



Shell & The Future of Energy

The changing world of energy and marketing

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SHELL INTERNATIONAL

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Shell at a glance

81,000

Average number of people we employed

\$53 billion

Cash flow from operating activities

30 million customers

Served every day through 44,000 Shell-branded retail stations

34.3 million tonnes

LNG liquefaction volumes

70+

Number of countries in which we operated



50%

Share of our production that was natural gas

9.5 billion

Litres of biofuels blended in the petrol and diesel we sold

3.7 million

Our production of crude oil and natural gas, in barrels of oil equivalent a day

71 million

Tonnes of LNG we sold

\$986 million

spent on research and development

\$113 million

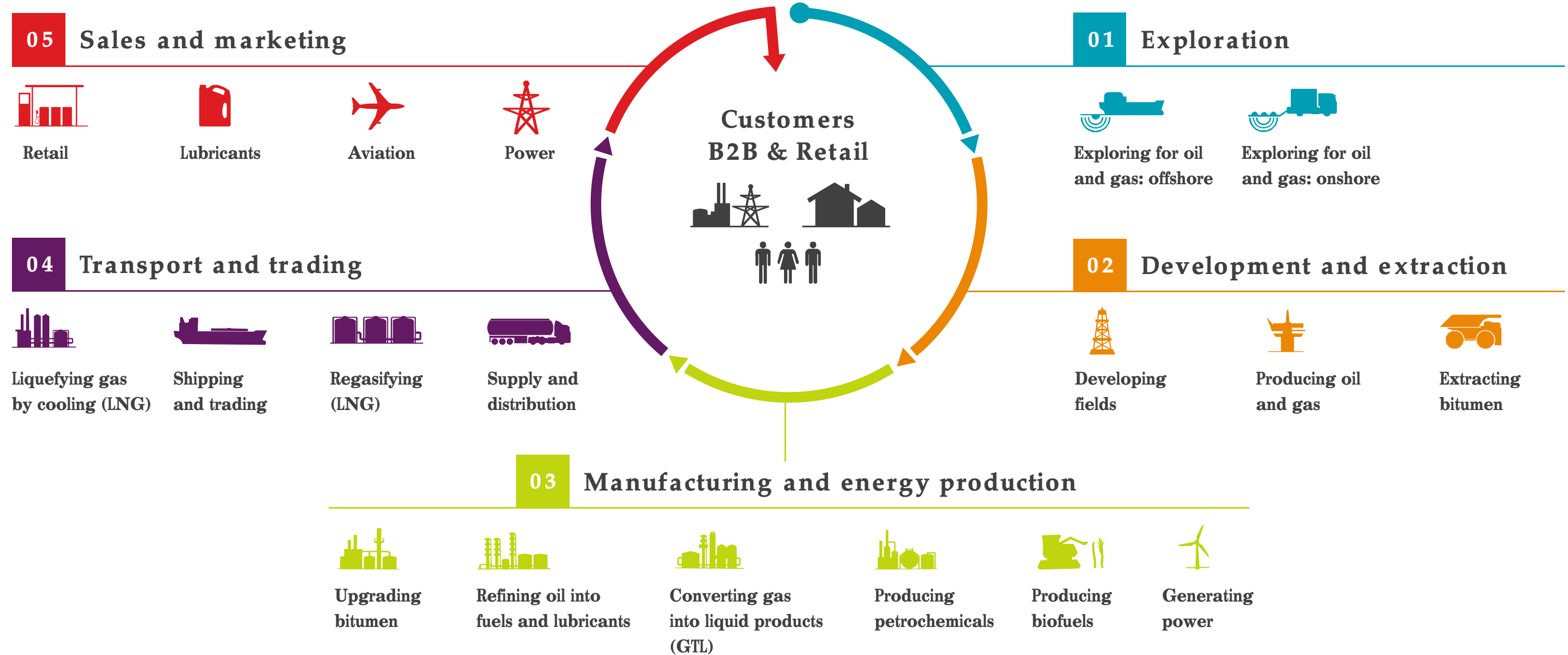
Spent on voluntary social investment worldwide



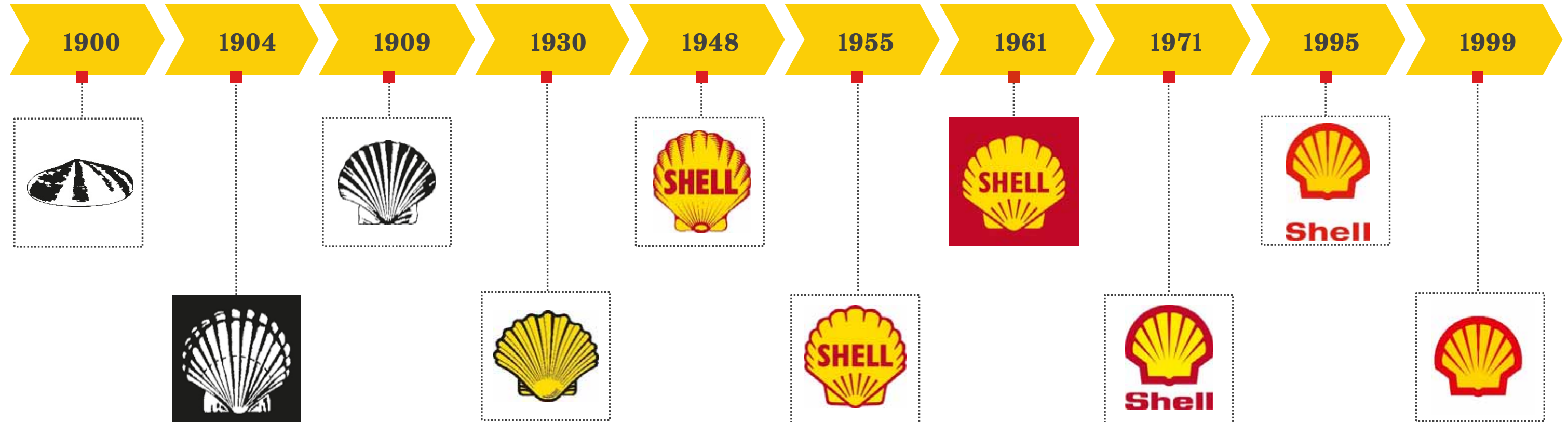
1+ million tonnes

Amount of CO₂ captured by Quest CCS facility in 2017

Shell at a glance



Shell brand history



The most valuable brand in our industry

Brand Value (USDm)

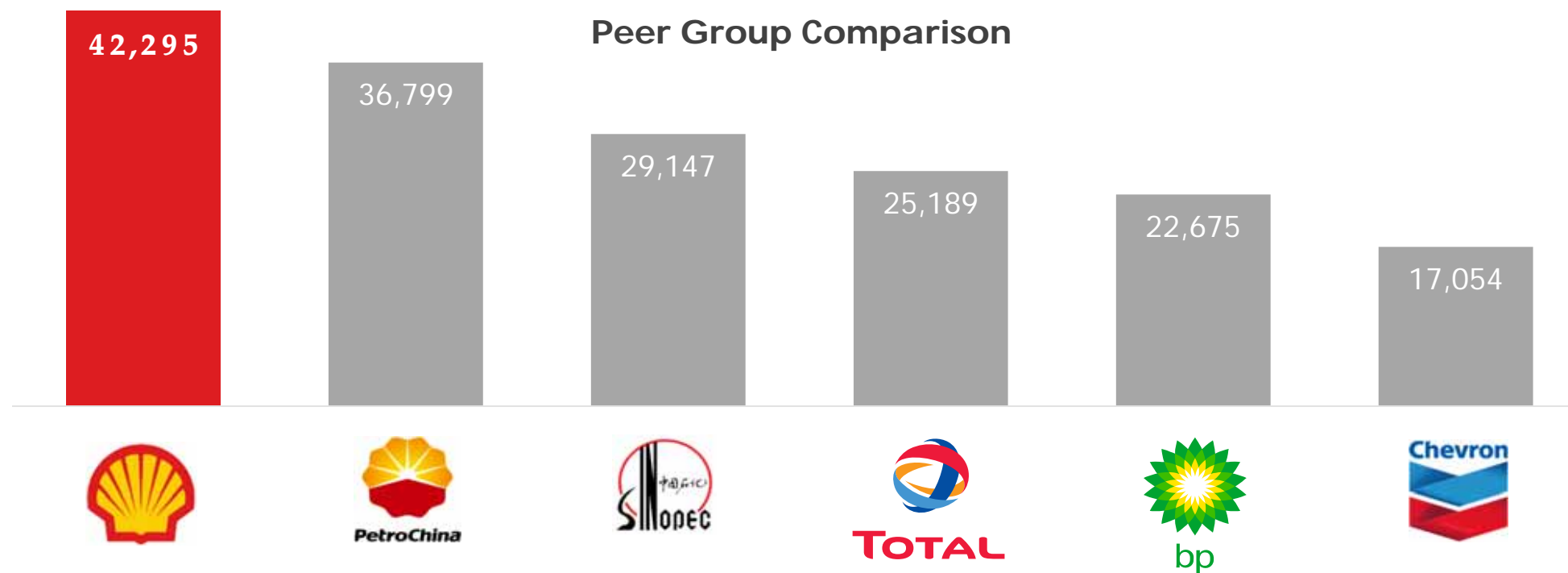
42,295

Brand Value Rank Oil & Gas 50

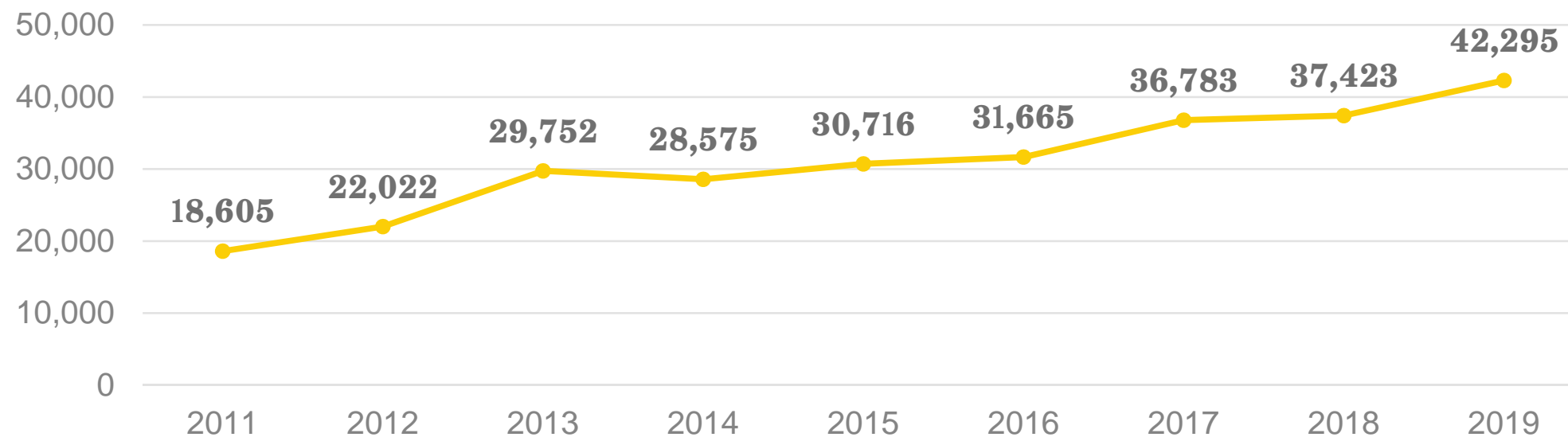
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2019 2018 2017

Brand Rating

AAA-

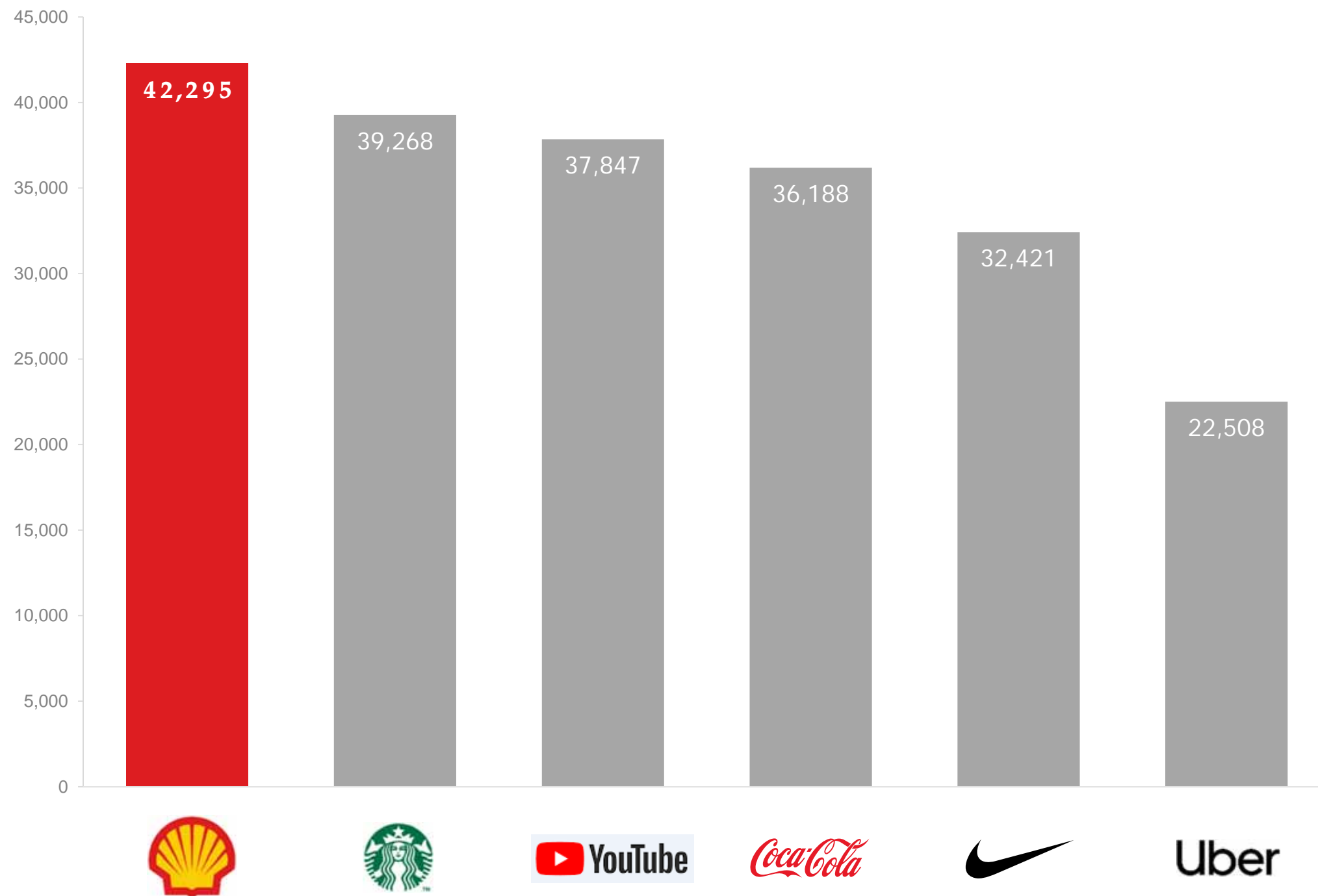


Historic brand value performance (USDm)



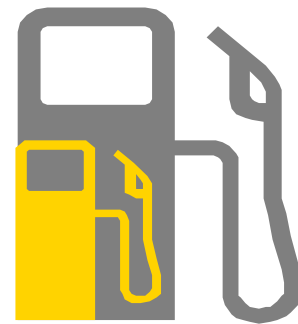
A powerful brand even outside the energy industry

Peer Group Comparison (USDm)



Energy for a changing world

There is more demand for energy globally as the world's population and living standards increase



Growing population

Global population will increase from around 7.4 billion today to nearly 10 billion by 2050, with 67% living in cities.

Rising demand

Global energy demand will likely be almost 60% higher in 2060 than today, with 2 billion vehicles on the road (800 million today).

Ongoing supply

Renewable energy could triple by 2050, but we will still need large amounts of oil and gas to provide the full range of energy products we need.

Mitigating climate change

Net-zero emissions is a potentially achievable societal ambition.

Shell's major plays in New Energies



4,827

**New Energies
& Integrated
Gas**



Solar



Wind



Storage



EV Charging



Hydrogen



Biofuels



Shell Energy - Homes



The Challenge

1

How do we pivot with the Shell Brand as we move to a new energy future?

2

How can we deliver targeted and relevant experiences at scale?



Shell
ENERGY

UK Consumer Home Energy

Launched March 2019

Our Home Energy Mission

Guiding you towards a better energy future for your home

Energy matters. It powers every aspect of our lives. And where it comes from matters too - today more than ever.

The world faces a challenge: we need more energy but it must be cleaner. We owe it to our children to take steps now towards a better energy future.



We want to guide our customers towards a better energy future for their home.

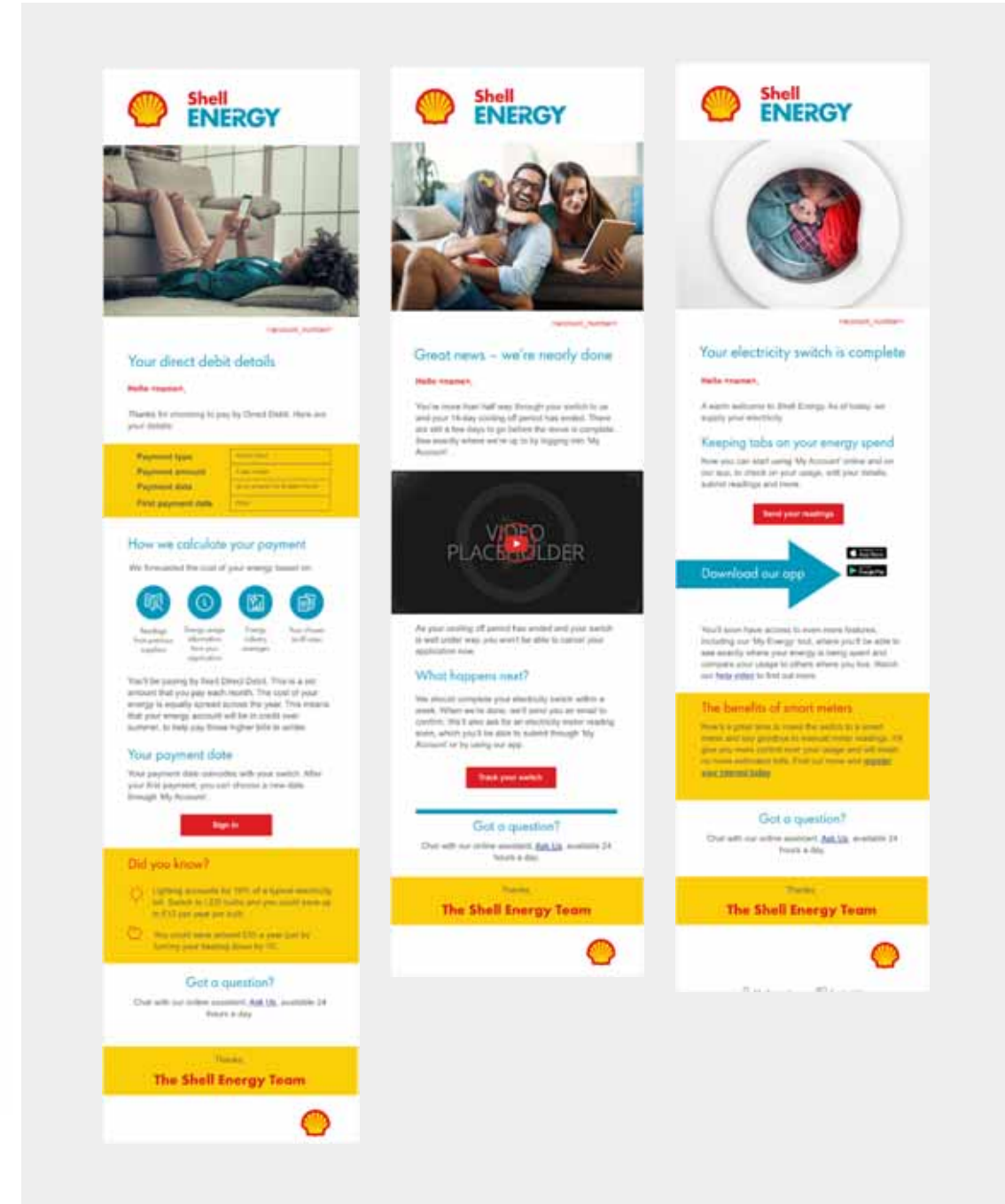
So we're playing our part by building a company that can be a force for good.

Home Energy Matters



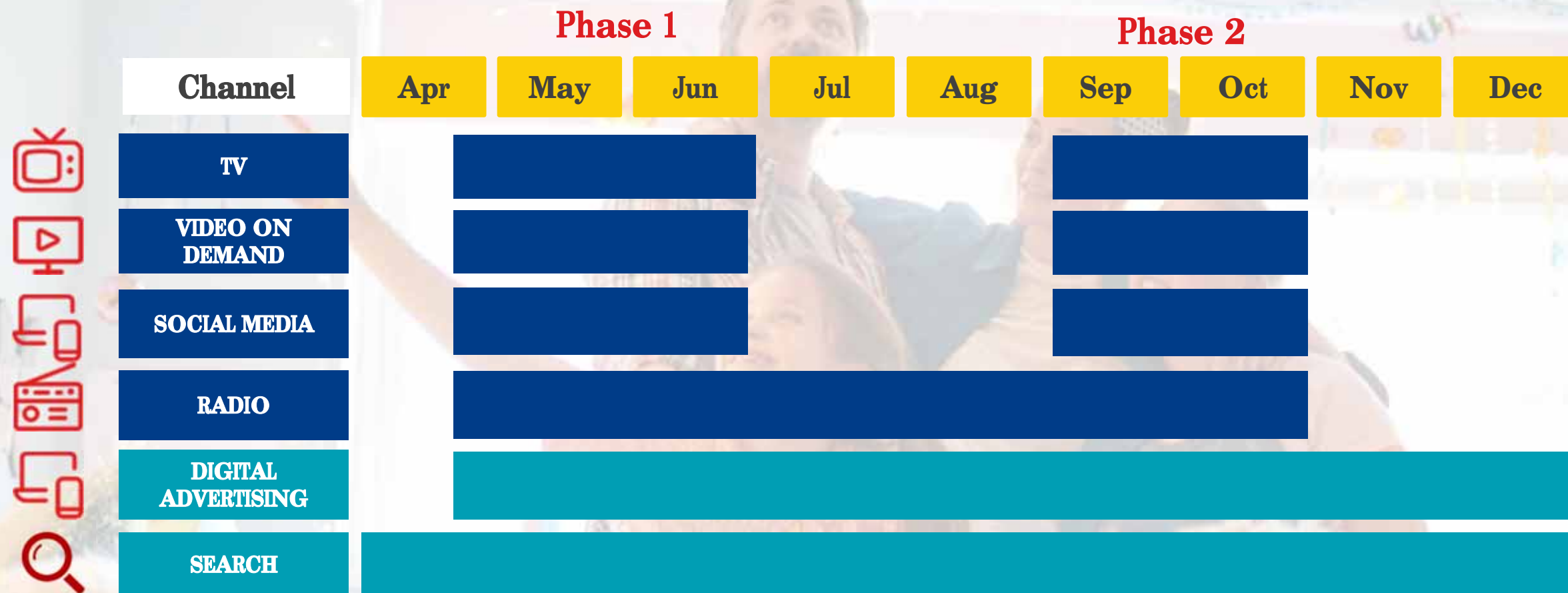
Shell
ENERGY

New brand identity implemented across digital and printed assets



Shell Energy advertising campaign launch 19 April

The campaign will run across TV radio, digital and social media platforms and is designed to deliver broad reach of our message to home energy consumers in Britain.

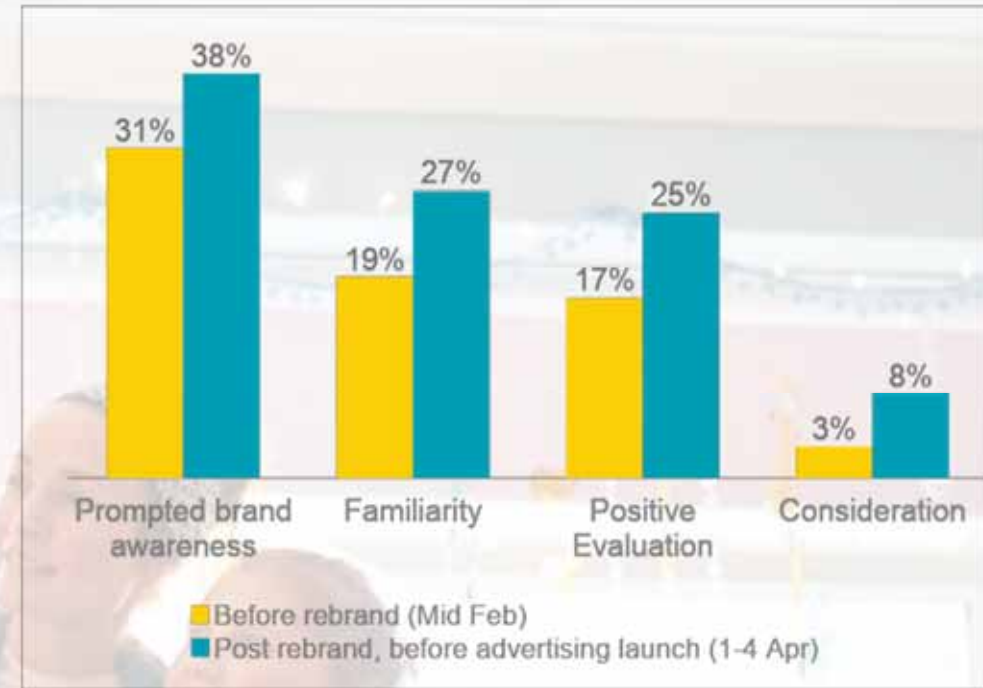




Impact



Positive coverage of 100% Renewable



Strong Brand Preference Metrics

Month after launch had the strongest customer acquisition to date

Major increase in Retail Loyalty Customers showing strength of CVP

As the portfolio diversifies, how do we deliver relevant experiences at scale?

A) Data & Technology

B) Rethinking the Agency Model

C) Self-Serve Personalisation

A: Data and Technology



B: Rethinking the Agency Model

JWT CREATIVE AGENCY

Develop "big idea", overall creative approach & develop initial bank of assets for asset library.

AD.LIB.IO DYNAMIC CREATIVE PLATFORM

Develop new creative executions quickly & efficiently using insight from data & existing asset library.

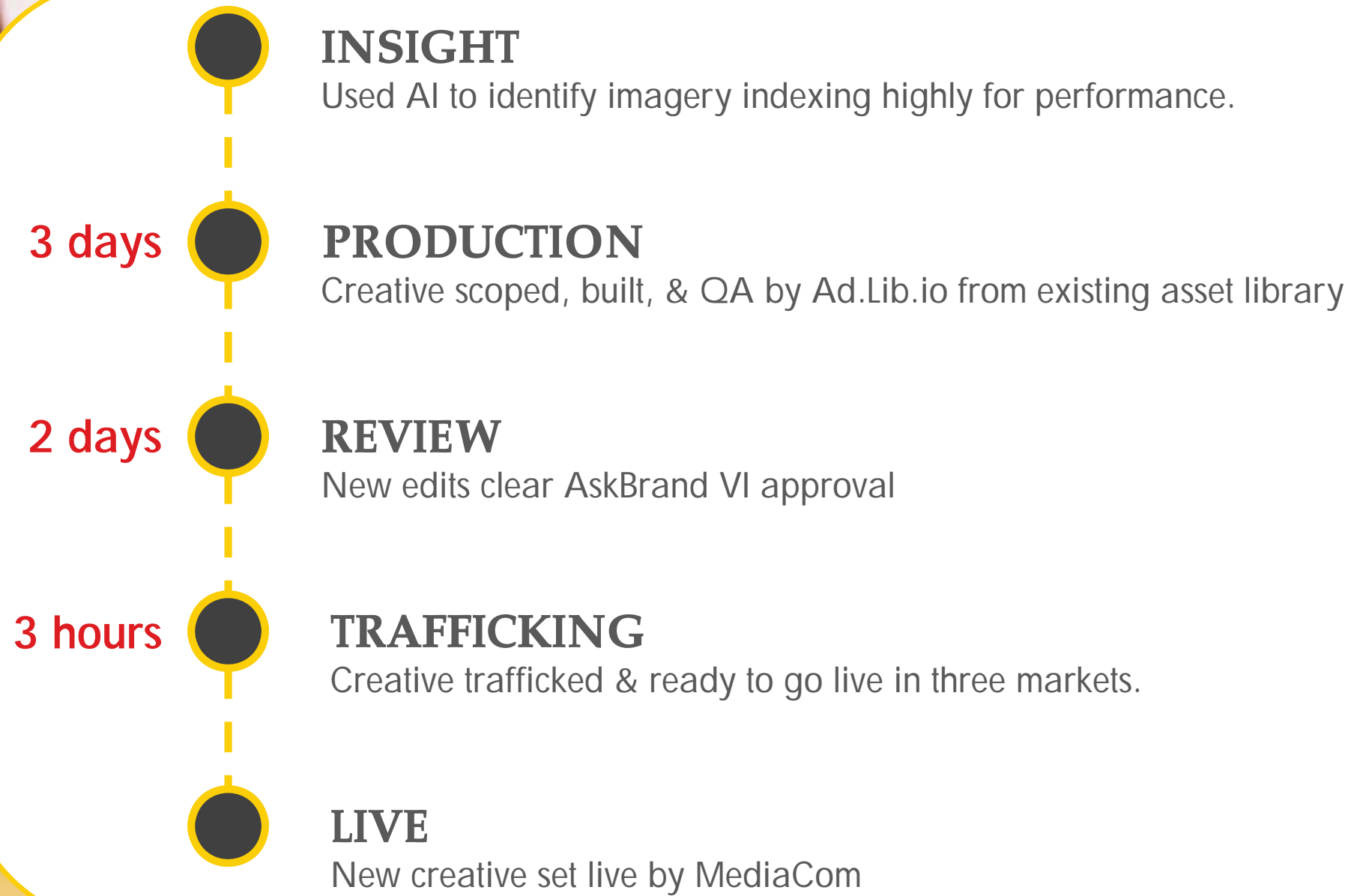
MEDIACOM MEDIA AGENCY

Develop media strategy & deploy creative against relevant segments.

ACCENTURE & GOOGLE ANALYTICS

Provide insight on performance of creative & segments which feeds into further creative iterations.

B: Rethinking the Agency Model



C: Self-Service Personalisation



Test & Target



UX



Creative Design



Insights & Foresights



Audiences



Micro-Targeting



Social Ads

In-Housing Capabilities

Democratising Access & Enablement

Self-Service Social Advertising

Key Learnings

The strength and perception of the Shell Brand was critical when pivoting to new customer base

Investment in Data & Technology is enabling dramatic shifts in our marketing – but creative production must evolve too

Agency relationships are evolving as we in-house and move towards dynamic and personalised experiences

