



EMPOWERING ALL TOWARD
INCLUSIVE GROWTH

OR Brand Perception Survey

2026



Brand Management Metrics

Brand Management Metrics – Sustainability Concept in OR's Brand

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.

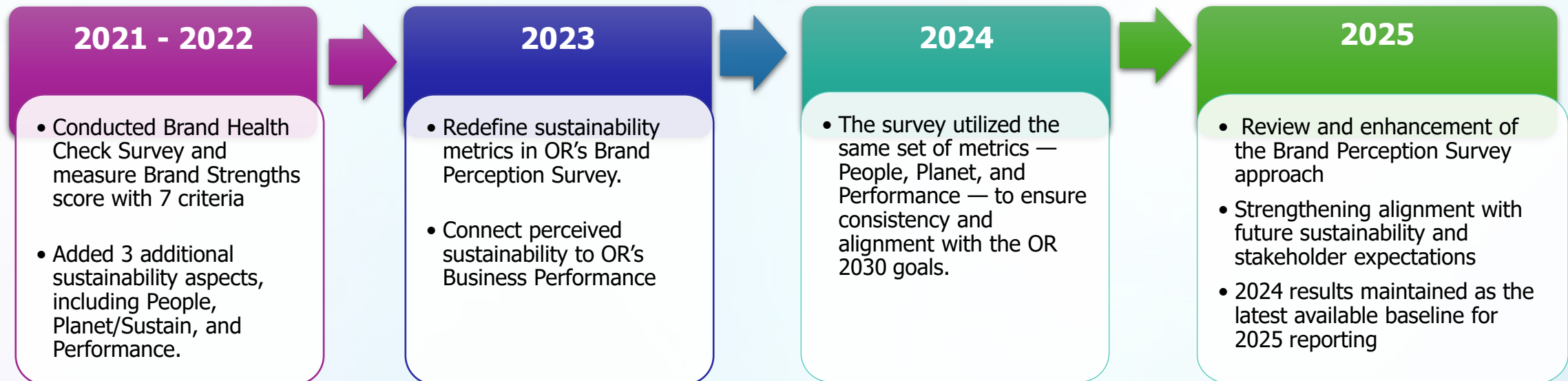


OR's Evolution of Customer Brand Perception



Over the past four years, OR has continuously evolved its approach to assessing stakeholders' perceptions of sustainability. Through the Brand Perception Survey, OR has monitored stakeholder views on its contributions to People, Planet, and Performance, reflecting its commitment to inclusive growth, social well-being, environmental stewardship, and long-term business performance.

- **From 2021 - 2022**, 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.
 - **In 2025**, OR is reviewing and redesigning the Brand Perception Survey methodology to strengthen alignment with future sustainability priorities and stakeholder expectations. During the review period, no survey was conducted; therefore, the 2024 results remain the latest available baseline for 2025 reporting. The review aims to enhance the effectiveness and relevance of future assessments and support the continuous improvement of OR's stakeholder perception measurement framework



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.

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Brand Perception Survey – Latest Available Results

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.

Note: No Brand Perception Survey was conducted in 2025 due to the ongoing review and redesign of the assessment methodology for the next implementation cycle. Accordingly, the 2024 survey results remain the most recent available dataset and are used as the baseline reference for 2025 reporting.

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 Station

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.

Guided by the vision of **"Empowering All Toward Inclusive Growth"** OR is committed to creating opportunities and shared value for all stakeholders through a wide range of initiatives and community engagement programs. These include the Happy Space, Happy Market initiative, which provides free retail space at PTT Stations for farmers and local communities to sell their products, as well as the purchase of oversupplied agricultural produce for distribution to customers through promotional activities at PTT Stations.

To date, the initiative has supported more than 2,000 community enterprises and local entrepreneurs, generating over THB 39 million in cumulative income through a network of more than 900 PTT Stations nationwide.

In 2025, the Happy Space initiative enabled farmers to generate more than THB 10 million in income by providing retail space at PTT Stations to sell their agricultural products directly to customers. OR also purchased oversupplied agricultural produce and distributed it to customers at more than 360 PTT Stations across Bangkok and its surrounding areas, with a total contribution valued at THB 3.786 million.



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PTT Station

In 2025, we conducted a satisfaction and engagement survey among 3,600 customers nationwide to analyze their consumption behaviors and perceptions of our business operations.

The survey results indicate a high level of customer engagement with PTT Station, with 99% expressing trust in our oil products. Furthermore, 62% of customers highlighted their impression of the station's diverse retail offerings and services including convenience stores, food and beverage outlets, coffee shops, clean restrooms, and our integrated service offerings, clearly reflecting the significant value consumers place on our status as a one-stop destination.

In terms of brand perception, 93% of respondents view PTT Station as a facility providing a comprehensive range of products and services. This is followed by 89% who recognize us as a market leader, a popular brand that is continuously evolving, pioneering new initiatives, and offering value that aligns with our brand image. These findings underscore how our identity as a one-stop destination serves as a fundamental pillar in strengthening brand trust.

Simultaneously, we have maintained high standards, achieving a 98% overall satisfaction rate regarding our fuel products encompassing quality, performance, technology, cleanliness, and environmental friendliness. This confidence is further reflected in our performance during the first quarter of 2025. While the overall fuel market contracted by 3.6% year-on-year (YoY), OR's revenue declined by only 3.21%, outperforming the overall market. This reflects our ability to retain our customer base and the continued confidence consumers place in our brand.



Café Amazon

Café Amazon is a leading coffee brand in Thailand, ranking the 6th of the world with the total number of 4,800 branches in 2025. 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.

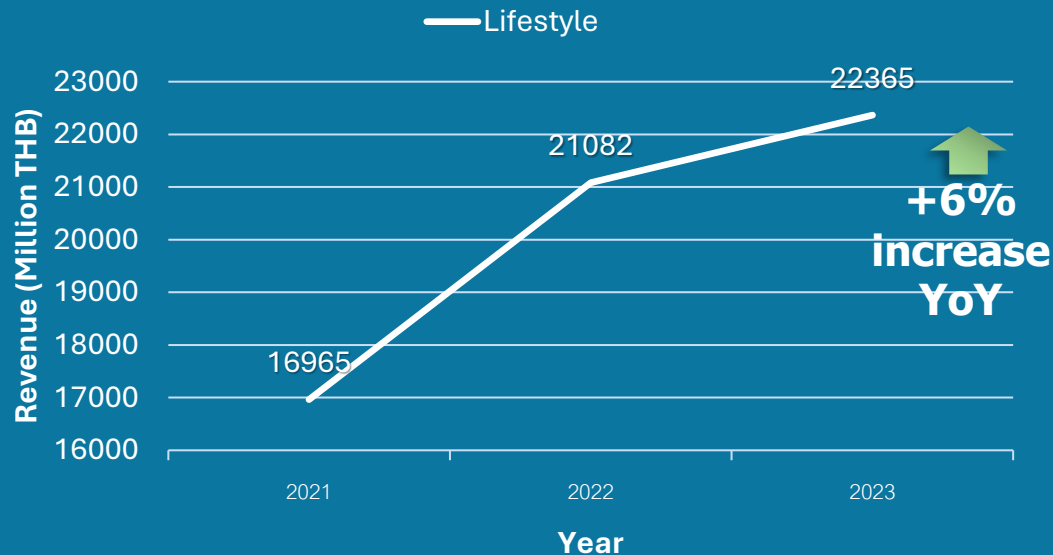
Café Amazon integrated sustainable practice throughout the value chain from sourcing coffee beans to inclusive employee programs. We purchased coffee beans from local farmers to support Thai producers.



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*