



Association Européenne des Concessionnaires
d'Autoroutes et d'Ouvrages à Péage

4th *MARKETING WORKSHOP*

27th of February 2017 - Copenhagen

Sund & Bælt Holding A/S, Vester Søgade 10, 1601

Marketing campaigns and actions to promote toll road infrastructure

The 4th ASECAP Marketing Workshop is an ASECAP annual event where the ASECAP members exchanged their best practices towards their customers. This year the initiative focused on the “Marketing campaigns and actions to promote toll road infrastructure”. Under the auspices of two sessions, wide range of topics has been discussed regarding *innovative mobility services for customers* (new mobility apps & technologies, new mobility concepts, pricing, toll and discount programs, make money/induce traffic, monitoring customers’ satisfaction) and *Innovative actions concerning service areas* (parking facilities, secure parking, rest areas).

The presentations were detailed and extremely interesting. The following brief resumé presents the key elements/messages raised:

The technological opportunities and social factors create a chaotic environment that could develop in many alternative ways. The direction will depend on the direction that the society (user) will take. The speakers took into account this changing landscape and indicated how their motorway sector is preparing its active role in front of the above technological opportunities and social factors. Over the next decades there will be changes towards “innovative intelligence” so all the speakers took into account these uncertainty periods where road infrastructure will become intelligent road infrastructure.

1. Digital Disruption & Preparing for uncertainty: The future orientations are under uncertainty as the new technological environment will need to be accompanied by regulated/coordinated activities from the various stakeholders involved.

New social needs will lead to re-defining the understanding of what is mobility in the future digital environment.

2. The future innovative mobility will be a key factor for the motorways industry. The motorways will need to identify:

- what is the horizon of their future services to the vehicles and
- which are the opportunities for added value services in other profitable areas, in cooperation with other urban zones and areas (city centers, parking areas, airports). The future orientations for the motorways appears to ask for a key role in a new “holistic mobility approach”. Such an approach should take into account, basically the car industry developments (electro-mobility, etc.) as well as the telecom sectors opportunities. The main priority for the motorways industry will be to attract new customers, to identify their priorities, and to offer them appropriate road services keeping their satisfaction index at high levels (quality and cost). The crucial point to consider is how the motorways will be prepared to answer to realistic future scenarios in this period of fast changing uncertainties. A possible area of interest could be the motorcycle segment, as the new conditions seem to support their more active presence in the network

3. Innovative actions are considered concerning service areas (clean parking facilities, secure parking, rest areas) having as a priority the customers’ satisfaction regarding the level of the offered qualities. New economic models of the “service areas” are reconsidered as the motorways might be interested in maintaining themselves the provision of services outside the oil market stations in their networks’ service and rest areas. Services in restaurants and other added value services are an issue of reflection regarding the sub-contracting procedures, their costs and their durations.

Analysis of the presentations

The workshop has been structured with different ASECAP speakers presenting the best practices and initiatives in their responsible areas.

The Welcoming speech of the workshop made by Mr. Mogens Hansen, Chief Financial Officer of Sund & Bælt Holding A/S. Mr. Mogens Hansen welcomed the participants to Copenhagen, praised the initiative of the ASECAP Marketing Annual Conferences and made an introduction to the keynote presentation.

Keynote speech

Mr. Jens Hjerrild Poder, Director of Innovation of the Peytz & Co (jp@peytz.dk) presented the key presentation with title “Digital Disruption & Preparing for uncertainty” focusing on the possible future orientations, under the fast changing technological environment, where business and services need to adjust.

What will happen if vehicles are rented from fewer major providers, rather than owned by individuals? How will it affect our business? Is it possible that information based services will supplant part of transportation needs, as VR technology advances? In what areas are digital services potentially supplanting transport? What is the possible impact of drone-based transportation? Is it possible to consider the impact of data, Internet of things, digital platforms, 3d printing, self-driving cars and sharing cars?

In the welcoming session the Secretary General K. DIONELIS set the scene for the discussions for the 4th ASECAP Marketing Workshop. The future orientations are under uncertainty as the new technological environment will need to be accompanied by regulated/coordinated activities from the various stakeholders involved. New social needs will lead to re-defining the understanding of what is mobility in the “future digital environment” and what the “future motorway needs to offer”.

1° PANEL

Innovative mobility services for customers (new mobility apps & technologies, new mobility concepts, pricing, toll and discount programs, make money/induce traffic, monitoring customers' satisfaction)

The moderator of the 1st Panel, Mrs. Emanuela Stocchi, Director of International Affairs, AISCAT, (emanuela.stocchi@aiscat.it) presented the speakers and their presentations followed by discussions and Q&A.

- **Andrea Manfron, AISCAT / Italy (andrea.manfron@aiscat.it):**
“Deployment of an electric fueling framework along the AISCAT network”
Mr. Manfron presented the concept of the deployment of an electric fueling framework along the motorway network. Mr. Manfron made an overview of the electric vehicle market in Europe and afterwards he focused on Italian Scenario regarding the electric charging project and the foreseen future Scenarios in the area of the electric fueling framework.
- **Malika Seddi, ASFA / France (malika.seddi@autoroutes.fr):**
“New Mobility services on French Motorway – Deployment of Electromobility”
Ms. Seddi presented the French network, the political context regarding the new mobility offers in the frame of the electro-mobility deployment program and the Commercial offers with discounts in order to promote the new mobility realities. Ms. Seddi described the construction conditions regarding the future electric suppliers in the French motorway network.
- **Fritz Werner, ASFINAG /Austria (werner.fritz@asfinag.at):**
“Changing customer habits and its effects on the “classic” offers of a Service Center”
In the presentation, Mr. Fritz Werner analyzed the 5 main “trends” according to the ASFINAG and the actions/ initiatives: “Digitization, Diversity, Super-Agent, Personal Service with wow-effect and Always on Society”.
- **Luis D'Eça Pinheiro, BRISA / Portugal (LEPinheiro@brisa.pt):**
“Brisa new marketing approach”
Mr. Luis D'Eça Pinheiro presented Brisa’s marketing approach. Mr. Pinheiro focused to the new visions and initiatives regarding the Motorways as essential part of the mobility ecosystem and the marketing approach taking into account issues like: digital Ecosystem, direct channels to each client and ability to collect data, mobility-shared economy, Big Data and new mobility payments framework.

- **Anna Kordecka, Gdansk Transport Company/ Poland (anna.kordecka@gtcsa.pl):**
“A different approach towards a client - social responsible motorway”
Mrs. Anna Kordecka presented the different approach towards a client and the social issues and responsibilities of the motorway, as well the methods and Campaigns that they follow regarding road safety. In addition, she underlined that the best Polish Road is a PPP projects.

- **Christos Koulouris, HELLASTRON / Greece (info@hellastron.com):**
“Applying integrated data driven approach to Marketing and Customer Care on Toll Roads.”
Mr. Christos Koulouris presented the applying integrated data model in Hellastron, the connection with the Marketing and Customer Careas well as how to moving towards a Service Provision Model. Mr Koulouris highlighted the need for standardized KPIs.

- **Bettoni Francesco, Brebemi SPA/ Italy (francesca.rossini@brebemi.it):**
“S2WAY: A new Service Provider”
Mr. Bettoni presented the S2Way as a new payment method based on Free Flow systems with license plates recognition.

The session followed by Q&A, moderated by Mrs Emanuela Stocchi, focused mainly to the future frame of electro-mobility and what is the consequences for the road operators/ motorways, with additional questions regarding the definition of the future model, the possible technological and economic frame, as well as clarifications on the existing initiatives from Italy and France.

2° PANEL

Innovative actions concerning service areas (parking facilities, secure parking, rest areas)

The moderator of the 2nd Panel, Mrs. M. Seddi (malika.seddi@autoroutes.fr) Director of International Affairs, ASFSA, presented the speakers and their presentations, followed by discussions and Q&A.

- **Karsten Längerich, Sund & Bælt Holding A/S / Denmark (kal@oresundsbron.com):**
“Cross Border Marketing”
In the presentation, Mr. Karsten Längerich focused to the price structure and the marketing strategy that followed by Öresund Bridge and the opportunities regarding the attraction of cross-border customers with reducing prices opportunities.
- **David Kollenhofer, ASFINAG / Austria (David.Kollenhofer@asfinag.at):**
“Good practices and innovative actions concerning service areas, parking facilities (secure parking), rest areas”
Mr. David Kollenhofer presented the ASFINAG rest area concept, focused in the innovative rest area cleaning and the ASFINAG’s new program on how to optimally serve customers, with the use of Data analysis.
- **Patricia Mota, BRISA/ Portugal (LEPinheiro@brisa.pt):**
“Service Areas – New Partnership Model”
Mrs. Patricia Mota presented the new partnership model regarding the Service areas that they implemented in Brisa. More specific, Service areas with 24/7 service, profitability issues on low intensity and creation of a new Service Areas brand.
- **Andreja Skroza, DARS/ Slovenia (andrea.skroza@dars.si):**
“Mobile Application DarsTraffic+”
Mrs. Andreja Skroza presented the Mobile Application DarsTraffic+ launched by DARS and the plans for the future with regular updates and improvements, new rerouting capable to follow GPS, direct communication driver to driver as well as C-ITS application with V2X communication.
- **Joaquim Lima, BRISA / Portugal (LEPinheiro@brisa.pt):**
“Motorcycle Segment –New Offer”
Mr. Joaquim Lima, presented the digital marketing campaign and pricing policy regarding opportunities to attract motorcyclists in the motorway network. He



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underlined that in Portuguese motorcycle sales are growing and the 80% of Via Verde Clients with motorcycle are owners of a car, considered as a significant business case for the motorways.

The session followed by Q&A, moderated by M. Seddi.

Closing – concluding remarks

Mrs. M. Seddi concluded the event by pointed out the priorities of toll operators to enhance customer needs and satisfaction and also the necessity for the sector to anticipate changes. The marketing workshop is from that perspective, a place where members can share and exchange on the latest developments as well as innovative plans initiated.

Mrs. Seddi thanks all the participants and organizers for the excellent work, and invited the ASECAP members to come forward if they are willing to host the next year event. President of Hellastron, B. Halkias kindly offered to host the 5th SECAP Marketing workshop in Greece.

All presentations appear in our ASECAP Web managed by our Secretariat and the interested members are invited to visit them. In addition, we have put the coordinates of the speakers so the interested members can directly contact them for additional information/clarifications.