

9th MARKETING & COMMUNICATION WEBINAR 23rd of March 2022

Ensuring sustainable and resilient mobility to toll highways' customers

The 9th Marketing and Communication Webinar, that brought together over 80 participants from 16 countries, gave the opportunity to discuss and to learn from our peers, sharing communications and marketing initiatives, as well as innovative customer service insights, social media usages, which helped - and which still help - to connect with customers or communicate on services during the pandemic crisis, when toll operators and agencies worked hard to ensure the continuity of the service to their customers, and they had to properly communicate with them. Furthermore, the workshop also focused on the new concept of 'mobility solutions' and on the digitalization of the transportation services, which somehow could also represent new services and new opportunities for tolling industry. Presentations also highlighted that toll road operators are working hard to expand and improve their services/operations and their communications towards customers, considering all the changes and developments needed to make the infrastructure ready to reach Zero carbon target by 2050.

Malika Seddi, ASECAP Secretary-General

The Marketing workshop is a yearly meeting that we try to maintain. We have faced a critical situation, and we have still covid, and this is why this year we are meeting virtually, hoping that next year we will be able to meet in person. We have another crisis which has started with the Ukrainian - Russian war which is also something we'll have to handle as motorway companies as it will for sure have a big impact on us, especially regarding the customer approach. We started our meeting in order to build a good networking between us and among senior marketing people working to connect with customers. In 2014, we had the first meeting in Lisbon and today we will welcome our President António Nunes de Sousa from APCAP who is the 2022 President. This specific event that we have on a yearly basis is a way for us to learn from each other and also exchange experience and build strong relationship, which is very important in this critical period. If you need some advice and ask our peers, it's always good to do it anytime in order to ask any questions.

António Nunes de Sousa, ASECAP President

I'm pleased to welcome you for the 9th ASECAP Workshop on Marketing & Communications, which has become a very important meeting for experts within ASECAP with a very strong network. The last in-person Marketing meeting was held in Vienna in 2020, but now we hope to start meeting again soon. Around more than 80 people have registered for the webinar, a very good number which shows the willingness of the senior experts in Marketing to keep the link and continue to exchange on the challenges they face to ensuring the services despite the pandemic. As Malika said, before the end of this crisis, we face a new crisis with Ukraine made of human suffering that must stop. ASECAP network has more than 87 000 km across 21 member countries. Since the beginning of the pandemic we have implemented marketing and communication initiatives to face the crisis while looking to the future to ensure sustainable and resilient mobility to users. It means that we are committed to make our sector more sustainable. Many motorway companies have already started strong actions to move towards greener motorways.

It's also an important task to involve citizens and drivers to change their behavior, and initiate them to consume green motorway services under the of user-pays and the polluter-pays principles. The deployment of electric cars has led to partnerships, new mobility services, and new services in service areas,

and these are also some of the topics that today webinar presenters will highlight to get knowledge on how operators in different countries are coping with the crisis and how they are communicating and interacting with users, stakeholders and public institutions. Regarding this topic, I take the opportunity of today's meeting to announce the 1st ASECAP Sustainability Forum where the strategy for sustainable mobility solutions will be discussed. It will take place in Lisbon on June 9th. Finally, I'm pleased to join the ASECAP Secretary General, Mrs Malika Seddi, and warmly thank the COPER II members under the chairmanship of Emanuela Stocchi, as well as the ASECAP team for putting together such a thoughtful and interesting program. I thank each of you for your expertise and contribution today, and I look forward to a great and insightful discussion.

Emanuela Stocchi, ASECAP COPER II President

I warmly personally welcome you for today's webinar and also on behalf of the COPER II, which is a Committee dealing with a wide range of topics: road safety, sustainability, and Communication & Marketing. This workshop has always been an important pivotal event for the Association giving the opportunity to the ASECAP members to exchange views and to focus on the several actions, initiatives and campaigns undertaken by the toll road concessionaires to promote road infrastructure. These initiatives, actions campaigns related to marketing & communications were even more needed, more than ever, during these two years of pandemic emergency that effected our sector, as underlined by our President and Secretary General. In this period, communicating in an efficient and proper way has been a key element for the road operators.

This is also why we wanted to dedicate the webinar on how it's still possible to ensure a sustainable and resilient mobility to our customers. We had in the last two years in our General Assembly meetings several tours de table, benchmarkings and exchange of views among us on how we were coping with the pandemic and how we were ensuring the continuity of the service to our customers.

In order to discover these initiatives and projects put in place by our concessionaires, we have here a distinguished panel of representatives of the ASECAP members reflecting also the wide diversity of the ASECAP countries: Austria, Greece, France, Portugal and Italy.

Key points highlighted by the speakers in their presentations

The workshop provided the opportunity to hear the presentations from the following experts:

- **Grigoris Chasanis**, Olympia Odos SA / HELLASTRON (Greece)
- **Hugo Bento**, BRISA / APCAP (Portugal)
- **Edith Rührer**, ASFINAG (Austria)
- **Handanos Yannis**, Olympia Odos Operation SA / HELLASTRON (Greece)
- **Alessandra Pipitone Federico**, ASFA (France)

Grigoris Chasanis, Olympia Odos SA / HELLASTRON (Greece)

"Initiatives developed to get closer to customer needs and expectations"

The motorway of Olympia odos is entering the operation phase after the construction phase. During this time, we developed the project with more services for our drivers and customers.

Some of the ongoing projects are the forecast traffic in two locations on the motorway where we use predictive algorithms in order to inform our customers about the traffic up to 72 hours later.

We have introduced, and we are the only motyorway in Greece to do so, contactless transactions in our APM automatic payment machines. We have introduced the energy saving using less luminaires in our existing tunnels. We had a new project "Water from the air" where we produce water using the thin air and

solar energy, and this is potable water offered to the users. And the most emblematic project is the Hybrid project which is also linked with our mobile application.

What does our client need?

The clients wanted an application for their OLYMPIA-PASS transponder. We have seen this from a survey we did in August 2020. This was regarding a digital transformation of our motorway. The questions were:

1. *"If a mobile app was available where you could monitor your transponder, will you use it or not?"* The answer was obvious: 65 % said yes, they will use it.
2. *"Would you like this application to provide other information but the Olympia-Pass?"* And again, we received more than 70 % of yes.

This follows the general trend of using more and more the mobile phones to do a lot of things, among which paying, etc. That's a normal trend that we wanted to follow. We have a website with statistics and we saw that even if our website is not very modern or responsive, 63 % of the visitors were using mobile devices to access the website, so it was obvious that we wanted the mobile app for those customers.

Going to the mobile app: we decided to have not only the transponder section but also to offer more services to any user even the ones who do not have one of our transponders. There is a section for all users where any user can have a trip planning, check the toll calculator, see the interactive map, the traffic prediction; section of news to inform our users; section of offers where we can promote some things by the motorist stations or other cases; a virtual tool where users can have a look on specific attractions along the motorway, and this is given for free to everybody.

The innovative services: when you access first time the app you are asked to give your mobile number to validate your device and then be able to send your geolocation on the motorway to the traffic monitor center. This is something the user does once for those who want to have access on this service of geolocation (not mandatory). When a user call the Emergency number of Olympia Odos, now if he doesn't use the app, the traffic center needs to ask where he is and then send the patrolling vehicle. By using the application and this service, the Traffic Monitoring Center knows exactly the location of the caller. This is quite innovative because this requires the connection link between the application and the motorway's SCADA.

This connection is also used on interactive map where if the user enables this point of interest receives audible announcements by the application and can be informed for the VMS messages, the motorway services, etc.

We also have a built-in toll calculator which calculates how much a user has to pay with a comparison with the normal cost and the discount he receives using the OLYMPIA-PASS Hybrid transponder.

Olympia Odos wants to follow the trend which is for the customers to use more and more the mobile phone, offering many digital services, many of them unique and innovative.

Grigoris Chasanis

Hugo Bento, BRISA / APCAP (Portugal) “Accelerating Marketing towards future growth”

At Brisa, one of our challenges is the brand relevance for younger generations. We have 50 years of presence in Portugal, and the majority of our construction work was done back over the beginning, so people aged over 35, they have seen the rise of Brisa and the construction of the motorways, and are deeply connected with Brisa impact, really understanding what Brisa did for the country in terms of enhancing the mobility of people and making everyone closer in the country with the motorways. For those below 35, we have really new challenges because the relations that they have with motorways is purely transactional, for them motorways are a given and we need to deepen this connection otherwise we will get obsolete and forgotten.

Via Verde, which is 30 years old already, is one of our key elements in enhancing this relationship with end users. As it's basically our first product with direct communication to end consumers and with added benefits beyond motorways.

Via Verde was the pioneer in electroning toll collection, not only in Portugal but as European wide, that's also something which is positive as a brand. We want to make sure that we are delivering our purpose which is transforming people's lives by delivering simpler, safer and sustainable mobility. Here we put the focus on the customers, even deeper, on the people. Using words and expressions that are closer to people and that are not infrastructure or engineer jargons. It's really relevant for us that our customers understand that we are on a journey to get closer to them, to serve them as best as possible. If nowadays, the question is about electric mobility, micro mobility, smart cities, whatever, we want to play and be a relevant actor too. We do not want to be that old ones that are very experts in motorways, but if the majority of the next generation will have a transactional relation with the motorways, we need to find ways to get closer to them.

We are changing our communication. We are no longer communicating about cars, vehicles, license plates, but we are communicating about people, daily chorus, challenges we all face daily: if I'm a family, single parent, a student or whatever, that's exactly the kind of people and places where we want to be always adapting to the different needs. And our mobile app will be pivotal for this – having a single power app we'll be closer to get more and more relevant information about our daily users, allowing us to better know and understand their unique needs.

At Brisa we are overseeing the strategic road map of the entire group. We are looking to the entire ecosystem and how can we do synergies between all the 5 group brands.

Digital agenda: the pandemic increased the number of people using digital app and services, and this was a way to force consumers to start using and trusting digital tools.

Brisa has a set of services and businesses that touch people's lives in a variety of daily chorus (service areas, pay parking, car inspection...). In the near future we will be able to have a 360° single clear view of the customer.

We are doing this hand in hand with our technical and juridical department to make sure that it's GDPR approved. We already know that the customers are becoming more connected and the majority of services are done online, and consumers are getting closer and more willing to use online tools.

Mobility data: we have a lot of information from our motorways, if we can combine that with the data that mobile phones can provide in terms of location, we can evolve our communication and personalization

even further.. We have loads of information, but we need to transform the data in order to make it actionable and intelligent. With Via Verde, we already have surpass a relevant trust moment which is having access to the bank account details – which is a pain point for most of the payment apps.

We have recently launched the extra service to use Via Verde to charge your electric or hybrid car. With digitalization, we keep trying to increase the capacity of our services, we are transforming our contact center to have more and more automated processes, faster for end consumers and less cost demanding. You can use interactive voice recording or recognition to book your car inspection appointment, increasing the number of appointments and reducing the operational costs as we do not need big teams in the customer center. Same thing for Colibri (brand for service areas): increasing the number of smart kiosks to increase the autonomy of consumers to register their own requests. The Click&Collect is also on the rise in the majority of other F&B players and we need to also pave that way. In a longer term, we are also willing to partner with artificial intelligence big players so we can be ahead of the curve: written customer service center that we can transform with artificial intelligence. In the near future we'll have robots responding to those chorus that are easy to do: change the licence plate, the email, etc. On dynamic price on service areas, we can also use dynamic pricing tools that could change according to the day of the week, the weather outside, our prediction of traffic, so it'll be helpful to increase the profitability of our business. Finally, connected cars will definitely be on the agenda.

Talent management: This topic is also critical for the marketing acceleration, will also be part of our agenda. Meaningful and in-person interactions are still critical in hybrid work contexts. By seizing the unique moment companies are now facing, companies could gain an edge in the race to attract, develop and retain the talent. The great attrition or the great attraction? The choice is yours: not only from a talent management point of view, but also from a customer relationship pov.

We want to make sure that we are delivering on our purpose which is transforming people's lives by delivering simpler, safer and sustainable mobility.

Hugo Bento

Edith Rührer, ASFINAG (Austria)

"Can motorways be green?"

ASFINAG wants to be a reliable, innovative and sustainable mobility partner, who connects regions and people in the heart of Europe.

There are five pillars of the sustainability program:

- 1) Decarbonisation and reduction of emissions: e.g. more charging points for e-cars, park and ride facilities, noise protection, etc.
- 2) Mobility concept of ASFINAG: e.g. fleet with alternative fueled cars, new home office and travel policies, etc.
- 3) Energy Strategy: save energy (e.g. switching to LED) as well as building new sources of energy (e.g. photovoltaics)
- 4) Operating sustainably: e.g. recycling materials (very high percentage of recycled concrete & asphalt); water protection; reducing waste along the motorway, etc.
- 5) Biodiversity: e.g. possibilities for animals to cross over; fostering insects, etc.

It is a comprehensive sustainability program however, the question is: how do our customers see us and do they recognize that effort? Another important question related to this topic is: what do our customers think about motorways in general? Constructions began in the 40s and people were delighted to have motorways built, which were seen as very modern and progressive. This changed in the 80s, when people started also to demonstrate against the construction of new motorways. There are of course different reasons for this image change - one of them is the fact that the number of cars has dramatically increased.

What do our customers think about ASFINAG and sustainability?

In ASFINAG, we have a regular customer orientation program running and once a year we have a large customer satisfaction study, which also includes a comprehensive reputation measurement. We discuss the results with senior management and take steps accordingly.

Reputation model: our reputation index is calculated by combining the results of several questions related to reputation. We also measure sub-areas of reputation:

- Emotional Appeal
- CSR & Sustainability
- Product & Services
- Workplace Environment
- Performance

For each of these sub-areas an index is calculated, which combines the results of several questions. We have a statistical model running in the background, which enables us to see how important those five areas are for the overall reputation. From this, we can see that emotional appeal is the most important factor and CSR and sustainability is the second most important contributor to reputation for car drivers.

Among all the 30 items, which we track in our reputation study, "taking care of environment" is the lowest scoring one. This can be partly explained by the limited knowledge of the sustainability agenda. Every year we publish a sustainability report, which shows what we are doing in terms of sustainability and the progress we make. When we look at the people, who know our sustainability report, and compare them with people, who do not know the report, we see quite a big difference in scores on sustainability: We reach much better results among people, who know what we are doing.

As part of our customer orientation program, we have decided to conduct further market research in order to improve our communication program on sustainability.

When we look at the people who know our sustainability report, and compare them with people who do not know the report, we see a big difference in scores on sustainability. We reach much better results among people, who know what we are doing.

Edith Rührer

Handanos Yannis, Olympia Odos Operation SA / HELLASTRON (Greece)

"How motorway companies have ensured continuity of services, moving people and goods during the COVID-19 era"

The Olympia Odos Motorway project is a 202 km of motorways connecting Athens the Capital of Greece with Patra which is an important gate to the West of Europe through its port. It consists of 3 sections, two existing motorway sections and one new the construction of which was completed in 2017.

What was the impact of covid on the traffic: the monthly evolution of traffic of 2020 and 2021 compared to 2019 which is a reference basis, as 2019 is considered a regular year. During this two years in Greece there were 2 lockdown periods with restriction of traffic. 2020 (January and February) started quite promising with a 10% increase of traffic, then the first lockdown (from mid March till beginning of May) followed where we can see traffic decrease up to 80% compared to 2019 (especially in April). The second lockdown period happened at the end of 2020 and more specifically from the beginning of November till mid of May where we can see a decrease of traffic by up to 50 % versus 2019.

Going now to the method of payment, before the pandemic, the method of payment included cash and card payments at toll collector lanes and only cash payments at APM. Electronic lanes with Olympia Odos OBU and 3 more interoperable OBUS's from other Concessions. Scalable discounts for frequent Olympia Pass users were offered. Olympia Pass ETC Account Top ups: cash&card to toll collector / customer service centre, bank transfer, credit/debit cards via website.

During the pandemic, most specifically in January 2020 just before the pandemic, payments with credit and debit cards at automatic payment machines was introduced. At the end of the year, the national ETC interoperability was completed and all Greek OBU's are accepted.

In January 2021, distance based charging for Olympia Odos pass subscribers was put in place, combined with existing scalable discounts. Olympia Odos Hybrid is the first and only distance based ETC in Greece. In January 2021, new flat discount of 20% was introduced for motorbikes using Olympia Odos pass Motocard. In February 2022, the Olympia Odos mobile app was introduced.

Starting with ETC penetration, there was a peak of ETC penetration during the Lockdowns, mainly due to significantly increase of electronic payment limiting Toll Collector lanes to a minimum even in reduced traffic. Compared to pre-pandemic gain in ETC penetration ~10%, from ~35% to ~45%.

Regarding the evolution of Cash vs Card Transactions in Toll Collector Lanes:

- Card use in Toll Collector Lanes was temporarily reduced during lockdown due to introduction and promotion of card payments in APM
- Compared to pre-pandemic gain in Card use in Toll Collector lanes ~20%, from ~10% to ~30%

On the evolution of Cash vs Card Transactions in Automatic Payment Machine Lanes:

- Spike during 1st Lockdown mainly due to promotion of card payments and discouraging users to use cash
- Compared to pre-pandemic gain in Card use in APM lanes ~33%, from ~3% to ~36%

As for the evolution of in person vs remote Olympia Pass Account Top Ups:

- Peak of remote top ups during Lockdown mainly due to limitation of Toll Collector lanes availability
- Compared to pre-pandemic gain in remote account top ups ~19%, from ~17% to ~36%

On the Evolution of Unattended Toll Collection (ETC and APM vs Toll Collector):

- Spike during Lockdown mainly due to limitation of Toll Collector lanes availability
- Compared to pre-pandemic gain in unattended transactions ~13%, from ~58% to ~71%

Greece is a country where "Cash used to be King". The trend for increased electronic /card transactions that started in 2015 (economic crisis & capital controls) was accelerated due to the Pandemic, as in person transactions were reduced/avoided. The undeniable winner is card payment, both in the lanes and on the website, with a drastic increase compared to before the pandemic. Achievement of National Interoperability and the implementation of the Olympia Odos Hybrid system also helped the increase of Electronic Toll Collection.

Future Outlook:

The newly launched Olympia Odos Mobile App is expected to increase the % of remote account top-ups reducing in person transactions even further.

While card payments have benefits, they have disadvantages (increase in transaction time, bank fees). ETC is the way to go!

ETC penetration is in a steady rise, but it must be further promoted and accelerated.

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Handanos Yannis

Alessandra Pipitone Federico, ASFA (France)

"Customer satisfaction index"

This survey concerns the French motorway network covering 9221 km runned by 21 concessionnaires and 4 operating companies. The network covers 364 service areas, 623 rest areas and 1013 interchanges. How do motorists perceive traffic and safety conditions, toll collection and services offered by the concessionary motorway network. It's to answer these questions that the motorway companies have set up a satisfaction indicator introduced in 1996. Customer satisfaction has been at the forefront of French motorway companies' priorities who were aware to be in charge of a public service mission. This is why this survey was introduced at the initiative of motorway companies and such a initiative was well welcomed by the State which proposed the introduction of specific provisions concerning satisfaction indicators in the concession contract in 2006 when motorway companies were privatized.

In 2006, the survey was adapted, with the Sate specifying the questionnaire, the survey design, the form of the report. The objective of this indicator, which is made every year, is to get a clear view of the opinion of motorists on the service provided and the purpose is to better understand their expectations. Results issued by ASFA are aggregated figures considered as a reference by motorway companies.

What is of the content of this questionnaire ?

Each participating motorist is handed out a questionnaire which is structure with several theme categories. It covers 37 different aspects called criteria of customer experience on motorway networks and these 37 criteria are grouped into 9 categories. The satisfaction is expressed on a 4-level scale going from highly satisfied to highly dissatisfied. This is then translated into a figure on a scale from 0 to 10. Satisfaction level is reached with rating above 7 and excellence level with rating above 8.5.

Who are the people using the motorways? How many miles do they drive annually, and for what purpose do they use the network?

Beyond the survey rating, motorway company wanted to get a better picture of the diversity of circumstances that lead customers to use the motorway networks and the services offered. It's also key to take into account the pandemic context and the impact that it has had on travels and the use of the motorways. For instance, if we look at heavy vehicles and compare the results of 2020 and 2021, we can notice an increase in the number of foreign vehicles. The increase of foreign vehicles is to be taken into account when assessing the results because the questionnaire which is filled by heavy foreign vehicles is adapted to the specific situations, and it makes it difficult to track errors. This is an aspect which is to be

considered when we assess the results of the survey. Concerning the light vehicles, we need to take into account the covid crisis because the sample now tends to reshape itself as it was before the covid crisis, so if we compare the results of 2020 and 2021, it's an element to take into account. It's worth mentioning that since 2020, we have an increase in the number of elderly people, and this has an impact on many other element of the sample. Due to this increase, we have an impact on the purpose of most of the trips of people interviewed (more personal trips rather than business trips) and also on the frequency of the use of the network. People interviewed now tend to use less often the vehicle, so the frequency is lower.

We can go onto the details of the sample which was taken into account to run the survey: first of all, there is an increase of the percentage of motorists of light vehicles aged between 60 and 69, and this has an impact on other factors. The users travel less and they less often have an OBU. Car-pooling remains quite low due to the difficulty of interviewing carpoolers as we would need to use other methodologies. We can also notice that there has been an increase in foreign vehicles which proves that the sample is reshaping itself as it was before the covid crisis. The frequency of use of the vehicle is impacted because of the covid crisis, but also because the age of the motorists of light vehicles has increased, so we notice that there is an increase of the percentage of motorists using the vehicle for private purpose. A decrease in the use of motorways for business reason was 31% in 2019 and 26% in 2020. At the same time, there is an increase of the percentage of people interviewed who use the motorways for commuting to work. All these aspects shape the results since the questionnaire has not changes since several years.

Let's look at the nine categories that cover 37 criterias which are the object of the survey. If we take one of the 9 categories which is traffic condition: in order to assess the satisfaction of the customer, several criteria are taken into account and there is this particular category driven by 2 criteria which is traffic flow and cohabitation with all the vehicles.

If we look at the results: we can see that for motorways conditions, despite the covid crisis, the score is stable and we have an average of 8.4 which is almost excellent. Road safety which is a key element of the survey has been improve since 2014 (with 7.7) and we reach 8.1 in 2018. Most criteria are following similar trend in this category. There are 2 criteria whose rates are decreasing: the frequency of safety areas and safety reminders are actually slightly decreasing since last year.

For traffic conditions, the traffic fluidity is viewed by motorists as one of the most important factors. For traffic conditions, there is a slightly decrease because we are exiting the covid crisis, so traffic has gone back to the levels previous to the crisis. For the plaza overall conditions, there are 2 main criterias. We can see that for the plaza overall conditions, the average rate has improved over the last 5 years and now this category is highly satisfactory which shows that toll plaza remained well rated. Another important element of the survey for the concessionnaires, it's information and signage because between 2014 and 2021, the information and signage rating has improved from 7.6 to 7.9. In this specific category, there are 2 main criteria: tourist information and breakdown information which are rated as satisfactory. For the service areas and infrastructures, over the 7 years, some of the criteria varied a lot. We have had 2 criterias whose rate has increased: facility and cleanliness of the area. We also have some decrease in the availability of parking and lightning of the area. Concerning services, the register shows an improvement in satisfaction over the 7 years and this is driven by the improvement of 2 criterias: the service of restaurants and cleanliness of the toilet (rated 8.3 out of 10).

The trend for each category and the evolution since 2014 to 2021: there was a drop in scores on a number of criteria and categories mainly due to the return of affluence on the motorways network and despite that, we also have had about 10 criteria which have improved. We can see that the history of results shows that there is a steadying in user satisfaction in all areas with some different trends depending on the specific category. And we need to keep in mind that for the past 2 years, there was a crisis which had an impact on the scores. Developments are difficult to predict, on the one hand because of the uncertainties of future context, and on the other hand because on the criteria, many aspects might change and also the sample. But what will keep its stronger stability is the commitment of the motorway companies to strive to match

users expectations and to improve the state of the network and provide a high quality public service to the user.

What will keep its stronger stability is the commitment of motorway companies to strive to match users expectations and to improve the state of the network, and provide a high quality public service to the user.

Alessandra Pipitone Federico

Q&A session

The session was followed by Q&A, moderated by Mrs Emanuela Stocchi. Also, participants had the opportunity to ask questions to the speakers via the chat. Below, you will find the questions raised and the responses given by the speakers:

Malika Seddi: Is Portugal implement dynamic pricing on the motorway? How does it work?

Hugo Bento: on the concession side, on tolling we are not allowed to do that. It's legislative and defined by the government. On the customer services that we provide we can do that: in the service areas, parking options, electric charging options, but not with the tolling collection. The dynamic part is more relevant in the pricing for the services.

Anna Broekere: How many electric car users are using the infrastructure?

Hugo Bento: the solution we are providing is a trick on the app that allows you to connect the cars to any charging hubs in the country, and as soon as you have an access payment, you can have access to the entire network. The needs in Portugal is increasing with 7k active users of Viaverde Electric, but in total since the beginning, we think that members of electric cars or hybrid cars circulating in Portugal is now 150 k. By providing charging hubs, we are reducing the users' anxiety when entering a motorway on whether they will have enough range to reach their final destination.

Harun Oztoprak: what is your way to get customers satisfaction survey data? What is the method?

Edith Rührer: For our satisfaction and reputation model, when we talk to cars drivers with 2/3 online and 1/3 on telephone to make sure that the whole population is 100 % represented. When we talk to lorry or bus drivers, you do not have a database, we are on the motorway and rest stations to have a face to face interview. When it comes to business user, it's always by telephone.

Alessandra Federico Pipitone: it depends on the category of the motorists. For feoreign heavy vehicles, there is a specific questionnaire and we adapt it to each category.

The results are examined by ASFA, in cooperation with the State because the survey is now part of the concession contract itself, even if it was an initiative of motorway companies, now it's a contractual obligation. It's a questionnaire runned by a person in charge of it and target of people being interviewed. It's normally runned on site on the area (service areas) and the questionnaire is translated for heavy vehicles, foreign motorists, etc.

Harun Oztoprak: How many questions do you have ?

Alessandra Pipitone Federico : the target of the persons interviewed was this year 8 054 light vehicles and 1989 heavy vehicles.

Malika Seddi: Olympia Odos has set up a distance based tolling system that offers some reduction to the customers who are not using the full stretches of the motorway, with an increase of the use of card and ETC. Was there any campaign to promote the system?

Yannis Handanos: the system provides this distance charging system and it's implemented at short trips (if someone uses the whole lane of motorway, he will not have any discount). For someone passing from a main lane and doesn't travel the whole distance, when he exits and gets back the charges for the distance he hasn't made (useful for people who use the motorway for short distances). This was introduced in the beginning of 2021, it was in the peak of the second lockdown, and so there was some kind of promotions mainly with distribution of leaflets at the toll booths. However, due to the pandemic, the full campaign, and Grigoris can provide more information, has not gone online and is expected to be soon advertised to inform users in a better way.

Grigoris Chasanis: We are now working on the app promotion. We had the ETC interoperability extended throughout the country so every transponder can be used on our tolls now. Having a product like the Hybrid is important because you differentiate your service and product from the rest. The app aims at bringing new users. Now we are trying to advertise this app with new features that nobody else has, and as Yannis said the Hybrid gives big discounts. During the pandemic, we had an increase of electronic payments using the POS etc., so there is this shift by using the ETC and POS payments on the motorway which is a new trend on our motorway.

Huguette Kirhero: Hugo Bento said they had the biggest challenge to find a sentimental link with the younger people. What is the communication they are using and how they managed to find this link?

Hugo Bento: it's a strategic revision of the communication framework for each of our brand. Viaverde has a strong heritage of communicating directly with end consumer. It has a stronger emotional link with younger generation. Brisa concessionaire is the main relationship, it's functional and transactional; you give it for granted and that's the hardest part.

Two areas we are exploring: technology : motorways that are ahead of the time and being prepared for the future with connected car, with near real-time information, electric charging station...And sustainability: we have a big heritage in the way we manage and build our infrastructure, but what we do not have is communication touch point for end consumers in the sustainable day-to-day impact on the community. We are looking into areas where we can be pioneer and use that to create the emotional link we do not have on younger generation.

Anna Broekere: How popular is the function of giving the number in connexion of the safety and location on the motorway?

Grigoris Chasanis : I cannot tell now as it's a new function on the app (February). But we can check easily because the validation process is through the user's mobile number, so we have an integration with an SMS provider for this service. We have now just more than 1 month of availability on the stores, so the question can be answered in a few months. We would like to make a survey to see if they are using this because we want to follow up on the app and put more services, not only on the subscribers section but for everybody. It's also a test to see if people like these innovations.

Malika Seddi: interesting KPIs from Edith related to reputation. Can you elaborate?

Edith Rührer: that's a reputation model developed by a market research agency. They have found out that those aspects of this emotional strength and work place environment for example, that these are the ones that are the strongest.

Workshop's concluding remarks

Emanuela stocchi, ASECAP COPER II President

We got lots of information for ASECAP and COPER II. There is a common denominator which is the customer centric approach. All of you were pointing out how it is important to match with customer needs and expectations and to know what is relevant to them. Gregoris Chasanis started with what does the client need and how we can help as a company the customer to address and deal with the digital transformation. Then we had Brisa with the new communication approach and vision. We have to think of what it's relevant to the customers and to shift the communication from cars to people.

And then Edith Rührer was also talking about customer centricity with the challenging sustainability agenda of ASFINAG, and the customer expectation and this reputational programme put in place by ASFINAG. Then we had again Greece, Yannis Handanos talking about evolutionary traffic during pandemic, looking inside into the traffic parameters and also the way ETC is helping this approach to the digital transformation for the Greek customers.

Alessandra was also focusing on the customers, describing this very interesting programme carried out by ASFA on the customer satisfaction index to verify if the motorway companies actions meet with customer expectations. A very useful tool for an association as ASFA, but also for the single member concessionaire. It could be interesting in COPER II to have a benchmarking and comparative analysis on this. All these initiatives will also be analyzed in the COPER II, mainly to feed the ASECAP sustainability report.

Malika Seddi, ASECAP Secretary-General

A special thanks to Emanuela Stocchi for her great moderation and to all the speakers, Grigoris, Hugo, Edith, Handanos, Alessandra for their excellent presentations. I would like to thank all the participants, my team Romina and Carole, as well as Fernando from MCI for the technical support.

Incoming events:

- Road safety event hosted by Aiscat and Brennero Motorway in Trento Italy (4th of April).
- First Sustainability Forum in Lisbon on the 9th of June
- ASECAP DAYS : 24-25 November 2022 in Brussels

I would like to thank all the participants and presenters for being with us.