WIFI: asfinag-guest Password: fsTrzw2m!



7th ASECAP MARKETING WORKSHOP

Marketing campaigns and actions to promote TOLL ROAD INFRASTRUCTURE





WELCOMING

Master of ceremony: Ursula Zechner, Managing Director, ASFINAG

Christophe Boutin, ASECAP President

Josef Fiala, CFO, ASFINAG







ASFINAG IN FIGURES

42 motorway maintenance depots



ASFINAG AN OVERVIEW.

ASECAP Introductory message

Malika Seddi,

ASECAP Secretary General Delegated

Emanuela Stocchi,

ASECAP Chair of Road Safety, Environment & Marketing committee (COPER II)



1st Panel:

Presentations and interactive Q&A

Moderator:

René Moser

Senior EU and International Affairs Manager, ASFINAG







Presentations and interactive Q&A

Moderator: René Moser, ASFINAG

Customer Involvement in ASFINAG chatbot programme

Werner Fritz, ASFINAG, Austria Sonja Eigner, ASFINAG, Austria

Easy Travelling with ANPR

Ole Lykke Christensen, Sund & Bælt Holding A/S, Denmark

Ascendi's Road Safety Campaigns

Filipe Melão, ASCENDI, Portugal

Marketing in a Digital world

Luis D'Eça Pinheiro, BRISA, Portugal

- 30 % program discount on toll subscription proposed on French networks

Malika Seddi, ASFA, France



The floor will be yours!

Share your thoughts & experiences with us and challenge us with your questions!



Customer Involvement in ASFINAG chatbot programme

Werner Fritz & Sonja Eigner, ASFINAG, Austria





ASECAP WORKSHOP MARKETING & COMMUNICATION

CUSTOMER SERVICE / CUSTOMER INVOLVEMENT AND ASFINAG CHATBOT

Werner Fritz - Head of Customer Service Department

Sonja Eigner - Chatbot Architect

Vienna, 28th February 2020



ASFINAG Customer Service – 1st Key Aspect

Omni-Channel Communication

Handling customer enquiries and complaints on toll fines

 via communication channel selected by our customers.

- > 24/7 service
- > ~700,000 contacts via phone and written communication
- > 700 personal consultation sessions
- > ~3,200 chats and 13,000 chatbot conversations
- Visits to about 30 fairs and events
- Support to currently 43,000 newsletter subscribers



Customer Service is More

When customers are put into the centre of one's business activity, a variety of sectors are involved:

- Product and Service Policy
- Quality and Process Management
- Human Resources and Employer Branding
- Communication and Marketing
- Innovation and Sustainabilty



ASFINAG Customer Service – 2nd Key Aspect

- Using results of empirical market research, we provide valuable input to the ASFINAG departments.
- We support further development of services by involving customers.
- We use key figures such as the Customer Orientation Index and the Customer Satisfaction Index to incorporate customer focus in our strategic work.

Customer Centricity Pushing Customer Orientation via Market Research and Customer Involvement



ASFINAG Customer Service Practical Exemple of how the Key Aspects work together

Omni-Channel Communication

Customer Centricity



CUSTOMER INVOLVEMENT IN ASFINAG CHATBOT PROGRAMME

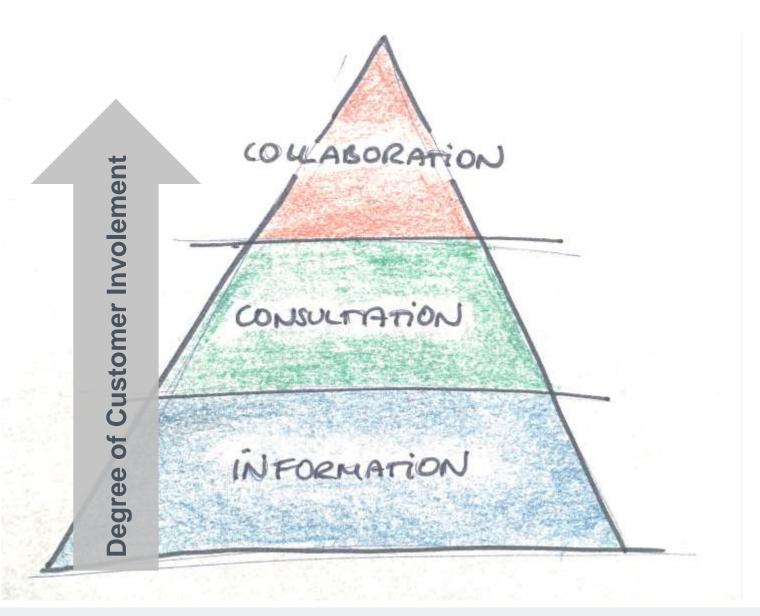
Sonja Eigner

Chatbot Architect – Customer Service Department

Looking back at last year's workshop in Zagreb:

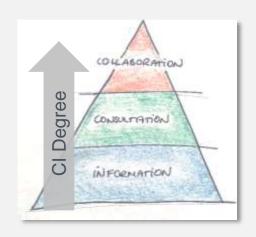


Stages of Customer Involvement



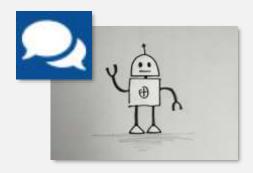
Today we will focus on:







ASFINAG integrates the whole model of customer involvement on various levels.



Chatbot project as a practical example of

how we use information, consultation and collaboration to design a service that addresses the needs of our customers.



Chatbot Projects





Webshop Apr. 2018

- Content-only chatbot in our webshop → shop-asfinag.at
- Information on digital toll products for vehicles up to 3.5 t MPW

GO-Maut Dec. 2019

- New Chatbot → www.go-maut.at
- Information on GO-Box and toll over 3.5t MPW
- Customer Involvement as project strategy





Chatbot Project 2019

Key Factors



Key Factor





- Adaptation
- Selection of best 2
- Customers' perceptions
- Best avatar
- Favorite names



Positioning

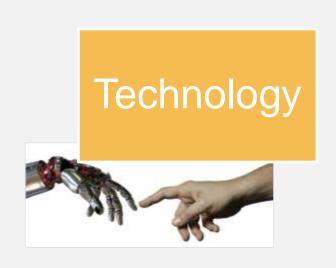
Design & Name







Key Factor



Market Analysis – Requirements for Chatbot Tool

- Proven technology
- Well functioning system
- Quick in-house creation & adaptation of complex content

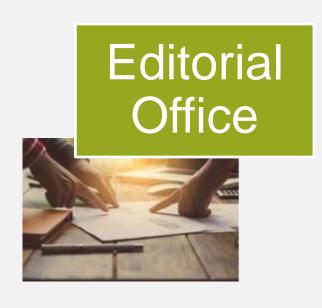


IBM Watson Assistant



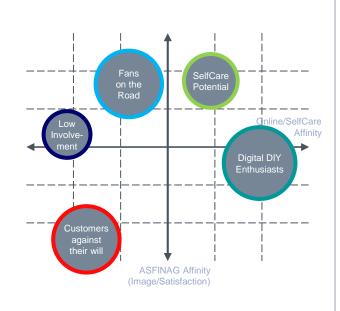


Key Factor



Editorial Groundwork - Defining Content

- Target group analysis
 - → Using Customer Segmantation & Customer Insights
- Identifying Customer queries from
 - → Experience from first bot project
 - → Written communication analysis (E-Mail, Live Chat, Service Center etc.)
 - → Focus groups



AISIFIINIAIG

Key Factor



Constant Improvement

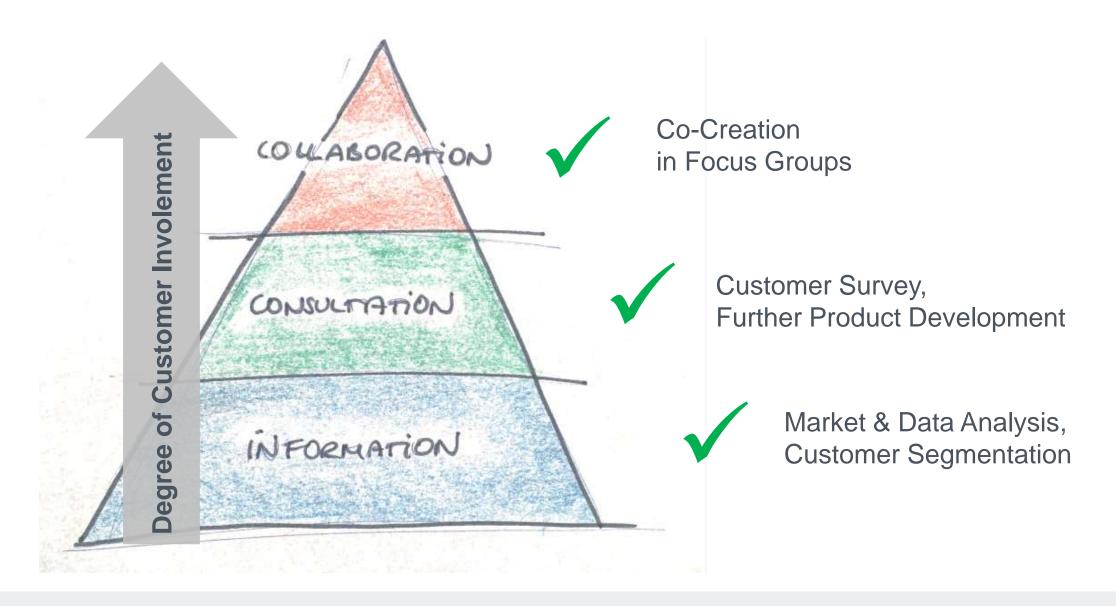
- Tracking customer usage
 - → Frequent topics
 - → Number of dialogues & messages
- Analyzing dialogues
 - → Bot understanding
 - → Customer feedback
- Adapting & updating content







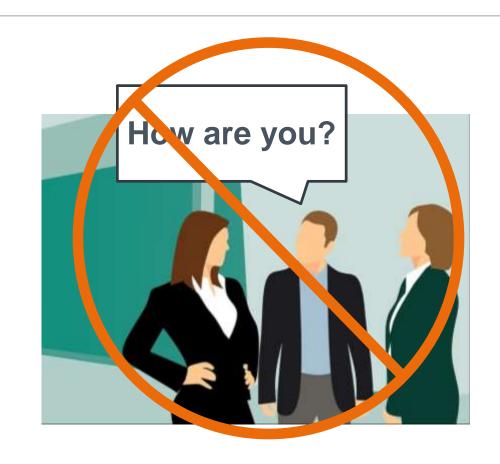






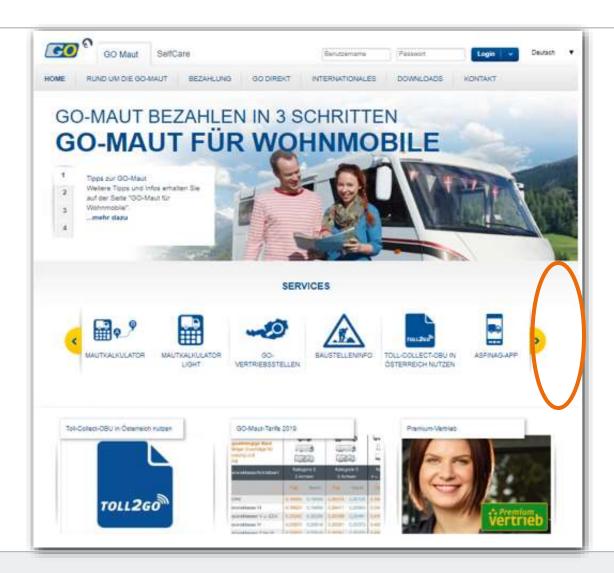
Content & Personality

- Important topics
- Purely informative
- No small talk needed
- Friendly





Positioning







Design

- Transparency
- Anthropomorphic elements
- Friendly but not too playful





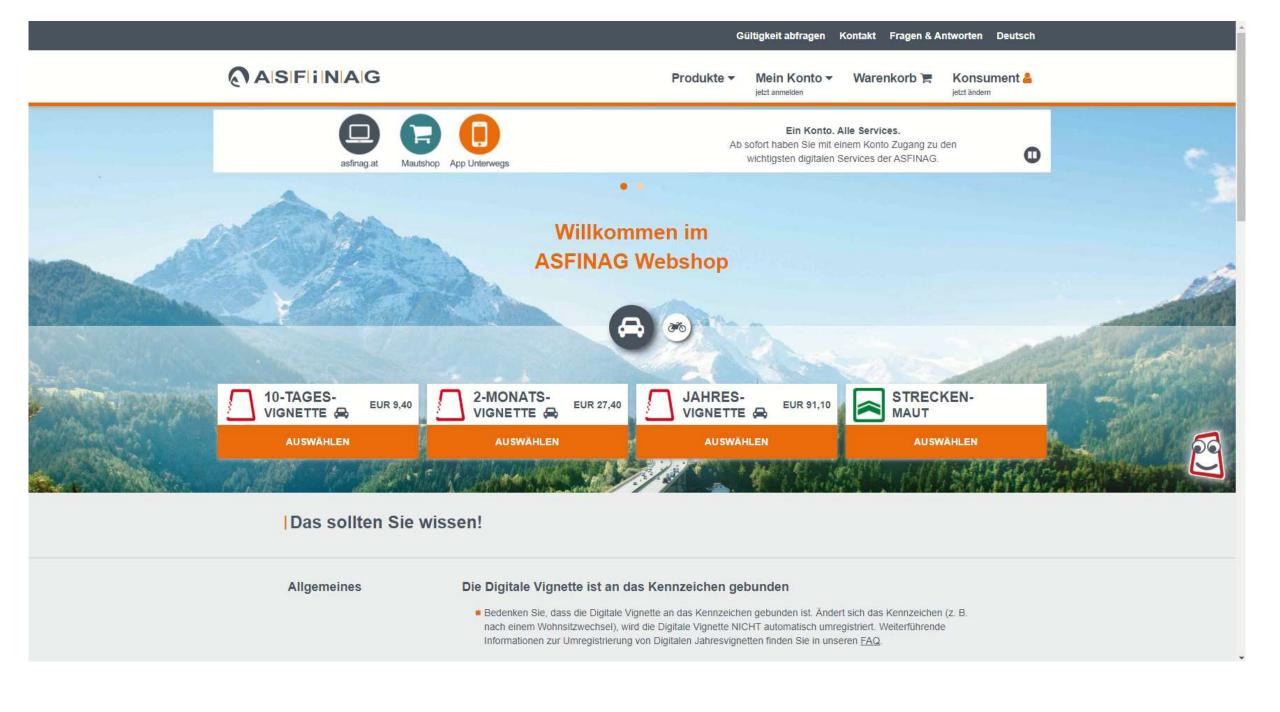


In the end we have a product that ...

- ✓ looks appealing to customers
- ✓ can easily be found on website
- ✓ is recognized as a chatbot



- → Impact on usage and high acceptance
- contains the right information for the target group
 - → Information support to customers





www.asfinag.at



Easy Travelling with ANPR

Ole Lykke Christensen, Sund & Bælt Holding A/S, Denmark





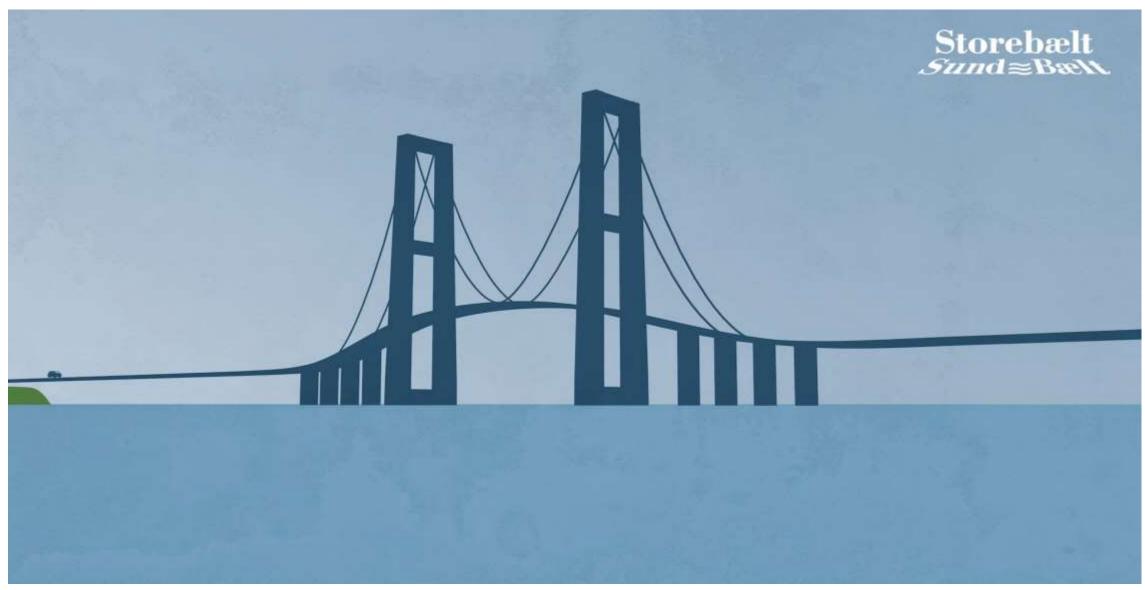




SUND & BÆLT
– COO OLE LYKKE CHRISTENSEN

EASY TRAVELING WITH ANPR

NEW TOLL STATION AT GREAT BELT WITH ANPR/VIDEO ACCOUNT IN EXPRESS LANES



ANPR TRACK RECORD IN DENMARK

| 1998 - | Great Belt Bridge toll station - ANPR for enforcement |
|--------|--|
| 2018 | Design & implementation of ANPR product (video account) |
| 2019 | New toll collection system at Great Belt with automatic payment with ANPR in Express Lanes |
| 2019 | Free Flow Toll Station at Fjordlink Frederikssund with video accounts and single passage payment |
| 2020 | Low Emission Zone enforcement in four cities – ANPR for static and mobile enforcement |
| | |



SITUATION AT GREAT BELT 2017

- ANPR cameras were used for enforcement, only
- Difficult to increase automatic payment ratio 65% wanted to increase toll station capacity
- Wanted to get experience with ANPR payment (Video Account) before ANPR becomes EETS compliant technology
- Agreed to do a Video Account trial together with BroBizz A/S
- Early, we realised that Sund & Bælt could reuse existing ANPR cameras and back office software

We used a year (march 2017 to march 2018) to

- Change systems
- Develop product and marketing concept
- Implementation with pilot of 1000 customers



2019 Great Belt traffic statistics

Yearly traffic: 13.3 mill

Avg. daily traffic: 36,359

Max. daily traffic: 51,918

Express lanes 76% (ANPR avg. 10% and 13,3% end of 2019)

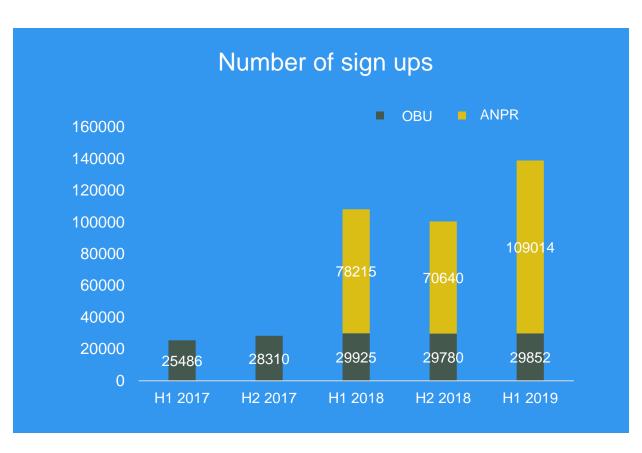
Card 23%

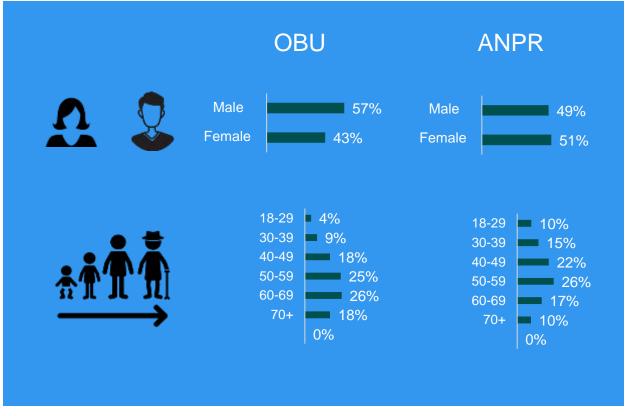
Cash 4%

MORE CONVENIENCE WITH ANPR (VIDEO ACCOUNTS)

| | OBU | ANPR |
|--|------------------|------------------|
| Fast and easy delivery (time & distribution) | 5 days | 20 minutes |
| Best price | 200 kr. | 0 kr. |
| No worries of life time and battery | × | * |
| The product is always with you | × | ~ |
| High flexibility in use | Always active | App controlle |

SOME STATISTICS FROM AN TSP PERSPECTIVE





LEARNINGS

More 350,000 subscribers in less than two years – half of them has already an OBU

Very positive customer feed back

- Easy and fast sign up usable within 20 minutes
- More vehicles and credit cards at same agreement
- Can use e.g. ANPR for business and OBU for private use
- Easy to deactivate/activate

More difficult for subscribers to understand and gives more customer calls

Higher read rate with OBU (99.9%) than ANPR (98%)

With new toll station: upgrade of ANPR cameras and early ANPR read in the lanes to handle 50 km/h

Automatic payment ration in Express lanes (76% i 2019 and increasing)





Ascendi's Road Safety Campaigns

Filipe Melão, ASCENDI, Portugal



7TH ASECAP MARKETING & COMMUNICATION WORKSHOP

ASCENDI'S ROAD SAFETY CAMPAIGNS



INDEX

/ 01 CONTEXT

RESPECT THE ROAD WORKERS CAMPAIGN

/ 03 JUNIOR PATROL CAMPAIGN



ASCENDI MOTORWAYS NETWORK

DIRECT OPERATIONS

6 ROAD CONCESSIONS under operation

630 km (of motorways) OPERATED BY ASCENDI





ASCENDI TOLL SYSTEMS

TOLLING OPERATIONS

2 x TRADITIONAL TOLLING

/ NT - Norte / GL - Grande Lisboa

6 x All Electronic Tolling (MLFF)

```
/ CP - Costa de Prata
/ GP - Grande Porto
/ BLA - Beiras Litoral e Alta
/ IN - Interior Norte
/ PI - Pinhal Interior
/ TM - Túnel do Marão
```



/ **01** CONTEXT



Road Safety Campaigns 2019

Road safety is a main aspect of Ascendi operation integrated in the company's strategy for Corporate Citizenship / Corporate Responsibility.

In **2019** Ascendi developed Road Safety campaigns aiming to raise awareness to the importance of adopting road safety behaviors. These campaigns are in the frame of Ascendi's strategy for **reducing the frequency and severity of road accidents** on its motorway network.

This is an **Ascendi effort** that can be significantly more effective, if there is a **stronger commitment on behalf of various stakeholders** such as Public Entities, Autarchies, Police Forces and civil society itself.

/ 01 CONTEXT



Road Safety 2019

RISK BEHAVIORS

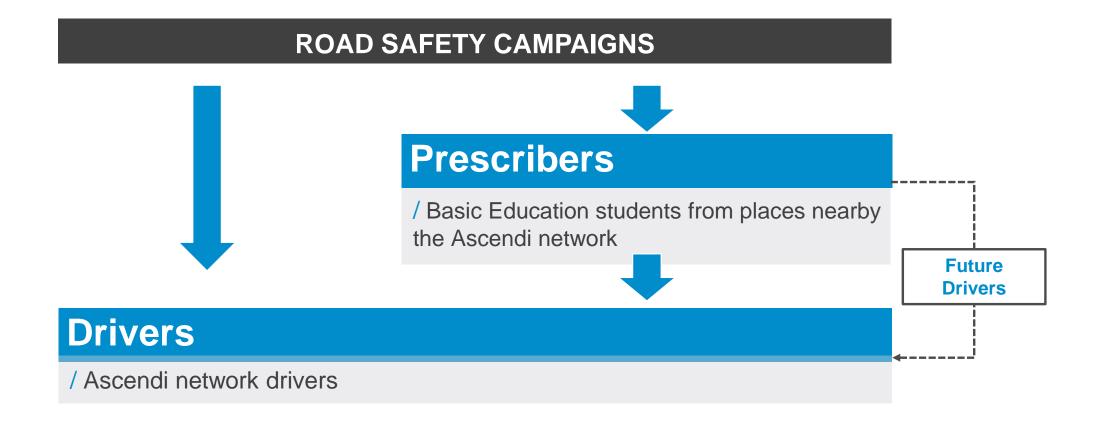
SPEED – speed inadequacy to road work zones and general speed above the legally allowed.

DIGITAL DISTRACTION – driver distraction when using smartphones, tablets and even vehicle instruments, such as GPS.



Road Safety 2019

TARGETS



7TH ASECAP MARKETING & COMMUNICATION WORKSHOP

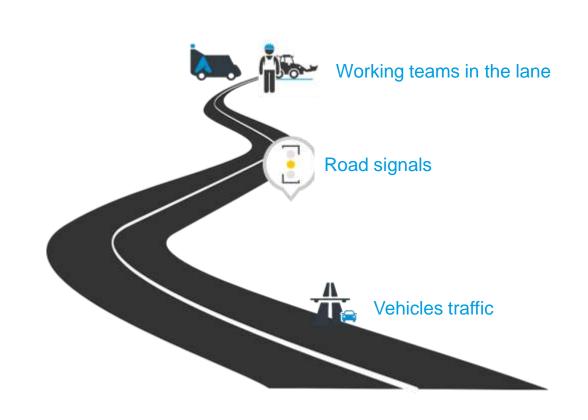
ROAD SAFETY CAMPAIGN

Raise awareness to accident risk with teams that work on a daily basis in the infrastructure.



Road safety

Safety is a priority for our customers but also for our collaborators, particularly those who work in the active lane. These professionals work every day to give our customers safe and quality roads, but also themselves, need to be protected.



ROAD SAFETY CAMPAIGN

Raise awareness to accident risk with teams that work on a daily basis in the infrastructure.



Partners



This intervention area is influenced by several entities. Therefore, Ascendi actively searched the engagement of the most relevant entities, thus granting a greater extent and effectiveness of the message.













Other entities could also add value to the campaign, granting a greater message coverage.











Strategy

CONSEQUENCE PERSPECTIVE

Firstly, we had presented the consequence perspective, real and visceral, showing the damaged vehicles of Ascendi, Firefighters and Police authorities involved in accidents while performing road services and markings. In order to accomplish this, we exposed in the service areas real accident vehicles.

HUMAN PERSPECTIVE

Secondly, we will present the human perspective, the feeling of those who work in the infrastructure with high speed vehicles passing by. With this perspective, we can rightfully appeal to drivers to adopt proper driving behaviors.

Communication Goals

RAISE AWARENESS

EDUCATE

INFORM





Infrastructure Communication

- Showing the damaged vehicles of Ascendi, Firefighters and Police authorities involved in accidents
- Road workers appealing to the drivers

Activations

- / Elements from the entities involved and from Ascendi gave their personal testimony to people in the service areas
- Promoters team had a script with questions on road safety prevention and best practices as well. At the end of the questionnaire a gift was offered to drivers.

Variable Message Panels

Campaign slogan displayed on Variable Message Panels

Radio Partnership

 Advertising spots, safety tips and workers' testimonials throughout the two-month-duration campaign

Digital Endorsement

Road safety advertising and testimonials videos



1st Moment: Consequence Perspective _ Message Impact

Speed also kills those who are Standing Still

Distraction also kills those who are Standing Still



/ Attached to the accident vehicle, visible for those who circulate in the service areas, both in fuel supply or other leisure areas. 2nd Moment: Human Perspective_ Awareness Message

Slow down. Respect those who work on the road.

Attention. Respect those who work on the road.



/ Attached to people, real teams working on infrastructure, in the moment drivers leave the service area to start their journey (service area exit).



* Speed also kills those who are Standing Still





* Slow down Respect those who work on the road.



















ascendi

Activations_ Team Entities

Goal: Addressing the theme of the campaign in the 1st person.

Teams consisting of elements from the entities involved and from Ascendi, during the campaign period, gave their personal testimony to people.

Supported by promoters in the distribution of flyers and merchandising.

10 ACTIONS

Only with mobile promoters circulating in a car designed according to the Campaign creativity.

5 ACTIONS















Activations_ Promoters

Approach and offer Merchandising / Gifts Proposal:

The Promoters had a script with questions on road safety prevention and best practices, as well as on the entities involved in this action. At the end of the questionnaire a gift was offered.

4.3_k
Questionnaire
Answered



RESPEITE QUEM TRABALHA NA ESTRADA

A segurança rodoviária é uma prioridade e é por ela que trabalham todos os dias centenas de agentes na estrada. Mas também eles precisam de ser protegidos e isso, é responsabilidade de todos os que andam na estrada. Conhecer as regras de segurança e cumpri·las pode salvar vidas, incluindo a sua.

Vamos testar os seus conhecimentos e deixar alguns conselhos que deve por em prática cada vez que conduz.

E lembre-se: A velocidade e a distração também matam quem está parado.





Use of Variable Message Panels

Information on Variable Message Panels throughout the campaign period, with reinforcement in roads with works



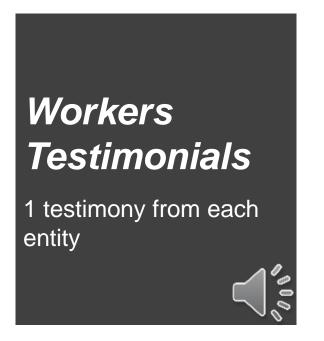


Radio Partnership

Throughout the two month duration campaign, at TSF (a national radio station)









DIGITAL ENDORSEMENT

Testimonials videos















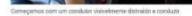
DIGITAL ENDORSEMENT

Speed



Distraction







No fundo versos um colaborador Ascendi cada yez mais perto a aceme-





Cortamos para um capacete e uma luva de trabelho a car no asfalto. Nesta temos sambém pinos caldos.

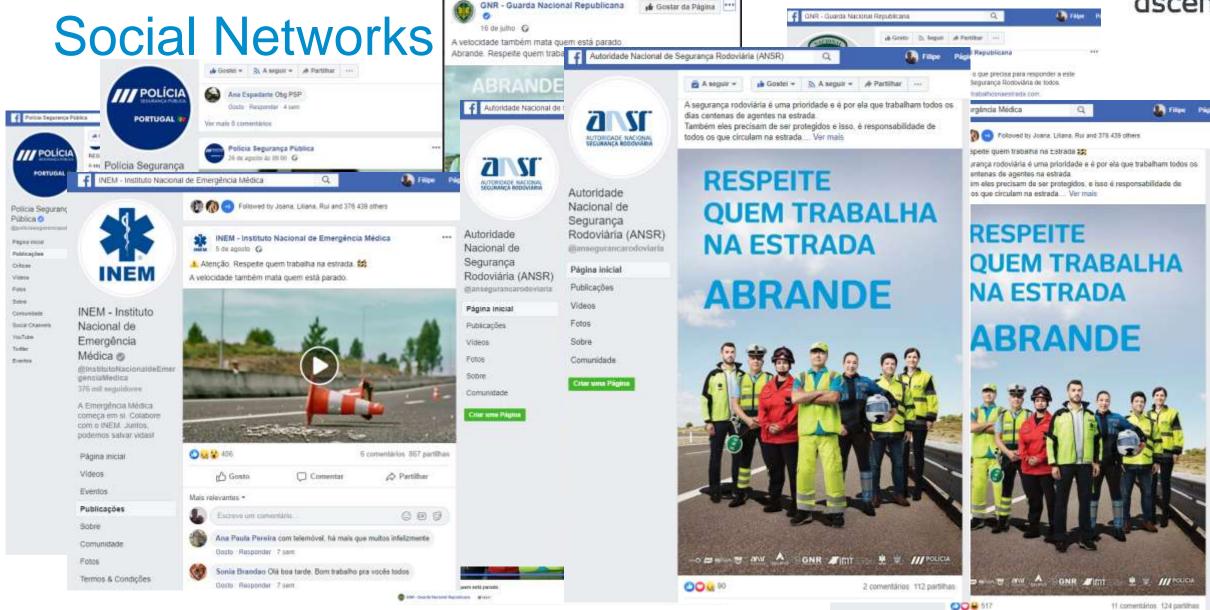


Entra o lettering com o claim de campanha so mesmo tempo que a voz. off: A distração também mata quem está parado...



Imagem dos apentes de assistência Atenção. Respette quem está a trabalhar na estrada.







Social Networks

573 _{k*} Views

22,7 k
Reactions



15,3 k Shares

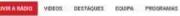
11 k
Instagram Likes

^{*} A serious accident in the infrastructure generated thousands of shares and 173k on Facebook in a post campaign

RESPECT THE ROAD WORKERS CAMPA

Nova campanha alerta condutores para respeitarem quem trabalha na estrada







More than 60 news

Clipping



Diário Viseu

de campanha de

PORTUGAL Area 12:35 x 22:54 m A25 recebe iniciativa

BRIEFING

umpanha anda de BUS

e traballe ou e-ream" é, ause, o more resta recitaire que decrea est VI, de extension

distributed and substitution of the contract party and the

de Nacional de Segurança Rodowána, a Ascendi, a GNR, o instituto da Mobilidade. portes, o INEM, a Liga dos Sombeiros Portugueses e a PSP juntaram-se para uma que visa sensibilizar os condutores para os riscos que correm as equipas que nas estradas. A criatividade é da BUS.



4 Fartiflerro Familiano

"Respeite quem trabalha na estrada"

America hoje campiente para alester da condutores para os riacos que comem en equipas de intervenção.



Vouzela Área de serviço servirá de paico à acção de sensibilização promovida por várias entidades públicas e privadas

segurança rodoviária

Nova cam quem trab

Nos das Z e 3 de Setendos, a Autoridade Nucional de Segumesca Rodovtaria, em parceriacomplacemb a CNR of PSP of hotituto da Mobildade e dos Transportes (IAIT), o fostituto Nacional de l'invegencia Méito (NIM) r.al.igados ilombeins Portugueses, ini promoer a camparho ile sensibilizado Tiespele quentrabalhana

Aintentive decement on A25. hualizada entre o nó de Reientido de sensibilizar oscono- prindos e presentivos. датично раза и мерапиндилич



na área de serviço de Visarela. Comportos correços em Alibo e terrora a 15 de Setembro

gosce cono de Camburinho, no tamentes de condução apro-matam agentes de assistência,

forças de segurança e protec-"Esta comportro de segurar- ção civil, e que na sua grande

limbirto dos agentes que lobre - qui rodoviário for parto de uma - maioria, ve actilentes resulta-

Uma campanha de segurança rodoviária para alertar os condutores para os riscos que correm as equipas de intervenção que trabalham nas estradas e autoestradas portuguesas arrança hoje



Automóvois sinistrados alertam para perigos da estrada

Wespelle speni trabalha na Estrada" e a rivote da trass recente compartiro de segurarsa riploviaria ent Portugal, tribala bars sould be exported the sources one interview to resolution be sintened to see those others had affect our extrader A public extracting management. Of expectation of whether on completeness parts on recovery management against the interview, the converse, Without the description of the company of the compa





GRR ATHT







CAMPAIGN AWARDED

3 bronze distinctions at the International Festival of Creativity Lusophone Awards.

/ The distinctions were awarded in the categories of Public Roadway Activation, Public Roadway Campaign and Company Social / Environmental Responsibility and reflect the differentiated nature given to this campaign.





7TH ASECAP MARKETING & COMMUNICATION WORKSHOP

ROAD SAFETY CAMPAIGN

Awareness of the dangers caused by driver's distraction with mobile phone.



Road Safety

Driver distraction from mobile phone use has been appointed as a major cause of road accidents in Portugal.



ROAD SAFETY CAMPAIGN

DIGITAL DISTRACTION – awareness of the dangers caused by driver distraction with mobile phone



Associates

1 National Road Safety Authority

2 Police Forces - National Republican Guard / Public Security Police

They lend more relevance to the theme and support to road safety message conveyance.







10 Municipalities

Ensure space and technical conditions for the Theatre play exhibitions, action promotion, connection to the school group and children's transport logistics (1st cycle)



Strategy

Named "Junior Patrol", the campaign is based on a theatre play, which aims to raise awareness among youngsters about road safety and prevention of risky behaviors on the road, setting the basis for, in the short term, ensuring that the message is conveyed to adults by a very persuasive agent – children and, in the long term, leading to future generations of more responsible drivers.

/ Exhibited to children of the 1st cycle of 10 counties adjacent to our motorway network





Strategy

- The play tells the story of a group of children who love to play with their best friend, a dog named CHICO. They meet a driver who is always using the smartphone.
- The children repeatedly warn him that this is very dangerous and a real Police officer enters on stage and gives him a fine. Several times the driver appears on scene using the smartphone.
- At a certain point, there is a sound of a big road crash. Listening to the actors you can understand that their friend, the dog, was run over by the driver who was always distracted with the smartphone.
- Then, the Dog enters in the scene with a hurt leg. At this time, the actors create the JUNIOR PATROL and ask the children to join them.
- / The play ends with the police recruiting the children as Junior Patrol agents, handing out the Good Agent Handbook and placing a badge on the children.



/ 03 JUNIOR PATROL CAMPAIGN



Theatre Play

- Exhibited to children of the 1st cycle of 10 counties adjacent to our motorway network.
- In a simple and direct way, alerts children to the dangers caused by the driver's distraction with the mobile phone.

Merchandising

Junior Patrol Badge and Good Agent Handbook with illustration of the risks of using a mobile phone while driving.

Digital Endorsement

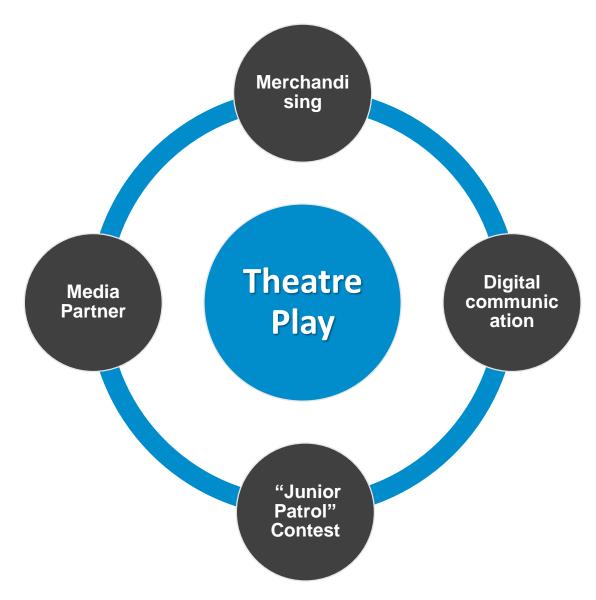
Videos and photos promotion on social networks and websites of all partners.

Junior Patrol Contest

National competition to encourage presentation of creative works on the theme "Road Safety" focusing on the message conveyed by the play, specifically the dangers of using a mobile phone while driving.

Media Partner

A forum for debate on a national radio, where the campaign was announced, involving all the partners



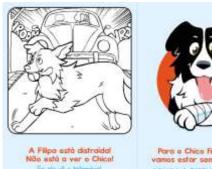


Theatre Play

10 counties adjacent to the Ascendi motorway network











Digital Endorsement

1º Post announcing Junior Patrol arrival



2º Theater play video at each location





Digital Endorsement

Road Safety Videos

Video 1 "Trip to school"



Video 2 "Family journey"















Junior Patrol Contest

Promotional video









Promotional poster







Radio Partnership

In the beginning of the campaign, at TSF (a national radio station)

20"

Radio Spot

Distributed the week before the Discussion Forum

60" Teaser

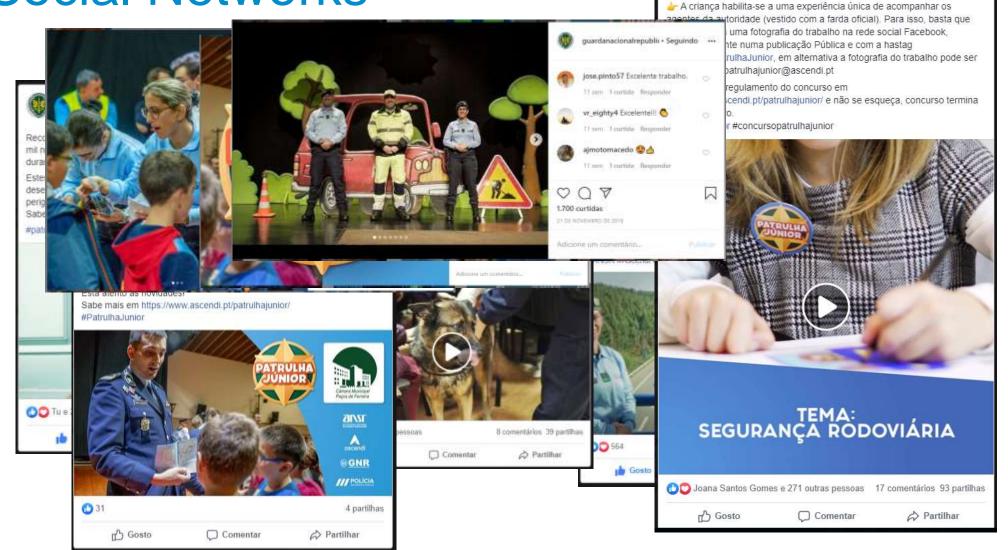
1 minute brief distributed one day before the Discussion Forum

60' Debate Forum

Debating the importance and characteristics of the campaign, with the participation of all entities

ascendi

Social Networks



Polícia Segurança Pública

19 de janeiro às 18:00 · •

condução e habilita-a ganhar prémios!

🥈 A Patrulha Júnior lança um desafio às crianças lá de casal 🥈

Convidamos as crianças até aos 12 anos a mostrarem o seu talento! Desafia-a a realizar um trabalho (escrita, desenho ou fotografia) sobre o

tema "Segurança Rodoviária": Perigo da utilização do telemóvel durante a



Social Networks

106_k Views

4.6 k
Reactions

1 k Shares 8,9 k Instagram Likes





Initial figures

2 months after the play was exhibited

95%

of Parents are still hinted by the campaign

97%

considers that the child's message has reduced their will of using their smartphone while driving

85%

considers that the child has made them more aware of the problem

Case Study

The campaign will be presented in an academic book that collects best practices in social marketing campaigns - Children as influencers of quality of life: a social marketing campaign for road safety

THANK YOU FOR YOU ATTENTION

Filipe Melão | fmelao@ascendi.pt



Join us on









Luis D'Eça Pinheiro, BRISA, Portugal







Brisa Overview



The backbone of Portuguese road system



1.700 km's
5 concessions
50% share
EBITDA > 550 M€
> 3.000 employees

Brisa Overview - always innovating



Via Verde - pioneer in electronic toll collection



4 millions OBUs
all PT motorways
non-stop UX
direct payments

Brisa Overview - always innovating



Via Verde gave us 4 strategic marketing assets









Brisa has leverage on digital & customer centric approach

Brisa Overview



Why Customers are important?









Toll Collection business requires satisfied customers

Satisfied customers allow us to increase our share of their wallet

Sustainability & business

Brisa Overview - Vision



From infrastructure to mobility





Delivering efficient mobility to the people (customer centric)

Brisa Overview - Vision



From cars to people (Customer centric)



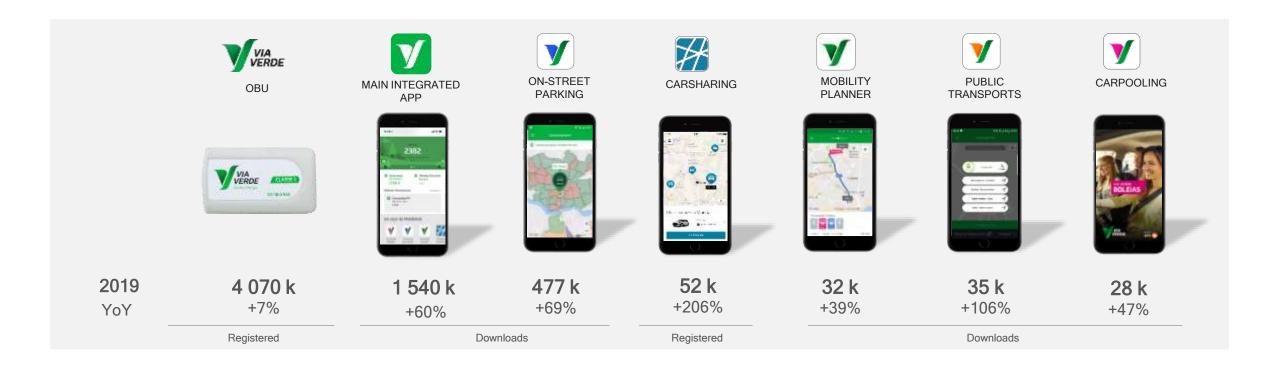


From tags to digital (apps)

Brisa Overview



OBU & App base services



Already several digital based services

Brisa Overview



... and strong digital engagement with customers

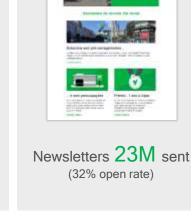


Site 4.4M users



App 1.5M downloads





WWW VERDE





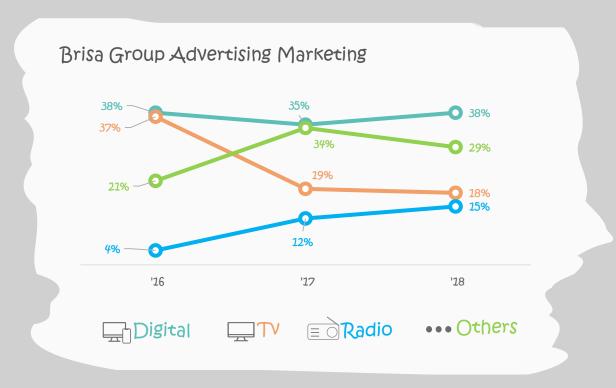
Integrating digital has been a natural step

Not Digital Marketing

But Marketing in a Digital World

Advertising expenditure

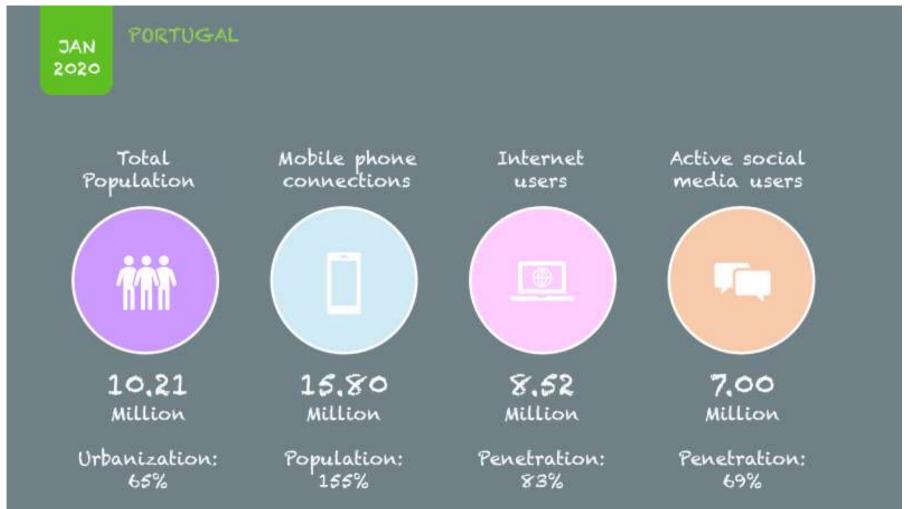




Blended Marketing - Brisa in line with trends







Portugal
has a high level
of digitalization
in line with trends







■ ■ ■ □ □

Mass Market

Mass Advertising

Intuition-driven

Mass of Niches Targeting of Scale Data-Driven Automation & data are enabling personalization in omni-channel

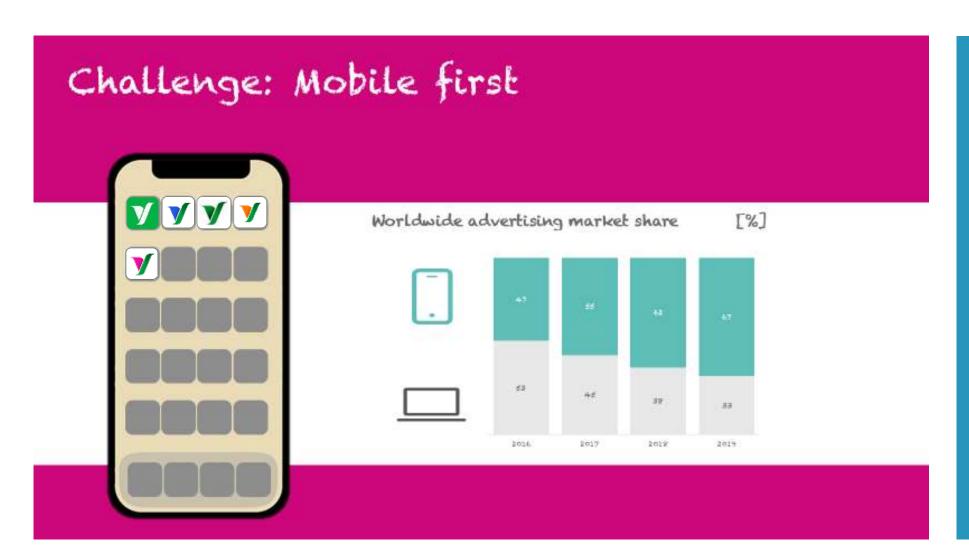




to capture
users attention

Content rules are changing for new formats



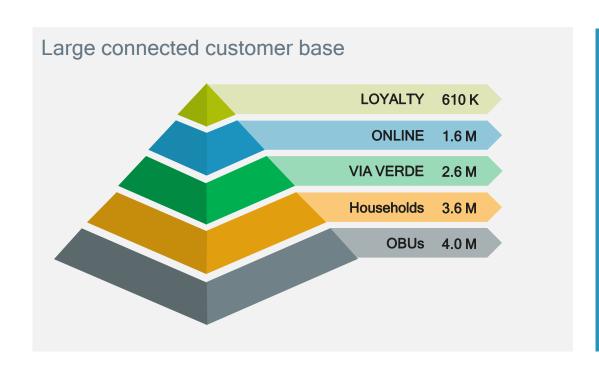


Media is becoming digital & mobile rules

Within digital advertising, revenue is shifting from desktop to mobile



How Brisa is improving satisfaction & share of wallet?



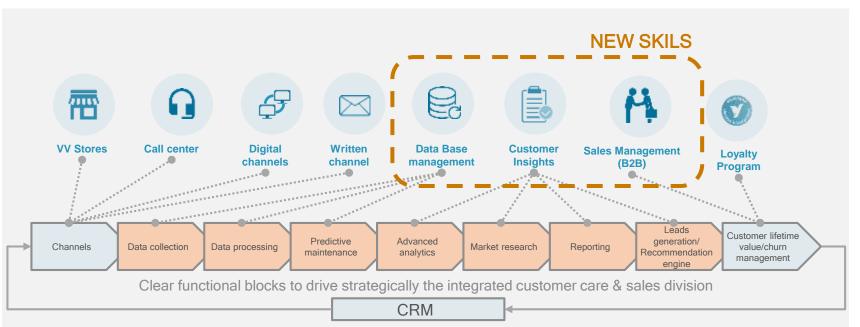
Large Data (GDPR compliant):

- Personal information / demographics
- Vehicle data
- Travel preferences (e.g. loyalty)
- Mobility profile / behavior (~500M transactions / year)
- Frequent engagement

Ability to analyze behavior to tailor products & communication



New Integrated Customer Management Unit



360º Vision

Marketing intelligence

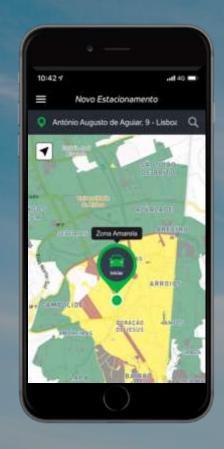
Efficiency

Increased customer knowledge to support business units

1

Using data for target marketing Campaigns

Launch on street parking app in Lisbon







On-Street Parking | Using data driven marketing for a campaign



Tailor communication:

1. Customers that enter Lisbon (850 k)



On-Street Parking | Using data driven marketing for a campaign



Tailor communication:

2. Customers that use VV offstreet parking in Lisbon (330 k)



On-Street Parking | Using data driven marketing for a campaign



Tailor communication:

3. Customers that already use VV on-street parking in Great Lisbon (33k)



On-Street Parking | Using data driven marketing for a campaign



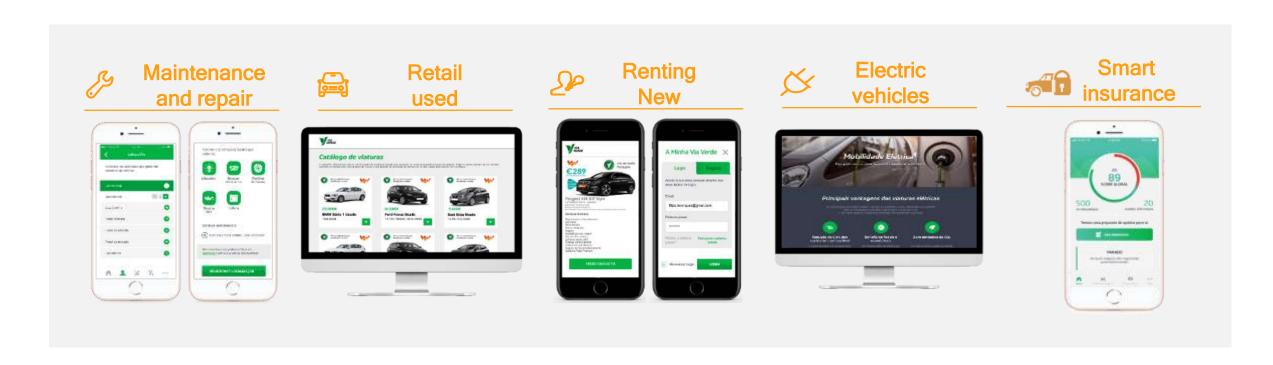
Tailor communication:

4. Other VV Customers (1.6M)

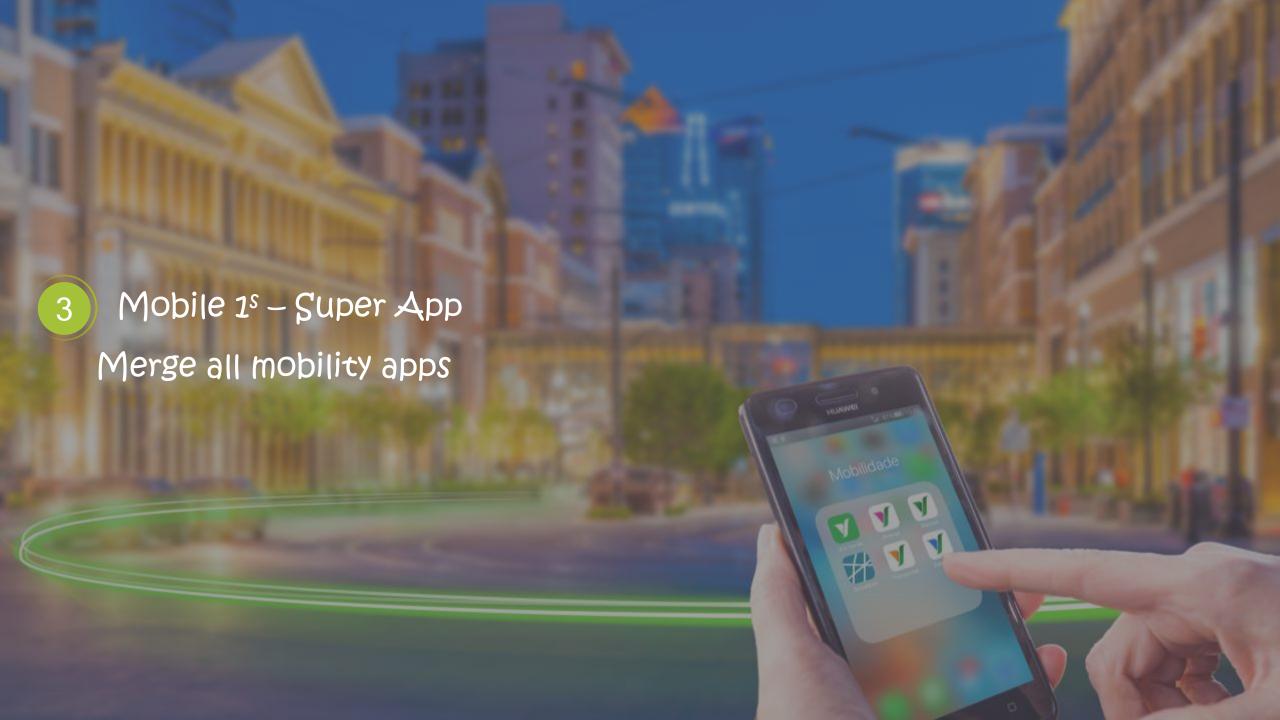




Auto Platform | Data on 4M vehicles & on the owner



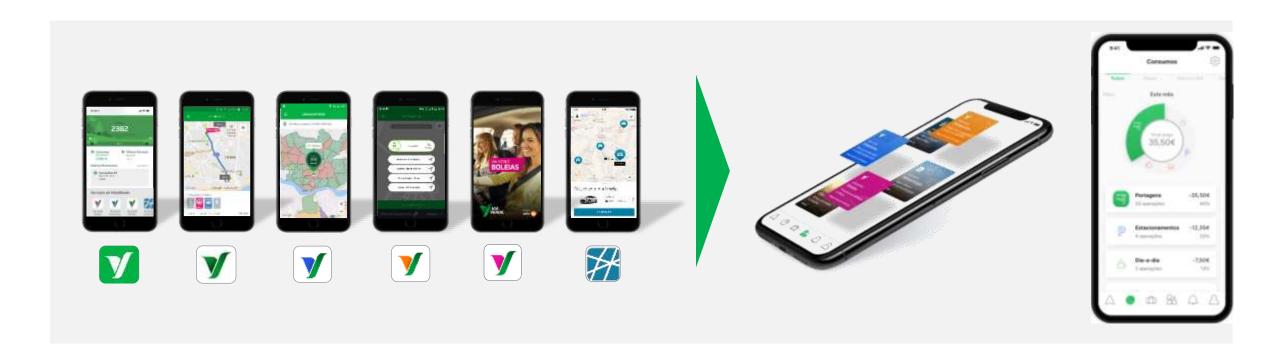
Tailored offers - in pilot stage



Marketing in a Digital World



A Single App | Focus on client journey beyond payments



Single platform to gain scale and efficiencies

Marketing in a Digital World



A Single App | With new services







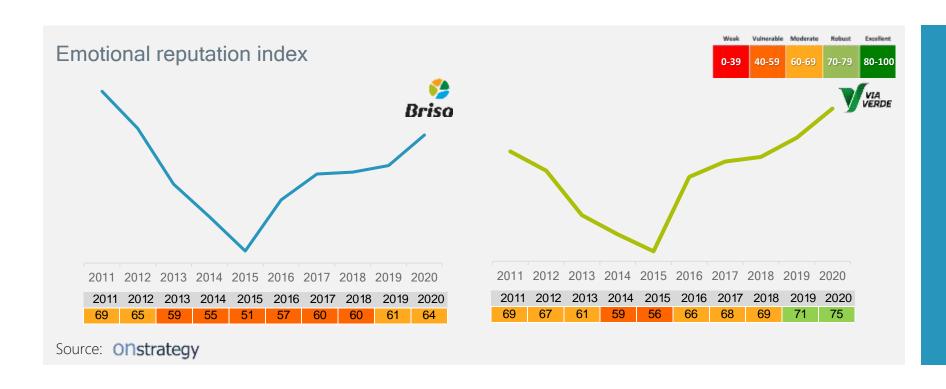
... higher focus on the motorway experience (core business)



Marketing in a Digital World



Stakeholders Reputation

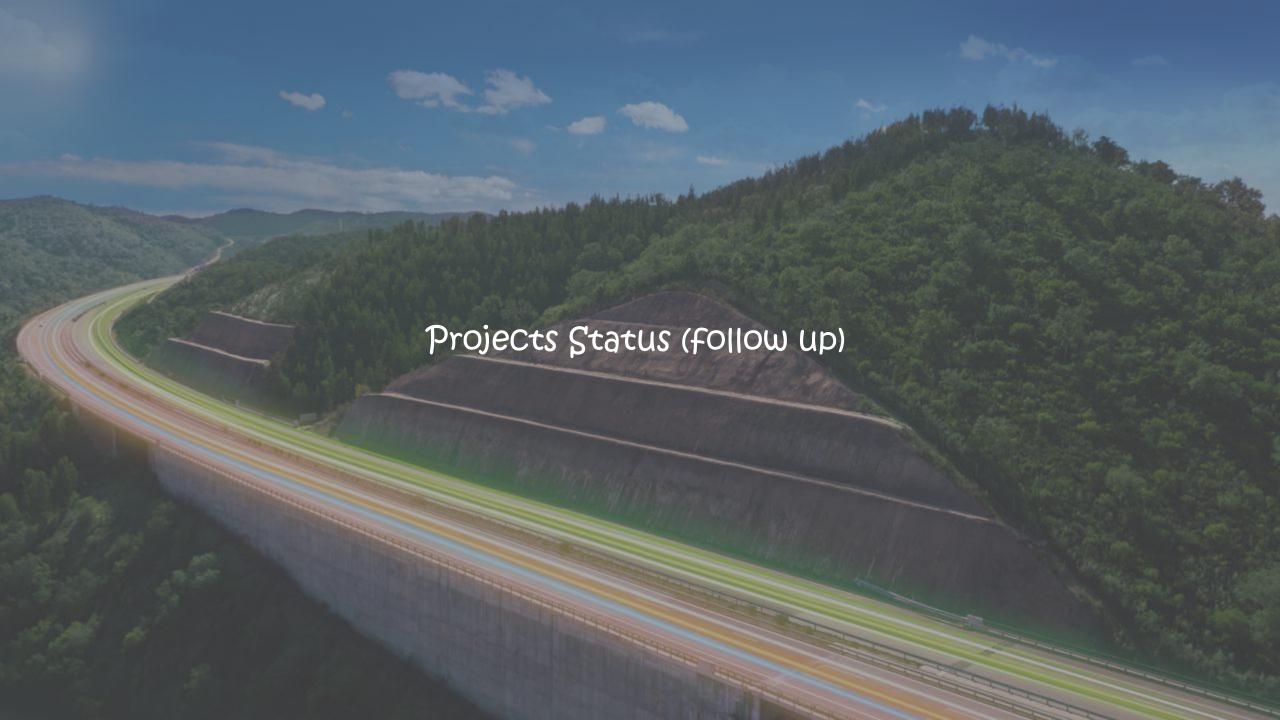


Strong Brands:

Awareness >96%

Via Verde Top national mobility brand (above Uber)

Strong recovery since 2015. New vision & marketing strategy

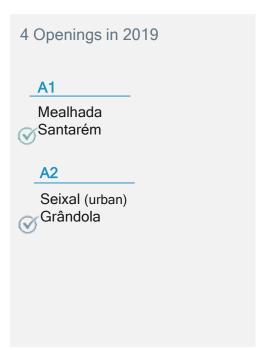






Service Areas Colibri | directly operated by Brisa









Strong deployment of Colibri units (F&B)



Service Areas Colibri | new concept

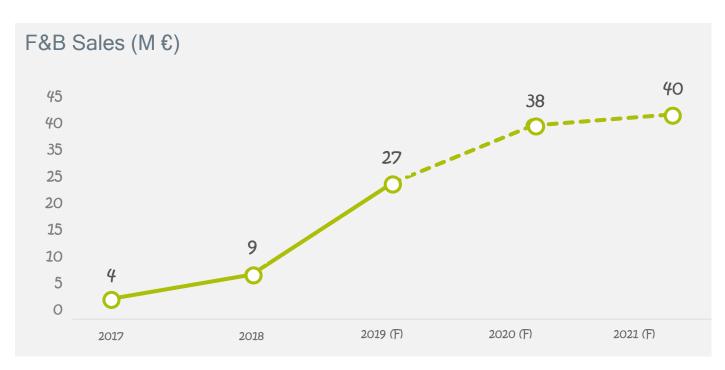


Cafeteria (not restaurant full offer) next to the oil store

+4 Colibri Express not included in the initial portfolio



Service Areas Colibri | Results achieved





Strong business growth



Service Areas Colibri | Results achieved

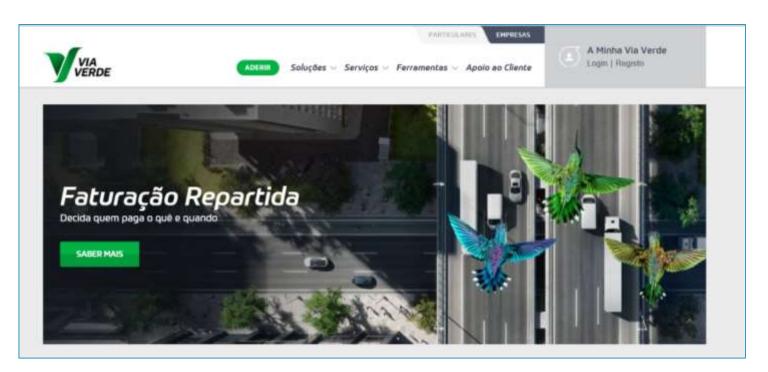


Much higher NPS & higher average ticket





Via Verde Business | New approach



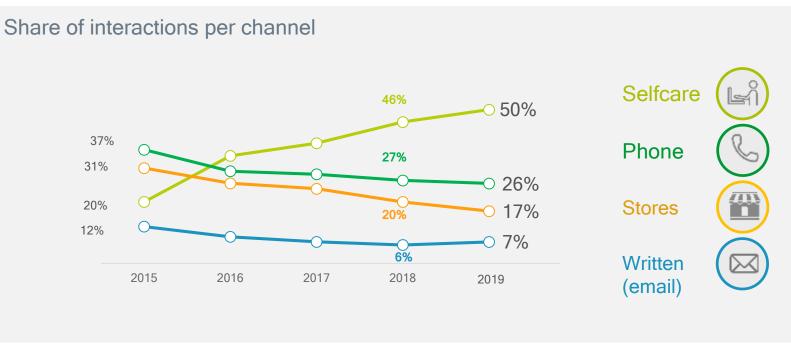
- Launch of a dedicated portal for business
- Launch of specialized back office
- New support & sales team

Higher client service level & customer insights



Via Verde Business | Digital selfcare client service



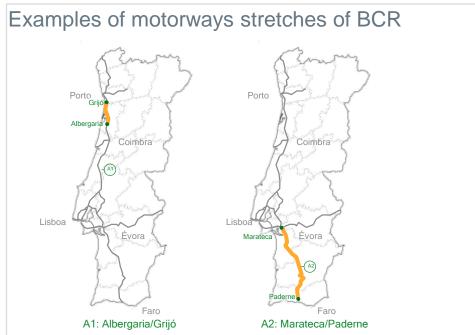


B2B Selfcare supported increase in digital (3.4 M Logins)



Via Verde Business | Pricing Pilot





Toll discounts (credits), only when consumption increases in selected 7 stretches, where there potential to divert traffic.

- 69 transport companies
- Heavy vehicles
- 6 months

Capturing additional revenue from competitive routes (+3%)





30 % program discount on toll subscription proposed on French networks

Malika Seddi, ASFA, France



30 % PROGRAM DISCOUNT ON FRENCH TOLL NETWORK

An answer to the concern expressed

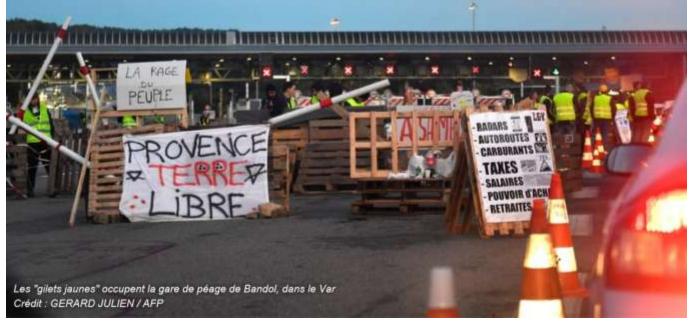




CONTEXT



- Yellow vest movement started October 2018
- Since 17th of November 2018, demonstration every Saturday
- People were protesting against the gasoline Increase
- The claims have evolved. Protesters are demanding measures to end expensive life & asking for an increase of their power purchase





CONTEXT

- ☐ Toll increase in France is contractual
 - Every year: 0,7 % of the inflation rate
 - In January 17th 2019: meeting convene by the Ministry and the concessionaires
 - → Find appropriate proposal to answer concerns expressed by the French people regarding their purchasing power, in particular for customers who are using motorways in their daily needs.
 - Subscription with 30 % discount have been proposed by the motorway operators



THE OFFER

- Every year: 0,7 % of the inflation rate
- In January 17th 2019: meeting convene by the Ministry and the concessionaire
- Find appropriate proposal to answer concerns expressed by the French people regarding their purchasing power, in particular for customers who are using motorways in their daily needs.
- Subscription with 30 % discount have been proposed by the motorway operators



A NATIONAL OFFER

- Motorway companies wished to provide answer the concern expressed in particular for customers having to take the motorway for their daily needs and journeys
- □ "30% offer "subscriptions Launched February 1st, 2019
 - drivers making at least 10 round trips in the month
 - on the same route,
 - 30% reduction in toll rates on all journeys.



OFFER MADE BY ALL MOTORWAY SECTOR

APRR







- 30 % de réduction sur un trajet. déterminé à partir de 20 trajets dans le mais
- Votre badge télépéage volable partout en France
- Votre accès à l'Espace Client + pour sulvire votre consommation 24h/24
- Vos factures ou format électronique
- Votre badge est accepté dans plus







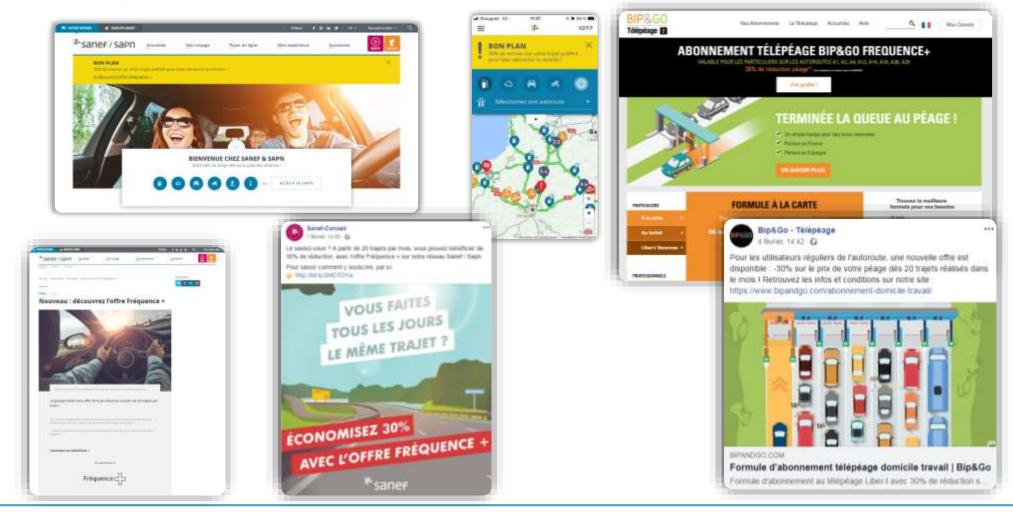






OFFER MADE BY ALL MOTORWAY SECTOR

■ Sanef Group





OFFERS MADE BY ALL MOTORWAY SECTOR

■ VINCI Autoroutes







OFFERS MADE BY ALL MOTORWAY SECTOR

Les offres des autres sociétés















PROMOTION OF THE 30% DISCOUNT SUBSCRIPTION ON THE **MOTORWAY WEBSITE**



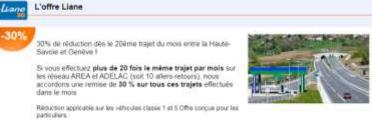


Car accommission regulars year desprings proving choice to trape trappers. and hear engrangement of our largest on a large frame in reduction. It shapes there increases pure reports aux office de l'eduction péope dels existentes pueque celha-c) acaient un ligegon su une bole. pergraphique processrouse par les assiètes (produissesses

Vous utilisez l'Autoroute Blanche (A40) au moins 1 fois/semaine Nous avons une offre faite pour vous ! Economised Jungs/à 30% and in recommend the brack live principal de insuse i et d. Virtre liados telepéage valable partout en France 3.08€/mois-HT OFFERT Actual - Dartaniar - EASYTRIP DISS - ASSAUR **EASYTRIP PASS - A28 ALIS** LE TÉLÉPÉAGE POUR LES TRAJETS DOMICILE - TRAVAIL SUR LE RESEAU ALIS

30% de réduction sur l'A28¹ sur le réseau ALIS (Rouen - Alençon Nord)

L'ADEPTE



tiber-t pourmed m'abanas ?



stomicle-traval es profiter des voies sélépéage

M ABONNEMENT DOMICILE TRAVAIL

Réservée aux perticuliers circulant en véhicules légers de classe 1, 2 au 5.

Vous emprument régulérement l'autorouse AGD-landes thection de l'AED entre Sallen et Saint-Geours-de-Warrenneil pour vous rendre sur voire lieu de travell.

Conformément aux engagements pris, Atlandes vous propose la formula d'absonnement « Fréquence landes » afin de faire des économies sur vos trajets

Liber-t - Fréquence landes - - nouvelle formule unique à compter du 1er février 2016

PROMOTION ON TWITTER







Prêt ♣GO! L'offre CITO 30 est lancée! Dès aujourd'hui, vous pouvez économiser 30% sur votre budget autoroute, si vous réalisez au moins 20 trajets identiques dans le mois ♣ow.ly/DEkd30nxSGy



136

A*LIÉNOR - Autoroute A65 @A65Alienor · 2 avr.
Pour vos déplacements fréquents sur A65, pensez #Cito30, disponible sur a65-alienor.com/cito30 #AutorouteA65 #Alienor #A65 #Telépéage CC @VoyageAPRS.



Bip&Go ⊜bipandgo - 3 mai

Vous êtes un utilisateur régulier de l'#autoroute et vous réalisez au moins
10 allers-retours dans le mois sur votre trajet favori ?

Proffrez de l'#oifre domicile/travail à -30% sur les prix de votre #péage !

Bill

Pour plus d'infos : bit.ly/2ZZYEMLI





PROMOTION ON FACEBOOK



Vendredi nous lançons Ulys 30, un abonnement qui offre 30% sur vos trajets réguliers.

Si vous effectuez au moins 10 allers-retours par mois (ou l'équivalent de 20 trajets) sur un itinéraire choisi, vous pouvez bénéficier d'une réduction de 30% sur l'ensemble de ces trajets et les suivants.

Ulys 30 a pour but de vous faciliter les déplacements du quotidien.









PROMOTION DISSEMINATE BY ASFA

■ Targeting Media



dissemination throughout social media







chez vous

et receves votre hwige-



Des questions?



30% ETC SUBCRIPTION IN THE NATIONAL NEWSPAPER 20 ARTICLES

Le Monde

PAGE(S):5

BURFACE : 14 %

PERIODICITE Quotiden

DEFUSION -275315

JOURNALISTE Shilippe Jacquit









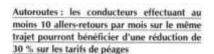




INDUSTRIE & SERVICES

Autoroutes: une réduction de 30 % des péages pour les trajets domicile-travail

* 18 janvier 2019 - N°24279



PAYS :France

PAGE(8):14-15 SURFACE:67 %

PERIODICITE : Quotidien





18 janvier 2019 - N°23150

LES SOCIÉTÉS D'AUTOROUTES FONT UN GESTE



Les sociétés d'autoroutes proposent des réductions, dit Borne



« ONLINE » : MORE THAN 50 REPRISES (1)





personnes

réguliers

« ONLINE »: MORE THAN 50 REPRISES (2)





TV & RADIO

- ☐ Around one hour audience at prime time
- ☐ a cumulative audience of 45.5 million over twenty days



















TV & RADIO (2)





















EXCELLENT FEEDBACK FROM CUSTOMER: VERBATIM SANEF CLIENTS

90% Satisfied clients

This offer is really very interesting because it will lighten my budget. I take the motorway every day to go to my place of work and it's really a big budget

To continue and to expand. I am a customer for a very long time on the SANEF network (1988) on average 3 return trips per week»

88% talk about it around them

« It's a very good incentive. I pay 7 euros per day or nearly 160 euros per month to go to work, this will allow me to save money which is desirable for a fixed route that I must carry out.»

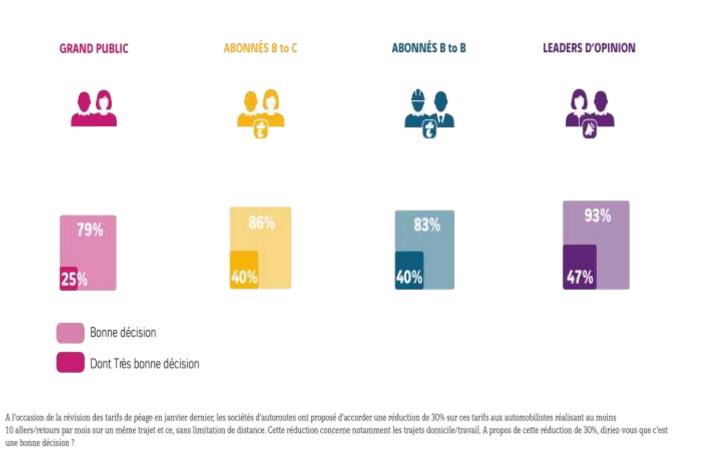


EXCELLENT FEEDBACKS ON VINCI NETWORK



ULYS 30

UNE DÉCISION TRÈS BIEN ACCUEILLIE





A GREAT SUCCESS

□ Around 120 000 subscriptions by end of December 2019

■An offer completing existing local subscription programs

■ Very well welcome by clients



THANK YOU FOR YOUR ATTENTION

MORE INFORMATION - malika.seddi@autoroutes.fr

WWW.AUTOROUTES.FR



@ASFAutoroutes







Lunch

13:00 - 2nd Panel

