



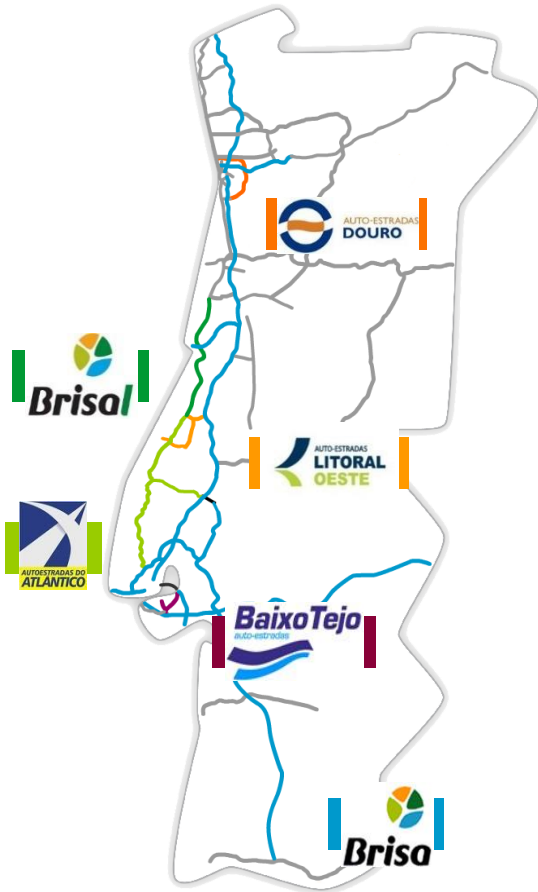
Keep Moving

ASECAP Marketing Workshop
Athens, May 2017



Brisa

RECAP



6 concessions in Portugal
19 motorways



1600 km



51% market share (in km)



electronic toll collection system

available in all Portuguese
motorways (3000 km)

processes around 77% of total
toll transactions in Portugal

AND THE MOBILITY PROVIDER UNDER “VIA VERDE” BRAND



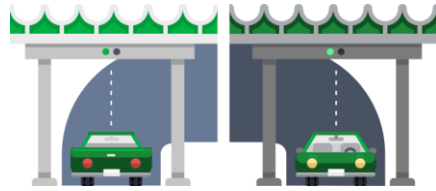
In your car....



In your smartphone....



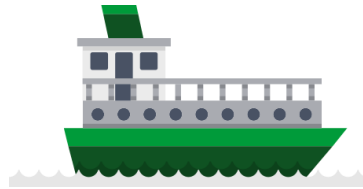
&



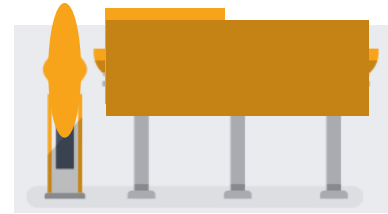
ETC



Parking



Ferries



Fuel Stations



Drive-throughs



Pharmacies



Carsharing



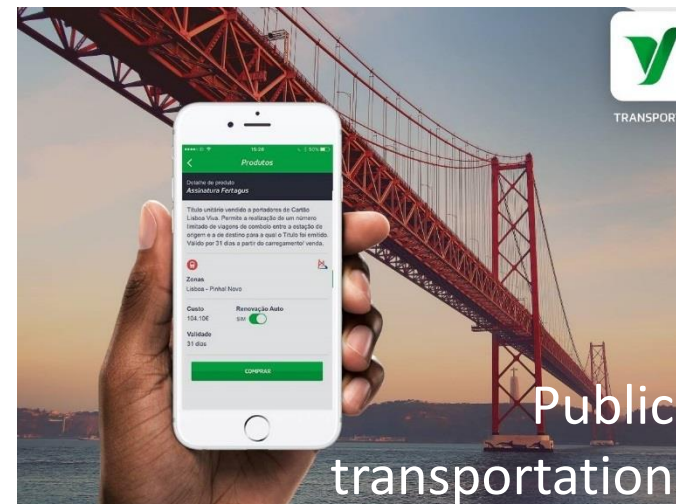
Street parking



Ridesharing

VAIS PARA O PORTO?

VIA VERDE BOLEIAS



Public transportation

I. INFRASTRUTURE

Increase client base and business

Service Areas are key in Brisa's customer experience



Colibri
VIA VERDE



+ 20 million cars



+ 10 million costumers

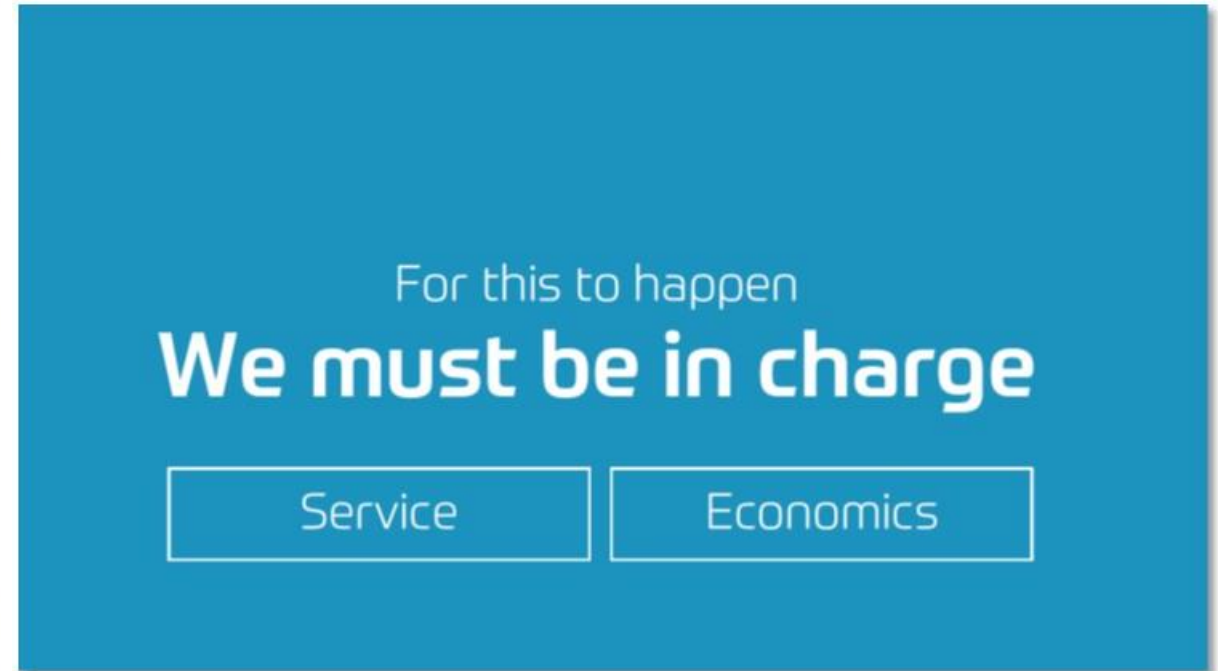
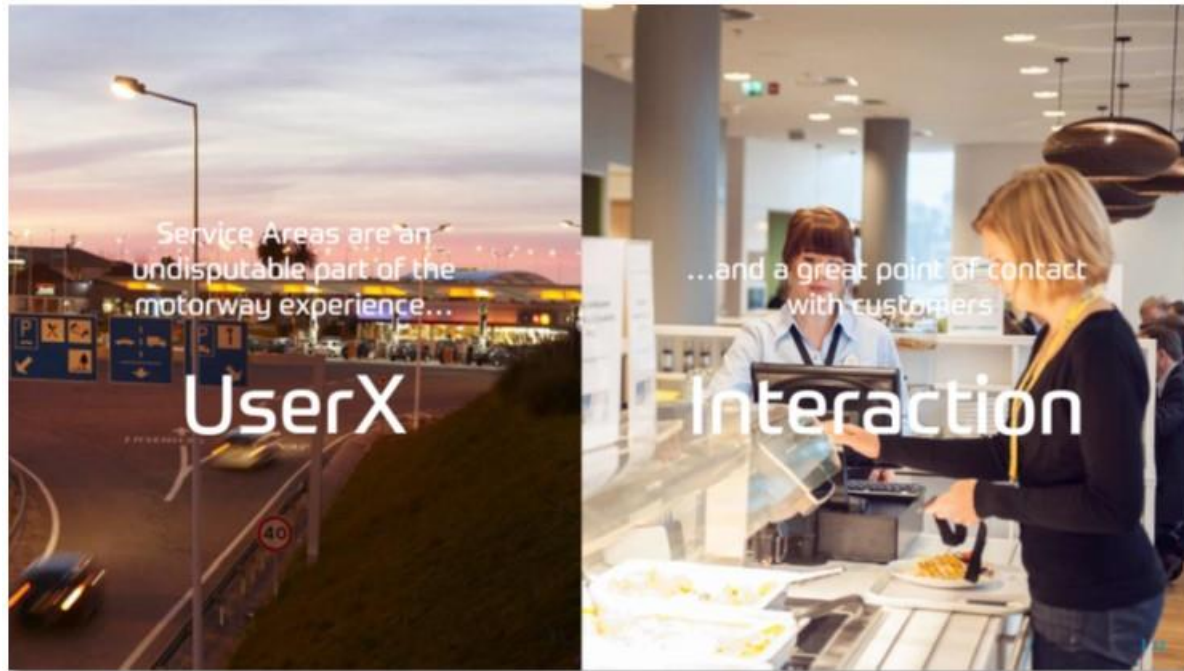


+ 5 million coffees



.. millions

Profitability issues on low intensity SAs and low customer satisfaction



This problems need a new strategic approach

Get an Industry partner

with high expertise on Food & Beverage / Retail business

Joint Venture

Brisa + AREAS (Elior Group)



Brisa Areas Serviço (BAS)



Get an Industry partner

Gain full control of service area

Brisa Areas Serviço takes on SA operational management:

Increase interaction with customers

Maximize current business



With different concepts according to client needs & traffic patterns

Umbrella Brand



F&B Brand



Other Brands



Store



Vending



Toilets

- › All Service Areas will be associated with this new Brisa brand
- › Different F&B concepts to apply to motorways given SA demand characteristics
- › Other facilities brands, important for the client to recognize our services in each SA

DESDE 2015
COMO
RESTAURANTE & CAFÉ



MODERN F&B SELF SERVICE | QUICK SERVICE
CLIENT PROFILE – COMMUTERS (URBAN)

A PAUSA
restaurante • cafeteria



TRADITIONAL F&B WITH SELF SERVICE LINE
CLIENT PROFILE – LONG RANGE TRAVELERS



F&B FREE FLOW WITH INTEGRATED STORE
CLIENT PROFILE – LONG RANGE TRAVELERS



F&B CONCEPT FOR A TRADITIONAL DELICACY
CLIENT PROFILE – LONG RANGE TRAVELERS



FOOD COURT WITH VARIED OFFER
CLIENT PROFILE – DIVERSIFIED LONG RANGE TRAVELER

IMPLEMENTED
CONCEPT ON THE
3 SERVICE AREAS
IN OPERATION

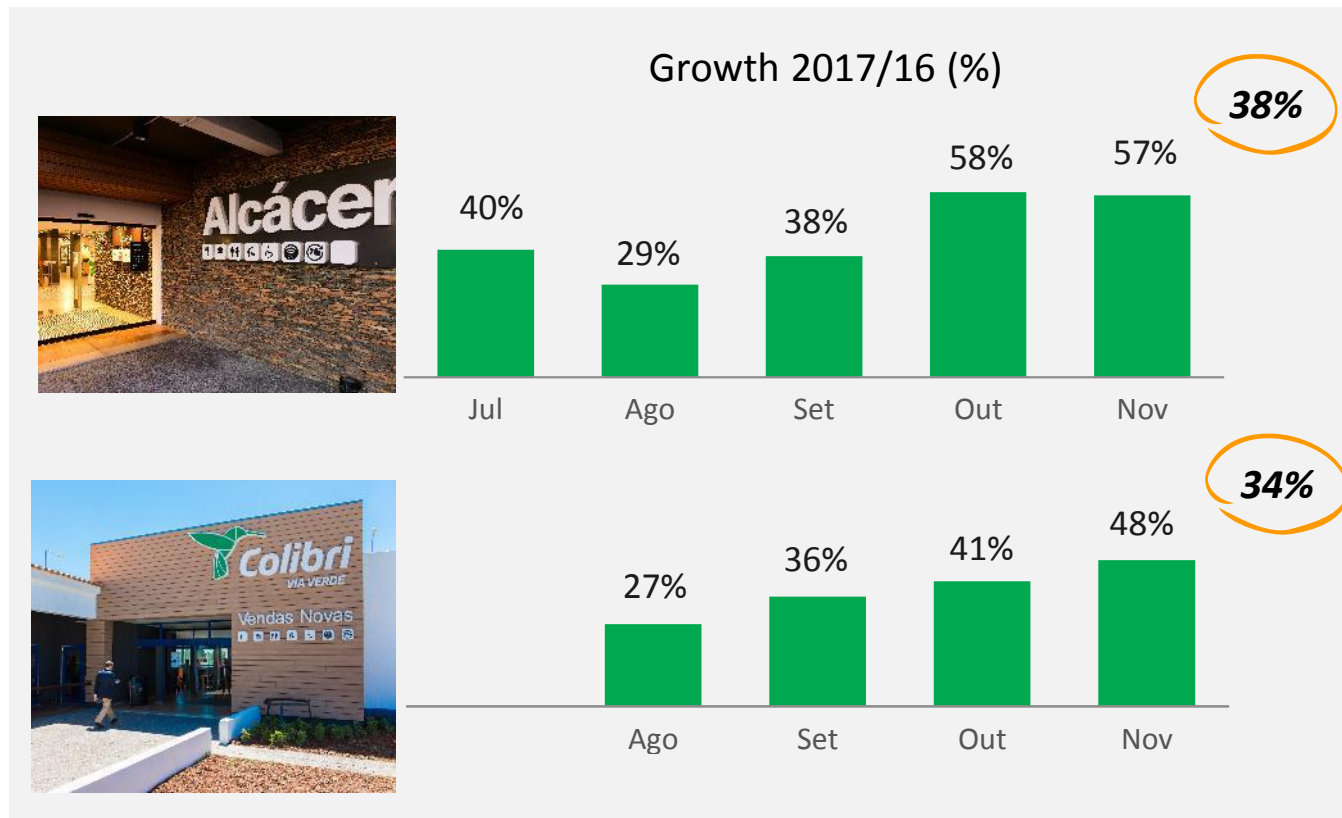
So far with positive results

QUALITY

PERCEIVED PRICE

Edgar Ribeiro
 Guia local · 90 comentários · 11 fotos
 ★★★★★ há 2 meses
 Mais uma area de serviço desta feita remodelada com preços deveras mais interessantes algo a testar

Luis Caeiro
 Guia local · 32 comentários · 261 fotos
 ★★★★★ há 3 meses
 Possivelmente a melhor estação de serviço do país!



The motorcycle segment are gaining relevance



10% total light vehicle park



0,1% tolls revenue



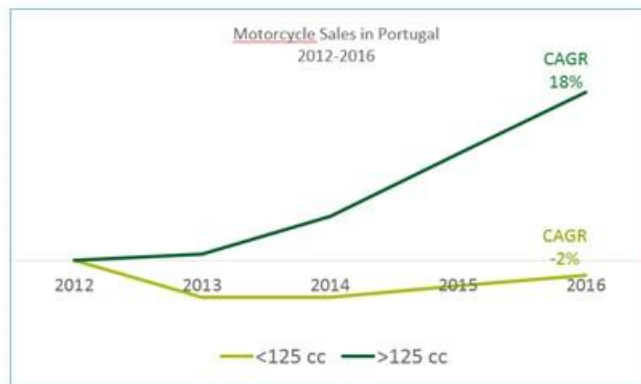
5% tolls revenue (motorcycle clients own a car)

A transport mode that needs attention, with challenging objectives

Motorcycle sales are growing at a fast pace



Portuguese motorcycle sales are growing...



... and the same in Europe, on a lower rate

ASECAP Marketing Workshop

| 5

The challenge is...

Convert motorcyclists into Via Verde clients

Make them actually use the highway

And increase their loyalty

We developed several initiatives in 2017

How we did it in 2017?

A digital marketing campaign

- Communication & Engagement** Understand consumer profiles and meet their needs
- Partnerships** Involve brands and stakeholders
- Data** Get and share insights with partners and cross sell

With an exclusive online offer

ANDA CONSIGO DE MOTO
ADIA JÁ E TENHA
30% DESCONTO
em todos os pagamentos

OFERTA EXCLUSIVA ONLINE

VIA VERDE

ASECAP Marketing Workshop | 11

Motorcycle clients should feel they're special

On top of the 30% toll discount, we wanted new clients to feel delighted

So, we offered them much more than a simple OBU...

A motorcycle special pack containing:

OBU OBU holder Free Sample

VIA VERDE

VIA VERDE PARTICULAR - Especial de Serviços
Assistência ao Cliente 24h
Cidade de São Paulo - São Paulo - CEP: 04001-000
www.viaverde.com.br

ASECAP Marketing Workshop | 12

With positive results

- 50% increase in sales of OBUs
- Increase by 25% the total active clientes



II. MOBILITY SERVICES

*Increase touch points and
become a relevant player in mobility market*

Brisa very well positioned to become a **provider of mobility services in Portugal**

Brisa's assets and capabilities provide a strong starting point

- Large client base with ~3M customers/cars
- Strong brand awareness
- Core business focused around the mobility space

Carsharing



DriveNow

Innovative concept of urban mobility

All included

Fuel, insurance & parking

Free floating carsharing

Possible to leave or pick the car anywhere inside the business area

Payment by the minute

Just pay for the use time

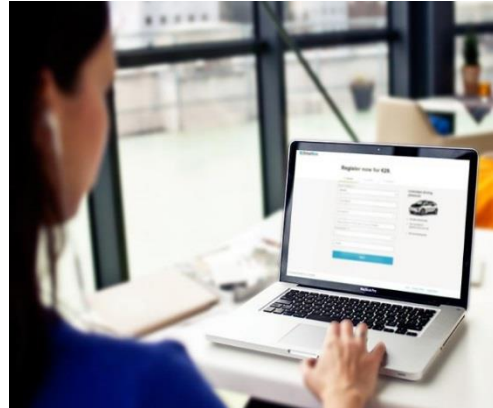
No more costs or annual fees



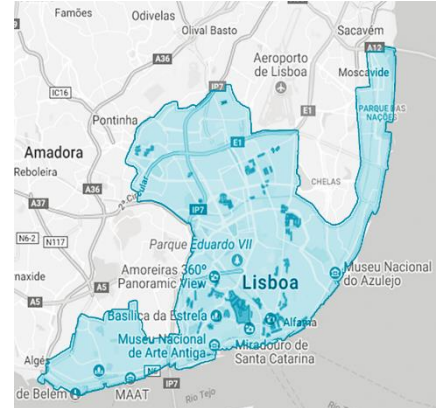
Premium experience of Carsharing



211 cars



**Price from
29 cent/min**



Lisbon



100% Digital

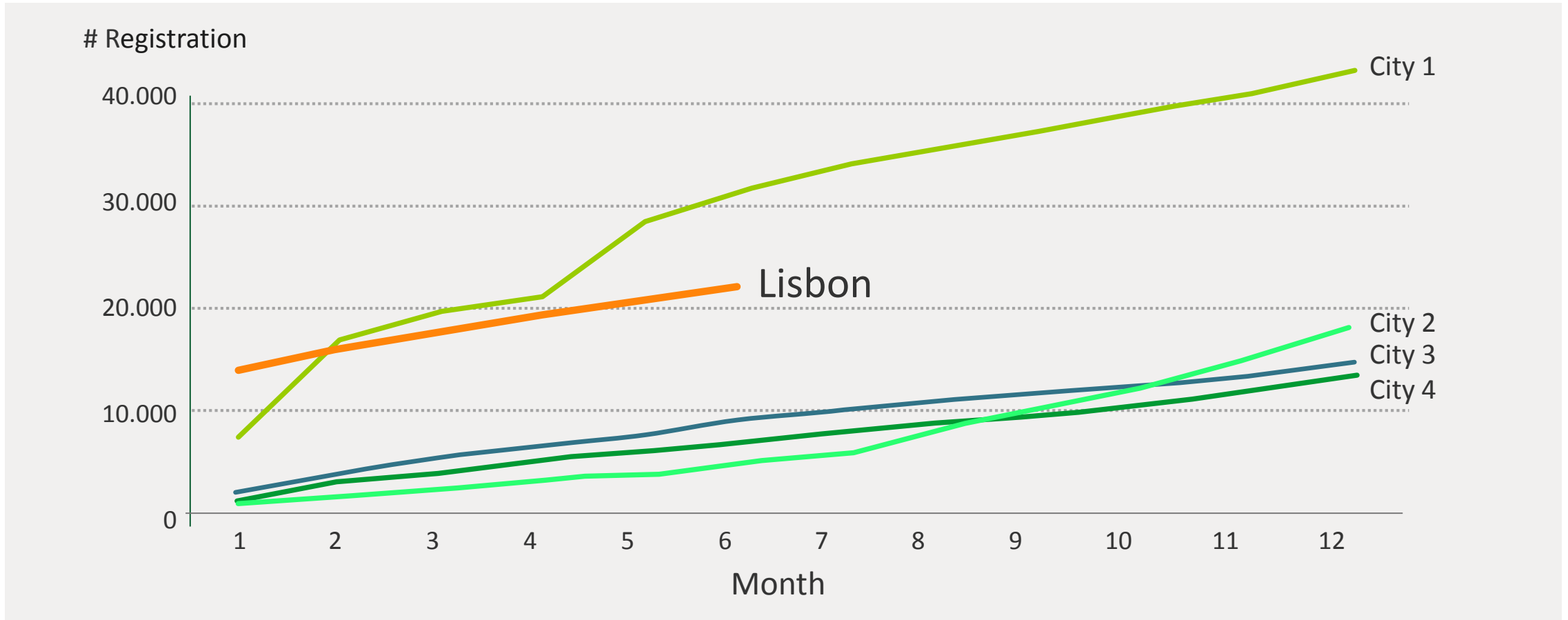


All included



DriveNow Lisboa
Launched in September '17

Registrations benchmark



A photograph of three people inside a car. A woman with long dark hair is driving, smiling at the camera. She is wearing a light purple zip-up jacket over a light blue shirt. In the back seat, a man with short dark hair is smiling, wearing a light blue button-down shirt. In the passenger seat, a woman with long brown hair is smiling, wearing a grey cardigan over a white patterned blouse. The car's interior is visible, including the steering wheel, dashboard, and seats. The background shows a bright, sunny outdoor scene with trees and a fence.

Ridesharing

SEVERAL
EU PLATAFORMS

+40
MILLIONS
USERS

Commission charged to users



ridesharing.com

Bla Bla Car

zimride

europa carpooling

karzoo

boleia.net

COMOVEE

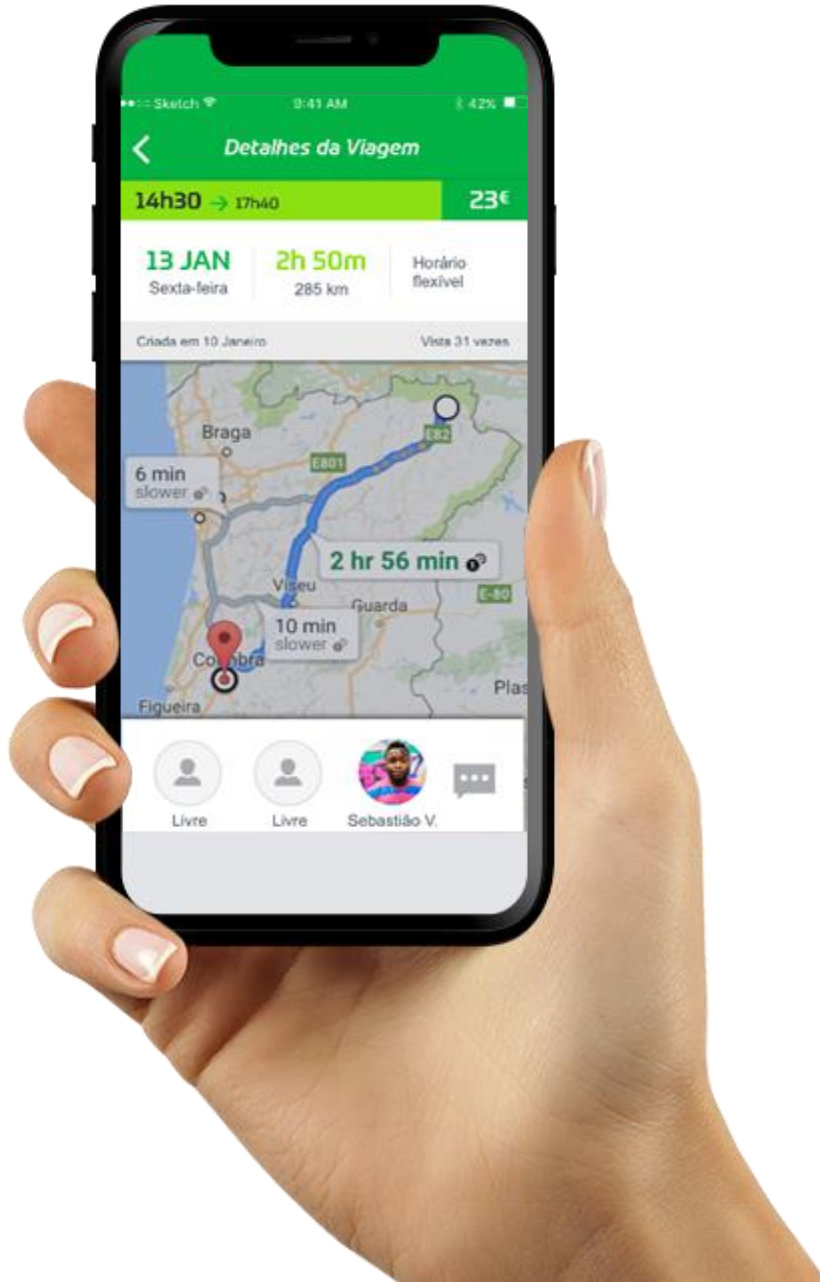
liftshare.com
travel together

hupp
smart move

Ridefinder

Via Verde Boleias

A digital platform for ridesharing



Save Money

splitting travel costs among passengers (0,05€/km)



Travel Safety

personal profile ratings and verified contact information



Help the Environment

reducing the number of empty seats in cars and single-passenger rides



VIA VERDE BOLEIAS
GROUPS

GROUPS



Closed groups in the platform (Website/ App)



Exclusive access



Without commissions for users



Launched in December 2017

VIA VERDE **BOLEIAS**

**MAIS PARTILHA,
MAIS POUPANÇA.**

A forma económica
de viajar



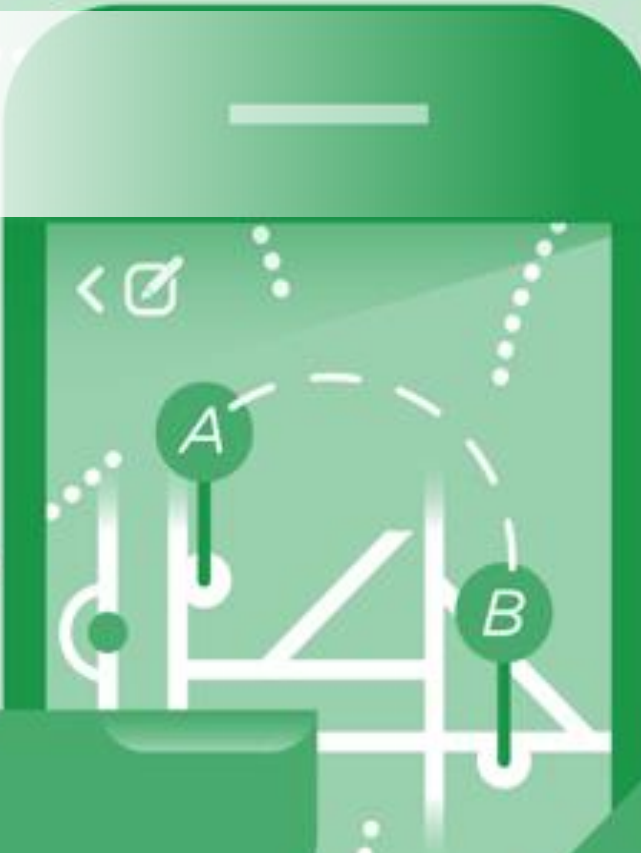
Se és passageiro aproveita
a campanha de lançamento
sem comissões

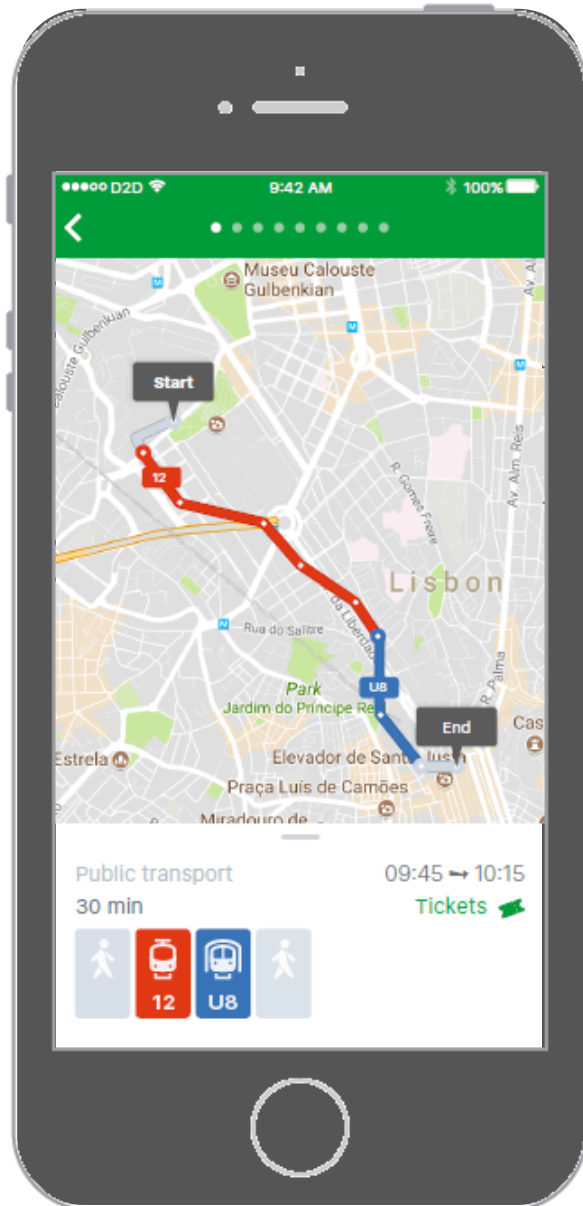


Regista-te

**VIA
VERDE**
Anda consigo.

MOBILITY PLANNER





Via Verde Planner

Multimodal platform that connects the starting point and the destination



Search a trip

find the best way to go from A to B



Save Money

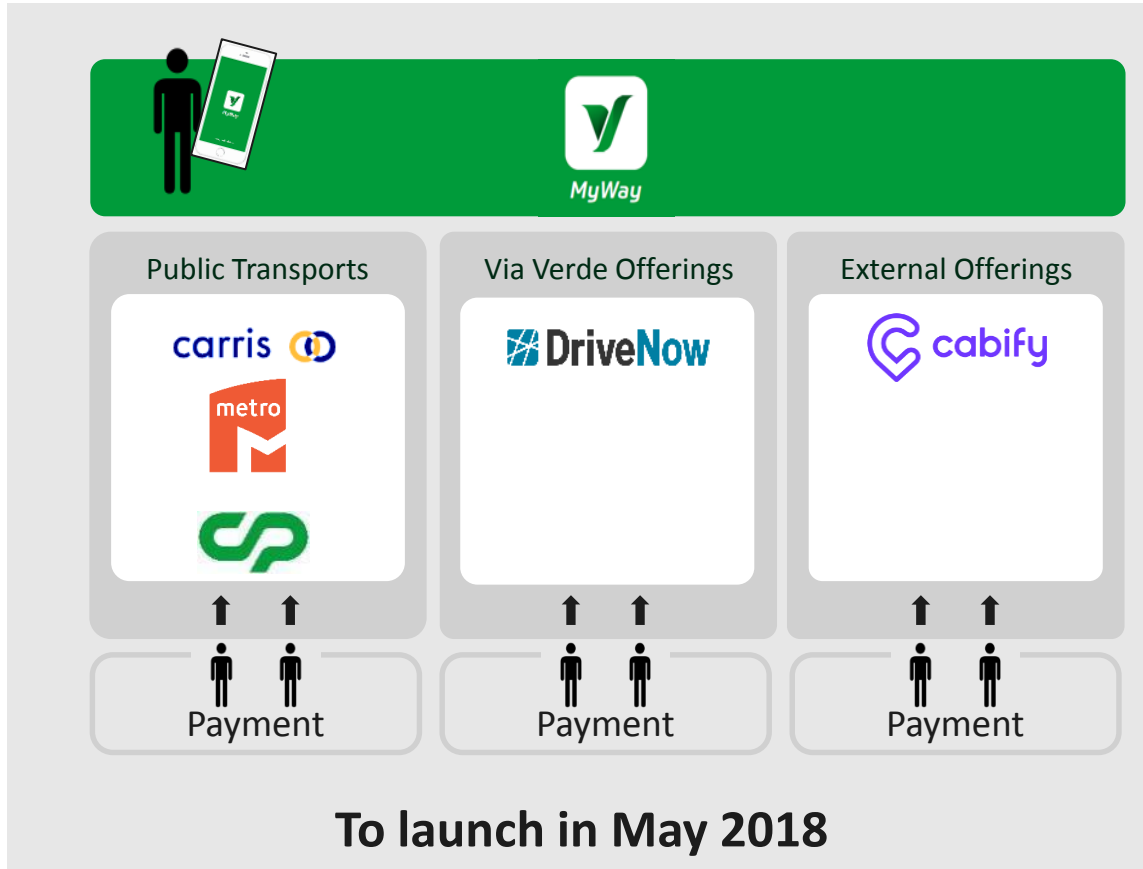
find the cheapest way to go around



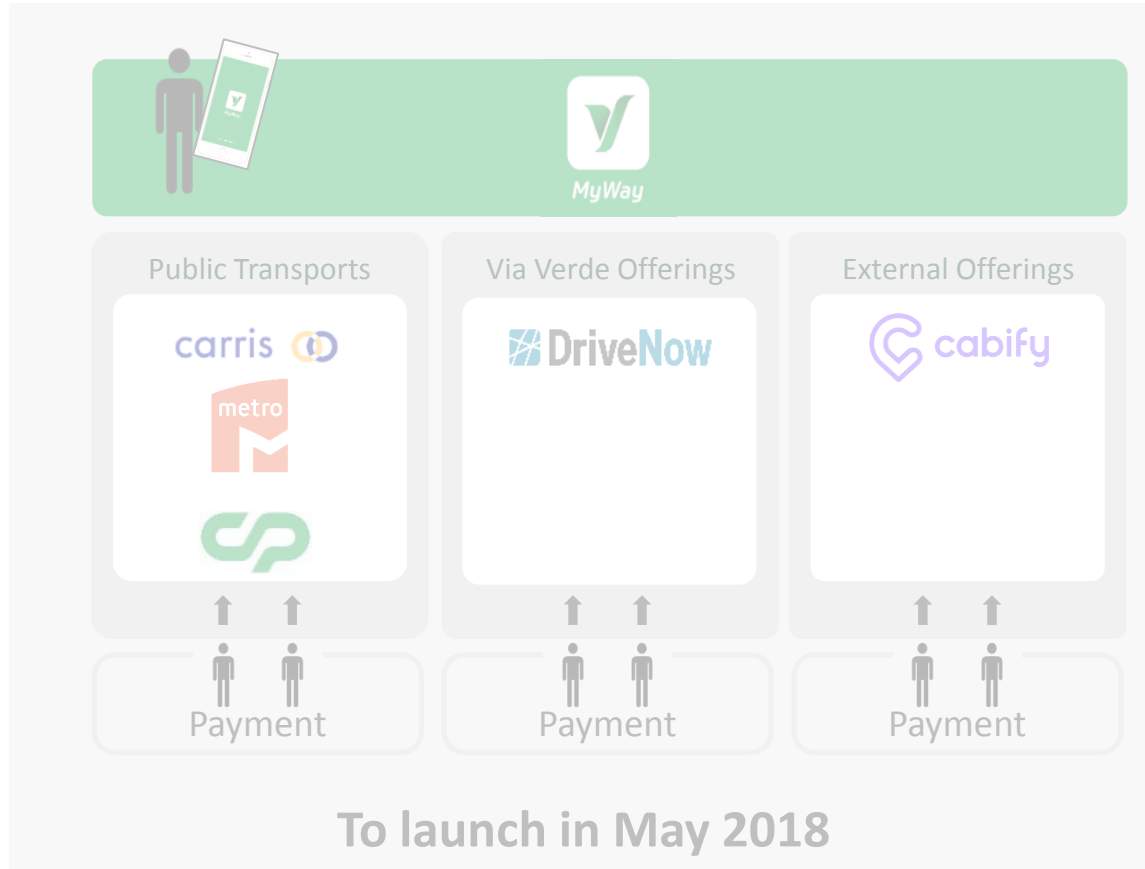
Save time

find the fastest way to go around

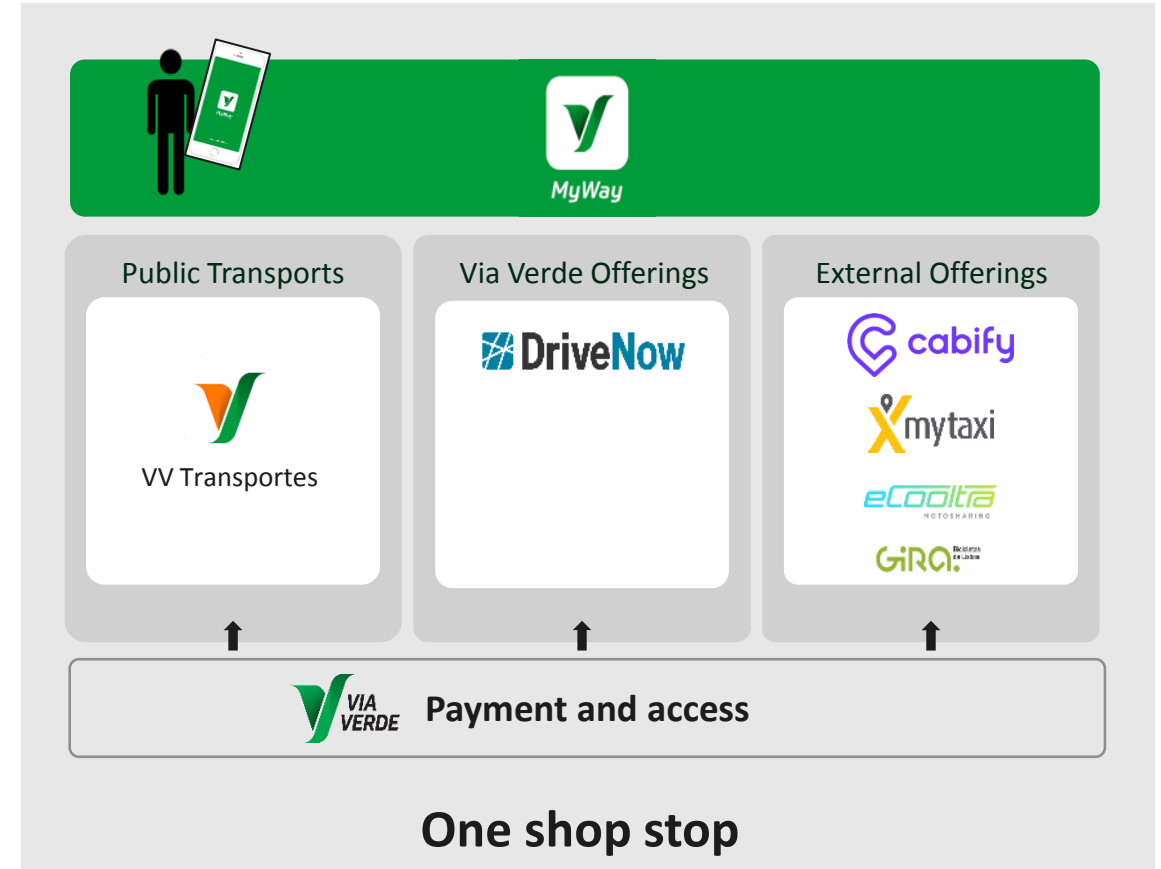
1st Phase: Initial offering



1st Phase: Initial offering



2nd Phase: Ambition



Brisa is enhancing core business
And exploring new opportunities on mobility



Brisa

THANK YOU!