



NEW SERVICES TO ANSWER CUSTOMERS NEEDS AND EXPECTATIONS IN SERVICE AREA



ASECAP MARKETING WORKSHOP – PARIS

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TOLLED ROAD NETWORK

9 048,1 km d'autoroutes concédées et d'ouvrages à péage en service
total of tolled road network

Répartition des recettes en millions d'euros (hors taxes)
Breakdown of revenues in million of euros (VAT excluded)



5 856,5
69% des recettes
of total revenue

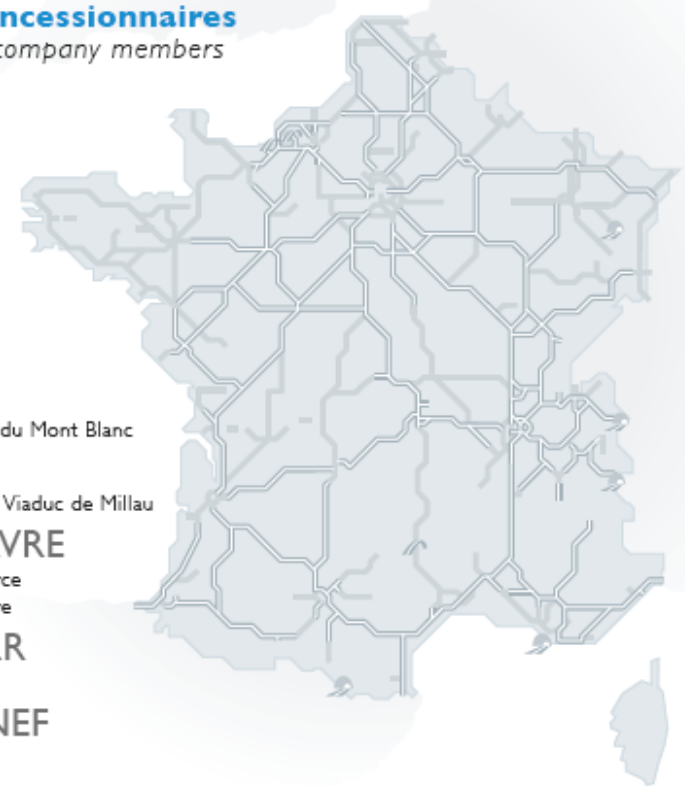


2 683,1
31% des recettes
of total revenue

Membres concessionnaires

Concessionaire company members

ADELAC
ALBEA
ALICORNE
A'LIÉNOR
ALIS
ATLANDES
ATMB
Autoroutes et Tunnel du Mont Blanc
CEVM
Compagnie Eiffage du Viaduc de Millau
CCI DU HAVRE
Chambre de Commerce
et d'Industrie du Havre
Groupe APRR
APRR – AREA
Groupe SANEF
SANEF – SAPN
SFTRF
Société Française du Tunnel Routier du Fréjus
SMTPC
Société Marseillaise du Tunnel Prado Carénage
VINCI Autoroutes
ARCOUR – ASF – ESCOTA – COFIROUTE



+ 4 operating companies

FEW FIGURES

➤ Provide customers possibility to have a rest every 10 kms :

LES AIRES

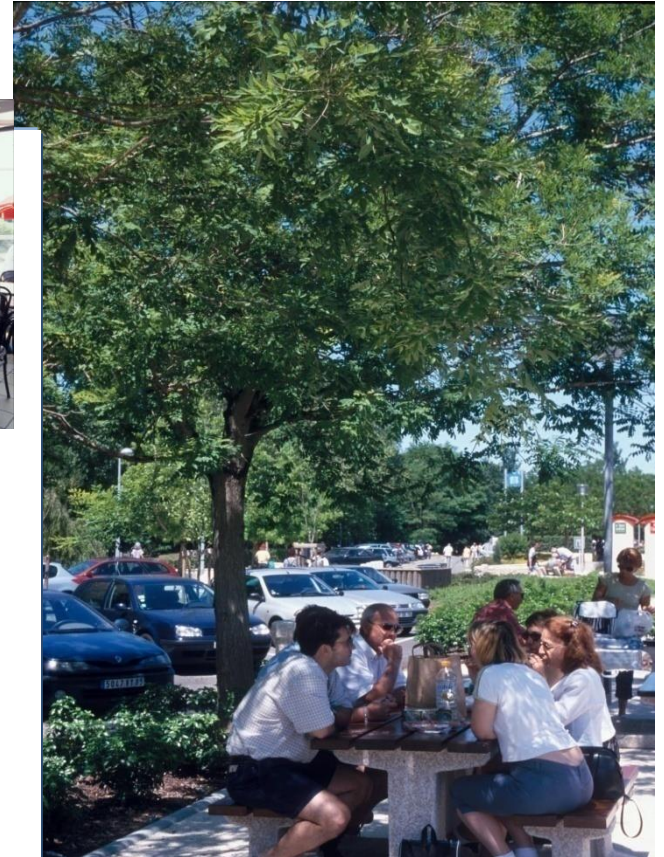
Service and rest areas

367 aires de services
services areas

2,1 milliards de litres de carburants vendus
billion litres of fuel sold

632 aires de repos
rest areas

429 restaurants
restaurants



DIVERSITY OF SERVICES PROVIDED



145 buffets / restauration rapide



354 boutiques



364 aires avec au moins une douche



23 hôtels / **293 802** nuitées



141 aires avec distributeurs de billets



170 aires avec points presse



92 aires avec bornes Internet et/ou espaces Wifi

RULES AND GUIDELINES

Motorway companies subcontract with another company or group of companies / consortia the management of services areas

- Call for tender to select the sub concessionnaire
 - Specification defining rules and obligations between the motorway company and the sub concessionnaire company.
 - Subconcession contract has a limited duration (10/15 years)
-

RESPONSABILITIES

Service area asset is shared as following :

- Part non allocated to a sub concessionnaire but under reponsability of toll road companies (some public parkings, public toilets,....)

 - Area allocated to one or several sub concessionnaires
 - Gazoline supplier
 - Restauration
 - Hotels
 - shops
 - Regional shops
 - Others activities

 - Duration of occupancy is fixed by contract .
-

RENEWALL OF CONTRACT FOR SERVICE AREA OPERATIONS NEW DEAL AND OPPORTUNITY TO IMPROVE SERVICES

➤ By 2017

➤ More than 100 services areas will be put under competition for :

➤ Gazoline station,

➤ restaurants ,

➤ shops,

➤

ADAPT THE SERVICE AREA ON MOBILITY EVOLUTION NEEDS

- Cars need less gasoline
- Service area concept :
 - Raise drivers awareness and fight against drowsiness
 - Create spaces for new services that meet customer needs
 - Offer services that provide good value on the quality / price ratio
 - Take into account all the evolution (economic, change in customer behaviour, need...)

Taking into account customer needs and expectations

New concepts of service areas have been included in the specifications for new tenders

- ↗ Increased safety footpaths areas
- ↗ Separated flow for light vehicle and trucks
- ↗ Accessibility
- ↗ Unique building for all services
- ↗ New signs and extended range of products
- ↗ More spaces to relax and have a break
- ↗ Additional services for commercial vehicles and trucks drivers (showers, corner to relax,...)
- ↗ Meetings rooms proposed for business meetings (with video ...)
- ↗ Animations
- ↗



SERVICES FOR TRUCK DRIVERS

Secured parkings

- video surveillance systems.
- relax corner with TV, restaurants
- showers
- buisness corner : Internet access, phone,

12 Secured parkings

1 606 parking slot available



ENVIROMENTAL FRIENDLY APPROACH



CHILDREN SPACES



INTRODUCTION AND VISIBILITY OF NEW BRANDS OFFERING CUSTOMERS SAME PRODUCTS THEY ARE FAMILIAR WITH

Avant renouvellements

Restauration



Boutiques généralistes



Après renouvellements

Restauration



Boutiques généralistes



INCREASE FOOD OFFERS

Bring the brands from the city center



DEPLOYING SUPERMARKET



ENLARGING SERVICES OFFERS



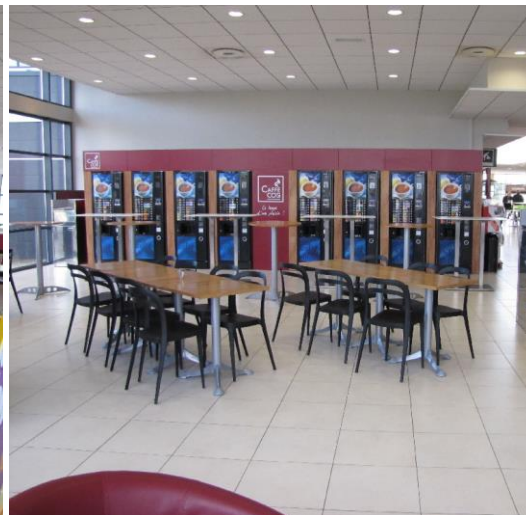
ENLARGING SERVICES OFFERS



ENLARGING SERVICES OFFERS



ENLARGING SERVICES OFFERS



ENLARGING SERVICES OFFERS



NEW LEGAL FRAMEWORK INTO FORCE SINCE END OF DECEMBER 2014

After several years of discussion with the State, there is a decree published on December 15, 2014. To have the brand signaled on the motorway to allow customers to make choices

SEQUENCE TYPE – MODELE 1

2000 m



1000 m



300 m



APPRECIATION OF THE CUSTOMERS ON SERVICES

7,9/10



THANK YOU FOR YOUR ATTENTION

