

CONSUMER

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Chief Consumer Market

Haarlem



CAPITAL
MARKETS
DAY 2018

**CONVERGED
HOUSEHOLDS
TO DRIVE
GROWTH**

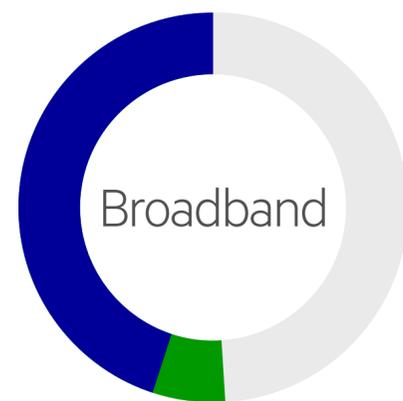
Strong market positions

with leadership in convergence

Broadband and mobile market share¹

>40%

Converged base



45% Total
51% KPN Brand



56% Total
68% KPN Brand

Best-in-class NPS²

+17 +28 converged



Best all-in-one fixed provider
Best mobile provider³

1 Mobile based on Q4 2017, broadband based on Q3 2018; based on Telecompaper & management estimates

2 Q3 2018; Sources: Kantar TNS

3 Independent market survey (Consumentenbond)

STRATEGIC FOCUS 2019 2021

Best **household access**
and **customer**
experience.

Growing converged
base and product
penetration.

Focus on
delivering value.

FttH access investments

driving higher returns

+15%

NPS¹

+€6

ARPU

-34%

Churn

+9%_{opt}

Broadband
market share

Q3 2018, >200Mbps households vs. <200Mbps households

1 KPN brand, source: Kantar TNS

Best household access and customer experience

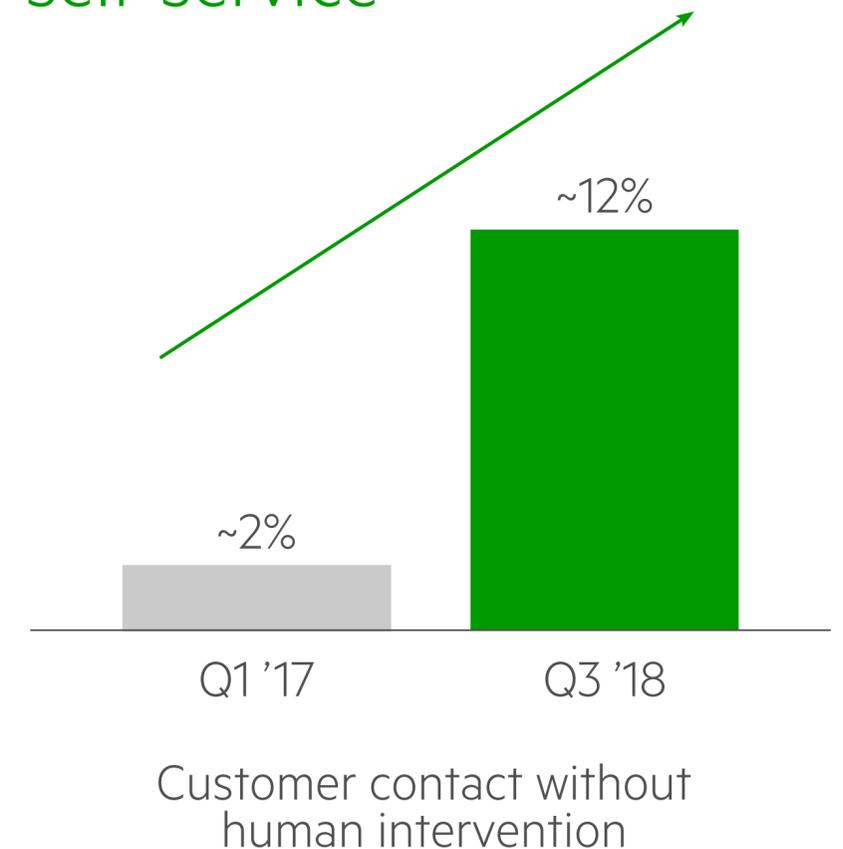
Household-centric propositions and organization



Best in-home experience

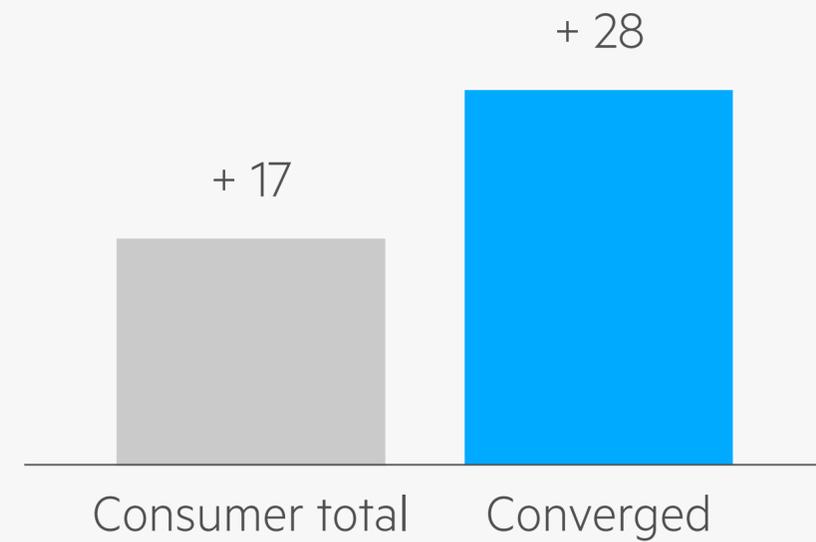


Easily accessible self-service

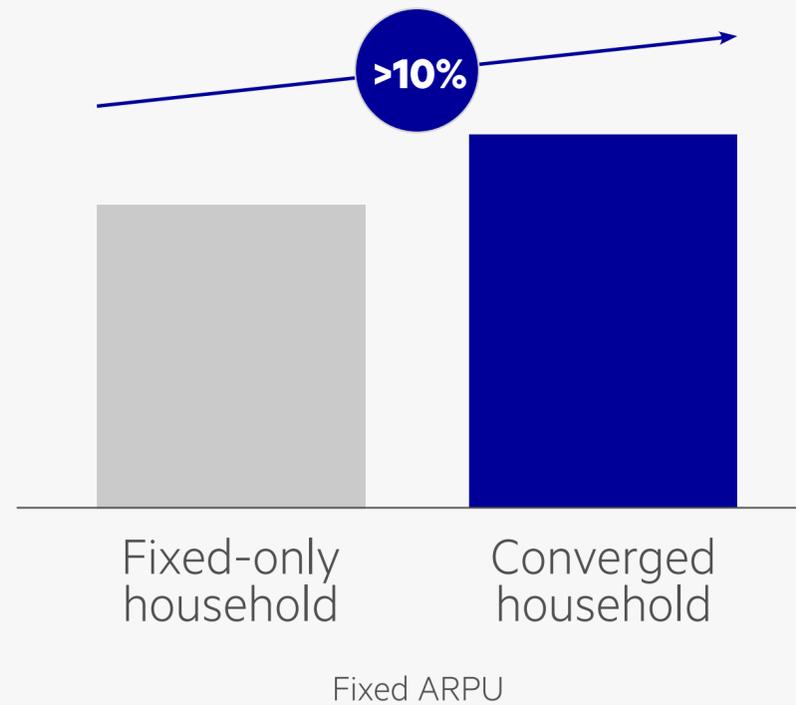


Convergence offers clear benefits

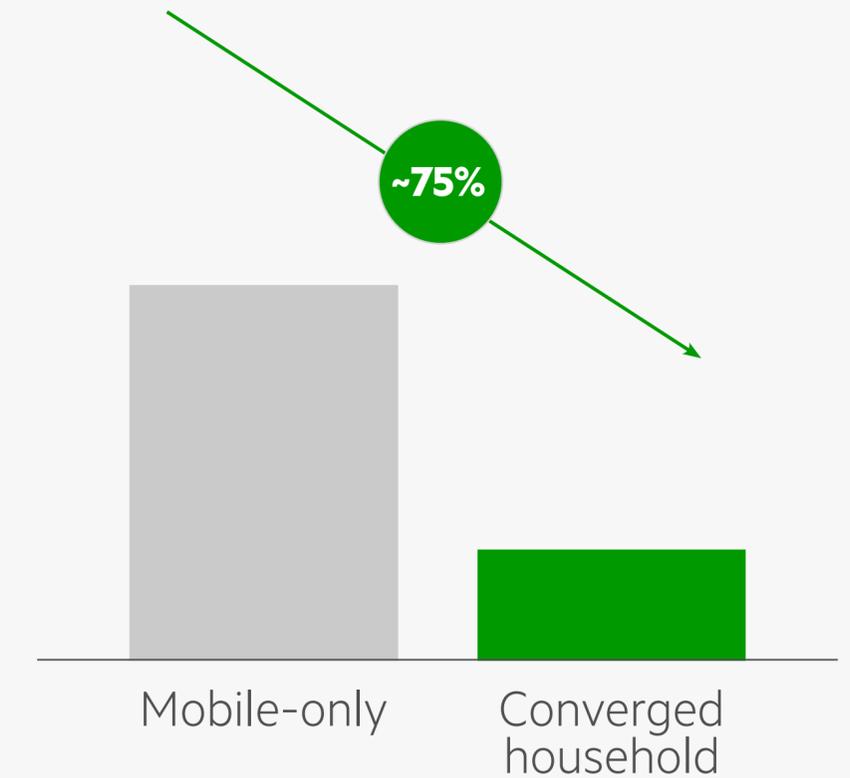
Market leading NPS¹



Higher value per household



Lower mobile churn



KPN brand

1 Source: Kantar TNS

Targeted household approach

to increase converged base by end 2021

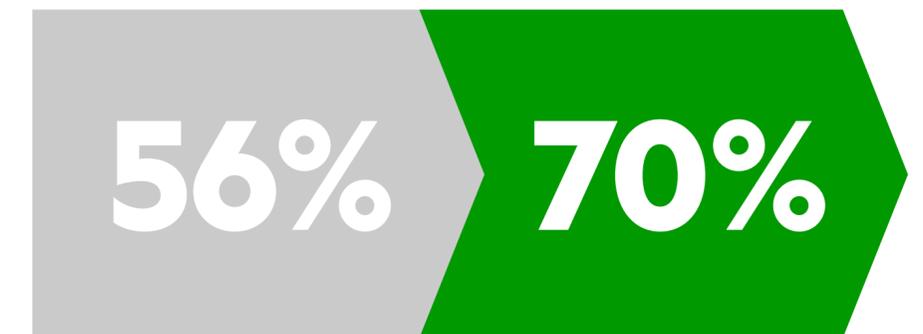
Grow converged households¹...

+300k

...and SIMs per household...

>10%

...to drive higher converged postpaid base



Q3 2018

by end 2021

¹ Q3 2018: 1,325k converged households

Data driven personalized campaigning

to increase up- and cross-sell

Offering tailored product and services advice...

...to further increase product penetration...

...driving high value inflow

Focused direct marketing

Regional approach

Successful up- and cross-sell

75% Mobile acquisitions from existing households¹

+5% Postpaid inflow ARPU (Sep '18 vs. Jan '18)¹

¹ KPN brand, Q3 2018

Clear value focus

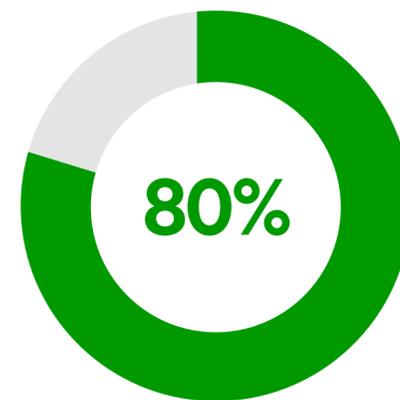
to drive sustainable service revenue growth

High-value broadband household growth

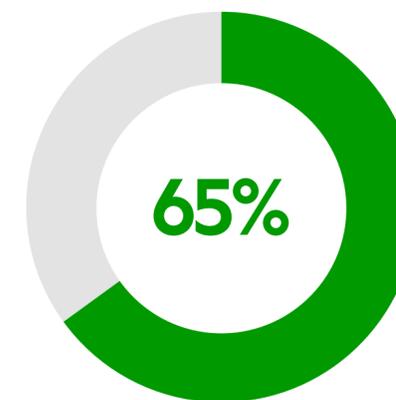


Supported by fiber roll-out

Growing converged KPN brand base



Converged net adds broadband YTD '18



Converged net adds postpaid YTD '18

Clear benefits



NPS



ARPU



Churn

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