

# STAND OUT

WITH SHELL



# SHELL RETAIL

# WORLD'S #1

# MOBILITY RETAILER

## Our History

Founded in 1897, Shell is the world's largest single-brand retailer, with over 43,000 retail stations spread across more than 80 countries. An amazing 300 cars visit a Shell retail station every second, 365 days a year. Shell is an international energy company that aims to meet the world's growing need for more and cleaner energy solutions in ways that are economically, environmentally and socially responsible.

## Meeting the Needs of Today's Fast, Dynamic, and Changing World

Shell's priority is clear: to deliver more and cleaner energy to the world. For more than 100 years, Shell has been committed to high-quality fuels research, development, and innovation to meet the evolving needs of customers and their vehicles. And Shell is investing in a range of lower-carbon energies including biofuels, hydrogen for transport, and charging for electric vehicles. After all, we've been helping people to get from point A to B for well over a century.

**And We're Not Going To Stop Now.**

**The Shell Brand is**



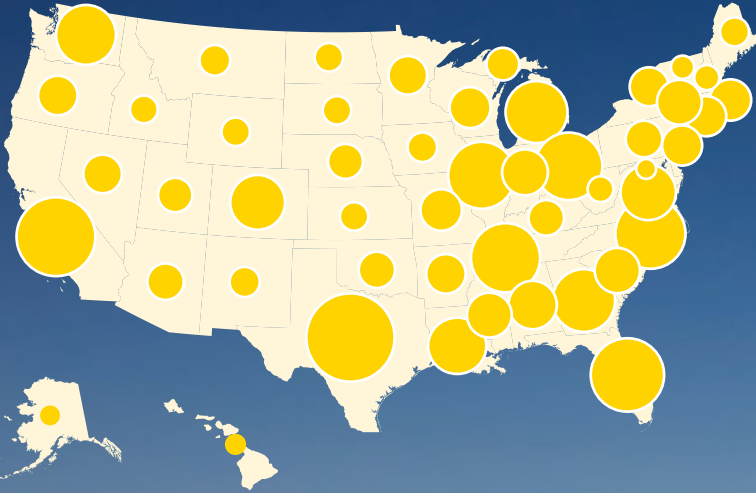
Staying number one is a priority. That is why we work so hard to develop and implement innovative ideas at every level of the business. Shell focuses on providing you with reliable fuel supply and innovative products, programs, and services that continuously drive traffic to your sites.



Major **Gasoline** Brand Share in the US<sup>2</sup>

## Shell Retail in the US

Shell's retail stations, quality fuels, and the Fuel Rewards® loyalty program are well recognized and enjoyed by customers from coast to coast. As the **#1 Fuels Retailer in the US**, we provide our retailers with proven brand strength and a solid portfolio of innovative products, programs, and services that can help accelerate your bottom-line performance.



In the US, we leverage the experience and skills of 18,000 Shell employees – upstream and downstream – to provide reliable fuel supply and to deliver customer value through more than 13,000 Shell retail stations across all 50 states.



**8 MILLION**  
CUSTOMERS  
SERVED A DAY



**3 BILLION**  
TRANSACTIONS  
A YEAR<sup>1</sup>



**13,000+**  
STATIONS ACROSS  
ALL **50** STATES



**Major Premium Gasoline Brand Share in the US<sup>2</sup>**



**Best-Selling Brand in Fast Lubricants in the US<sup>3</sup>**



**Heavy Duty Engine Oil in the US<sup>4</sup>**

# ENGAGE WITH THE POWER OF SHELL

## OUR CORE VALUE OFFER

- Over 1.5 million barrels per day, crude oil refining capacity
- 300+ equity terminals and outside supply points across the United States



Reliable fuel supply



Iconic brand image



Site technology that delivers programs with reliability and speed

## HOW WE HELP YOU STAND OUT



## HOW WE SUPPORT YOU

### 24/7 Site-level support

- Customer service helpdesk
- Site systems & technology helpdesk
- Fuel loading support helpdesk
- Online access to financial, supply and business data



Experienced brand advisors that provide you endless support



# HIGH QUALITY FUELS POWERED BY INNOVATION

## SHELL IS THE CONSUMER'S BRAND OF CHOICE



**Brand Preference<sup>1</sup>**



**Brand Share<sup>2</sup>**

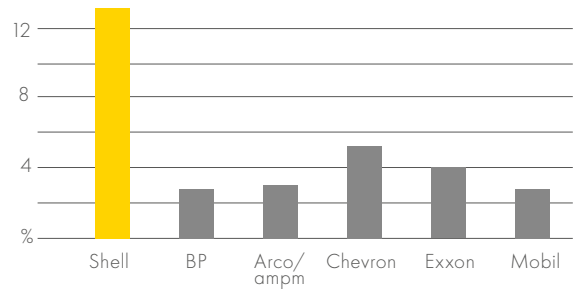


**Premium Brand Share<sup>2</sup>**  
Shell V-Power<sup>®</sup> NiTRO+<sup>2</sup>

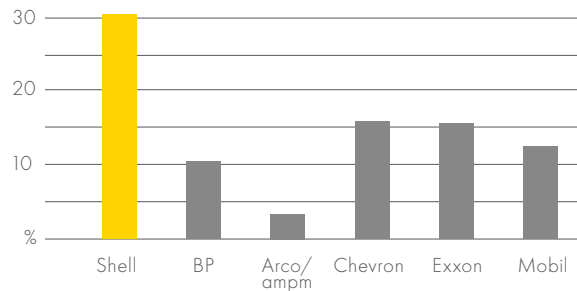


**High Quality Fuels Perception<sup>1</sup>**

## RETAIL BRAND PREFERENCE<sup>1</sup>



## HIGH QUALITY FUELS PERCEPTION<sup>1</sup>



## THE SHELL FUELS STORY

Throughout our history, Shell scientists have experimented with fuel formulations; constantly improving, constantly innovating, constantly leading. The high-quality fuels we sell are designed for today's vehicles. Through consistent fuels research and reformulation, we demonstrate our passion to provide for our customers' needs, keeping in step with an ever-changing world. As engine technology improves, it is imperative that the fuel going into the engine meets new standards for performance. Our Shell fuel technology encompasses research which covers a broad range of vehicle engines, including hybrid and flex-fuel.

Through our human ingenuity, we will continue to design fuels to drive volume, margin, and customer loyalty for your business.

<sup>1</sup> Source: US, GRT, National, Q4'18-Q3'19, Total Fuels Missions.

<sup>2</sup> Source: The NPD Group/Motor Fuels Index, Total US; 12ME Sept. 2019.

## NOT ALL FUELS ARE THE SAME

At Shell, we know that not all fuels are the same, which is why we developed fuel formulations that help clean and protect our customers' engines to get them to choose Shell more often.



All three grades of Shell gasoline contain the Shell Nitrogen Enriched Cleaning System that seeks and destroys engine gunk left behind by lower quality gasolines. Shell Nitrogen Enriched Gasolines act as a barrier to help clean and protect a vehicle's fuel injectors and intake valves from the build-up of deposits.

**No other gasoline protects better against gunk!**



Shell V-Power® NiTRO+ Premium Gasoline is our most advanced fuel ever. Containing the highest concentration of the Shell Nitrogen Enriched Cleaning System, Shell V-Power® NiTRO+ is engineered with four levels of defense against gunk, wear, corrosion and friction to help keep your engine running like new.\*



Unsurpassed protection against gunk



Our best protection against wear



Unbeatable protection against corrosion



Our best protection against friction

Go to [shell.us/vpower](https://shell.us/vpower) to learn more

\*In engines that continuously use Shell V-Power® NiTRO+ Premium Gasoline.



## READY TO EMPOWER FUTURE JOURNEYS

In the coming years you will likely see a richer array of vehicles on the road including cars powered by electricity, trucks powered by hydrogen, and school buses running on natural gas.

Shell has been fueling vehicles large and small for more than 100 years. We are committed to developing mobility solutions to meet the evolving needs of your customers and your retail sites.



# DRIVE MORE FUEL AND C-STORE SALES

WITH THE FUEL REWARDS® PROGRAM



The Fuel Rewards® program is a loyalty program that empowers customers to never pay full price for fuel while driving repeat business for you! Program includes **22+ million members**, who have saved more than **\$530 million**.



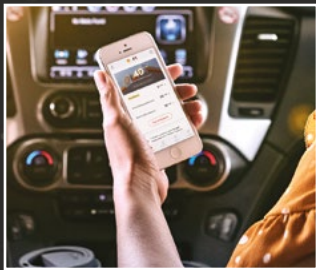
## Provides the Best Offers & Experiences

- Everyday rewards for customers who shop at Shell is the foundation of Fuel Rewards® benefits
- **GOLD STATUS** provides an everyday reward of 5 cents per gallon<sup>1</sup> plus partners such as T-Mobile® and Dunkin'® provide even more savings



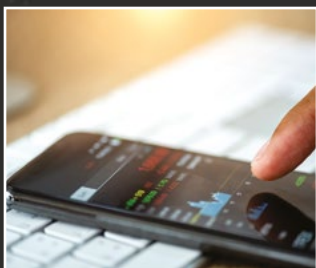
## Integrates Fuel and C-Store

- Drives members inside the c-store with promotions fully funded by c-store vendors, plus options to include your own coffee, fountain and car wash offers **and more**
- Helps create the habit of earning rewards inside the c-store and fueling outside



## Improves the Customer Experience

- Leverages technology, such as Link & Save™ and Shell Pay & Save, to improve the customer experience
- We continue to stay ahead of the curve by making it easy for customers to earn and redeem their Fuel Rewards® savings



## Demonstrates Growth

- Provides you with demonstrated results and insights through data
- Easy access to view the benefits of loyalty, including fuel volume and c-store purchases, through online reports available at customer and site level

**Fuel Rewards®  
Members Buy<sup>2</sup>...**

**4x**  
more fuel 

**3x**  
more premium  
gasoline 

**2x**  
more inside  
the c-store 

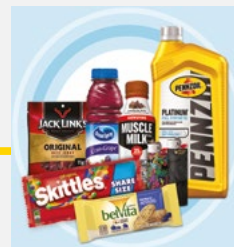
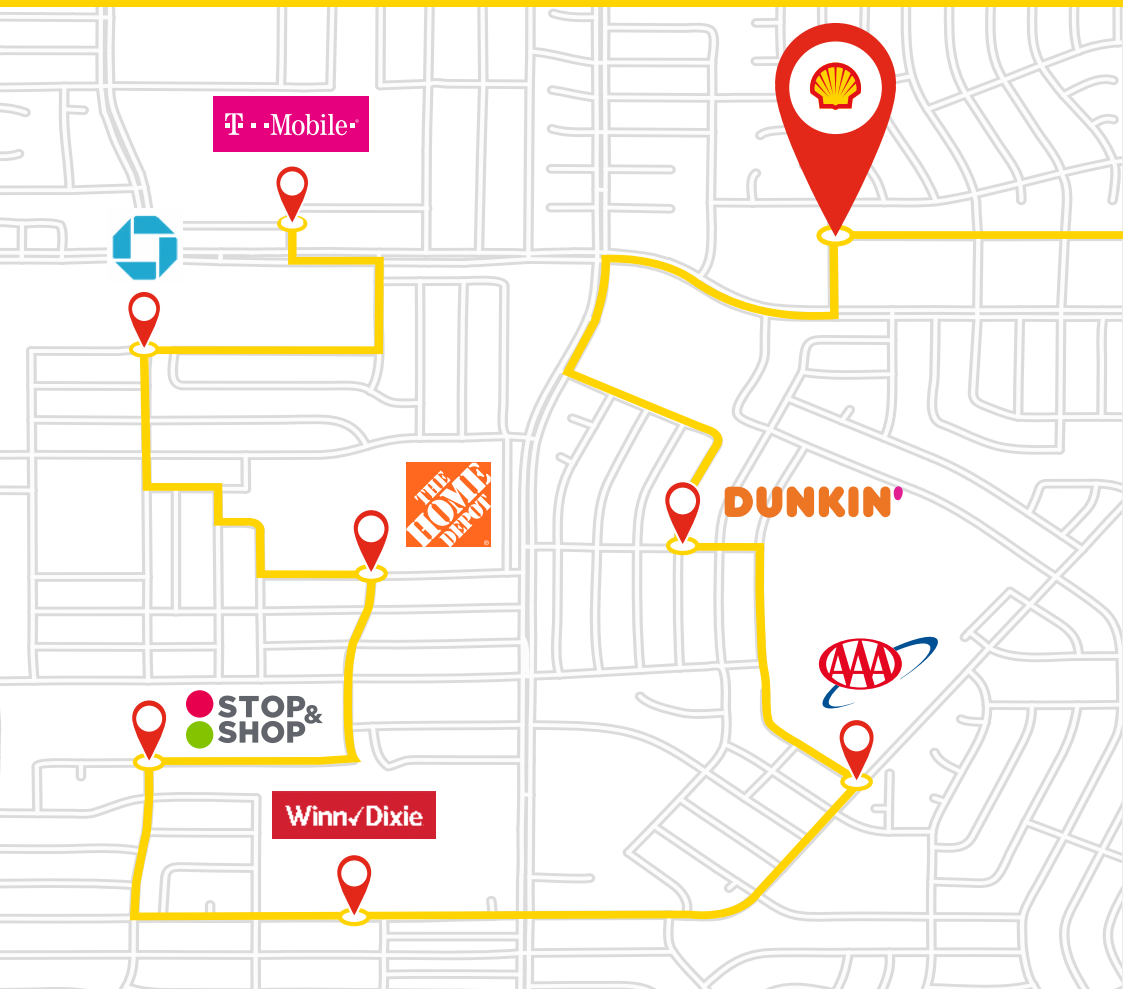
<sup>1</sup> Restrictions apply. At participating Shell stations only. Limit 20 gallons. Active Gold Status required. See [fuelrewards.com/gold](https://fuelrewards.com/gold) for details.

<sup>2</sup> Fuel Rewards® member purchases and savings are compared to those of non-members from Shell analysis based on 2019 credit card data.



# PARTNERS PROVIDE SAVINGS AT EVERY TURN OF THE CUSTOMER JOURNEY

See how Fuel Rewards® partners can fuel a day in the life of your customers.



## Fuel Rewards® In-Store Rewards

National c-store brands, such as Red Bull and Jack Link's, fully fund "cents per gallon" promotions that help drive Fuel Rewards® members inside your store to earn even more savings!

## THE POWER OF STACKING REWARDS<sup>1</sup>

Daily Offer	In-Store Rewards	Partner Offer	Partner Offer	Partner Offer	Partner Offer					
5¢ PER GAL	+	5¢ PER GAL	+	10¢ PER GAL	+	5¢ PER GAL	+	5¢ PER GAL	+	10¢ PER GAL
<h1>40¢ PER GAL x 20 gallons<sup>2</sup> = \$8 savings!</h1>										

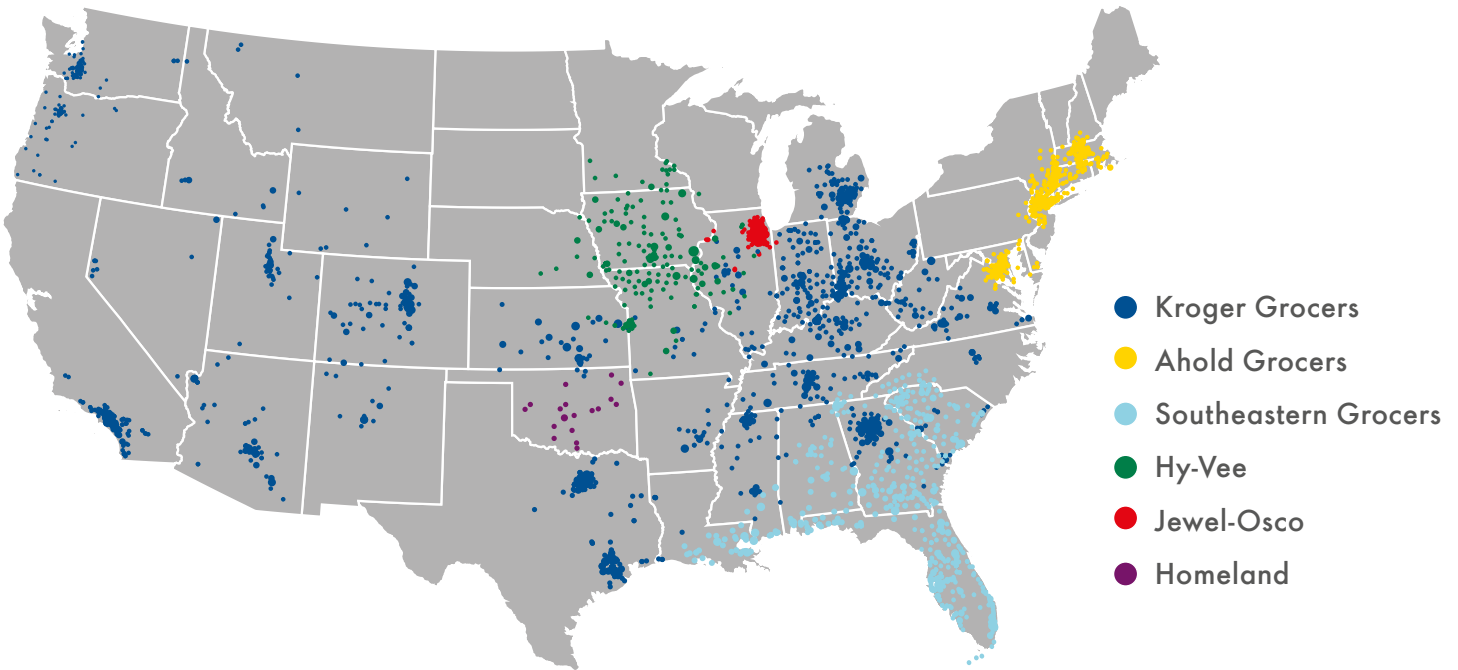
<sup>1</sup> Restrictions apply. Terms and conditions for each offer vary and some partners require members to also join their loyalty program. For more information go to [fuelrewards.com/fuelrewards/terms-conditions](http://fuelrewards.com/fuelrewards/terms-conditions) and visit participating partner websites.

<sup>2</sup> Rewards redeemable on up to 20 gallons per transaction.

# MORE GROCER LOYALTY PARTNERS THAN ANY OTHER FUELS PROVIDER



Shell currently has agreements in place with the grocers' below, and we continue to aggressively build alliances in markets throughout the country. Customers earn points from grocery purchases that translate into instant savings at the pump at participating Shell retail stations.



**KROGER GROCERS**

\*San Diego only

**JEWEL-OSCO**

**Shell | Fuel Rewards® Grocers**

Turn everyday shopping into everyday savings with participating grocers and the Fuel Rewards® program. Fuel Rewards® members save even more by stacking points with their Fuel Rewards® savings.

<p><b>AHOLD GROCERS</b></p>	<p><b>SOUTHEASTERN GROCERS</b></p>
<p><b>HY-VEE</b></p>	<p><b>HOMELAND</b></p>

<sup>1</sup> Coverage as of December 2019.





# PAYMENT SOLUTIONS THAT SEAMLESSLY INTEGRATE LOYALTY REWARDS

Our range of innovative and integrated solutions offer Shell retailers:

- **Faster transactions** – customers answer fewer prompts at the pump and on the PIN pad that help them get back on the road quicker
- **Flexible payment options** – from cards to smartphones to vehicles, customers have a wide range of secure payment options they can use at Shell
- **Customer loyalty** – customers can redeem their Fuel Rewards® savings on every transaction, which can help drive more same-store sales

## TWO CARDS WITH GREAT BENEFITS

Shell | Fuel Rewards® Card

Shell | Fuel Rewards® Mastercard®



### CARD BENEFITS<sup>1</sup>

#### Same Shell benefits on both cards:

- 10 cents per gallon savings on every fuel purchase
- 10% rebates on the first \$1,200 Shell non-fuel purchases per year
- Auto enrollment in Fuel Rewards® program with Gold Status
- Enabled with Link & Save™ – pay and redeem rewards in one swipe
- No annual fee

#### Additional Shell | Fuel Rewards® Mastercard® benefits:

- 2% rebates on the first \$10,000 dining and grocery purchases per year
- 1% rebates on other qualifying purchases


<sup>1</sup>Restrictions may apply. Go to [shell.us/getrewards](https://shell.us/getrewards) for information.

<sup>2</sup>New Shell | Fuel Rewards® Credit Card activity through October 2019

# SHELL PAY & SAVE

DIGITAL SOLUTION AVAILABLE ON NUMEROUS PLATFORMS

PRODUCT FEATURES:




**Payment at the pump**



**Payment in the c-store<sup>1</sup>**



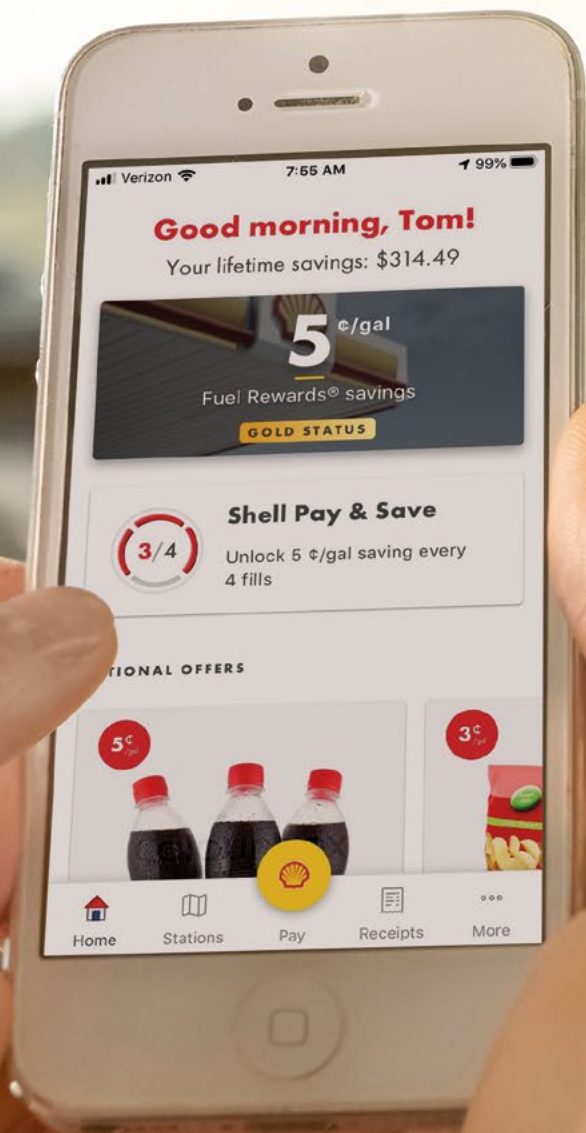
**Fuel Rewards<sup>®</sup> integration**



**In-app receipts**

Shell offers the widest breadth of digital payment options in the fuels industry<sup>2</sup>, including a proprietary digital ACH solution (Shell S Pay) with an everyday 10 cents per gallon saving<sup>3</sup>.

## THREE SUPPORTING PLATFORMS AND SUPPORTED PAYMENT METHODS



### SHELL APP



### FIAT CHRYSLER AUTOMOTIVE UCONNECT<sup>®</sup> MARKET:



### GENERAL MOTORS MARKETPLACE:



<sup>1</sup> Indoor payment options not available for connected car platforms (UConnect<sup>®</sup> Market, General Motors Marketplace).

<sup>2</sup> Based on supported digital payment capabilities as of November 2019.

<sup>3</sup> Shell S Pay everyday offer in effect Q2 2020.

# NATIONALLY-RECOGNIZED, STRATEGIC ADVERTISING

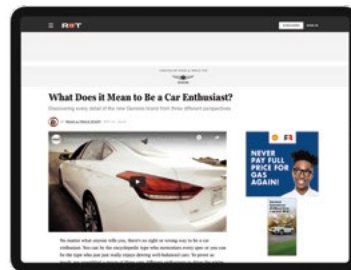


With tens of millions of dollars invested annually in the US alone, Shell is one of the most recognized brands in the industry from coast to coast. We work with talented agencies that understand our business and know how to tap into the hearts, minds, and loyalty of our customers.

Leveraging our national scale and the power of our relationships, we're able to execute award-winning advertising and marketing programs that reach today's on-the-go motorists.

## ADVERTISING AND MARKETING CHANNELS:

- Cable and digital TV
- Exclusive advertising partnership with ESPN
- Official fuel sponsor of *Car and Driver* and *Road & Track*
- Radio
- Outdoor billboards
- Digital and social marketing
- Retail station point of purchase
- GSTV media content at the pump
- Public relations, events, and influencer marketing
- National motorsport alliance with Team Penske (e.g. NASCAR Cup Series, IndyCar Series)
- Local sports sponsorships with high-profile professional teams and college conferences (e.g. Los Angeles Rams, New England Patriots, Chicago Cubs, Big 10 Conference)



## SUPPORTING OUR RETAILERS

Shell supports retailers with national advertising and provides free point-of-purchase signage to retail sites in support of every national campaign and key initiative. Additionally, retailers have access to an extensive library of Shell-approved advertising assets and point-of-purchase signage that can be utilized as is or customized to meet local marketing needs.



# ACCESS A **WINNING** MOTORSPORTS PORTFOLIO

Shell's relationships may provide opportunities for your business to access **"one of a kind"** opportunities for your customers, associates and communities due to a portfolio of motorsports sponsorships including Penske, Ferrari, NASCAR, INDYCAR, and Formula 1.

## VIP Race Experiences

Treat your guests to exclusive tours, driver meet and greets, private hospitality, or pit seats.

## Race Car Decklid Branding

Display your logo on the trunk (or decklid) of a car that is caught on camera during the nationally televised 100+ laps of the race.

## Driver Appearances

Promote your facility, event, or special promotions with an appearance by a Penske driver.

## Shell Show Car Experience

Bring excitement to your Grand Openings, Customer Appreciation, or employee events with a replica No. 22 Shell-Pennzoil Ford Mustang.

**NASCAR**

**INDYCAR**



VIP RACE EXPERIENCE



RACE CAR DECKLID BRANDING



SHOW CAR EXPERIENCE



INDYCAR TEAM



## **New Orleans Jazz & Heritage Festival**

Shell is the presenting sponsor of this high-profile event that attracts **425,000 attendees** every spring to The Big Easy. Our exclusive sponsorship opportunities allow you to take advantage of private hospitality and special "up close" seating for concerts with artists such as Bon Jovi, Aerosmith, Dave Matthews Band, and many more.







# BRAND CONVERSION SUPPORT

OPENING A NEW SHELL RETAIL SITE HAS NEVER BEEN SO EASY!

## 1 Upgrade to the iconic Shell Retail Visual Identity

Sporting a clean, modern look and vibrant lighting, the Shell Retail Visual Identity is one of the most striking, well recognized retail images on the street. We will connect you with national suppliers to provide you what you need to help convert and stand out with the Shell brand.

## 2 Connect to the Shell technology platform

Shell's unique technology platform seamlessly integrates payment with the Fuel Rewards® loyalty program to simplify the customers' experience and provides rewards for every transaction.

To get your site online and ready to process payments and loyalty rewards on day one, our **best-in-class technology concierge team** will help you every step of the way.



### BEST-IN-CLASS TECHNOLOGY CONCIERGE SERVICE HELPS YOU:

- Order Site Systems equipment
- Link your new site to the Shell network
- Enable payment and loyalty program functionality

## 3 Attract new customers right away with turnkey Shell brand and marketing support

Once you complete an online store profile, your new retail site will receive a Welcome to Shell kit that includes all the essential Shell marketing materials you will need to open the doors, including:

- Shell point-of-purchase signage
- Shell credit card applications and program brochures
- Shell Brand Standards guide







# DIAMOND DEALS

PURCHASING POWER  
TO ENHANCE YOUR SITE

## DIAMOND DEAL

The **Shell Diamond Deal Program** is a unique program that offers potential money-saving purchasing opportunities to Shell retailers. Leveraging the size and scale of our network, we offer competitive, best-in-class deals for goods and services (“Diamond Deals”) that help enhance the customer experience at your sites.

Listed on the reverse are some Diamond Deal purchasing opportunities available to our Shell-branded network<sup>1</sup>.

There is no cost or enrollment fee to participate. New deals are regularly developed and communicated to Shell retailers. More information on these deals is available by contacting the suppliers and asking for the Diamond Deal pricing.

<sup>1</sup> Diamond Deals listed above are subject to change without notice at the sole discretion of Shell.

# DIAMOND DEAL PURCHASING OPPORTUNITIES



**Wayne Fueling Systems**  
Ovation<sup>2™</sup> dispensers available at an exclusive Shell negotiated price.



**CREE LED Lighting**  
Unique interior and exterior lighting solutions.



**Federal Heath**  
Digital sign hardware and personalized advertising solutions to help enhance inside sales.



**CAF Cleaning**  
Cleaning products, supplies and training for on-site staff to maintain a superior exterior image.



**March Networks**  
Exclusive Shell pricing on HD video surveillance and intelligent IP video solutions that enable you to minimize loss and increase revenue.



**LSI Industries Graphics** – Competitive pricing, durable materials and easy installation of interior graphics that complement most existing store types.

**LSI Industries Lighting** – LED lighting that saves on energy costs and improves the look and feel of interior/exterior lighting.



**Timeco**  
State-of-the-art time and attendance solutions compatible with your existing HR and payroll application.



**Rugid Guard Island Restoration**  
Services to help improve the image of your forecourt.



**Istobal Vehicle Wash and Care**  
Preferred pricing for rollover vehicle wash equipment.



**CSC ServiceWorks**  
Industry-leading Air machines, as part of a revenue-sharing offer that includes installation and maintenance at no cost to the retailer.



**Home Depot Restroom Upgrade Program**  
Restroom upgrades with quality products at best-in-class prices.



**Franklin Fueling Systems**

**Franklin Fueling Systems**  
Exclusive Shell pricing on end-to-end petroleum equipment solutions.



# SITE OPERATIONS ESSENTIALS

THAT EMPOWER YOUR FRONT-LINE STAFF

workjam



## New Digital Workplace Technology

- Mobile app that offers Shell training and continuously empowers site staff
- Creates an open dialogue in real time with site staff, channel partners, and Shell via communication channels where best practices and more can be shared
- Motivates and inspires site staff with recognition and rewards to become the best Shell ambassadors, offering exceptional customer service at your site

## Fast. Easy. Always On.

- Best in class online platform delivering a one-stop shop experience for Shell partners
- Secure access to your site-specific information, including direct access to third-party sites
- 24/7 central access point for all your marketing materials and financial, accounting, supply, and pricing data

Shell  
MarketHub



## Your Tool to Drive Smiling Customers at Every Site. Every Visit. Every Day.

- Mystery shopper program based on Shell guidelines and brand standards
- Online customizable reporting to measure overall customer experience, recognize excellent site-level performance, and identify improvement opportunities

## MYSTERY MOTORIST PROGRAM



## PEOPLE Make the Difference REAL!



## Site Recognition & Reward Program Driving Results Through Appreciation

- People Make the Difference Real (PMTDR) recognizes and rewards your top-performing sites and front-line staff throughout the year with various incentives, including an all-expenses-paid trip, for delivering excellent customer service, loyalty, and volume growth
- PMTDR provides a variety of tools to enrolled sites including exclusive online training and friendly regional competitions
- PMTDR provides an in-the-box solution for recognizing your staff and helps to reinforce priority alignment on delivering excellent customer service



# FORCE FOR GOOD

PROGRAMS EMPOWERING YOU TO DRIVE SOCIAL AND ENVIRONMENTAL CHANGE



# 70%



of **customers** consider the **social, health, environmental and safety impact** of the product they are buying<sup>1</sup>.

# #1

**FACTOR**

**Commitment to social cause** is the **#1 most important factor** when choosing a brand, when price and quality are equal<sup>2</sup>.

## OUR COMMITMENT TO SUPPORTING LOCAL COMMUNITIES

### Waste Reduction

Initiatives targeted at reducing, reusing, and repurposing waste at retail stations.



### Empowering Programs

You can wrap a pump in support of an approved organization, making a donation for every gallon sold.



### Consumer Awareness

Shell showcases retailers' community efforts to consumers on gas station TVs and other media.



Shell's approach to sustainability starts with running a safe, efficient, responsible, and profitable business. We work to share wider benefits with our retailers, and we are working together to help shape a more sustainable energy future.

# TOGETHER, WE ARE A FORCE FOR GOOD!

[Shell.us/ForceforGood](https://Shell.us/ForceforGood)

<sup>1</sup>Source: October 2018 'Honest Product Survey' by The Consumer Goods Forum and Futerra survey (3,621 consumers surveyed in seven countries and more than 70 corporate leaders).

<sup>2</sup>Source: Edelman Earned Brand 2016.





# DEDICATED TEAM COMMITTED TO GROWING YOUR FLEET BUSINESS



## Fleet drivers visiting Shell...

have  
**3.5x**  
more  
fill-ups



buy  
**9x**  
more  
gallons



spend  
**40%**  
more in  
the c-store



spend  
**3x**  
more  
on car washes



## SHELL FLEET SOLUTIONS TEAM DELIVERS MORE THAN JUST A FUEL CARD

### ■ Industry-leading card portfolio for all fleet sizes

Universal and Shell-accepted cards to meet the needs of large and small fleets

### ■ Unique fleet driver loyalty program

Fuel Rewards® Pro is the only loyalty program designed specifically to reward fleet drivers with personal rewards

### ■ Integrated mobile payment wallet

Shell Cards integrated into WEX DriverDash Mobile App for easier payment and Fuel Rewards® Pro personal rewards redemption

### ■ Strategic growth programs: Shell B2B network & merchant funded rebates

Additional rebate offers that provide you the flexibility to further incentivize individual fleets to visit your sites

### ■ Innovative Quick Leads® app

A mobile application designed for your staff to easily submit fleet leads and help our team of sales professionals to close the deal

### ■ Insightful fleet reporting

Customized reports that summarize fleet sales down to the site level, further supporting you in managing and growing your fleet business

### ■ Dedicated professional sales and support organization

In-market sales professionals committed to growing fleet sales at your sites



**SHELL FLEET SOLUTIONS**



# SHELL RETAILER LUBRICANTS PROGRAM



WE'RE HERE TO HELP YOU WITH...

## PROMOTIONS

- Improve your Pennzoil sales with exclusive Fuel Rewards® offers
- Purchase ANY two 1-quart Pennzoil bottles and customers receive \$2 INSTANTLY!



## CATEGORY MANAGEMENT ASSISTANCE

- Offering business solutions for your unique issues and opportunities, including confidential analysis of category POS data
- Professional planogram analysis and recommendations are available to all retailers

## SALES INITIATIVES

Shell retailers can receive a sign-up bonus and annual incentives based on lubricants sales through authorized grocery wholesalers.

## PENNZOIL UNIVERSAL TOP OFF OIL™

Innovative product specifically designed for the convenience channel to simplify the customer's purchase journey.



