



EMPOWERING ALL TOWARD
INCLUSIVE GROWTH

OR Brand Perception Survey

2025



Brand Management Metrics

OR recognizes that brand management is crucial for businesses to communicate the identity and creating competitive advantages in the market. In terms of sustainability, OR realizes opportunities to showcase stakeholders on our work towards inclusive growth for all, while ensuring the well-being of people and the planet, and aiming for remarkable performance standards.

OR believes that real sustainability efforts take time to be reflected in the perceived efforts on our stakeholders. Although the perceived sustainability is crucial, it is a process to ensure that everyone is on the same page. Communication is key when it comes to disseminating the sustainability work at OR. We assess the brand perception to understand more about the perspective of our customers, OR shareholders, employees, communities and community leaders, dealers, investors, the press, and the public have on our business.

We recognized that the perceived sustainability of OR is linked to overall business performance. Therefore, this is our opportunity to realize competitive advantages with clearly defined positioning of OR compare to peers. We foresee all stakeholders illustrating their understanding on our sustainability initiatives at OR .

OR 2030 Goals

OR conceptualizes sustainable future through OR's SDGs to enhance opportunities to grow together with communities, economy, and society to effectively target OR 2030 goals.

The OR SDGs consist of:

- S – SMALL (Opportunities for Communities)
- D – DIVERSIFIED (More Products and Services)
- G – GREEN (Low Carbon Business Areas)

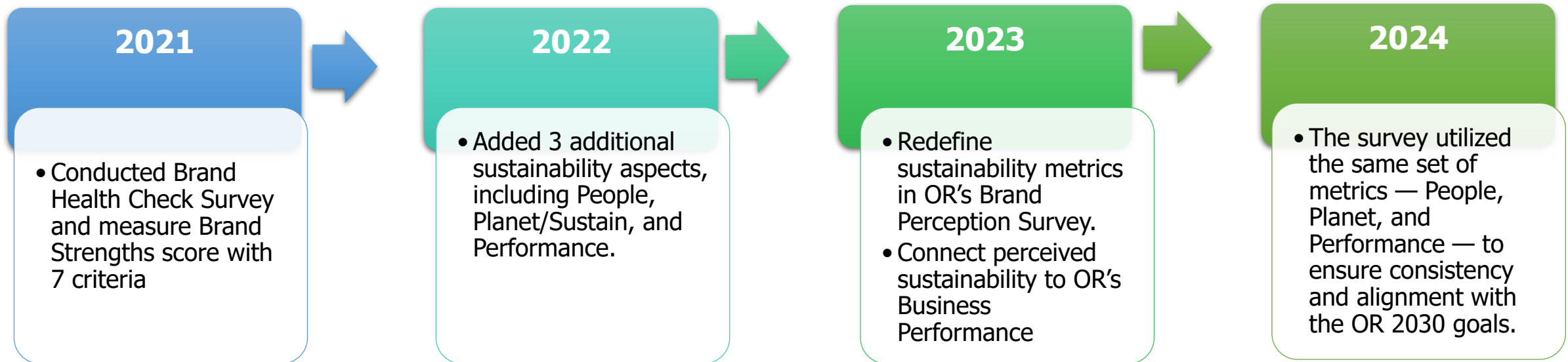


OR's Evolution of Customer Brand Perception



At OR, we facilitate significant developments over the past 4 years on the perceived sustainability of stakeholders. We showcase our efforts to empower all towards inclusive growth to benefit the well-being of people and the planet, while ensuring remarkable performance standards.

- **From 2021**, conducted Brand Health Check Survey and measure Brand Strengths score with 7 criteria, including Willing to protect, Pass on to Next Gen, Reliable & Part of Life, Grow New Business, Well-Balanced Values, Proud, and Trustworthy.
- **In 2022**, we showed our value to sustainability topics and therefore added 3 additional sustainability aspects, including People, Planet/Sustain, and Performance. We have the total of 10 criteria in our Brand Perception Survey.
- **In 2023**, OR redefined sustainability metrics in OR's Brand Health Check Survey to connect with OR's Sustainable Perception in term of OR 2030 Goals
- **In 2024**, OR conducted a Brand Health Check Survey focusing on sustainability aspects with the same group of stakeholders, as they remain a strategically important stakeholders for the organization. The survey utilized the same set of metrics — People, Planet, and Performance — to ensure consistency and alignment with the OR 2030 goals.



Brand Perception Survey

OR conducted Brand Perception Survey to assess stakeholders' perception on the brand's perceived sustainability. To do this, we integrate sustainability metrics in our survey questions. The metrics are correlated with the targets to achieve higher understanding of OR's sustainability efforts from our stakeholders.

List of stakeholders included in the survey

1. Communities
2. OR Dealers
3. OR B2B customers
4. OR Employees
5. OR Shareholders
6. General population
7. Investors
8. Press/Community leaders

We used the following **sustainability metrics** to assess the perceived sustainability among stakeholders:

1. How much do you trust our brand in relation to sustainability?
2. Do you agree that our brand creates job opportunities and distribute income to people in every group, and creates growth and distribute income to dealers, shareholders, small and medium-sized business owners, workers, and communities?
3. Do you agree that our brand improves quality of life, society, and community?

We set out **quantifiable targets** to ensure that the sustainability metrics are traceable as follows:

1. We have set the target to reach 79 of "Agree" (Scale 4-5) within 3 years across all 8 stakeholders.
2. We have set the target to reach 79 of "Agree" (Scale 4-5) within 3 years across all 8 stakeholders.
3. We have set the target to reach 79 of "Agree" (Scale 4-5) within 3 years across all 8 stakeholders.



Brand Perception Survey 2024

We perform a statistical analysis of our brand perception survey result. Accordingly, sustainability metrics have a weight of **30 percentage (3 out of 10)** from the total survey questions on brand perception.

Focusing on the three-sustainability metrics, we observed slight increase over the survey results from 2022 to 2024. The average percent of participants with 'Agree' response has increased from 77.1 % to **79.6 %**. This highlights the increasing trend of the perceived sustainability at OR, especially on improving quality of life, society, and community.

The only decreasing trend of 'Agree' response was on the second sustainability metrics, highlighting the perceptions on creating job opportunities, distributing incomes, and supporting local communities. In this regards, OR realized the challenges of ensuring the perceived efforts across 8 stakeholders on the subject.

Sustainability Metrics	Stakeholders with % of 'Agree' responses		
	2022	2023	2024
1. How much do you trust our brand in relation to sustainability?	76.5	77.9	80.1 ▲
2. Do you agree that our brand creates job opportunities and distribute income to people in every group, and creates growth and distribute income to dealers, shareholders, small and medium-sized business owners, workers, and communities?	77.7	76.8	79.7 ▲
3. Do you agree that our brand improves quality of life, society, and community?	77.2	78.8	79.1 ▲
Total Score	77.1	77.8	79.6 ▲

▲ Increase from 2022 and 2023 results
▼ Decrease from 2022 and 2023 results

PTT Stations

PTT station ranks No.1 for the total oil market share in Thailand. Operated by OR, PTT stations consist of integrated retailing of goods and services in gas stations, including coffee businesses, food and beverage outlets, convenience stores, and restaurants. OR manages retail spaces and other services within the PTT stations.

OR places great emphasis on the vision of "[Empowering All Toward Inclusive Growth](#)" and has unlocked opportunities through different projects and activities, e.g., generating income for over 137 underprivileged persons, which also included aging population, people with learning disabilities and hearing-impaired difficulties, by training them to become baristas at Cafe Amazon for Chance; organizing the Happy Space, Happy Market project, which was to allow farmers and local communities to sell their produce within PTT Stations at no cost; buying oversupplied agricultural products and giving the same away to service users at gas stations through different promotional activities, which contributed to community income of more than 15.6 million baht.



PTT Stations

In 2024, we conducted post campaign survey with the total number of 578 participants across four regions of Thailand including Central, North, South, and Northeast. We assessed their consuming behaviors and their perceptions on our business.

From the survey result, we found that our stakeholders perceived xtrasave campaign positively in terms of awareness of oil product quality, with **85.47% of the 'Positive' response due to** advertising effectiveness. This illustrated their perception on our brand owing to convenience and easy access to PTT Station, whereas the perception on our oil product quality has yet to be properly recognized. This is reflected on the **Revenue increase of 2.5% YoY from the first quarter of 2025 from last year's performance.**



Thaidet

Thaidet is a CSR initiative by PTT Oil and Retail Business (OR) dedicated to enhancing the quality of life and boosting local economies by supporting community enterprises across Thailand. In collaboration with over 10 government ministries, the project carefully selects outstanding local products and provides access to nationwide sales channels through OR's business platforms—especially PTT Stations and Café Amazon branches. OR acts as a facilitator, connecting community producers directly with retailers via a centralized product catalog.

Now in its 7th year, Thaidet features more than 1,200 products and 21 premium “Thaidet Select” items, available through over 380 distribution points and online via ThailandPostMart. In 2024, the initiative generated THB 166.07 million in revenue for local communities and aims to reach THB 200 million in 2025. Thaidet continues to make quality, everyday-use community products more accessible, while strengthening local identity, empowering grassroots economies, and supporting sustainable growth nationwide.



Thaidet

In 2024, we conducted Post Campaign Survey of Film Campaign Evaluation with the total number of 250 participants across Bangkok, Petchburi, Mahasarakham, Nakhon Ratchasima and Nakhon Pathom. We assessed their consuming behaviors and their perceptions on our business.

From the survey result, we found that our stakeholders perceived the Thaidet advertising campaign positively, with a 100% favorability rating and 11% awareness. The campaign effectively influenced customers' intention to visit Thaidet stores, especially during travel (78%) or while refueling (66%). Key factors attracting customers included product variety (73%) and the appeal of local specialty items. All respondents across provinces agreed the ads were easy to understand (100% T2B) and encouraging, helping to drive store visits.

Overall, the advertisement communicates well across all dimensions. It is most effective in conveying that the store offers products with unique local identities (98%). However, there is room for improvement in clearly communicating that the store is located within PTT Station.



Café Amazon

Café Amazon is a leading coffee brand in Thailand, ranking the 6th of the world with the total number of 4,462 branches and sales of 402 million cups in 2024. The brand was debuted in 2002 as a coffee shop inside PTT petrol stations to increase retail sales. From the start, Café Amazon has a clear positioning towards being a '**Green Oasis**' for consumers to refresh and recharge during their journeys. Sustainability is at the heart of Café Amazon. OR operates the brand based on the principle of creating additional value to the society, sustainable growth together with communities, and the environment.

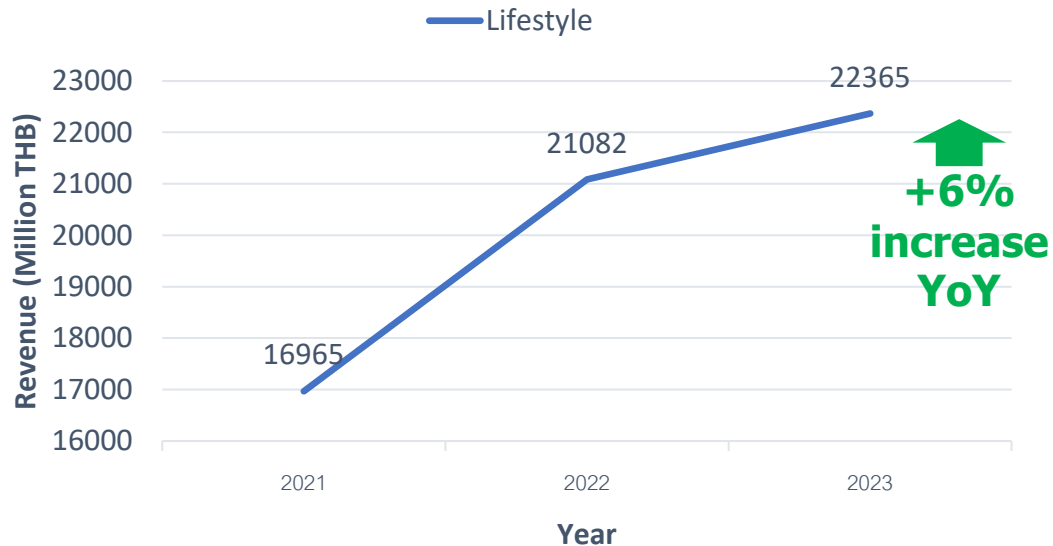
Café Amazon integrated sustainable practice throughout the value chain from sourcing coffee beans to inclusive employee programs. We purchased coffee beans from local farmers to support Thai producers.



Café Amazon

In 2024, we conducted our post-campaign survey in which we ensured the diversity of participants (demographic, location, educational background, and occupation) with the total number of 240 people across Thailand. We used quantitative approach with random sampling and face-to-face interview. From the survey result, Café Amazon remains the most well-known coffee brand in Thailand, with 75.4% of consumers recognized the brand as "The Top of Mind Brand" that came first to their minds when it comes to coffee and beverages compare to other brands.

OR's revenue from Lifestyle Business (Café Amazon)



The main message that we communicated in 2024 was "Coffee that's Fair to All: Fair to The Deaf" under three main SDG pillars: S (Small People), D (Diversify Business), and G (Green Economy). The "Coffee that's Fair to All: Fair to The Deaf" campaign focused on "S (Small People)" by communicating the story of the deaf baristas for whom Café Amazon created job opportunities. The results show that after watching the "Coffee that's Fair to All: Fair to The Deaf" campaign, all participants (100%) had positive sentiment towards the brand and agreed that the brand creates job opportunities for disabled workers.

We calculated that the sustainable outlook of Café Amazon is accountable for 6% increase of revenue Year-on-Year (YoY) from 2022-2023. From the analysis, Café Amazon will have increasing trend of revenue generation due to the strong customer base with the highest number of shops (almost 50% of the total of approximately 8,400 Thai coffee brand outlets). This addressed the importance of perceived sustainability to our business performance.



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INCLUSIVE GROWTH**

OR เติมเต็มโอกาส เพื่อทุกการเติบโต ร่วมกัน

*Harnessing OR
competencies to support,
fulfill, and elevate*

*Sustainable growth
with Living Community,
Healthy Environment, and
Economic Prosperity*

*Moving forward with
strong determination and
leaving no one behind*

*6 groups of
OR stakeholders*