

from cars to people

*ASECAP Marketing Workshop
Rome, February 2016*



Brisa

MOTORWAYS BUSINESS IS CHANGING

Business model is under pressure

Lower economic growth



Less new construction

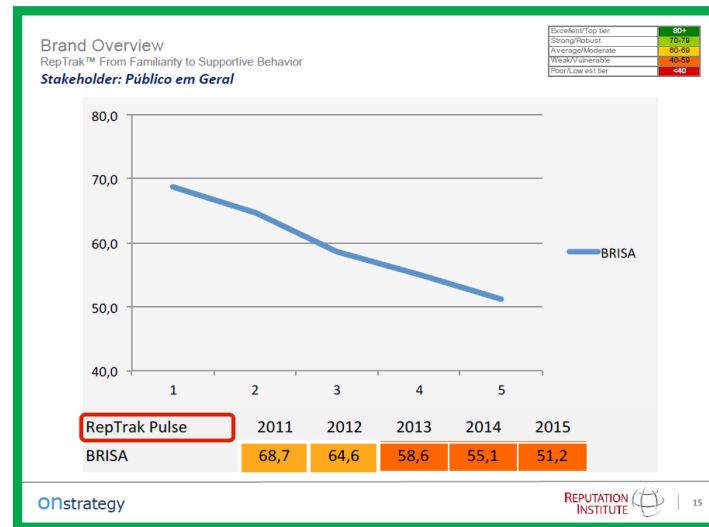


Business model is under pressure

Financial constrains



Reputation at risk



Business model is under pressure

Disruptive digital models



New big players (ie Google)



**IT'S NOT CIRCUMSTANCIAL
IT'S STRUCTURAL**

Industry trends

Lot of threats ... but also lots of opportunities



**ECONOMY &
DEMOGRAPHY**
Low
growth



TECHNOLOGY
Transformation &
disruption



**CONSUMER
BEHAVIOUR**
Less car culture



**LEGAL &
REGULATION**
CO2 emission & car
circulation limits

BRISA NEW VISION

From infrastructure to mobility

Delivering efficient mobility to the people



Mobility Concept

Customer Centric & Ecosystem

CONNECTIVITY

AFFORDABILITY

INTERMODAL
INTEGRATION

SMARTCITIES

DYNAMIC TRAFFIC
MANAGEMENT

LOW CARBON



DO THE RIGHT MIX

New approach

From infrastructure to mobility

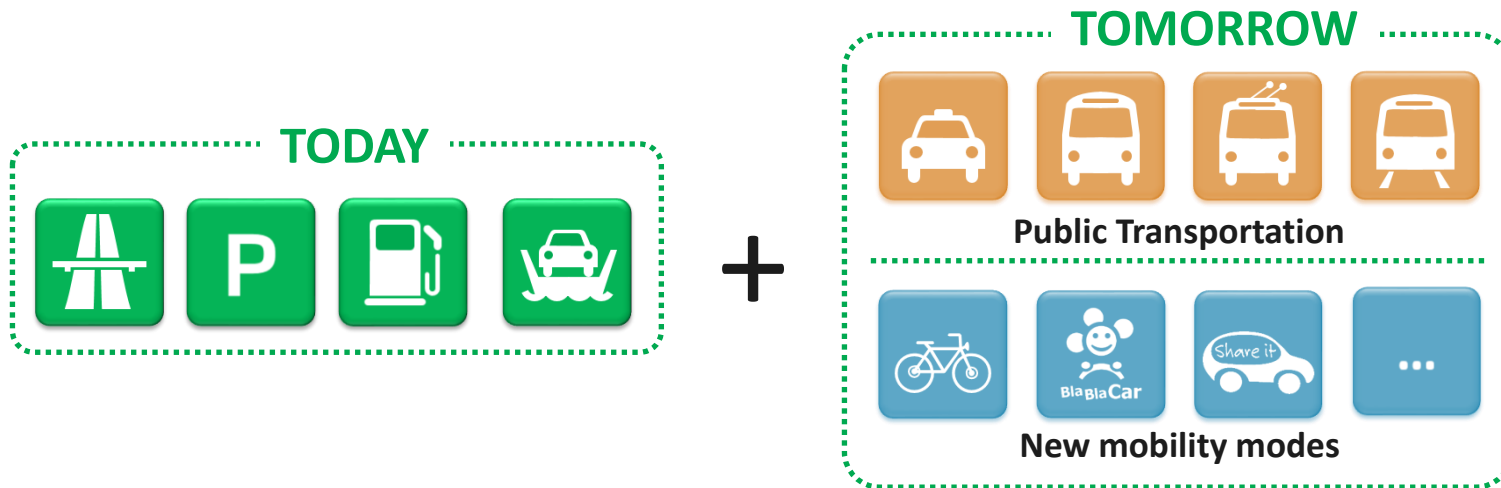


From cars to people

VIA VERDE MOBILITY

Via Verde Mobility (VVM)

Paying system (ETC) for all transport modes



Via Verde Mobility (VVM) Mobility Broker



From cars.....



... to people, APP

Via Verde Mobility (VVM)

Payments to be launched on Via Verde APP in 2016



**STREET
PARKING**

7 major cities



TRAIN & BUS
Lisbon Tagus
river crossing



**PUBLIC
TRANSPORTS**
Oporto



TAXI APP
Partnership
with taxi's
operators



CAR SHARING
Lisbon

**BUT CLIENT CENTRIC
IS MUCH MORE**

Customers are our best asset

Knowing them and improve relation are key, meaning new focus



**CUSTOMER
EXPERIENCE**
self care



**CUSTOMER
INTERACTION**
digital ecosystem



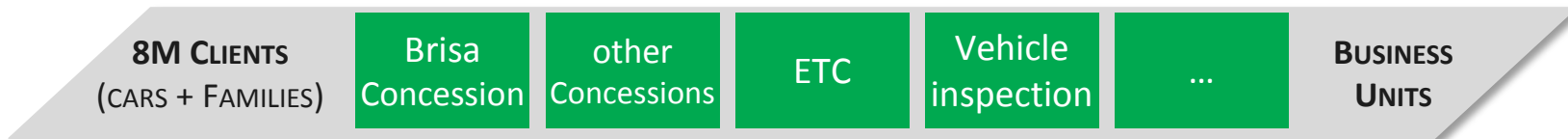
SHARE OF WALLET
new offer &
cross sell



REPUTATION
emotional
relationship

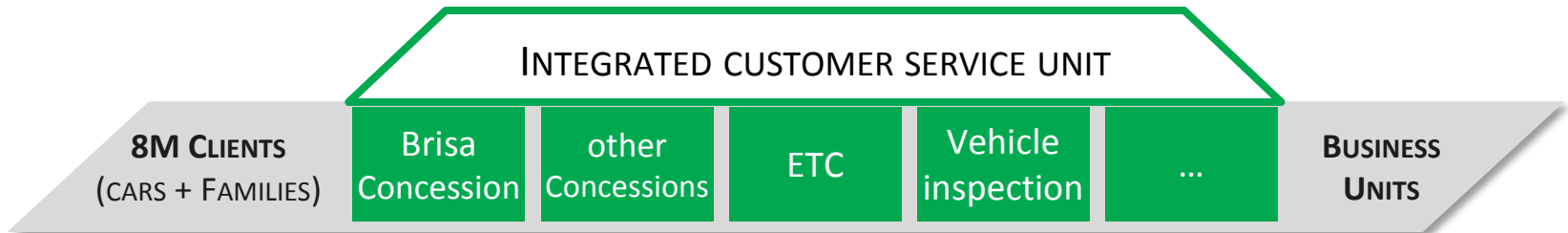
Brisa group client base

We serve almost all Portuguese



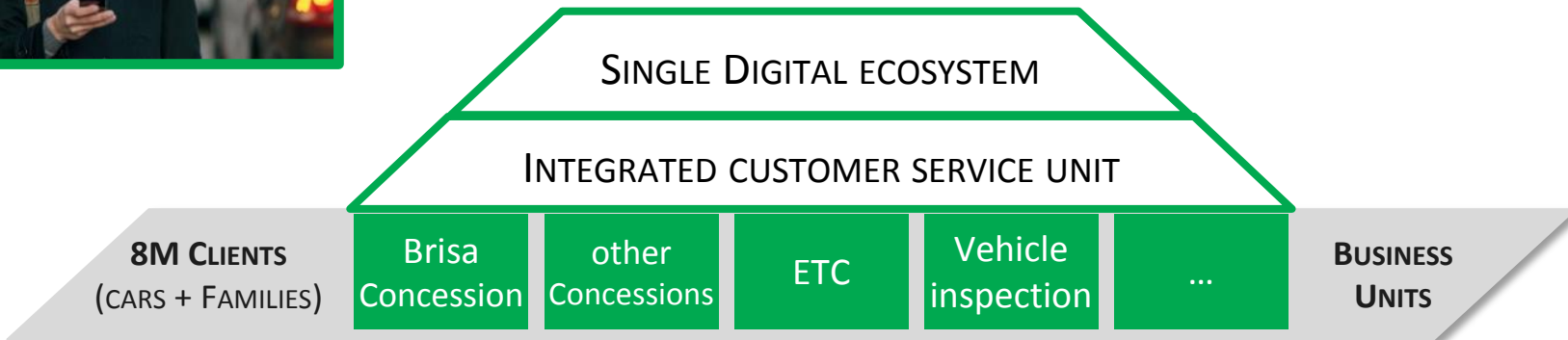
A new integrated customer service unit

Simplification & user friendliness



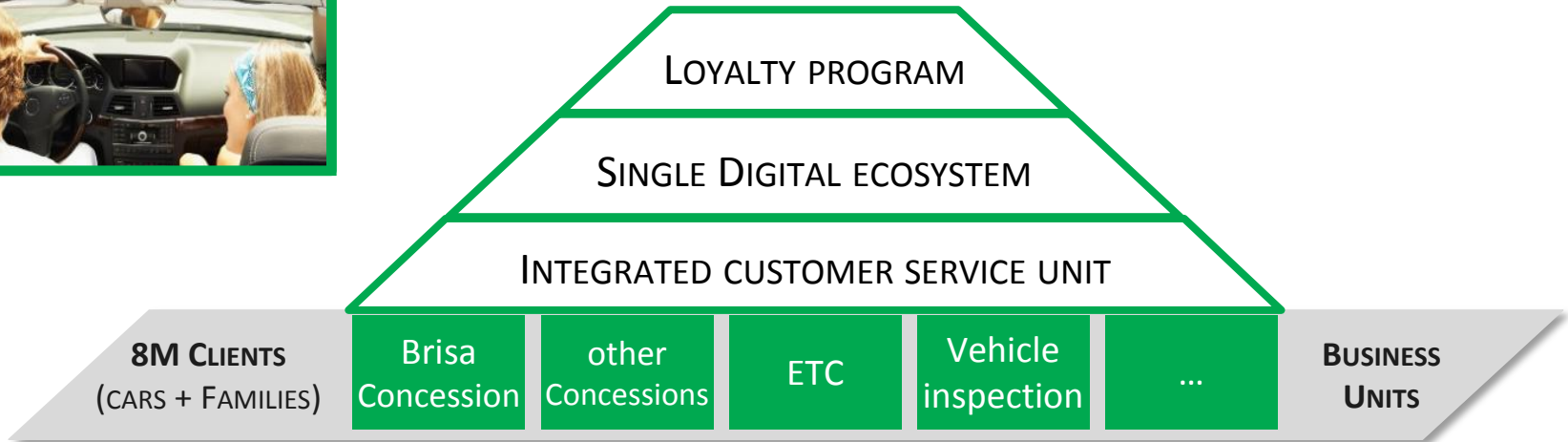
A new digital ecosystem

Direct channel to each individual & ability to collect its data



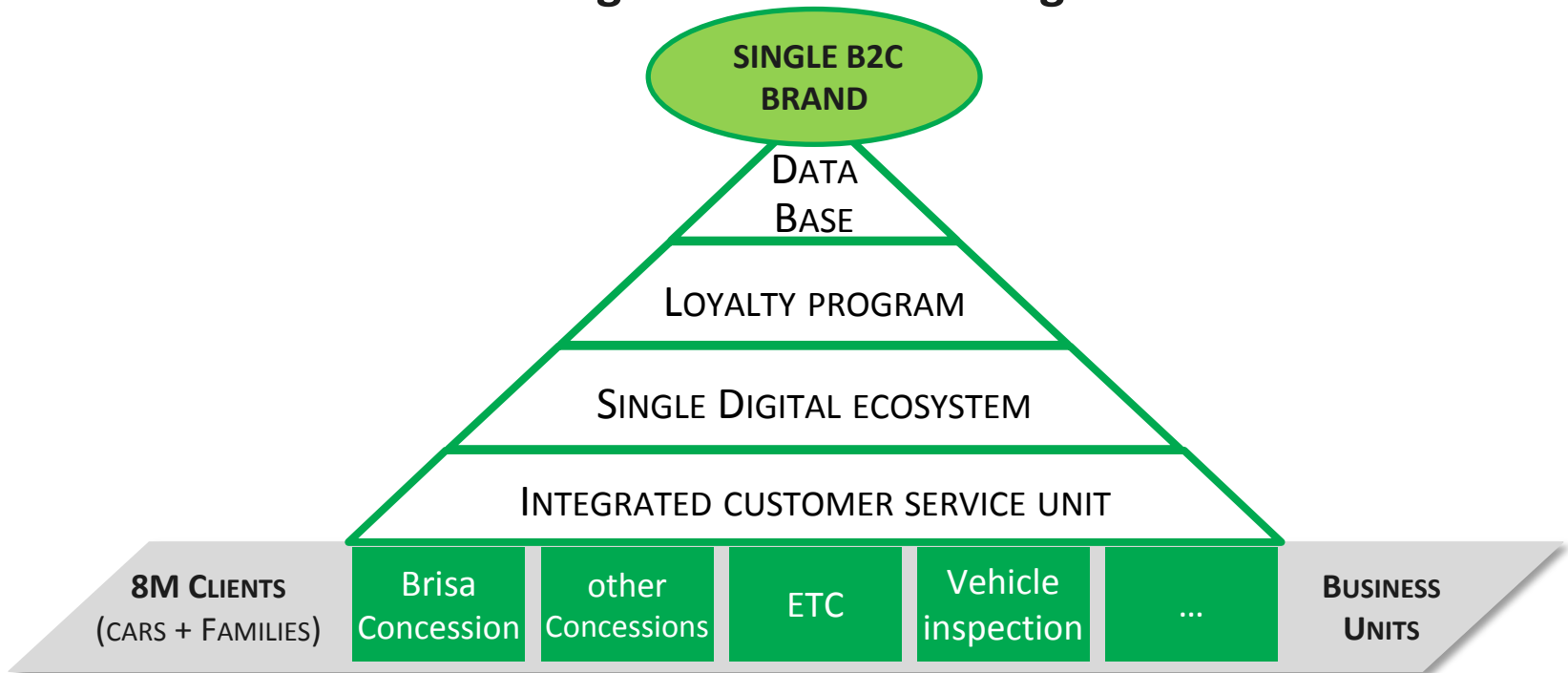
A new loyalty program

Engage with customers and increase share of wallet



Single Customer

Convergence and offer integration



A SINGLE B2C BRAND

3 Options

Commercial brand



Too corporate
Not universal



The right choice
Easy to implement

NEW BRAND

Too expensive
Kills VV brand

Extend Via Verde as the commercial brand

The right choice



- Very high recognition
- Mobility DNA - Category owner (“Gillette”)
- Natural extension – people expect more
- Service Brand not Corporate Brand
- Universal Brand – different usages and partners

Brand management



Brisa

Institutional

- Holding
- Operations & Concessions
- Speaks with regulators, financial markets, partners, wholesale, staff & general public
- Communicates values, social responsibility, excellency, innovation



**VIA
VERDE**

mass market

- The brand of the new offer (customer care & loyalty)
- The B2C single Brand
- Not exclusive, but with potential to be used in new services ecosystem
- Higher brand cohesion & efficiency

Via Verde as B2C mobility brand

New logo: beyond tolls & payments



Nature

Movement

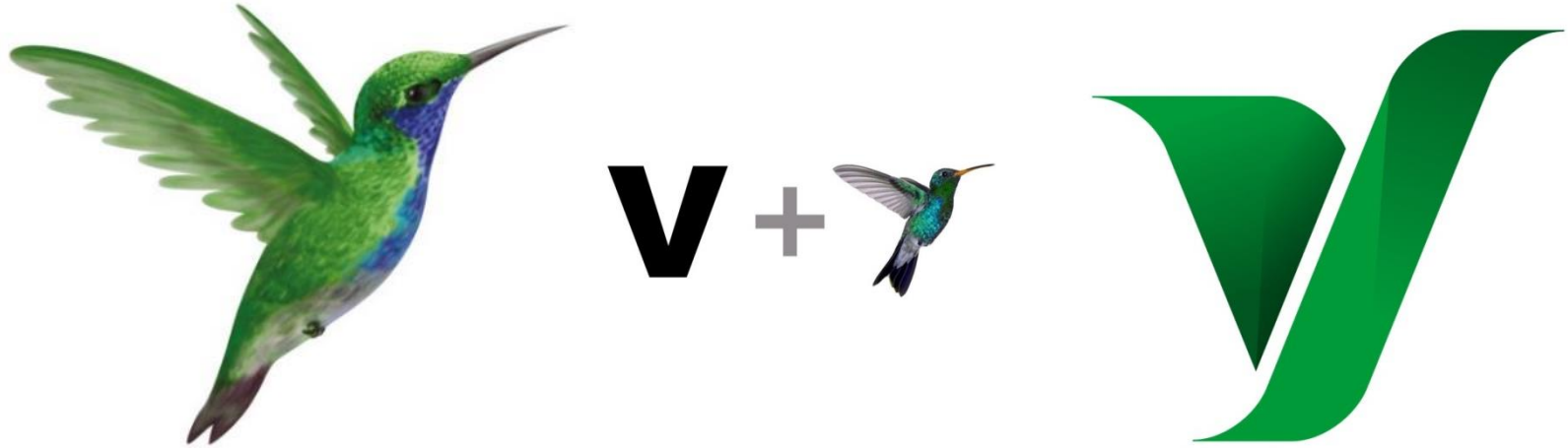
Technology

Speed

free as a bird

New Via Verde logo

A new brand with “mobility DNA”

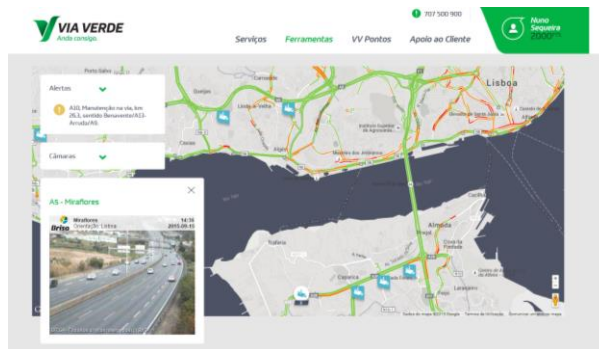


New Via Verde logo

A new brand with “mobility DNA”



Via Verde Ecosystem Beyond tolls & payments





VIA
VERDE

Moves with you.