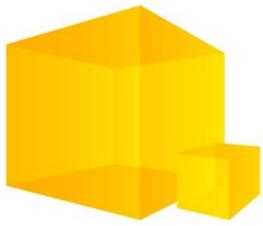
Restructuring distribution and wholesale models

- Exit non-branded distribution
 - Telechoice (March 2013)
 - Allphones (August 2013)
- Investment in online capabilities
- Review of wholesale arrangements

Productivity improvements

Number of employees





Network investment to close gap to incumbent's network

900MHz spectrum migration program



4G coverage



Approx. 1,000 additional mobile sites

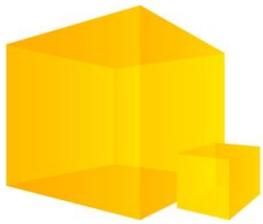


98 MHz of spectrum acquired (2.3GHz)

- Improved 3G performance, particularly in-building capital city coverage
- Launched in Sydney, Melbourne, Perth, Brisbane, Adelaide, Gold Coast and Newcastle/Hunter region
- One of only two carriers providing 4G services in Australia
- Competitive to Telstra's network (where comparable coverage exists)
 - data downloads on the Optus network faster in 11 of 13 Sydney locations tested¹
- Extended JV with VHA
- Increased network capacity in metro
- Faster time to market
- High speed data services
- Download speeds ranging from 25Mbps to 87Mbps²

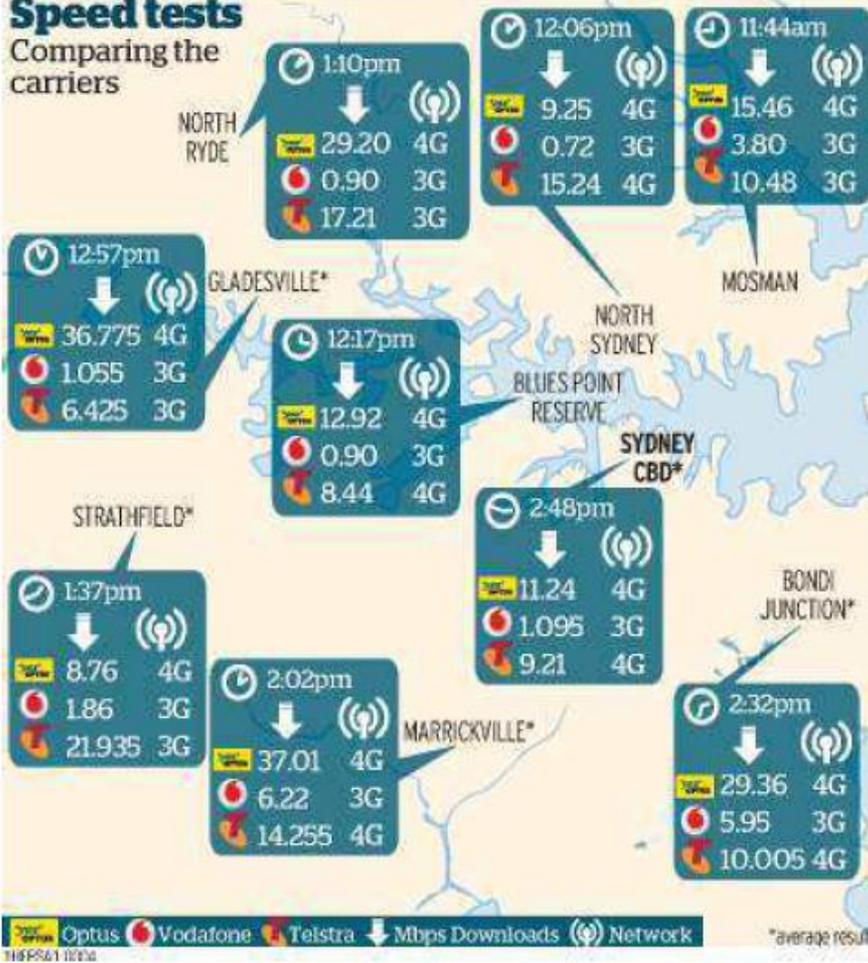
¹ The Sun-Herald – 14 Oct 2012

² Based on a two month trial of LTE-TDD conducted by Vividwireless in early 2011. The speed range quoted is the 25th – 75th percentile.



4G Network

Speed tests Comparing the carriers



“Optus blitzes 4G tests”

Vivid deal sets up Optus for 4G battle

MITCHELL BINGEMANN

TELCOS
OPTUS is ready to accelerate the rollout of its national 4G mobile network after it completed its \$750 million acquisition of Telstra

Telstra already operates a 4G network. The spectrum when used by Optus to offer download speeds twice as fast as existing 3G services with typical download

ment of that upgrade. Optus is building two major LTE testing facilities in St Marys in western Sydney and at the Optus Campus in the city's Macquarie Park.

The successful evolution of television. The government announced that next April it would auction off valuable tranches of the 700MHz and 2.3GHz spectrum to telecommunications companies. It is expected that the sale of that

Optus shows fastest download speed in 4G tests

BEN GRUBB

IF YOU happen to live in Marrickville and use Optus for your 4G smart phone, you're in luck. Optus customers in the inner-

almost always have the slowest download speeds. Vodafone trailed its two bigger competitors at 12 out of 13 locations.

phone company. Even where only 3G networks were available, Vodafone struggled to deliver better results. At times,

Optus unveils 4G network

TELCOS

Nathan Mawby

AUSTRALIA'S telco market yesterday took a step towards greater competition as Optus unveiled its long-awaited 4G high-speed mobile internet network for capital cities.

