

**MOBILITY
STARTS
HERE**

PARKING REIMAGINED



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OUR BUSINESS IS PARKING TODAY AND IN THE FUTURE

The world we live in is changing; and as we move towards a more digital, urban, and mobile society, the needs of businesses are changing too.

At APCOA PARKING, we recognise the importance of these changes, and utilise innovative technology and modern parking solutions to keep industry moving forward. At the centre of all our work are our consumers, their lives, and their journeys – a mindset that benefits our B2B clients just as much as those who park with us.

Our business is built upon five pillars: insight, yield, innovation, sustainability, and partnership. These values, alongside over 45 years of experience, ensure we are the perfect partner for successful car park management.

SHIFTING PERSPECTIVES: WHAT DOES PARKING LOOK LIKE FOR THE CONSUMER OF TOMORROW?



PARKING THAT FOCUSES ON THE CONSUMER

At APCOA PARKING we strive for convenient and customer-oriented solutions that tackle the unique issues modern travelers face when parking.

Today's consumer is more informed, and more demanding, than ever before: with the digital world at their fingertips, they expect products and services which are as connected and modern as they are.

Our goal is to provide intelligent solutions in parking that meet the demands of the modern, connected consumer by providing them with an equally connected car park.

Our infrastructure allows us to equip our car parks with interactive, digital features that just make sense in today's technologically forward world. From simplifying the search for parking spaces, to hassle-free parking fee payment through a range of methods; our innovations create a seamless parking experience for every consumer.

PAY AND DISPLAY WAS YESTERDAY, MOBILE SOLUTIONS ARE THE FUTURE



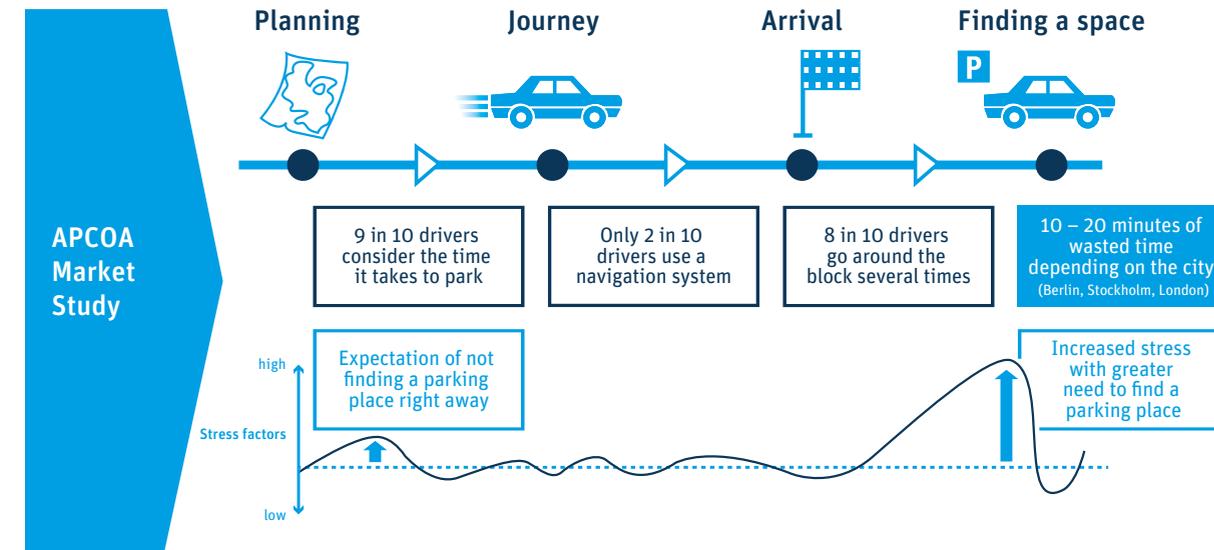
EVERYTHING THE CONNECTED CONSUMER NEEDS

Only by understanding the modern consumer, and their needs, can we offer the best service that ensures repeat visits. By providing comfort and quality we are able to create loyal consumers who come back to park with us again and again, increasing turnover for you and your business.

We are continually expanding the services we provide; cooperating with our B2B clients to create bespoke solutions that provide consumers with convenient and seamless parking experiences.

Not only do we stay up-to-date with the industry by adopting the most cutting-edge technology on the market, we also drive the trends that shape modern parking through design and innovation. We know our business, are proactive to change, and are always prepared to think outside the box.

APCOA PARKING Market Study 2015: Consumers want integrated and convenient solutions across their whole journey



PARKING SEARCH TIME FACTOR

A study commissioned by APCOA PARKING and conducted by BCG Digital Ventures across Berlin, Stockholm and London in 2015 shed light on how much time consumers waste by continually circling around streets to find parking spaces. Parking is a stressful necessity for many travelers; but one that can be improved through consumer-oriented solutions such as:

Easily Accessible Information Prior to Arrival

Consumers should be able to access information about availability, price, travel time, and alternative parking options.

Integrated Parking Solutions

We strive to provide consumers with access to all parking options available, whether it is on-street, off-street, no matter the provider.

Providing a Seamless Parking Experience

By reducing the time spent looking for a parking space and providing shorter walking distance to their destination we work to create convenience for every consumer.

Unique Pricing Offers and Payment Solutions

Special offers, season passes, package deals, and mobile payments can be introduced on site to improve consumer satisfaction and provide uplift in sales.

IMPROVING PARKING FOR EVERYONE INVOLVED



OUR PARKING, TAILORED TO YOU

The best operators in any sector are those with access to specialist knowledge; but this can be tough to achieve for businesses who find themselves operating across multiple industries. We provide the tailored support our B2B clients need to be successful in long-term car park management, while also providing them the means to hit their earning potential.

As an authority in parking sector, APCOA PARKING is able to offer targeted, in-depth support across a number of areas, including: professional lifecycle management, maintenance, modernisation, intelligent investment strategies, and the development of innovative parking products.

We know that modern consumers increasingly value simplicity and convenience when parking, combined with technological advancements, and we are continually developing our business model to meet their demands.

WE MANAGE PARKING AS EFFICIENTLY AS POSSIBLE

SUCCESS IS THE SUM OF ALL INDIVIDUAL PARTS

Ensuring the smooth operation of each of the car parks under our care is a responsibility that we take pride in fulfilling. Whether the site has been developed and designed by us, or is looked after as part of one of our tailored management packages, we strive to provide your car park with the most innovative and price-effective solutions and improvements.

As part of our industry-leading parking management strategy, we use Commercial Asset Management (CAM) to provide a detailed analysis of your car park. By assessing how factors such as price, timing, consumer loyalty and rent interplay, a high degree of revenue stability can be achieved.

Additional revenue streams, such as the long-term rental of parking spaces or dynamic price structuring, can also play a part in contributing to a successful parking business model.

Did you know that APCOA PARKING ...

- manages 1.4 million parking spaces in over 9000 locations?
- sells more than 150 million tickets per year?
- generates a turnover of over € 1 billion incl. external sales?
- has 4600 employees and operates in 13 countries?
- has over 45 years' experience in car park management?
- is the No. 1 parking management company in Europe?

CASE STUDY

JERVIS STREET – IRELAND'S LARGEST CAR PARK

Intelligent pricing strategy leads to higher income

Jervis Street is APCOA PARKING's largest car park in Ireland, and plays a leading role in overall turnover for the country. A nearby car park run by a competitor, boasting a better location, more parking spaces, and lower prices, meant that we had to reassess our own offering.

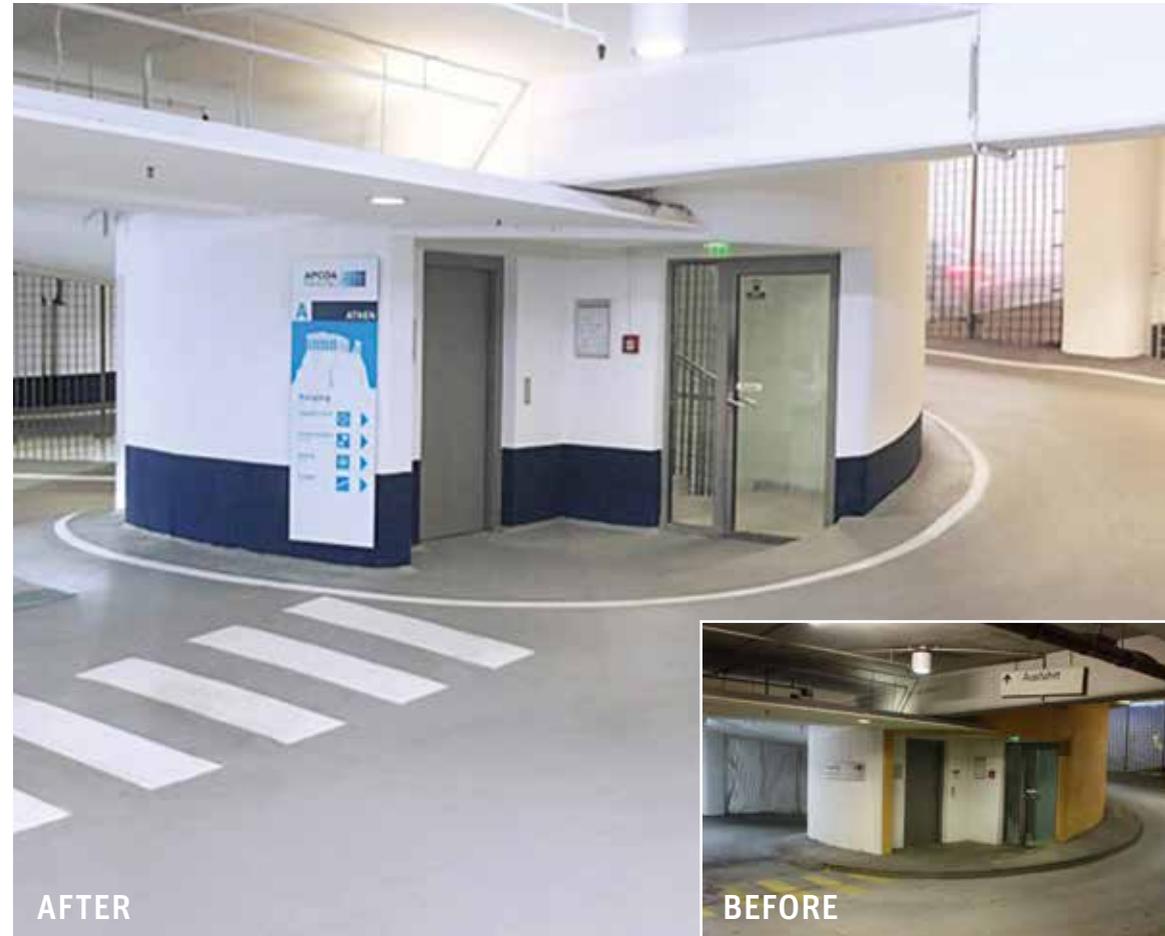
A thorough assessment of the site, combined with local knowledge lead to the following conclusions:

- on weekends Jervis Street is more popular
- the busiest month is December
- occupancy is extremely low during the last four hours of the day
- a price simulator suggests that a different hourly rate on weekdays would have a strong effect on the occupancy of the car park



An intelligent pricing strategy was derived from these observations that promised a theoretical revenue growth of 6%. All that was left was to implement the differentiated pricing structure on site.

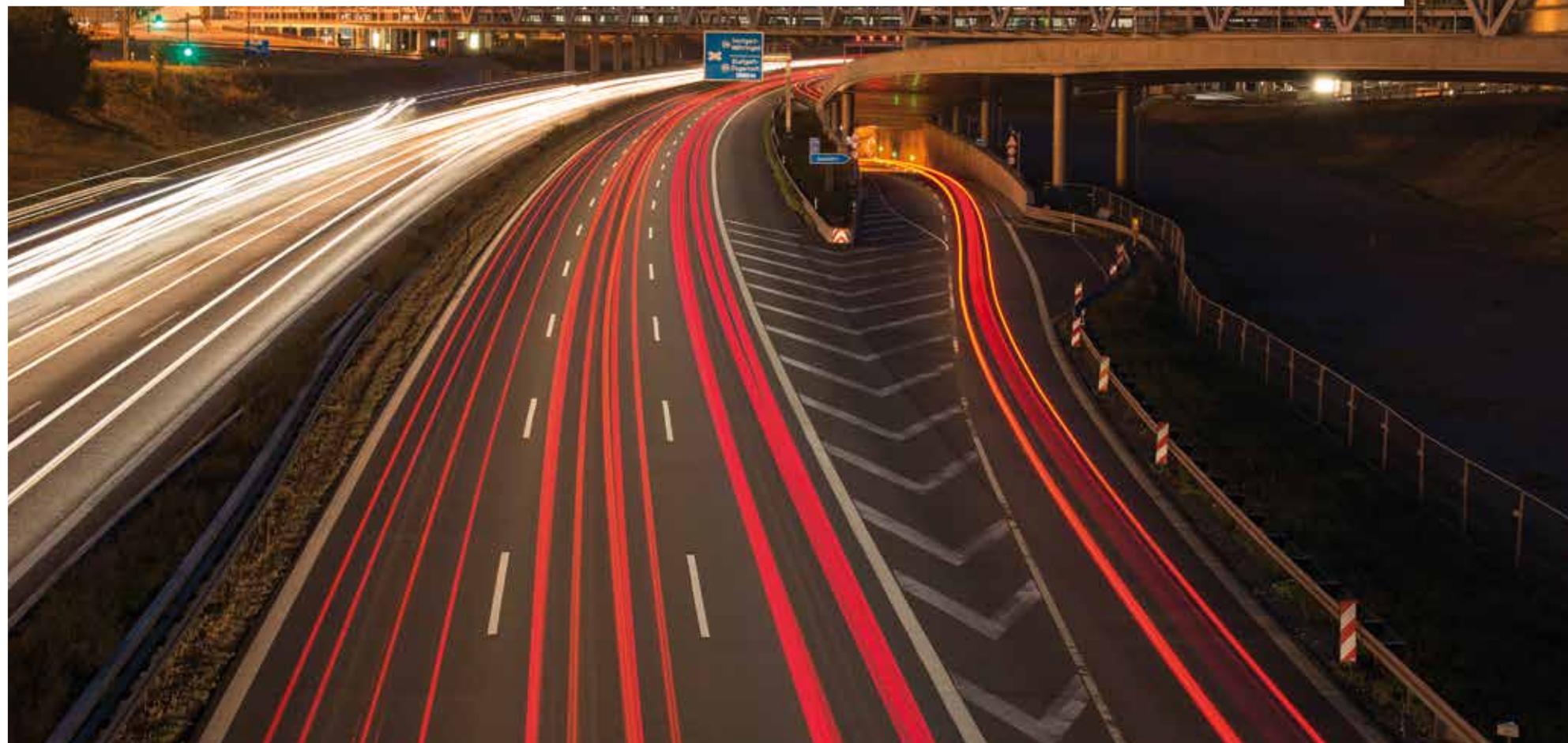
The site is now pleased to report that their growth targets have been met, and revenue has increased. Overall there was almost no loss of consumers parking on site, and our satisfied client is open to further price strategies in order to increase car park turnover in the future.



AFTER

BEFORE

AUTONOMOUS DRIVING IS THE FUTURE, CONSUMER-ORIENTED PARKING THE REALITY



THE SOLUTIONS WE NEED ARE ALREADY HERE

The parking industry is constantly moving and changing. Managing a car park is no longer as simple as providing space for vehicles – instead, the modern traveler looks for innovations that make the process of parking a stress-free affair. Because of this, we work with carefully selected partners to find intelligent parking solutions that solve the problems present in traditional parking operations.

In order to stay ahead in the industry:

- we have links to car manufacturers
- we are in regular contact with mobility service providers
- we participate in various research projects regarding innovative parking, and regularly conduct market surveys among our target groups
- we work in cooperation with suitable partners to set new standards and secure strategic partnerships

With 45 years of experience in the parking business we are able to offer attractive and sustainable services for both our B2B clients and their consumers.

Our services include:

- innovative payment options
- charging stations for electric cars
- intelligent traffic management
- indoor car park navigation

In addition, advancements in technology allow us to compile comprehensive data on the parking habits and trends, which can be used in targeted marketing activities as well as to guide expansion of services. In the same way, this data can provide important information about the car park itself, which can be used to increase the income it generates.

TOMORROW'S CAR PARK WILL HAVE NO BARRIERS AND NO PAY STATIONS



PARKING SYSTEMS FOR THE CAR PARK OF TODAY

As part of our bespoke services, we are able to outfit your car park with the latest technology; replacing traditional pay stations and barriers with new digital options that improve efficiency, satisfaction, and revenue.

We believe all transactions should be simple, which is why we have developed our own system that allows consumers to pay by phone, web or app, and can even be utilized to allow the booking of car parking spaces online. These online systems also provide the opportunity for loyalty programs to be established, producing repeat consumers for your site.

Automated barriers, and even barrierless parking, are now at the forefront of our parking systems. With state-of-the-art technologies such as RFID chips and automatic number plate recognition (ANPR) enabling contactless entry and exit, we can provide a seamless transition between road and car park.

We can even improve access to public transport systems on your site by providing tailored solutions for other transport service providers such as taxis and buses.

CASE STUDY

RO'S TORV SHOPPING-CENTRE: IMPLEMENTATION OF ANPR TECHNOLOGY

Consumer friendly solution leads to a better public image

Ro's Torv is a shopping-centre in Roskilde, Denmark. The centre focusses on design, art as well as architecture and wants to provide a shopping experience through a pleasant and a bright atmosphere. A large number of fines being issued resulted in a bad public image of the car park and the complex as a whole.

APCOA PARKING in Denmark created and implemented a new concept of car park management.

- A system of automatic number plate recognition (ANPR) keeps the traffic flow at maximum level thanks to barrierless entry and exit.
- An enabled hassle free whitelisting system allows parkers to pay automatically (AutoPay) or later if they forget (LatePay).
- Targeted marketing based on occupancy throughout day and week as well as on origin of shoppers expands the customer journey.



The new solution improves the public image of the centre especially when it comes to enforcement activities. The majority of the enforcement revenue only comes from illegal parking behaviour now and acknowledges the necessity to keep parking facilities available to authorized consumers. Furthermore the possibility for LatePay is perceived extremely beneficial by consumers.

INTELLIGENT CAR PARK MANAGEMENT SAVES RESOURCES AND IMPROVES QUALITY OF LIFE



URBAN PARKING SOLUTIONS

As urban areas expand, and more people move towards city-centre living, congestion and pollution have become major issues for businesses, governments, and residents alike. As a company, APCOA PARKING seeks to do its part in finding solutions that increase quality of life for our consumers, despite ever-increasing traffic, by researching and implementing modern transport and mobility concepts.

Our goal is to significantly reduce the levels of CO₂ in cities by utilizing innovative parking space solutions, electric vehicle support, optimized marketing of free parking spaces, and intelligent traffic management. We take pride in our contributions to environmental protection, and see our commitment to local communities as an integral part of our business.

Collaborating with local city governments, we work together to increase the attractiveness of the local area, help the environment, and improve the quality of life for those living in urban areas.

DRIVING EFFICIENCY AND LOWERING EMISSIONS ON THE ROAD AND IN OUR CAR PARKS



PARKING AND THE ENVIRONMENT

Our car park concepts can help reduce CO₂, smog and noise emissions in the inner city areas through innovative technological solutions and careful planning.

By shortening the search for parking spaces using targeted parking guidance systems, and by cooperating with navigation services, we can quickly and effectively direct customers to the closest available parking space, and effectively reduce engine run-time.

Our multi-storey structures improve quality of life in urban environments by saving space in city-centre areas and creating more available living space. These carefully planned sites can also be transformed into mobility hubs that provide easy links to eco-friendly modes of transport into city-centres, whether that be car sharing, electric bikes, or public transport. These structures can also take advantage of new technology such as electric vehicle charging points and paperless parking ticket solutions.

Traffic management is another solution from APCOA PARKING that provides cities and municipalities with an effective means to reduce emissions and control traffic flows. This can be utilized in a number of areas such as airports, railway stations and ports.

CASE STUDY

OPTIMAL TAXI MANAGEMENT AT STOCKHOLM ARLANDA AIRPORT

Intelligent software ensures greatly reduced CO₂-emissions and higher service quality

All airports have the same problem: taxis must be checked and verified while still maintaining the smooth arrival and departure of visitors to the terminals.

APCOA PARKING in Sweden offers a range of services for taxi management at airports, from pre-reservation through to fee collection. They manage and control access flow, and the entry zone, in compliance with all safety conditions.

HERE IS HOW THE TRAFFIC MANAGEMENT SYSTEM AT STOCKHOLM AIRPORT WORKS:

- At the entrance to the airport the taxi is registered and the driver receives a number.
- The level of CO₂ generated by the vehicle determines its place in the queue.
- When the driver sees their number on the screen, they know it is their turn.
- Only vehicles whose number has been called up are permitted to drive to the terminal itself.



THE RESULT:

- The proportion of environmentally friendly taxis at Stockholm Airport has risen from 16% to 84%.
- In general, the turnover in the taxi traffic at the airport has increased.
- Fewer running motors has significantly reduced CO₂-emissions.
- Predictable waiting times have resulted in greater satisfaction among taxi drivers.
- Consumers have benefited from increased service quality and reduced chaos at the taxi stand.

CONSUMER-ORIENTED PARKING, TAILORED TO YOUR BUSINESS



OFFERINGS THAT FIT YOUR INDUSTRY'S NEEDS

Having worked with B2B clients from a variety of different sectors for almost 50 years, we understand no two parking operations are alike. We provide a bespoke service to all of our B2B clients, assessing the individual needs of your business to ensure that your car parks are tailor-made operations that suit you and your consumers.

Examples of our made-to-measure solution can be found across our European businesses. At airports, where a large number of consumers must be served, we can offer additional services such as Forecourt Traffic Management and Valet Parking; while in shopping-centre locations, where returning consumers are important, loyalty programs are one of our more popular services.

Regardless of the sector you are based in, our financial stability and market-leading experience can help you get the most out of your parking operation. By working in partnership, we can tailor every solution to you and your consumers, proving cutting-edge solutions that are as unique as your business.

DIVERSE BUSINESS SECTORS – COMPREHENSIVE OFFERS: APCOA PARKING

With the ability to provide comprehensive parking management in any industry, examples of our tailored solutions can be found across our business sectors.



TRAVEL

- Online reservation
- Traffic management
- Connections to public transport
- Additional services such as valet parking and car cleaning



HEALTHCARE AND EDUCATION

- Parking permits for a range of users
- Traffic management
- Car park surveillance
- Charitable projects



CITY- AND SHOPPING-CENTRE

- Loyalty programs
- Credit concepts
- Use of advertising space
- Charging stations for e-vehicles



ENFORCEMENT AND PARKING SERVICES

- Traffic management concepts
- Car park surveillance
- Construction of sustainable infrastructure
- Combined payment system



EVENTS AND HOSPITALITY

- Combined booking options for trade fairs or hotel reservations
- Valet parking
- Video surveillance and on-site security
- Extra support at large events

CASE STUDY

DBFO INSTALLATION AT THE CITTADELLA CAR PARK IN VERONA

Working in partnership helps to minimize risk and optimise planning

In 2005 the city of Verona took over an undeveloped plot of land close to the city's famous Arena. One of Italy's leading construction companies won the contract to build a car park, and needed to meet a number of standards imposed by the city. APCOA PARKING in Italy helped to:

- improve the shape and structure of the site
- adhere to the complex framework conditions imposed by its location and proximity to the Arena
- create a location that could maintain a healthy and stable income

By combining expertise and knowledge in a successful and sustained partnership, we were able to create a car park with a secure cash flow that has continued to grow steadily.



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