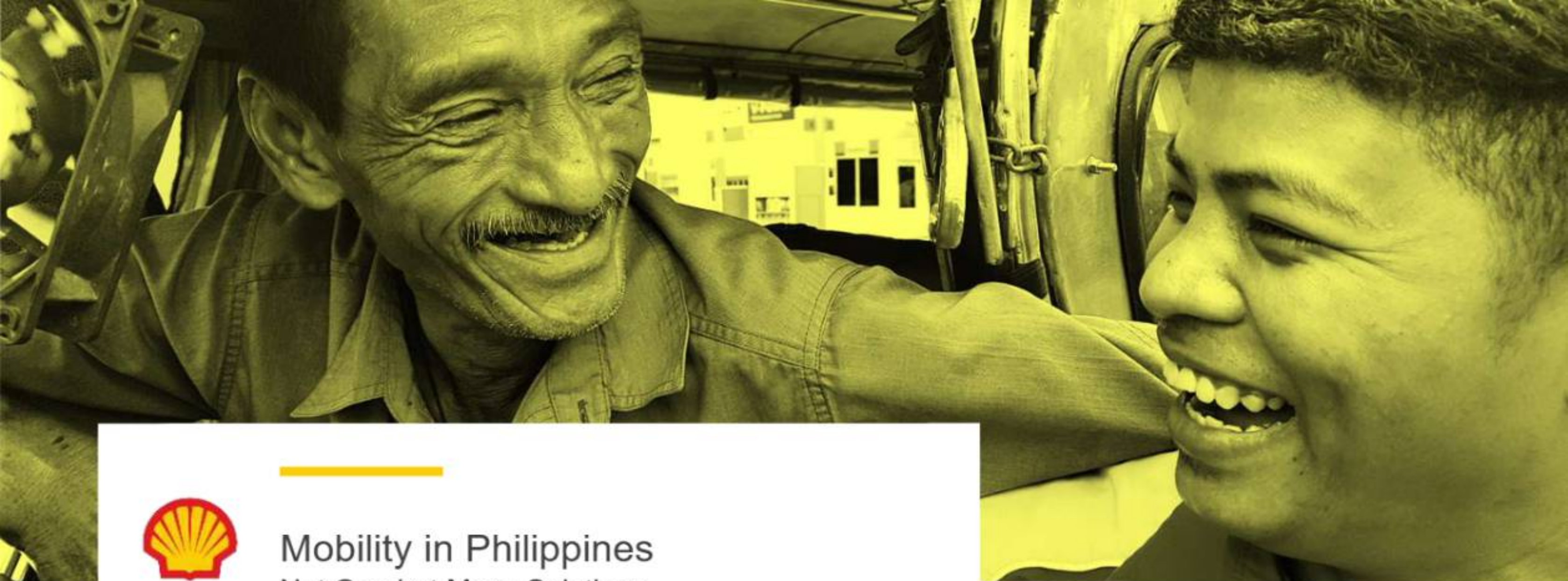




Mobility in Philippines

Not One but Many Solutions

Randy del Valle

Vice President and General Manager for Retail
Pilipinas Shell Petroleum Corporation



METRO MANILA

THE PHILIPPINES

URBANIZATION



POPULATION



DIGITALIZATION



SERVICES



Disrupters



DRIVE THERE
Around you

INTEGRATED
JOURNEYS

Demand for convenience



EFFICIENCY
IMPROVEMENTS

Increased awareness



MEET CUSTOMERS'
EVOLVING NEEDS



Young nation with immense social media penetration, increased demand for convenience and higher purpose

DIGITALLY NATIVE and ready to use technology

They are **NOT INTERESTED** in owning a vehicle

They care about the **IMPACT OF MOBILITY** on the environment

A woman with long brown hair, wearing sunglasses, a black long-sleeved shirt, and blue jeans, is riding a grey Like scooter. She has a large black backpack with blue straps on the back. The scooter is parked on a paved road next to a concrete guardrail. In the background, there are lush green mountains and a yellow road sign with a black arrow pointing left. The sky is overcast.

What do customers want and need?

We will only be successful if we offer choices, products, services and solutions that respond to what customers need and are prepared to pay for



Taking the lead on the family business, Cathy has very little time on her hands shuffling from a supplier meeting to taking online orders from clients.

She often finds herself exhausted on the road, and frequently stops at a Shell station on her route to take a break. She likes stopping there because it's easily accessible, with friendly staff. She also often finds herself a treat in Shell Select.

Quite recently, she's found that she can do a wide range of chores in errand in a nearby Shell station, from basic groceries, paying bills, and even taking a moment for herself at the lounge while waiting for her oil change to finish.

Transactions are becoming frictionless

In South Asia, mobile internet connectivity doubled since 2014 to

33%¹

In East Asia, over

50%

of the population are connected over mobile²

In Philippines,

75%

of internet users purchased a product or service online³

¹ <https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2019/09/Mobile-Internet-Connectivity-SouthAsia-Fact-Sheet.pdf>

² <https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2019/09/Mobile-Internet-Connectivity-EAP-Fact-Sheet.pdf>

³ <https://datareportal.com/reports/digital-2019-ecommerce-in-the-philippines>

PAY CONTACTLESS IN OUR STATION WITH GCASH



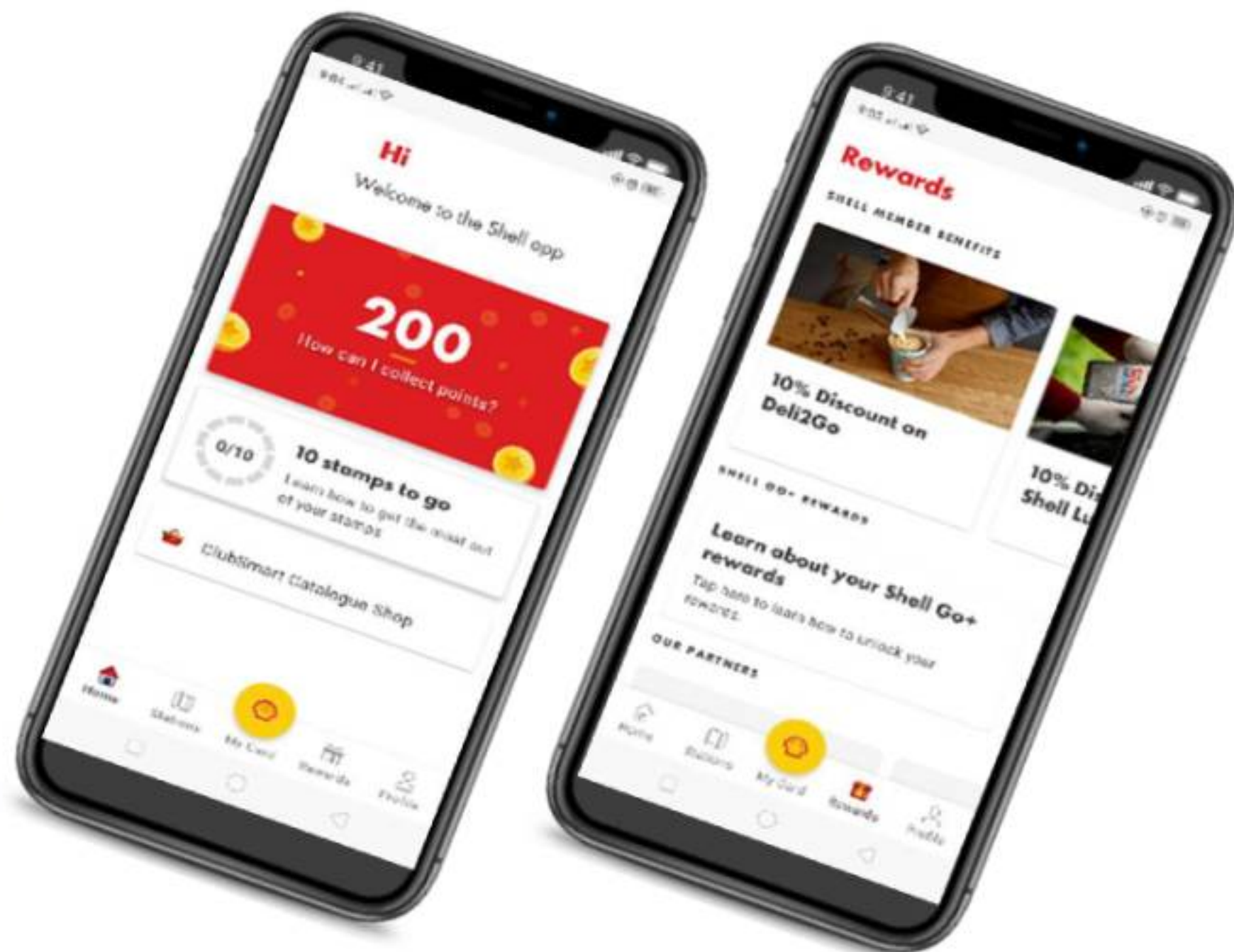
REWARD YOUR EVERY JOURNEY WITH **Shell GO+**



DOWNLOAD
THE APP NOW.



GO WELL



Convenience at a touch
of a button

50%

Likely to purchase
online

SHELL FLEET SOLUTIONS
TOGETHER ANYTHING IS POSSIBLE

DESTINATION:
TELEMATICS ADVANTAGE

Shell Global Insights, Future of Retail Report, 2020

Caring for the biggest vehicle segment in the country



Our commitment to reduce carbon intensity in our sites



Shell
Biofuels



Shell
Bitumen FreshAir



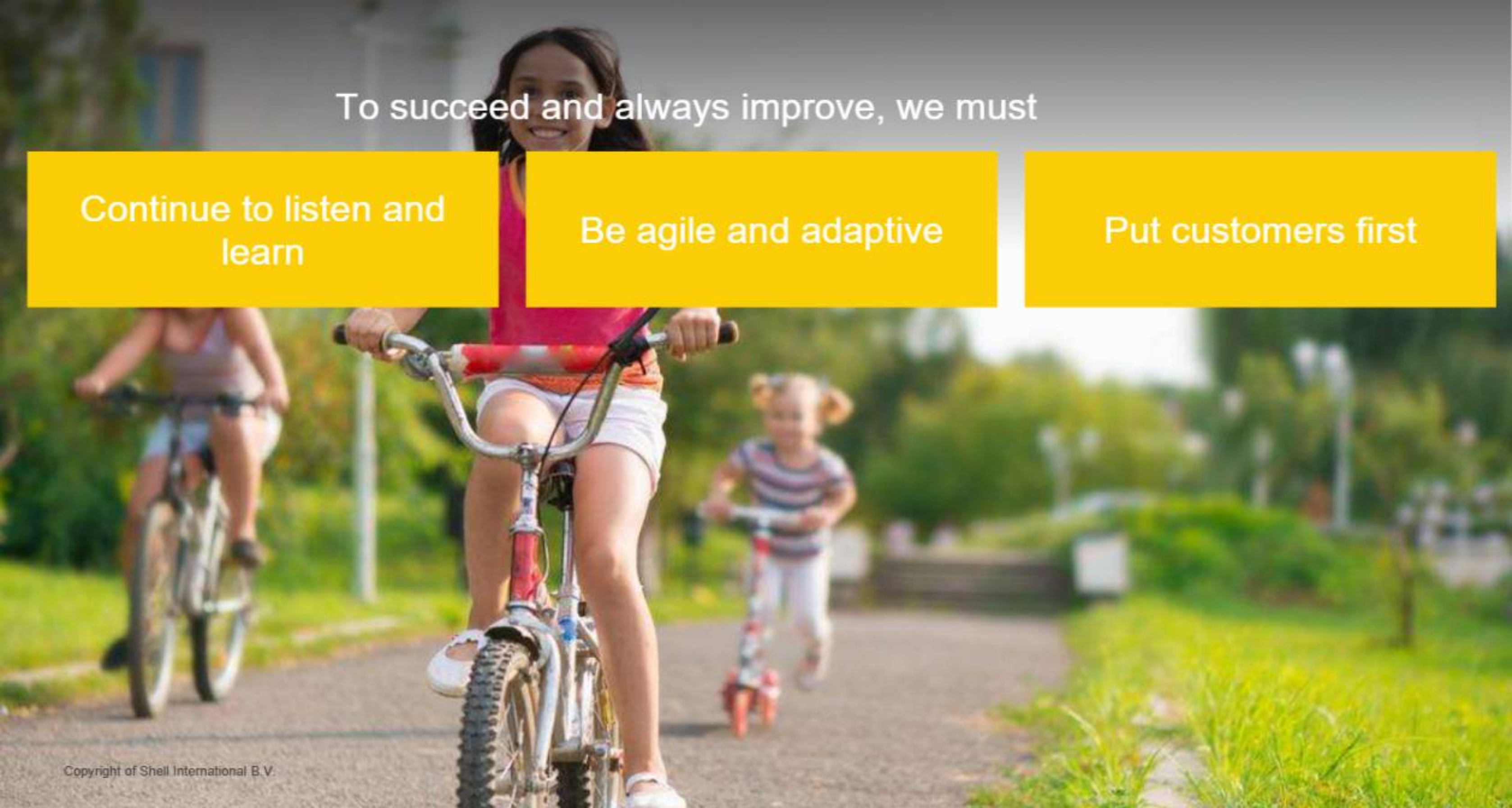
The impact of COVID-19

- GDP declined by 16.5% in Q2 2020 driven by 45% unemployment rate
- Convenience through online platform and on demand delivery is also influencing how and where people consume goods, with a greater focus on clusters of shops and services
- With uncertainties on vaccines – use of public transport is heavily impacted. Marginalized sectors are heavily impacted
- Many governments are incorporating green initiatives into large economic stimulus packages to assist their economies

A photograph of several small green seedlings growing in dark, rich soil. The scene is illuminated by warm, golden light, likely from the sun low on the horizon, creating a soft glow and long shadows. A semi-transparent dark grey rectangular box is positioned in the upper left quadrant, containing white text. A thin yellow horizontal line is located above the text box.

Whilst there is no one single solution to address the mobility challenges and opportunities, there are 3 things in common:

- Close collaboration between government, industry and society is required
- We can influence the future of mobility by building and strengthening partnerships
- Mobility providers have a key role in offering advice and support to national mobility policies

A young girl in a pink shirt and white shorts is riding a red bicycle towards the camera on a paved path. In the background, another child is riding a bicycle to the left, and a third child is riding a scooter to the right. The scene is set in a park-like area with green grass and trees under a bright sky.

To succeed and always improve, we must

Continue to listen and
learn

Be agile and adaptive

Put customers first



www.shell.com.ph