

Agenda

- 10:00-10:05 Welcome by Ooredoo Group (OG) IR, Andreas Goldau & Sara Al Sayed
- 10:05-10:15 GCEO – Deputy GCEO Waleed Al Sayed (OG), CEO Ooredoo Qatar
- 10:15-10:35 New Lead strategy and 5G, Mansoor Al Khater, Chief Strategy Officer, OG
- 10:35-10:55 Digital Transformation - Andrew Kvalseth, Commercial officer, OG
- Coffee break
- 11:15-11:35:00 GCFO - Ajay Bahri, OG
- 11:35-11:50 Strategic Sourcing - Group Chief Procurement Officer - Christian Linhart
- 11:50-12:05 Indosat Ooredoo update –Indosat Ooredoo Vikram Sinha, COO Indosat Ooredoo
- 12:05-12:20 Ooredoo Oman update – Ian Dench, Ooredoo Oman CEO
- 12:20-12:55 Q&A (all speakers and attendees as merited)
- 12:55-13:00 closing remarks Ooredoo Group IR, Andreas Goldau & Sara Al Sayed
- 13:00-14:30 Meet the Ooredoo Group Team / Lunch



Ooredoo Group

Capital Markets Day

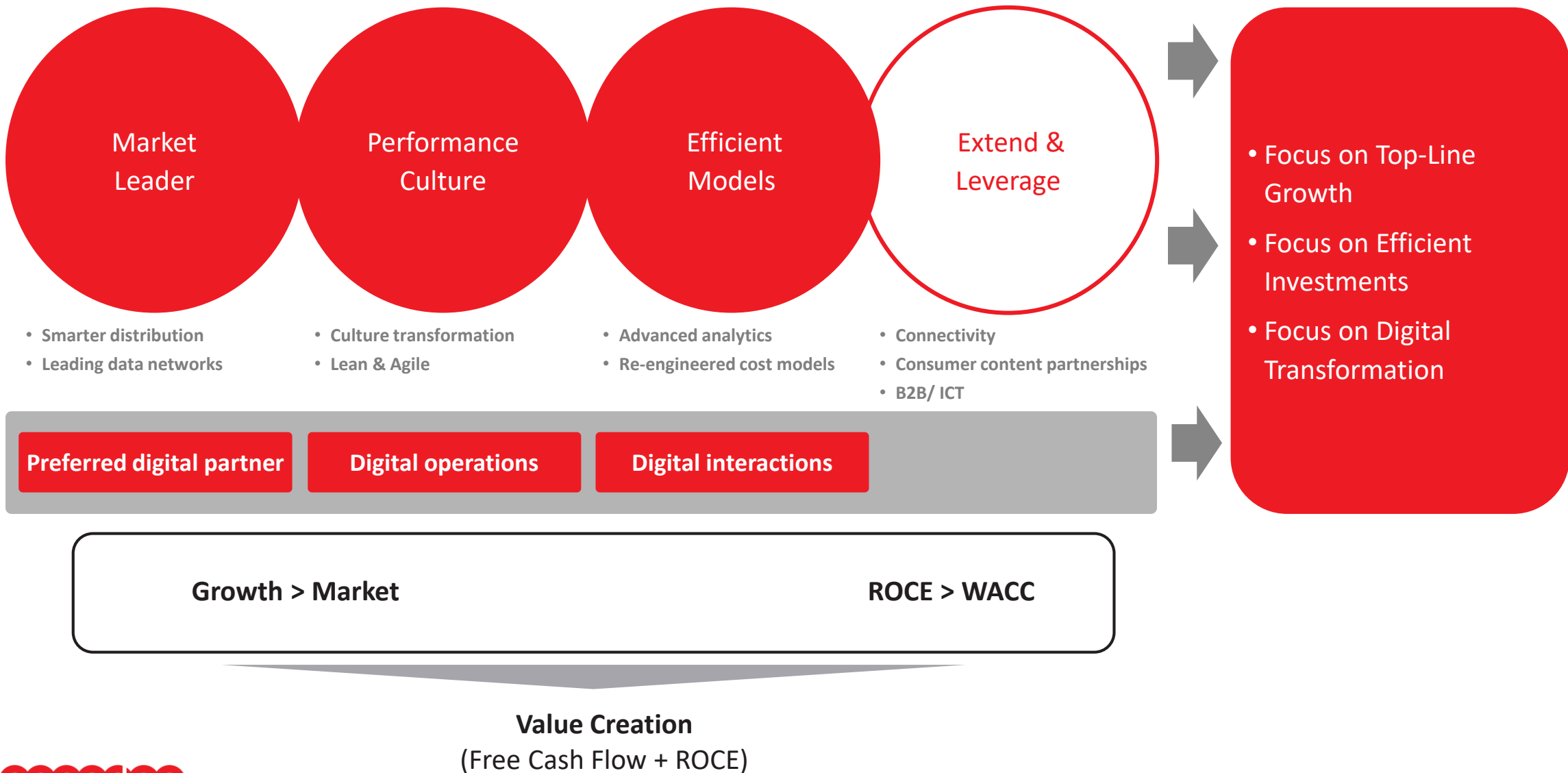
Digital Section

19 June 2019

Digital / GCCO

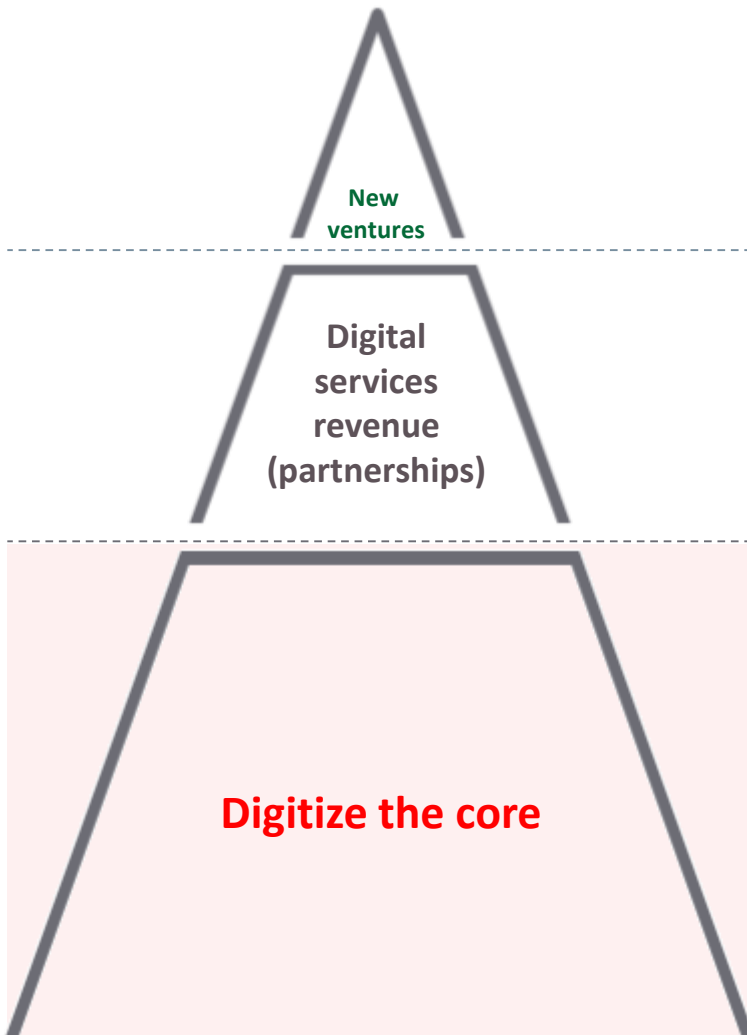


Digital is a key element of our LEAD strategy



Our primary focus will be to digitize the core to drive digital sales, marketing, and care

FRAME THE DIGITAL OPPORTUNITY



DESCRIPTION

FURTHER DIGITAL OPPORTUNITIES

- Explore selective ventures for attractive digital opportunities providing core capabilities or new revenue streams

DIGITAL REVENUES FROM PARTNERSHIPS

- **Continue** to grow additional revenue from digital services (e.g. premium video, mobile money payments, etc.)

MAKE IT EASY TO FIND, BUY AND USE OUR SERVICES ONLINE

- Drive digital sales, marketing, and care
- Increase online SIM sales to acquire new subscribers and lower costs
- Boost upsell through our apps, to grow revenue, and reduce costs
- Provide care via our apps for higher customer satisfaction and lower cost

We are digitizing the core to make it easy to find, buy and use our services online

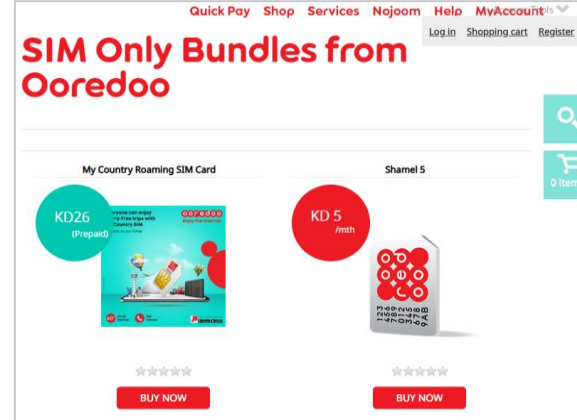
DIGITAL MARKETING



Executing best-in-class digital marketing will allow us to:

- Leverage underutilized media in our markets
- Improve reach, targeting, and marketing optimization
- Ultimately drive down marketing costs and increase return on investment (ROI)

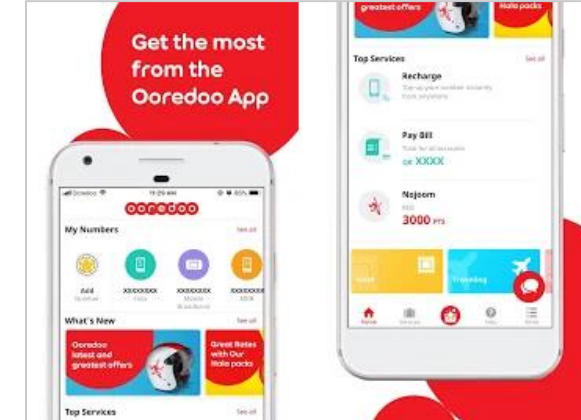
DIGITAL SALES



By making products available and easy to purchase online we can:

- Serve untapped consumer demand
- Increase upsell and cross-sell
- Reduce customer acquisition costs

DIGITAL CARE



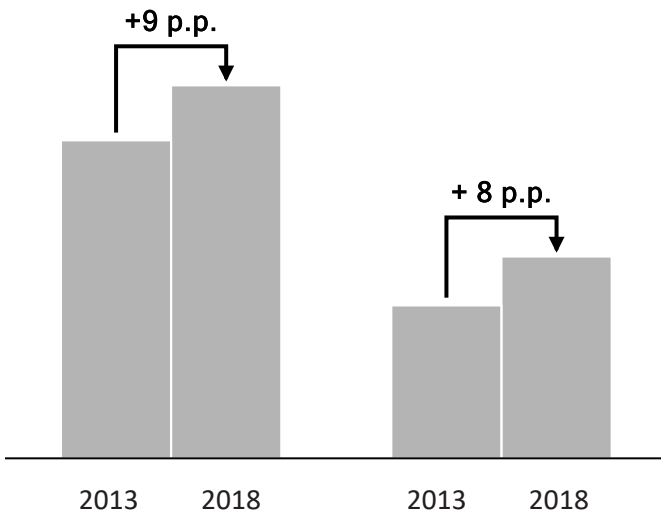
Creating best in class digital customer experience will:

- Improve customer experience, satisfaction, and loyalty
- Reduce operating and customer retention costs

We see significant and immediate growth and efficiency opportunities to capture by digitizing our core

DIGITAL MARKETING

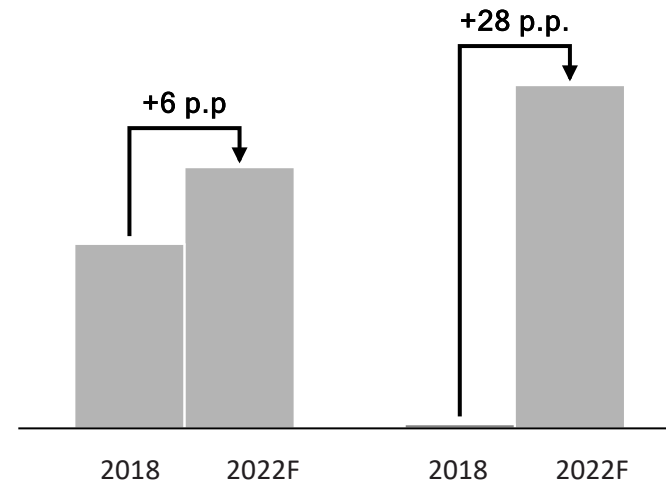
Global



Digital media still underutilized

DIGITAL SALES

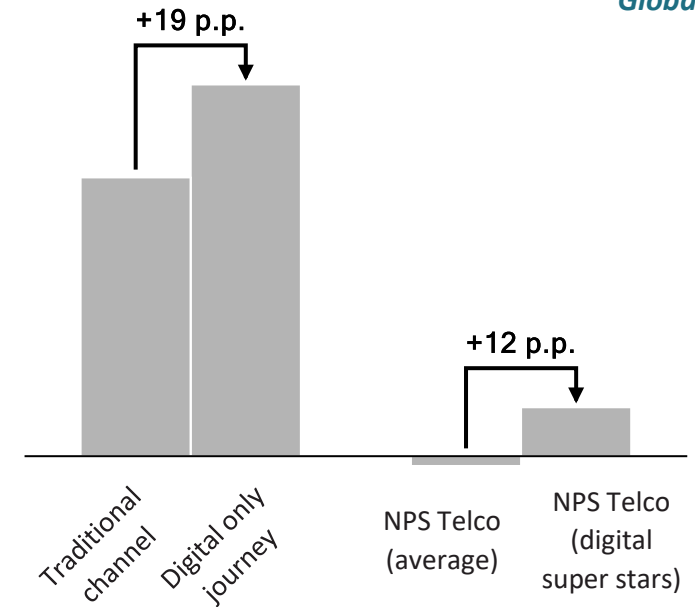
Asia



Strong opportunity to sell more Telco products online

DIGITAL CARE

Global



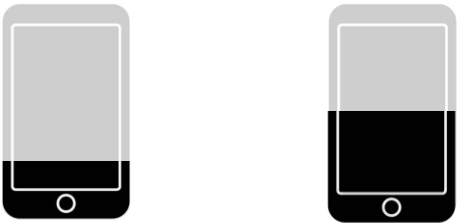
Digital care leads to a substantial top line uplift

We are executing an ambitious plan to digitize the core

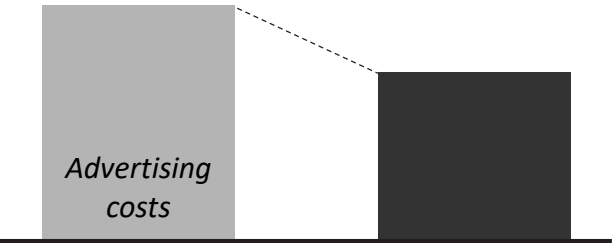
DIGITAL MARKETING



Increase % of digital media spending



Increase total advertising spending efficiency

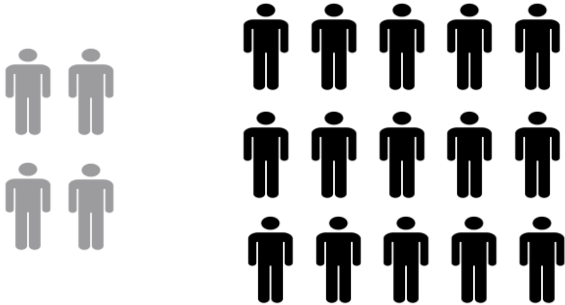


Improve digital marketing execution to drive marketing efficiency

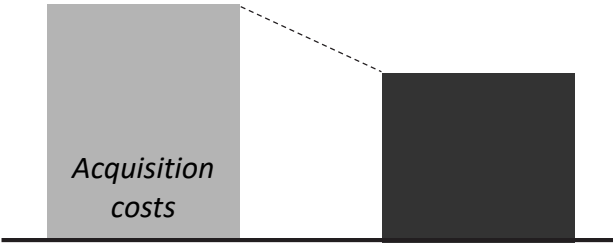
DIGITAL SALES



% SIM sold online



Reduction in acquisition cost

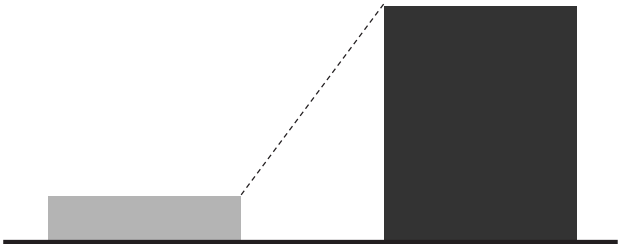


Increase digital sales to improve customer acquisition efficiency

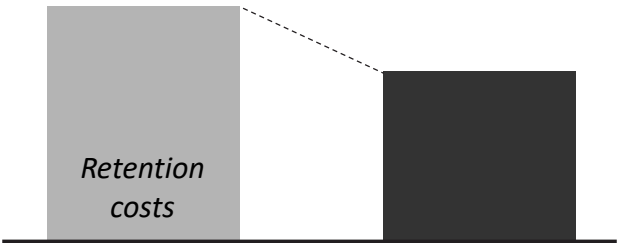
DIGITAL CARE



Increase number of Monthly Active Users (M)



Reduction in retention cost

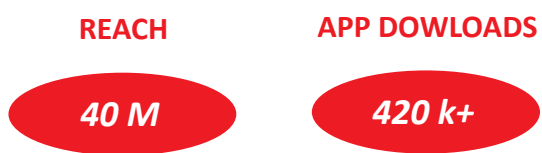
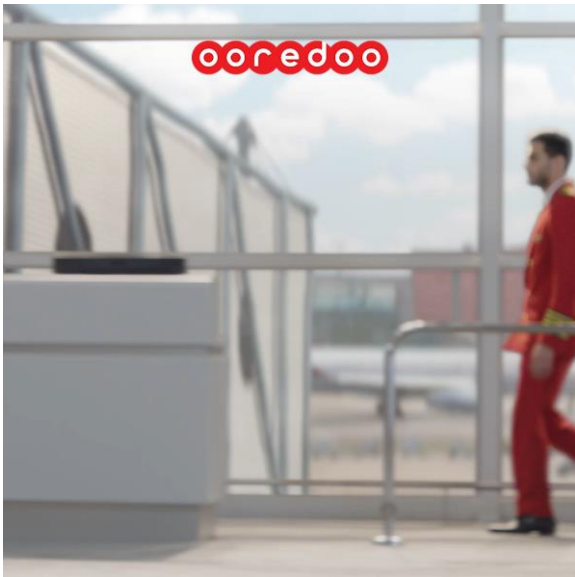


Increase digital care usage to improve satisfaction, loyalty, and to reduce costs

Examples of making it easy for our customers to find, buy, and use our services online in the first half of 2019 ...

DIGITAL MARKETING

Successfully Messi campaign



DIGITAL SALES

 Launch of Ooredoo ANA



The first fully digital mobile plan in the country

 My Ooredoo App



Significant reduction in churn and increase in ARPU vs. non app users

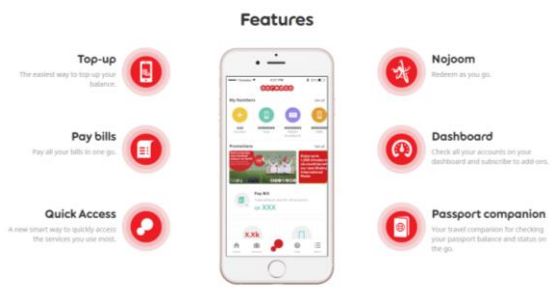
DIGITAL CARE

 Digital care campaign



Combined campaign to drive app growth and then usage

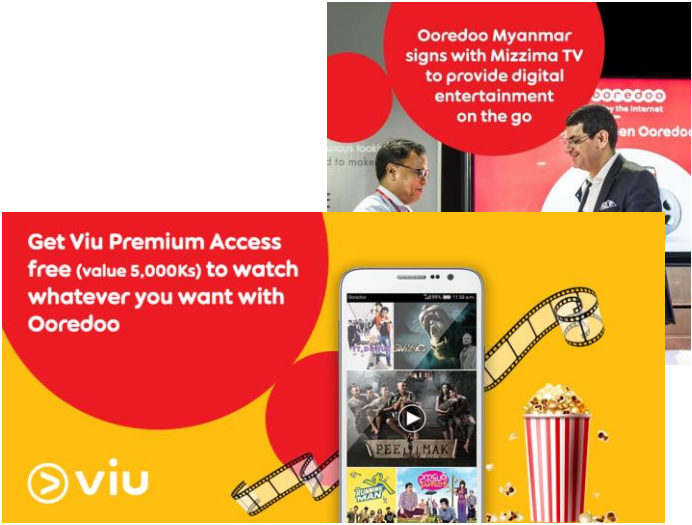
 Launch of new care / upsell digital channel mobile data plan



Lower friction for top-up and transactions, increasing Monthly Active Users and conversion

...and building New Digital revenue through partnerships

Partnership with VIU and Mizzima TV



Unique value proposition of localized premium Asian content

New Ooredoo Android TV

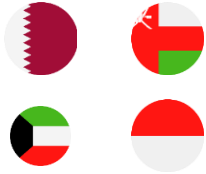


All digital services through one set-top box intended to be the premier digital hub for customers in Qatar

Apple / Google carrier billing



Google Play



Ooredoo Google and Apple carrier billing for purchases on the App Store

Results don't happen overnight, success requires hard work and focus

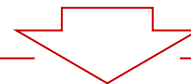
Relentless focus on growing our digital customers and capabilities...



...day by day in our markets, playing the long game



Maximize returns, significantly ahead of the competition



Our long-term focus on digital transformation will enable us to build a strong foundation for future success, by making it easy for our customers to find, buy, and use our services online



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