

CSR REPORT 2018



**We
Develop
Quality**

**We are passionate
about space for people!**

RESULTS

PERFORMANCE HIGHLIGHTS

	2016	2017	2018
General information			
Owned, Concession + Long-Leased (O+LL) PFs	604	676	770
Short-Leased PFs	2,765	3,410	2,120
Managed PFs	179	841	535
O+LL parking spaces (kWh measured)	187,637	197,899	221,841
O+LL parking facilities (kWh measured)	393	561	547
Financial information			
Net revenue (x EUR million)	825.0	854.5	877.9
Net result (x EUR million)	194.9	261.5	277.5
Cash flow from operating activities (x EUR million)	128.9	110.6	249.3
Total of capital investment (x EUR million)	58.9	64.7	110.1
Net revenue from parking activities (x EUR million)			787.9
Net revenue from short-term parking (x EUR million)			593.6
Net revenue from long-term parking (x EUR million)			194.3
Non-financial information			
Average carbon footprint (kg CO ₂) per parking spaces	149	144	113
GWh consumed by O+LL PFs	97.5	98.0	96.4
Total GHG (tCO ₂)	31,914	32,205	29,892
Scope 1 (tCO ₂)	3,274	3,062	4,158
Scope 2 (tCO ₂)	28,274	28,740	25,461
Scope 3 (tCO ₂)	366	403	280
Car fleet e-cars	57	70	71
Car fleet diesels	480	468	448
E-charging stations	825	1,117	1,322
Employees	2,507	2,521	2,378
Employees receiving regular general training	1,660	1,574	1,406
Employee training hours (average per year)	15.3	15.4	17.2
Health & Safety number of incidents	151	219	158
Health & Safety number of lost days	1,835	1,522	1,002

	2016	2017	2018
Total PFs offering 24/7 service			3,425
Total PFs offering online information			1,861
Total PFs offering onsite services information			1,612
Total PFs offering online pre-booking services			385
Total PFs dedicated to hospital parking			63
O+LL PFs with disabled parking spaces			472
O+LL PFs underground			427
O+LL PFs with elevators			352
O+LL PFs in energy-saving LED project			260
O+LL PFs with CCTV			259
O+LL PFs with e-charging stations			130
O+LL PFs near public transport hub			119
O+LL PFs offering car sharing schemes			36
O+LL PFs with bicycle parking			16
Strategic cities with five or more PFs			58
Total PSs dedicated to PRMs (excl. BE, DK, NL, NO, SE)			2,421
Total POIs listed online (excl. FR)			1,333
Developed strategic PaSS Platform			yes
Developed strategic Q-Park Liveability Model			yes
Developed strategic Compliance Programme			yes
Developed strategic Thought Leader / Expertise Programme			yes
Developed strategic LED Transformation Project			yes

VALUE CREATION



Accessibility

City centres

Parking facilities have a positive impact on the quality of life in urban areas and in large cities in particular. After all, a city is more attractive if there are fewer cars on the streets. With our parking facilities and services, we contribute to the accessibility of vital functions, such as public transport hubs, train stations, airports and Park + Ride nodes in particular, as well as local government offices, hospitals, schools and universities, points of interests as well as shopping centres.

Reducing traffic searching for a place to park saves time and has a positive impact on air quality in the city. And when cars and bicycles park underground, this frees up the public space for greenery and other purposes. All this means we have an indirect influence on the well-being of people.

We work together with municipalities to establish fair parking tariffs that contribute to the quality of life in urban areas. It is in the interest of municipalities, as well as Q-Park, to tune parking tariffs for different facilities and distances, such as parking on-street or in parking facilities, and in the city centre or at the outskirts of the city.

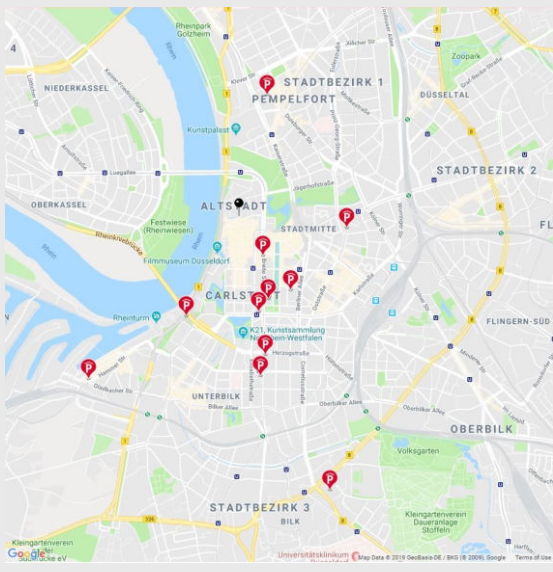
By engaging municipalities in dialogue on these matters, we want to use our expertise to make a contribution to the accessibility and sustainability of cities. We actively seek collaboration with local governments, so that regulated and paid parking become an integral part of urban mobility.

At Q-Park we endeavour to provide a range of parking solutions for easy access to city destinations. These can be at Park+Ride, inner ring, or city centre locations.

Even though municipalities throughout Europe are increasingly imposing restrictions on city centre access by cars, some access is required to be inclusive to all sections of society. Some visitors prefer to travel as close as possible to their final destination by car and are willing to pay for that service, others opt for a journey including Park+Ride or Park+Walk.

Düsseldorf as an example

In Düsseldorf, Q-Park offers multiple parking locations in and around the city. According to their destination in the city, visitors can select the most suitable car park in advance, and get driving directions sent to their mobile phone.



Inner-ring purpose built parking facilities in particular enhance accessibility while maintaining mobility. They reduce inner-city search traffic and on-street parking which in turn improves the liveability for residents and visitors alike.

Car parks located at varying distances from the city centre give motorists a choice to park further away at a more economic parking tariff or park nearest to their final destination at a higher tariff.

Results

With purpose built parking facilities at varying distances from the city centre and with varying parking tariff schemes, Q-Park contributes to:

- | accessibility to amenities such as public transport, hospitals, shops and events;
- | decreasing traffic searching for a place to park;
- | freeing up public space for green parks and social squares;
- | opportunities to reduce on-street parking;
- | nudging motorists to make informed choices;
- | creating sustainable parking solutions;
- | decreasing subsidised parking, by pursuing the 'user pays' principle.

Hospitals

At Q-Park, we partner with hospitals and healthcare facilities whenever we can because this allows the hospital to focus on its core business of healthcare while we can focus on the parking.

Good parking facilities help hospitals run smoothly. Patients arrive on time and are less stressed for their appointments. For hospital staff, good parking facilities provide a convenient end to their journey which means they will start their shift in a positive frame of mind.

Some may argue that parking at hospitals should be free, but paid parking is the best method for an efficient healthcare centre to meet the parking needs of staff, patients and visitors with the limited space and resources available.

At Q-Park we know that parking is never free. There are often transport alternatives to using a car and especially in a healthcare setting, for those who can, we recommend encouraging visitors to use active transport such as walking or cycling. This relieves pressure on the limited parking capacity available and ensures that there is always a parking space for those who really need to travel by car.

When we partner with a hospital, we first diagnose parking needs. We help the hospital gain insight into the types of treatments they provide, the preferred means of transport and parking movements per target group (staff, patients and visitors) to determine:

- | the parking capacity required;
- | a bespoke tariff structure;
- | specific parking products;
- | a nudging mobility menu per target group.

This helps a hospital understand the needs of their parking customers. When Q-Park operates a hospital park, we will ensure our signature features are present. For hospitals these include:

- | extra spaces for blue badge holders;
- | wide parking bays, preferably angled for easy access;
- | specially trained Parking Hosts, committed to providing friendly and respectful service and in line with that of the hospital's own policy and procedures;
- | separate parking areas for staff and visitors.

Results

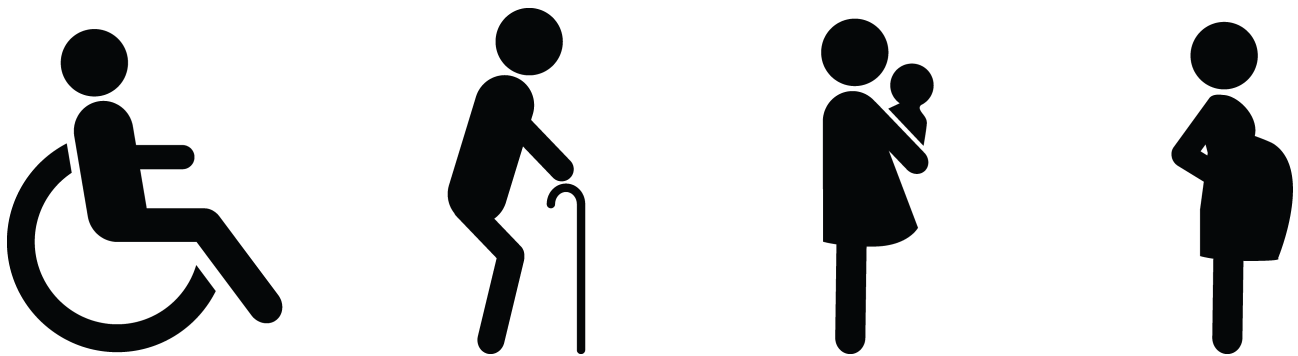
In 2018, Q-Park had a total of 63 parking facilities dedicated to serving hospital parking needs.

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Figure 10: Specialists diagnose parking needs for hospitals



Figure 11: Inclusive mobility for PRMs



Mobility inclusion

Governments and municipalities are committed¹ to providing access to public transport and amenities for all citizens, including persons with reduced mobility (PRMs).

More than 80 million people in the EU, about 16%, live with a disability of some kind, often affecting their mobility. Considering the inevitable reversal of the population pyramid and that more than one third of people aged over 75 have an age-related condition that restricts their mobility to a certain extent, providing easy access to public amenities is vital.

Q-Park ensures that its parking facilities meet government requirements² for inclusive mobility with features including:

- I wide walkways that provide ample space for wheelchair users and people using walking aids such as a walking stick, crutches or a frame;
- I spaces for disabled motorists are always located close to the pedestrian exit to minimise walking distances;
- I threshold-free access from pedestrian area to parking deck;
- I wide doorways;
- I ramps with gentle incline and lifts suitable for wheelchairs and buggies;

- I safe handrails and protection under tapering constructions;
- I easy to read signage with sufficient colour contrast;
- I more than sufficient lighting levels.

The availability of inner-city parking close to POIs is an essential service to enable PRMs to participate fully in society and Q-Park is committed to providing this service.

Results

In our parking facilities we have allocated multiple spaces for motorists with special needs, whether they are parents with young children and buggies or passengers with reduced mobility. In 2018, we started to collect this information in our new back-office systems for display on the country websites per parking facility. Some countries are still inventorying these special spaces so we expect this information to be complete in 2019. The following countries have already registered dedicated spaces for motorists with PRM passengers:

- I Q-Park Germany 464
- I Q-Park Denmark 194
- I Q-Park Finland 277
- I Q-Park Ireland 113
- I Q-Park UK 1,373

¹ <https://publications.europa.eu/en/publication-detail/-/publication/20f5cc9b-b820-11e2-ab01-01aa75ed71a1/language-en>

² https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/3695/inclusivemobility.pdf committed

Mobility hubs keep cities moving

Mobility hubs are busy places where travellers arrive and depart by different modes of transport, such as bicycle, car, train, or plane. Mobility hubs help cities to be accessible and liveable. Q-Park wants to help customers complete their journey as conveniently as possible so this is the place to provide additional services for car parking customers.

Besides ample parking facilities with the Q-Park signature features, fundamental services such as AEDs and toilets are available too. These services contribute to the customers' sense of safety and convenience, and help make cities more accessible and liveable.

Mobility hubs also feature:

- Kiss + Ride zones:** Customers can park here for a brief period to drop off or pickup family and friends, or a ride share. These facilities have a



longer grace period so customers don't have to worry about overstaying their welcome.

- Lockers:** Customers can leave luggage and shopping while they use the amenities in the vicinity.
- Parcel walls:** These are special lockers filled by parcel delivery services who give their customers a digital key to open the door and thus take delivery of their online purchase. This logistic facility contributes to reducing parcel delivery mileage and emissions, while offering added convenience to customers who order online.

Services Q-Park provides to increase urban accessibility and liveability include:

- Pickup points:** as a service, stores in the shopping centre can deliver shopping and/or bulky goods to the pickup point. The customer drives by the pickup point to collect their goods on their way out.
- Refrigerated lockers:** for groceries and perishable goods. At some inner-city locations this service is used by restaurant suppliers to make early-morning deliveries, avoiding congestion.

Figure 12: Mobility hubs with Lockers & Pickup points



I Service desks: at facilities which are part of a large amenities complex we have extended the Parking Host function to include a reception or service desk. Here we can give personal service and information, offer loyalty cards and tips for public transport and bike hire. We also look after lost property.

Integrated mobility issues are becoming more important to municipalities. Their primary concern is how to improve accessibility and, at the same time, reduce congestion and CO₂ emissions. Integrated off-street parking solutions with public transport and bicycle parking provide answers in the short and longer terms.

Results

Our proximity to alternative mobility options has increased further, particularly in France, Sweden and Norway. In total we have 119 owned and long-leased parking facilities near a major public transport hub. This means we achieved our 30 percent target in recent years and are right on track to achieve our new and ambitious 2020 target of 40 percent.

Figure 13: Proximity to alternative mobility options



Off-street parking

We are passionate about space, about people and about the living environment. We are passionate about enabling people to move around.

We provide space to park cars at locations where people want to be. At places where they want to walk, cycle, exercise or play sports. Where people want to socialise or just enjoy the surroundings. Places where they can enjoy nature, leisure and culture in its full glory.

Off-street parking facilities reduce the amount of traffic searching for a place to park, which, in turn, has a positive impact on emissions and air quality in city centres.

Wherever possible, we give the public space back to the community and enable people to use space as they see fit. This means that parking facilities are constructed under parks and squares so that cars and coaches are off the streets and out of sight. And this means that public spaces that were previously packed with parked cars can now be returned to the community, improving liveability for all.

The public space in squares and parks that are free of cars because parking is beneath the surface can be used by the local community for a wide variety of activities such as daily walks, weekly markets, monthly events, as well as for annually recurring events such as music festivals and carnival parades.

By moving car parking to underground facilities we create value for public and private landlords, commercial partners, citizens and motorists who recognise that off-street underground parking is an essential link in the mobility chain.

- I By investing in off-street car parks we help maintain accessibility of urban areas.
- I By taking parked cars and bicycles off the streets we help enhance the liveability in cities and towns.

Results

Of our 770 owned, in concession and long-leased car parks, more than half i.e. 427 (55%) are underground.

 [Click here for our Passionate about space article.](#)



Functional quality

24/7 Service

Most Q-Park parking facilities are open 24/7 for motorists to park and retrieve their car.



That's why we offer an international help desk to motorists that is available 24/7. The QCR gives customers instant access to multi-lingual Parking Hosts in a control room centrally operated by Q-Park. They

provide help and support with queries relating to the payment system or to accessing or exiting the parking facility.

The QCR is in contact with Parking Hosts and Mobile Teams in the vicinity of the parking facility. If a customer needs assistance that cannot be given remotely, the QCR will dispatch a Parking Host to assist at the location itself. For mechanical problems, the service department and service technicians can be called in to help.

Results

In total we have 3,425 parking facilities offering 24/7 services.

Figure 14: Q-Park Control Room (QCR)



Onsite services

Our aim is to foster mobility and enable access to essential urban functions in conjunction with sustainability concerns. Each of our parking facilities provides a number of onsite services. These are listed on the parking facility's website page so customers know in advance what services they can expect to find.



From our recurring customer satisfaction surveys we know that customers value the presence of AEDs. The AEDs should be located at a logical, secure and accessible place so they can be used by trained volunteers or medical personnel when needed.



Our customers greatly appreciate toilets being available in or near our parking facilities. Toilets are present in the car park or there is clear signage directing people to the nearest toilets, for example in shopping centres.



Customers who drive electric vehicles or plug-in hybrids like to recharge their vehicle while parking. We support the use of more sustainable passenger cars by providing charging stations for electric and hybrid cars at many of our facilities. To help these customers plan their trip we indicate on our website, per parking facility, whether e-charging stations are present.



Another highly appreciated service is the presence of jump leads. The Parking Host or mobile service team has access to jump leads and are available to help customers who find themselves with a flat battery. If the Parking Host is not on site, customers can call the QCR who will dispatch a Q-Parker to assist.



The QCR is also available to help customers with problems at the payment machine or access and exit barriers. Naturally, the QCR is available 24/7 and all our QCR Parking Hosts speak two or more languages

so we can always help customers in their first or second language.



Young people, particularly those who live in large cities, have less need for a car, particularly when there are sufficient alternatives such as good public transport or cycling routes. Yet some choose to become a member of a car sharing scheme that give them the mobility freedom without the hassle of car ownership. We therefore have an increasing number of parking facilities in major cities that offer spaces to car sharing schemes. Spaces for shared cars are designated with this icon.



We want to play a role in ensuring sustainable freedom of movement and mobility options for citizens, which is why we offer parking facilities for cars and bicycles at public transport nodes. For this, we seek active cooperation with local authorities. Integrated mobility issues are becoming more important to municipalities. Their primary concern is how to improve accessibility and, at the same time, reduce congestion and emissions.

Integrated off-street parking solutions with public transport and bicycle parking provide answers in the short and longer terms. Our proximity to alternative mobility options has increased further, and we incorporate bicycle parking in our new build parking schemes, such as Bruul in Mechelen and Handelsbeurs in Antwerp.

Our owned and long-leased parking facilities provide information about alternative mobility options. We continue to seek and provide relevant mobility information to our customers.



The number of owned or long-leased parking facilities where the parking tariff is adjusted according to supply and demand continues to increase. In the near future we expect this number to rise further when more parking facilities are connected and integrated with our back-office-calculation (BOC) system which makes it possible to offer parking tariffs for different needs, and on different days at varying times.

- I In the Netherlands differentiated parking tariff strategies were introduced at several parking facilities to better control supply and demand, mainly differentiating week and weekend tariffs.
- I Germany and Belgium have also introduced new schemes.
- I The UK and Ireland work with special evening tariffs.

Results

We started collecting onsite services information per parking facility in our new back-office systems in 2018 and not all countries have registered the onsite services yet, making it less useful to show the results per specific service. This will be followed-up in 2019.

What we do have is 1,612 parking facilities offering a variety of onsite services which can be reviewed online.

VALUE CAPTURING



Our financial performance

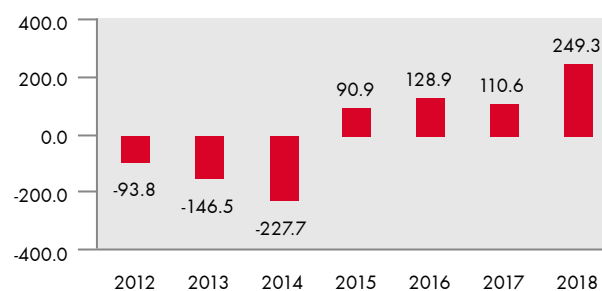
In 2018, Q-Park continued to perform well financially. All major financial indicators show an improvement.

The operating result before depreciation and amortisation came out at EUR 277.5 million (2017: EUR 261.5 million). This excellent performance is driven by a strong increase in total revenue of 2.7% from EUR 854.5 million in 2017 to EUR 877.9 million in 2018. This increase is supported by the like-for-like portfolio with a revenue growth of 2.2% and the good performance of new business.

The cash flow from operating activities in 2018 also shows healthy growth from EUR 110.6 million in 2017 to EUR 249.3 million in 2018.

Chart 4: Cash flow from operating activities

(x EUR million)



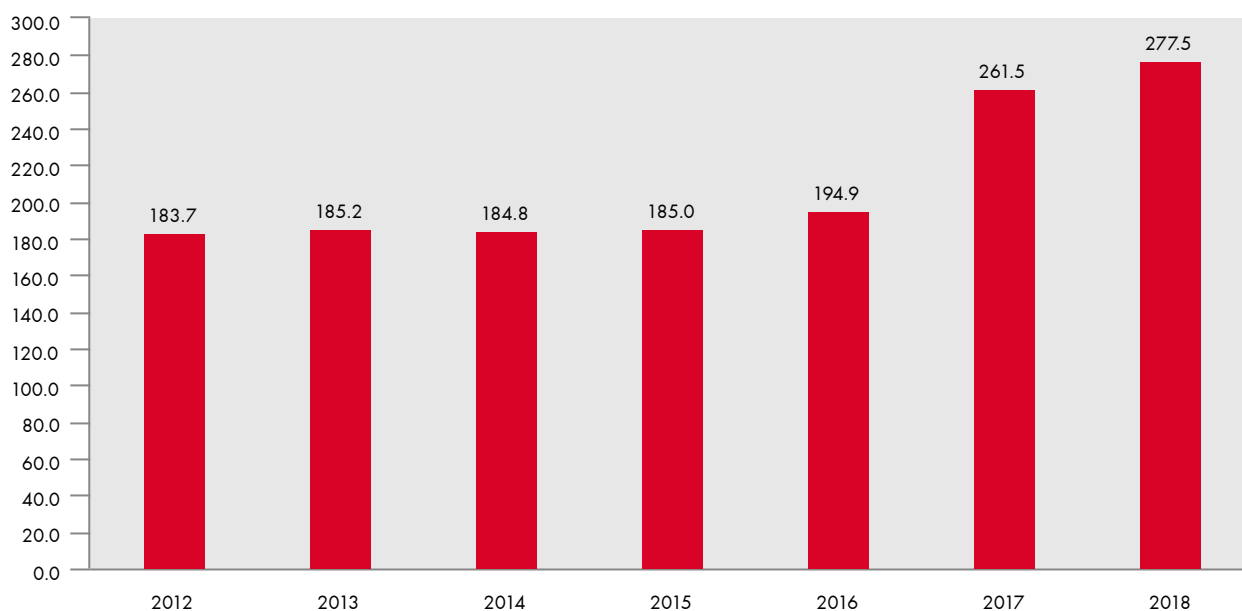
Parking revenue

Of our total revenue, about 90% (EUR 787.9 million) comes from short-term and long-term parking activities. Our total parking revenue consists of:

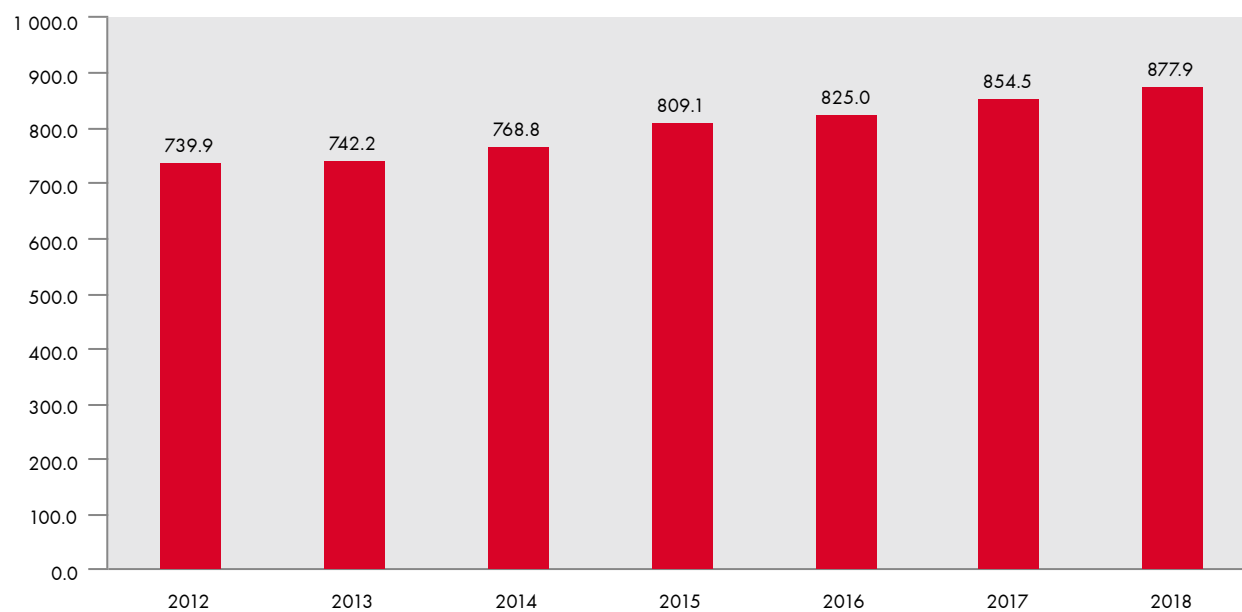
- 75% short-term parking i.e. EUR 593.6 million;
- 25% long-term parking i.e. EUR 194.3 million.

Chart 5: Operating result

(x EUR million)

**Chart 6: Net revenue**

(x EUR million)



Smart contracts

We capture value for public and private landlords by offering a range of contract types and value propositions. We operate parking facilities that we own, have in concession, lease or under a management contract.

Results

Of the 3,425 owned, in concession, long-lease, short-lease and management contracts:

- | 770 (22.5%) owned, concession or long-lease
- | 2,120 (61.9%) short-lease
- | 535 (15.6%) management

Figure 15: Offering a range of smart contracts - ownership, concession, lease or management



Strategic locations

We capture value for all our stakeholders through our portfolio of purpose-built and off-street parking facilities at strategic locations: in or near multifunctional inner-city areas, at public transport interchanges, and at hospitals.

In cities where we operate a certain number of car parks, we become a highly efficient parking operator and profound mobility partner. We can then engage in meaningful dialogue with other parking and mobility partners, including:

- | providers of parking route information systems;
- | urban planners regarding capacity of parking spaces needed and routing traffic;
- | public and private landlords to efficiently integrate and operate their car parks in our portfolio;
- | mobility providers such as public transport, shared cars and bicycles providers;
- | parking tariff policy makers.

With our integrated and connected expertise, municipalities can take multiple measures to:

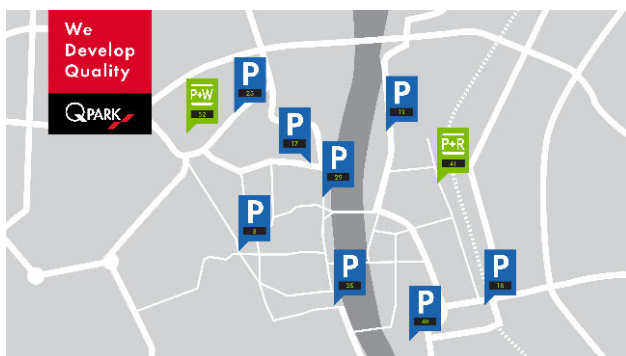
- | reduce traffic searching for a place to park;
- | improve air quality and reduce emissions;
- | provide for sufficient parking capacity and proper usage, both on- and off-street;
- | create a more liveable urban environment.

Results

Cities where we have five or more purpose-built off-street parking facilities, increasing our operational efficiency significantly (in alphabetical order):

- | Belgium – Antwerp and Brussels
- | Germany – Berlin, Darmstadt, Düsseldorf, Hagen and Saarbrücken
- | Denmark – Aarhus, Copenhagen and Odense
- | Finland – Espoo, Helsinki, Tampere, Turku and Vantaa
- | France – Aubagne, Brest, Chalon sur Saône, Chambéry, Colombes, Marseille, Montigny le Bretonneux, Paris, Saint-Étienne, Toulon and Valence
- | Ireland – Cork and Dublin
- | Netherlands – Amersfoort, Amsterdam, The Hague, Eindhoven, Groningen, Heerlen, Maastricht, Roermond and Rotterdam
- | Norway – Bergen, Drammen, Kristiansand, Lillestrøm, Oslo and Stavanger
- | Sweden – Falun, Gävle, Göteborg, Helsingborg, Malmö, Örebro, Stockholm, Uppsala and Västerås
- | UK – Glasgow, Leeds, Liverpool, London, Manchester and Sheffield

Figure 16: Strategic locations



Environmental footprint

Q-Park aims to reduce its environmental footprint for all its operations. We express our environmental impact in terms of CO₂ emissions per parking space in owned and long-leased facilities.

We manage our environmental impact by reducing energy consumption and by introducing energy-saving technology such as LED lighting with smart switching controls in our parking facilities.

Our lighting systems switch to brighter lighting when movement of cars or pedestrians is detected. In addition, when no cars are present in part of the car park, lighting is automatically dimmed to emergency levels.

We also take simple operational measures to increase the efficiency of our parking facilities. For example, in quiet periods, we temporarily close off parking decks until the number of available spaces on the decks in use

reach a certain minimum. We can do this simply by placing traffic cones in the entrance.

Emissions

Q-Park wants to contribute to lowering CO₂ emissions of other harmful substances, and to reducing particulate matter. Reducing emissions contributes to the general quality of life, and that in urban areas in particular.

Results

At Q-Park, in 2018 we again reduced our carbon footprint per parking space in owned and long-leased parking facilities by 21% compared to 2017. This considerable reduction can be attributed to our LED programme and operational measures designed to increase overall efficiency.

Note

The carbon intensity of EU electricity production decreases every year due to the increased role of renewable electricity and increased transformation efficiencies. Of the countries in which Q-Park operates

Figure 17: Simple operational measures to increase energy efficiency - a traffic cone



we see an impressive decrease of carbon intensity in electricity production in the UK, France, Denmark, Norway and Finland. So where as the average decrease of kWh usage per owned and long-leased parking space is 12%, the average carbon footprint reduction is 21%.

The increase of direct energy consumption and Scope 1 emissions is mainly due to an increase in kilometres driven by car in the UK, France and Denmark.

Chart 7: Greenhouse gas emissions (GHG) in tons CO₂

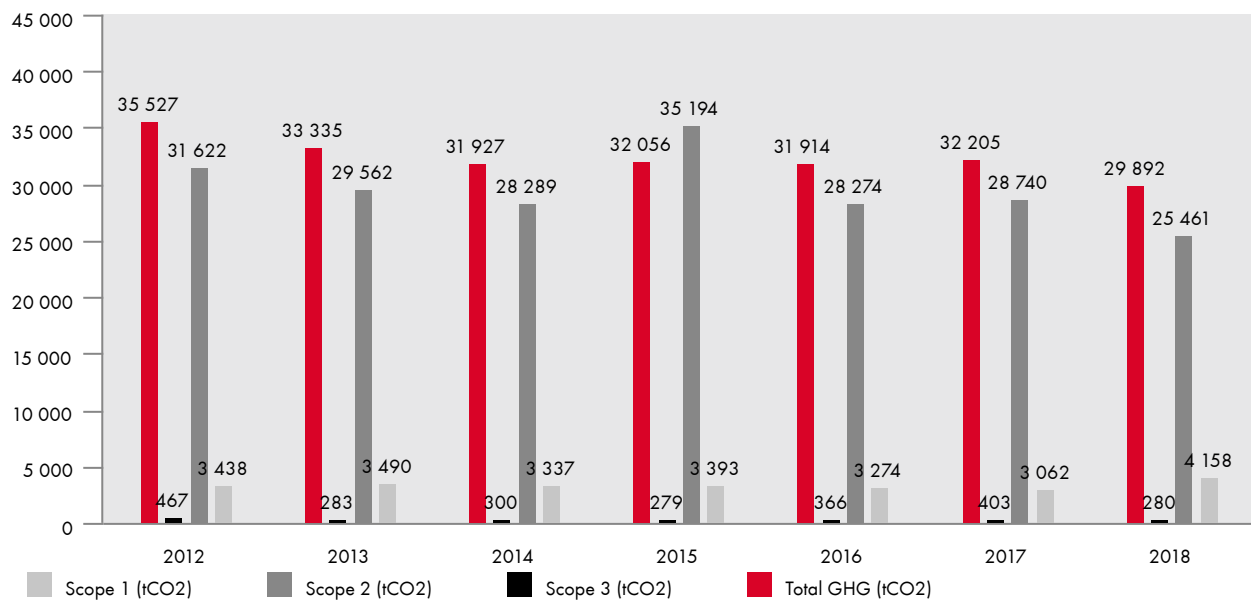
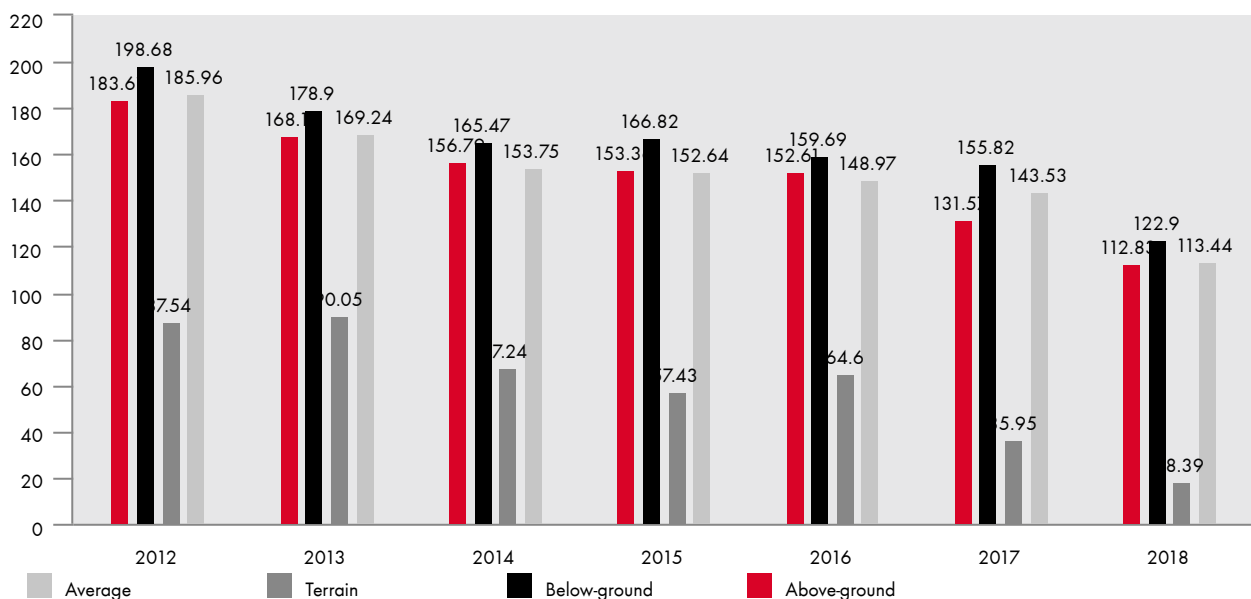


Chart 8: Carbon footprint (kg) per parking space per type of structure



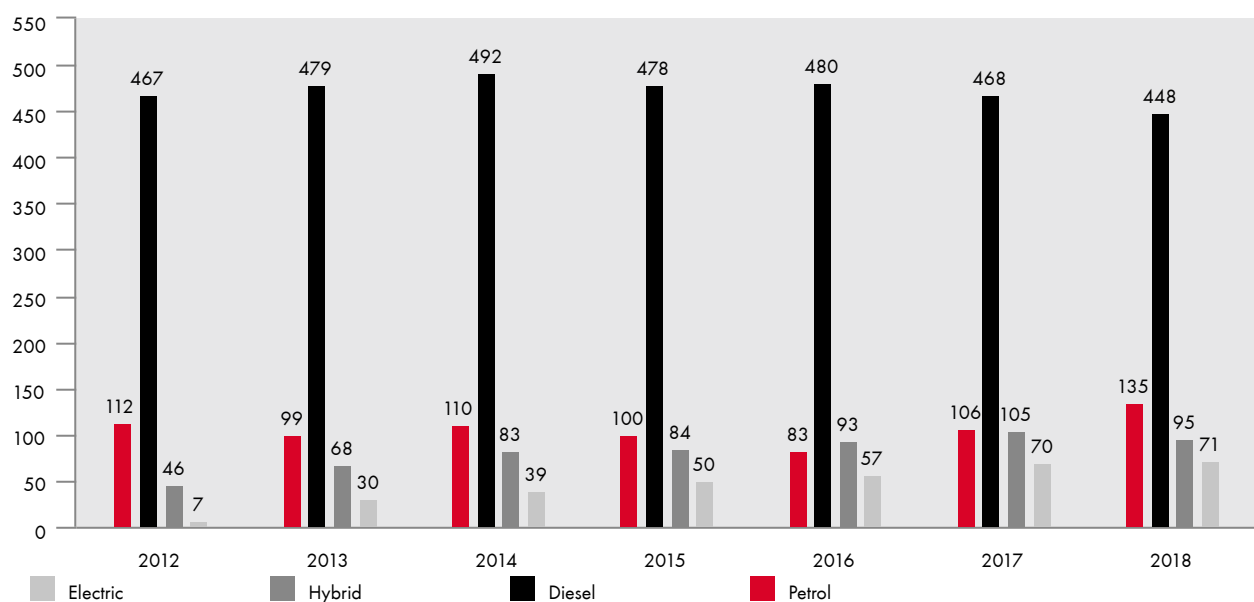
Our car fleet

We endeavour to take specific measures to reduce the negative impact that our own operating activities have on the environment. Our car fleet is slowly changing as we replace diesel cars at the end of their useful life span. In the coming year, as lease car contracts expire, we expect a considerable reduction in the number of petrol cars in our fleet as well.

Results

In 2018 we reduced the number of diesel cars in our fleet by 20 and increased the number of all electric cars by one, so we now have 71 e-cars.

Chart 9: Car fleet



Energy efficiency

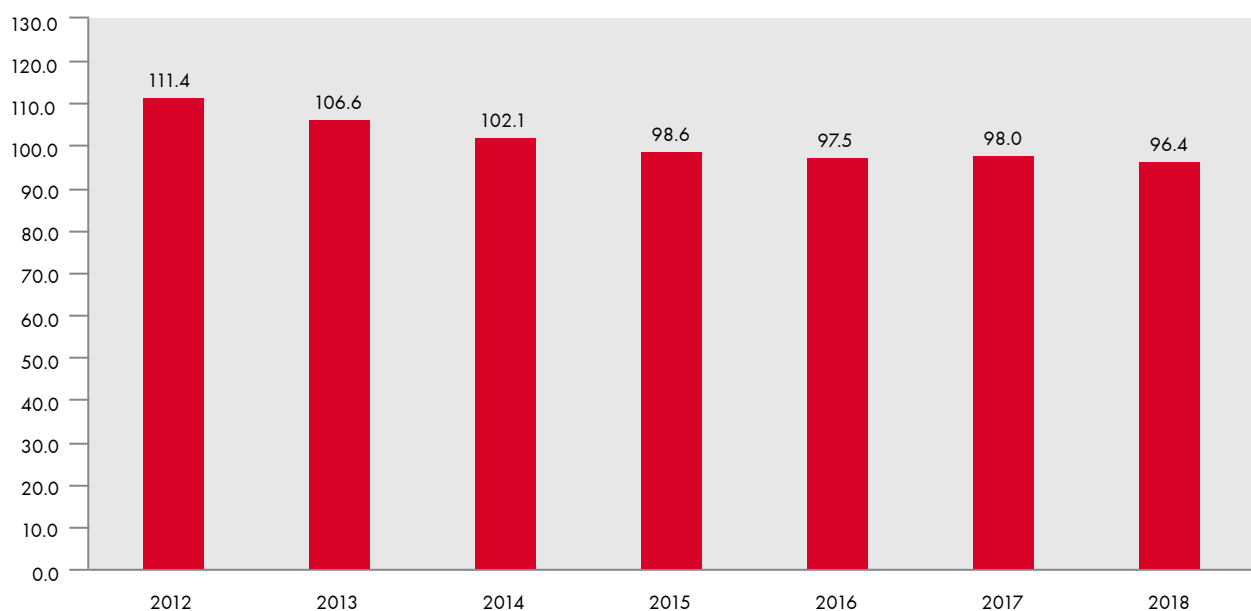
Q-Park is a large consumer of electricity, both for lighting and operational equipment, as well as for charging electric cars. We have an energy-saving programme in place to implement measures for reducing energy consumption.

The Q-Park energy-saving programme is demonstrating clear benefits – in financial terms as well as in our environmental impact. We procure our energy on a larger scale by means of a central purchasing policy and have operational action plans to consume fewer kWh ourselves.

Results

In 2018 the total amount of energy, measured in GWh, that we consumed in our owned and long-leased parking facilities decreased by 2%.

Chart 10: Total GWh consumed by owned and long-leased parking facilities



LED transformation project

In 2018 Q-Park gave impetus to its LED transformation project to accelerate the transformation to energy efficient LED lighting in parking facilities. It's thought to be the largest project of its kind in Europe.

To ensure that its parking facilities take full advantage of the latest energy-saving technologies, Q-Park is partnering with Future Energy Solutions (FES) to install state-of-the-art LED lighting in its parking facilities.

The project is being simultaneously rolled out across the Netherlands (72 sites), Germany (32 sites), France (50 sites), Belgium (22 sites), United Kingdom (47 sites), Ireland (10 sites) and Denmark (15 sites). This ambitious project will be complete by December 2019, bringing forward the considerable savings.

The huge investment, exceeding EUR 15 million, going into this LED transformation project will add more than 260 locations to the ± 100 parking facilities already fitted with energy-saving lighting in the period 2013–2016.

Because of the scale of this project, Q-Park can specify criteria light fittings and every single LED. This ranges from manufacturing, installation and maintenance. We require durable, consistent quality lighting with a long warranty of at least 10 years on every lighting product we use. We have specified differing lighting levels for different purposes in the various areas within a parking facility.

We have specified our lighting requirements to meet or exceed statutory requirements as follows:

- | 85 lux - parking spaces, driving aisles
- | 100 lux - staircases, lift lobbies, toilets
- | 200 lux - parking equipment areas
- | 300 lux - payment areas
- | 75 lux (night time) and 300 lux (day time) - transition light at car access and exit areas to allow motorists time to adjust their eyes to differences in light levels
- | Kelvin light colour temperature - 4,000K

The project will be completed by December 2019, bringing forward the benefits and savings.

Figure 18: LED transformation project - infographic

LED lighting

A responsible investment.

20%

Energy cost reduction

7,200

Tons CO₂ reduction

€2.7 million

Saving every year

€15 million

CAPEX investment



20GWh

Energy reduction

7

Countries

260

Q-Park locations

100,000+

Light fittings



Win-Win for all

By the end of 2019, a significant proportion of the purpose-built parking facilities in our portfolio will consume less energy compared to 2018. In this way, we contribute to the aims of the Paris Agreement, which set ambitious targets for reductions in carbon emissions.

Results

Energy consumption is expected to drop by more than 20%, equivalent to more than EUR 2.7 million, accompanied by a carbon footprint reduction of more than 7,200 tonnes of CO₂ per year. These savings are cumulative, so by 2025 Q-Park will have saved more than 140 GWh of electricity, equivalent to more than 50,000 tonnes of CO₂.

In addition to more than 65% energy savings using LED lighting, installing smart lighting controls will contribute to an extra 10% energy reduction. This project means a major financial and environmental benefit for current and future Q-Park stakeholders and portfolio partners: Project developers and Public & Private Landlords.

Due to its scale, Q-Park has negotiated a 40% reduction on cost per light product. By December 2019, the lighting experience at 260 parking facilities will have been transformed with more than 100,000 installed LED luminaries.

[!\[\]\(4fe57c3593bf1b21d272ae7ac8dfaf77_img.jpg\) Click here for our LED Showcase.](#)

Figure 19: LED transformation project - transitional light at car access and exit points



Parking products

Short-term parking

We serve about 1,000,000 customers every day and most of them just take a parking ticket or use their bank card to access and exit our parking facilities.

Most customers visit us between 2 to 4 times a month which makes it very convenient to just be able to make use of our services without having to register or log in. They can just come and go as they please, knowing that their car will be parked safely near a location where they want to be.

Customers hardly ever plan their trip when going shopping or visiting friends as they know that we have parking spaces available for them. But if they have tickets for the theatre or a concert and they know it will be busy in the car park, then they may want to plan and pre-book a parking space.

For customers who want to plan, or who know exactly where they want to go, our country websites provide pre-booking services and detailed information for navigation purposes. Per car park the website also includes details of onsite services, such as where they can charge an e-car and what the parking tariff structure is so customers can make an informed decision of where to park.

Results

Of our total parking revenue about 75%, EUR 593.6 million, is generated from short-term parking.

Figure 20: Short-term parking offers flexibility and freedom of mobility



Season tickets

We offer a wide variety of season ticket options for our customers who park with us frequently and are looking for a more economic and convenient parking solution.

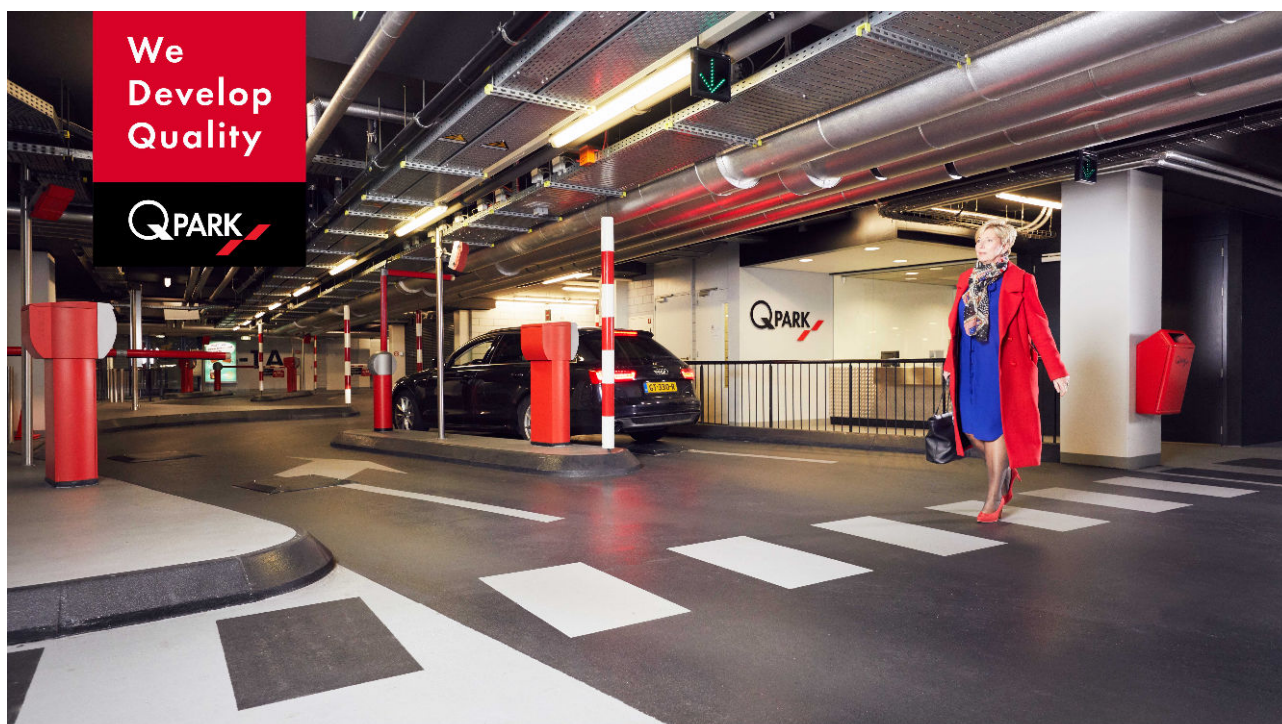
- | Residents may want a Nights + Weekend product.
- | Employees may want an Office solution, for five days a week from 7:00 til 18:00.
- | Those working in retail may be better served with a 6x24 hour season ticket.

We have season tickets available for a month if customers need flexibility or for a longer period of time for customers who are looking for a better price.

Results

Of our total parking revenue about 25%, EUR 194.3 million, is generated from season ticket sales.

Figure 21: Season tickets offer an economic solution for frequent customers



Pre-booking

We offer pre-booking services for our customers via our own sales channels, the country websites.

We also offer pre-booking services for the customers of our commercial partners via their sales channels. By means of APIs we offer integrated solutions for our partners and their customers to combine pre-planned activities. Consider, for example:

- I Booking theatre tickets and an evening parking ticket in one smooth flow;
- I Or booking your holiday and a few days or weeks parking at an airport.

The number of pre-booking transactions grows year on year as well as the number of commercial partners who seek to connect and integrate with our seamless planning-paying-parking solutions.

Results

We have 385 parking facilities offering pre-booking services online.

Figure 22: Pre-booking services online

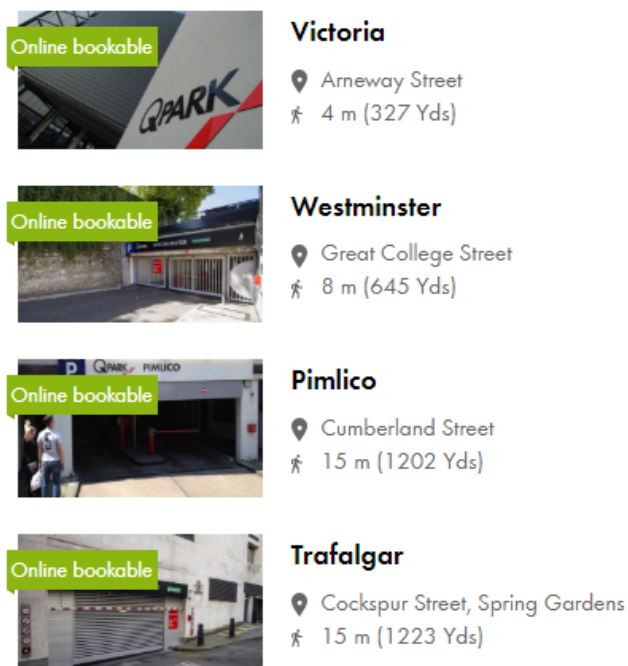


Figure 23: Pre-booking services for seamless planning-paying-parking partner solutions



VALUE SHARING



Parking information

Q-Park aims to provide as much information as possible about its parking facilities to visitors at the location itself and in advance through country specific websites.

We have created a useful place for all this information in our recently renewed back-office systems which feeds the country websites. Besides mentioning popular destinations nearby, the information presented includes:

- I number of parking spaces, including those for blue badge holders
- I drive through height
- I number of e-charging stations
- I parking tariffs and options for pre-booking and season tickets
- I services provided, such as AED, family parking, and toilets

Figure 24: Information about our services online

Services

Disabled	Electric charging point
Car wash	AED
Bicycle parking	Free buggy hire
CCTV in operation	Lift
Information	Jump leads
Motorcycle parking	Shoe polisher
Toilet	Free umbrella hire

Wherever possible, we locate our inner-city parking facilities within easy walking distance of points of interest (POIs). And we indicate this distance to attractions in the information about a parking facility on our websites and in our parking apps.

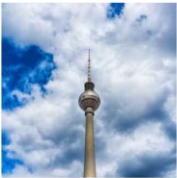
Figure 25: Walking distance to attractions shown online

Results
1,861 parking facilities provide the most sought after information by our customers, and more, online.

Attractions



ATTRACTIONS
Gendarmenmarkt
404 m to Unter den...



ATTRACTIONS
Berlin TV tower
1.05 km to Unter d...



ATTRACTIONS
Checkpoint Charlie
1.11 km to Unter d...



SIGHTS
Brandenburg Gate
1.19 km to Unter d...



ATTRACTIONS
Reichstag building



Points Of Interest (POIs)

Identifying and listing points of interest (POIs) in the vicinity of a parking facility is not an easy task but it is something we at Q-Park do diligently.

Organisations responsible for a POI, local tourism or an event can help visitors by registering with partners in the travel chain such as Q-Park, who then add the POI to the information provided per parking facility.

In addition, we have integrated smart and intuitive search engine functionality in our websites and we also indicate how long the walk is to the final destination. And many POIs offer a reciprocal service by including a link to our parking facility and pre-booking services on their site.

Results

In 2018 we listed 1,333 POIs which are near to our parking facilities. The online information includes walking distance, parking tariff, navigation information et cetera, enabling motorists to make an informed decision of where to park.

Except for France, all countries have listed relevant POIs in our back-office systems. We will follow-up in 2019 and continue to add POIs easily accessible from our car parks and thus contribute to further decreasing the amount of traffic searching for place to park.

Figure 26: POIs near our parking facilities identified



CSR car options

E-charging

Electric vehicles (EVs) have become part of the cityscape – they are here to stay for the foreseeable future. EVs need to park just like petrol and diesel fuelled cars do. The difference is that motorists want to recharge their car's batteries while parking.

The EV not only occupies a parking space, but it may hog an e-charging point even when it's fully charged. And this poses societal dilemmas.

Societal debate on e-charging behaviour

The charging behaviour of electric vehicle motorists was a subject of societal debate in 2018. One major source of irritation is charge-point 'hogging': when cars that are fully charged block charging stations for hours. The Dutch Association for Electrical Vehicle Drivers (VER) and some major energy companies think the problem can be solved by imposing an extra charge for people who 'hog' charging stations.

A survey by PitPoint Clean Fuels and two Dutch academic institutions indicated that people would move their cars if they had to pay more once the battery was fully charged. The counter-argument is that when customers park and charge their e-car to visit a theatre or a restaurant they are unlikely to interrupt the evening to move their car when it's fully charged and would accept the 'fine' as part of the costs of their evening.

The number and complexity of contracts between charging point suppliers, energy companies and e-charge providers in Europe also impede transparency, which is a precondition for introducing any extra costs for customers.

Q-Park e-charging service dilemmas

We also have paying guests who park their petrol or diesel car on a reserved charge-point parking space - we are experimenting with measures, social or otherwise, to nudge our customers to park their car at the right space.

Our service is all about 'no worries' after parking your car. We don't want our paying guests to come back, just to re-park their car.

The service of EV-charge providers conflicts with ours. We are talking with all parties concerned to come up with a holistic solution.

Smart charging outside peak times

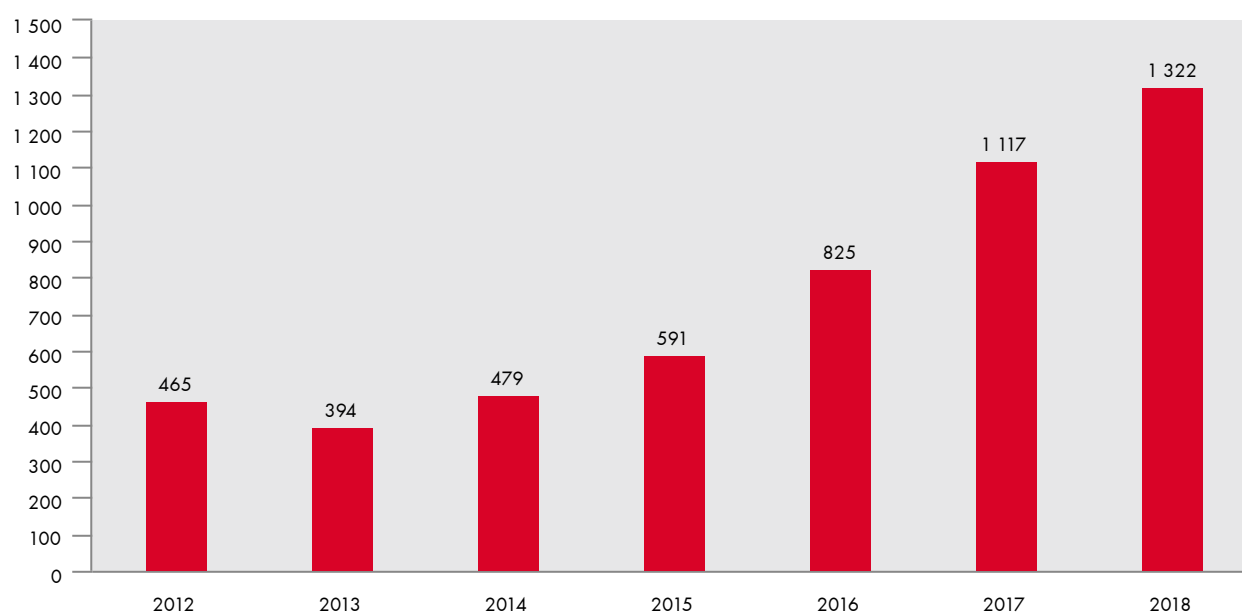
The timing of e-charging is another issue on the minds of local authorities. A survey into the charging habits of e-motorists indicated that the numbers of people charging their e-vehicles at the same time (usually between 18:00 and 22:00) could overload the power grid and reduce the beneficial environmental impact of electric vehicles.

Since the potential growth of e-vehicle numbers will only intensify this problem, Gelderland and Overijssel want to install 4,500 smart charging stations in 44 municipalities to make it more attractive and convenient for motorists to charge their cars outside peak times.

Results

In 2018, Q-Park had 1,322 parking spaces reserved for e-charging in more than 220 parking facilities, an increase of 18%.

Chart 11: E-charging stations



Car sharing

As municipalities increasingly impose measures to nudge people towards lower car use in city centres, it is logical that more people are embracing car sharing as part of the wider trend towards the sharing economy.

People who live in large cities have less need for a car, particularly when there are sufficient alternatives such as good public transport or cycling routes. The actual number of shared cars is still low compared to the total number of cars on the road. Current forecasts, for example from Shared Mobility News, predict continued market growth for both shared fleets as well as people subscribed to one or more car sharing schemes.

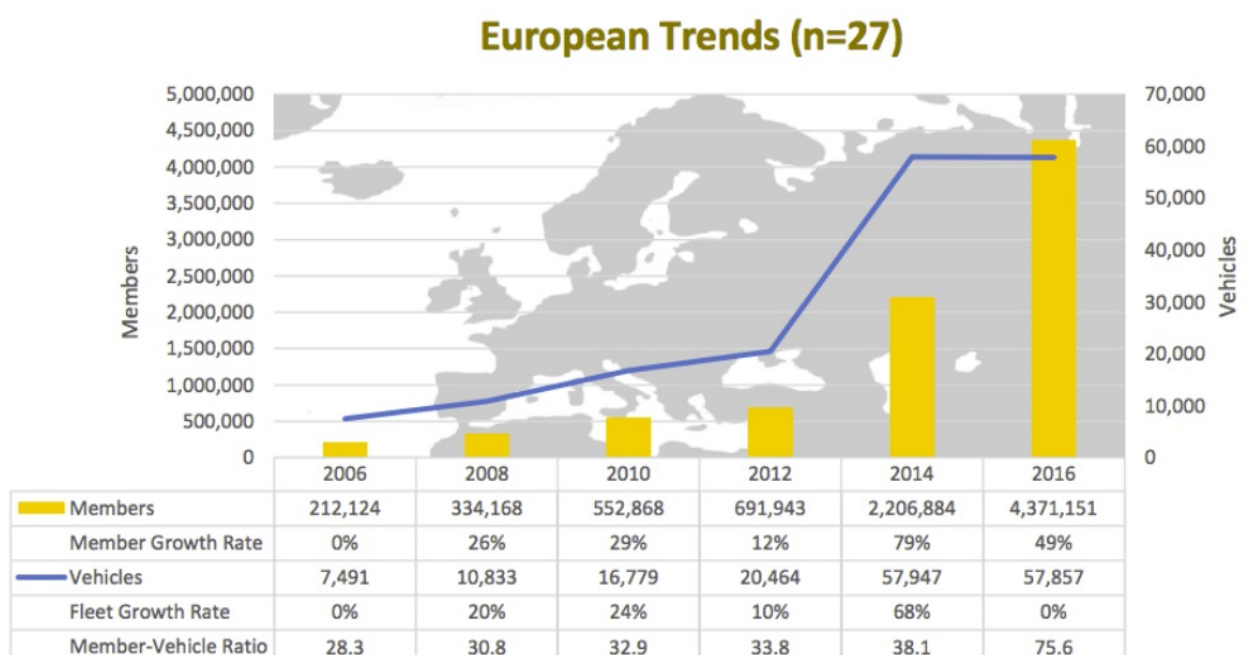
And according to research firm Frost & Sullivan, the number of people using car sharing services is expected to increase almost threefold from roughly 7 million members and some 112,000 vehicles in 2015 to almost approximately 36 million members and some 427,000 vehicles by 2025.

As a strong supporter of initiatives to support sustainable mobility, Q-Park already focuses on making parking spaces available to car sharing service providers and their customers.

Results

In 2018, there were 36 owned and long-leased parking facilities offering spaces to car sharing schemes.

Figure 27: European trends on car sharing (source: Shared Mobility)



Digital services

Cashless and contactless payments

Naturally, on accessing the car park, a motorist can still take a traditional paper ticket and pay by cash or card at a Pay-On-Foot (POF) machine before driving to the exit, but cashless and contactless payments continue to gain in popularity.

Making life easier for customers and operators

In response to changes in customer needs and behaviour, digital and payment trends, and the evolution of smart cities, we are constantly developing our parking management systems and our operational processes. We have offered various cashless and contactless payment options at all our parking facilities since 2016.

Value for customers

Cashless and contactless payments enable motorists to access and exit a parking facility using their payment card, just as they would pay for their groceries. This contemporary way of paying for parking enhances the customer experience and at the same time makes our payment transaction systems future proof.

Card payments are on the increase and many people don't even carry cash any more. Our customers clearly like paying by card.

Top four advantages for the customer:

- I Customers can access and exit the car park using their debit or credit card or partner loyalty card, or smartphone
- I Customers save time as they don't have to go to the Pay-On-Foot machine
- I No paper ticket to lose
- I No need to carry change

Value for operators

Cashless and paperless parking transactions make parking facilities safer and cheaper to run for operators and landlords. Even though the payments services provider charges a fee per transaction, there is no need to empty cash from the machine, deposit cash at the bank or purchase change. In addition, there is less wear and tear on the machines, less vandalism and less temptation for fraud as with cash.

Top four advantages for the operators and landlords:

- I All payment options open
- I Safer – less cash at the car park
- I Fewer breakdowns and reduced maintenance costs for parking management systems
- I Card payments are cheaper than cash

All these developments reduce the total investment and cost of ownership of the parking management system, making a cashless and contactless barrier system even viable in smaller car parks. Some car parks are even 'cashless only'.

Validation

We offer a number of schemes to assist our purpose partners. We call this validation – it means that our partners can reimburse their customers for all or part of their parking fee. This may be in the form of a free exit ticket or specific time or value reduction on a parking transaction. For example:

- I First hour for free when spending EUR 20 or more at a grocery store;
- I EUR 2 discount when spending EUR 20 or more at a fashion store.

Q-Park UK has launched a loyalty programme in conjunction with purpose partners.

Q-Park customers can easily earn benefits using the Q-Park Rewards app. Customers register their bank card in the app and use that card to pay for parking at Q-Park or one of the many high-street retail partners. Q-Park tracks the payment and gives the customer rewards and benefits based on the amount spent on parking.

Results

In 2018 we developed the Parking as a Smart Service (PaSS) platform. This will enable us to launch even more digital enabled value propositions (planning, payment, parking) to public and private landlords, and to commercial partners.

Figure 29: Parking as a Smart Service platform



Figure 28: Cashless and contactless payments



VALUE RETENTION



Programmes

Compliance

We aim to comply with national and European laws and regulations regarding our industry. Our risk management policy states that we are averse to the risk of non-compliance with relevant laws or regulations, and to non-compliance with our own codes, contractual agreements, and covenants.

In 2018 we initiated a Compliance Programme to analyse our risks and to improve our risk management mechanisms throughout the organisation.

We mapped our compliance areas in a risk matrix and defined improvement actions related to our high priority compliance areas. We defined GDPR (EU General Data Protection Regulation), PCI DSS (Payment Card Industry Data Security Standard), ethics and integrity as high priority areas.

GDPR

Our GDPR team, consisting of Q-Park country and corporate privacy officers with external support, had the necessary procedures in place in all Q-Park countries in time for 25 May 2018, the date GDPR came into force.

Although GDPR has transitioned from a project to the operational phase, this area requires ongoing attention to ensure compliance with:

- | data retention periods and clean systems
- | data processor agreements at corporate and country level

In addition, we will continue our awareness and training programme regarding information security policies and guidelines.

Figure 30: Map of compliance areas



PCI DSS

PCI DSS is the worldwide Payment Card Industry Data Security Standard that was set up to help businesses process card payments securely and reduce card fraud. Compliance with the standard is required from all organisations that handle branded credit cards from Visa, Mastercard and AMEX. PCI DSS is intended to protect sensitive cardholder data. Validation of compliance is performed annually.

Figure 31: PCI DSS compliant



Organisations that store and process credit card information must comply with PCI DSS guidelines, regardless of the size of the organisation and regardless of the number of transactions. The guidelines are widely set up and include detailed measures at both business and ICT levels. Policies, procedures and technical measures are all part of the package.

PCI DSS distinguishes between transactions (expressed in levels). The greater the number of transactions an organisation processes annually, the higher the level and the stricter the measures. These may vary from fines per incident to termination of the contract.

As cashless payments at parking facilities continue to increase, Q-Park relies considerably on card transactions. Compliance to these standards are therefore critical to our operations.

Ethics and integrity

As a provider of high-calibre parking services, Q-Park considers compliance to high ethical and integrity standards very important.

In 2018, the Compliance Programme team prepared an ethics and integrity project plan which includes a statement of the project objectives, approach and deliverables - including the Q-Park Integrity Policy. In the coming year the team will continue its work, culminating in a training and awareness programme to raise awareness of the importance of this compliance area and to make improvement actions sustainable.

[Click here for our Integrity Policy](#)

Results

- I We developed a strategic Compliance Programme to analyse our risks and to improve our risk management mechanisms throughout the organisation.
- I For GDPR, all necessary procedures in place in all Q-Park countries in time for 25 May 2018.
- I Validation of compliance with PCI DSS.
- I Q-Park Integrity Policy developed and published.

Employee training

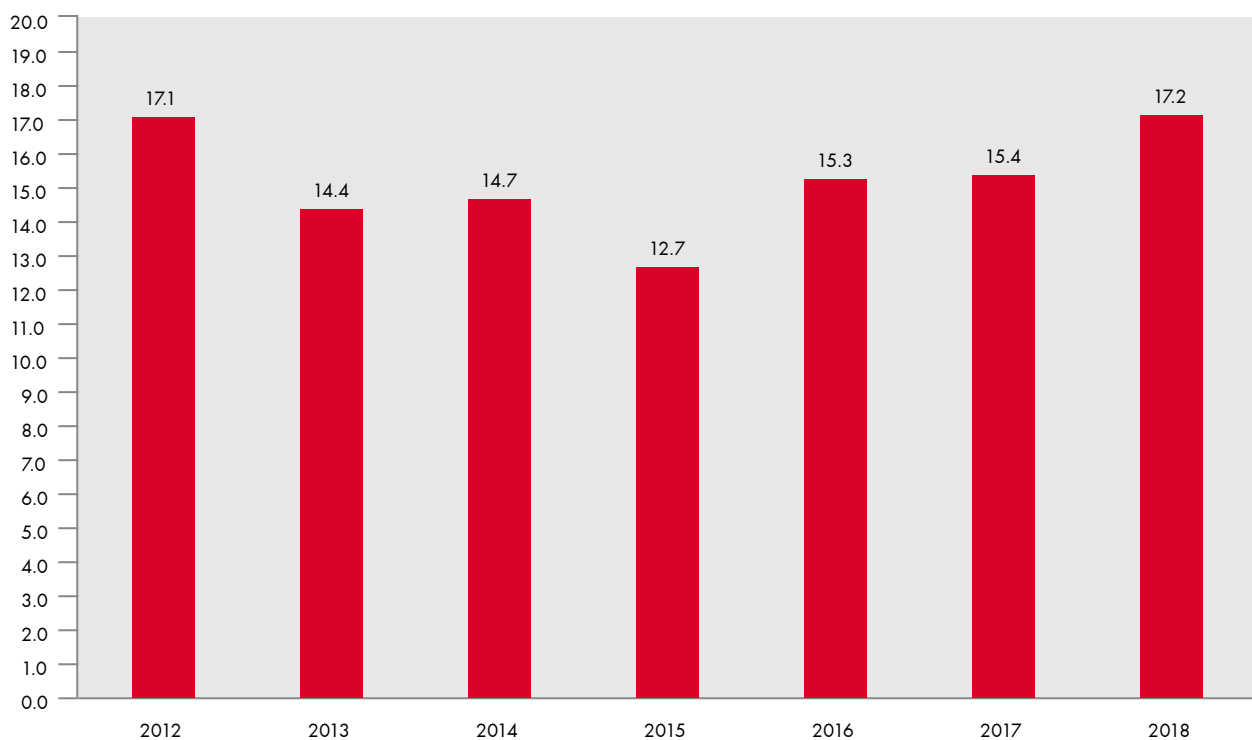
We value our employees and want them to be confident about the various elements of their work. To assist this, we aim to give our employees regular training and professional development opportunities.

In our materiality analysis, we found that anti-corruption was seen as material by our stakeholders. This year, there were no confirmed incidents of corruption. However, we will keep measuring this and include an anti-corruption training in the general training package for employees.

Results

Across all countries, including head office in the Netherlands, employees in managerial and non-managerial positions receive an average of 17.2 hours training each year.

Chart 12: Employee average training hours



Health & Safety

Our aim is to increase our employees' engagement as well as contribute to their health and safety.

Q-Park has 2,378 employees (2,146 FTEs). The majority of these people work in or near our parking facilities as Parking Hosts. Our social relevance for operational employees is considerable. Together with the retail and cleaning sectors, we are committed to helping people who like to take a practical approach. We are a binding factor; we offer varied work and a certain status, so all colleagues feel appreciated.

Q-Park promotes the health and safety of customers and employees. We achieve this mainly by training our employees and equipping them for their work, and by creating a safe and healthy working environment. We also offer our employees the opportunity to learn lifesaving skills so that they can help someone both at home and at work.

Every year, we receive millions of visitors in our parking facilities at all hours of the day. Unfortunately, it is inevitable that our employees will encounter aggressive or inappropriate behaviour. We offer Parking Hosts conflict management training so they can learn to deal with such situations.

Results

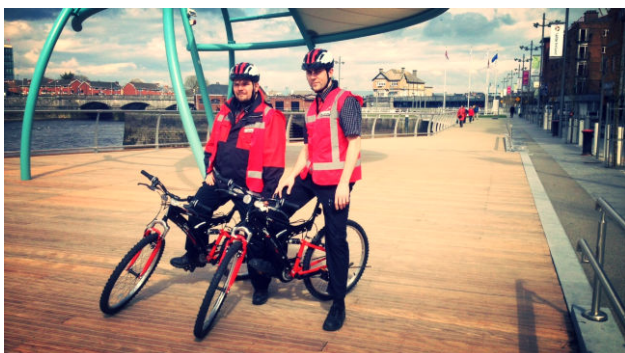
Health

- | Training to learn how to use an AED, a skill most appreciated around family and friends
- | Active mobility teams who can be dispatched by QCR at a moment's notice
- | Climate control and over pressure in the Parking Hosts' lodge to limit car fumes in work area

Safety

- | Less cash in our parking facilities, we proactively encourage cashless payments
- | Conflict management training to learn how to deal with aggression
- | CCTV monitoring and footage is available

Figure 32: Active mobility teams



Co-creation

We aim to retain value through co-creation.



We work together with parking payment service providers (PPSPs) such as EasyPark and Yellowbrick who want to combine their on-street parking and payment solutions with off-street parking for their customers.

This partnership enables customers to:

- I park in our facilities with the PPSP card of their choice;
- I receive a convenient overview of all their parking transactions;
- I pay immediately or make a single payment at the end of the month.

In the Netherlands, Q-Park has a co-creation solution with the NS, the national railway operator. Q-Park manages the Park+Ride car parks at train stations and enables NS Business Card holders to use their public transport card for parking as well.

We co-create with municipalities and public and private landlords to provide underground bicycle parking, infrastructure solutions, green spaces as well as routes for pedestrians and cyclists above ground.

Figure 33: Co-creation with NS Business Card

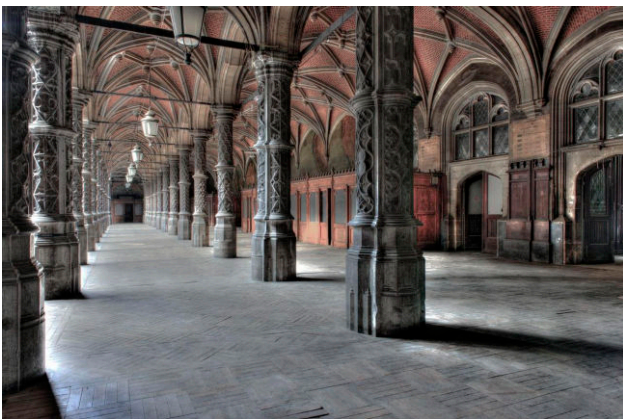


We also endeavour to create aesthetically pleasing interiors and exteriors to our structures either as an artistic statement or to blend in with the surroundings. In many of our inner-city projects, such as Deansgate North in Manchester and Handelsbeurs in Antwerp, we have retained the architectural heritage.

Figure 34: Architectural heritage - Deansgate North



Figure 35: Architectural heritage- Handelsbeurs



Results

From 2019 onwards we intend to start listing value retaining co-creation partnerships, for example on:

- | third party parking and payment enablers;
- | sustainable transport enablers;
- | public transport enablers;
- | public-private partnerships.

Expertise

We aim to retain value by sharing our expertise. We do this with the We Develop Quality (WDQ) campaign, the Annual Q-Park Thesis Award, Thought Leader events, and by participating in industry platforms such as:

- | Danish Parking Association
- | Norwegian Parking Association, and Parking Complaint Team
- | Board member at Vexpan, Stichting Maatschappelijke Projecten Maastricht
- | Member of Communication Partners
- | Member of GBN platform (grote bedrijven netwerk - MVO nederland)
- | CROW, (Dutch technology platform for transport, infrastructure and public space)
- | EPA (the European Parking Association)

We Develop Quality

We launched the WDQ campaign in 2018 to share our expertise of car park design and knowledge of the role of parking in making cities more liveable. In this campaign Q-Park ambassadors are encouraged to read and share the articles with their network.

 [Click here for the expert articles.](#)

The **We Develop Quality** goals are twofold, to:

- | Improve top-of-mind awareness of Q-Park's expertise, products and services among public and private landlords
- | Strengthen the organisation

The articles cover a wide range of topics and form an invaluable knowledge resource in the expertise centre as part of the corporate website.

In total, 32 articles were published under the headings:

- | Customer focus
 - | Parking facility design
 - | Operations
 - | Digital solutions
- | Urban mobility
 - | Mobility hubs
 - | Social responsibility
 - | Parking tariffs
- | Expertise & Passion
 - | Future of parking
 - | Above & beyond
 - | Eco systems

Using the social sharing tool 'Social Seeder', the articles were first shared among Q-Park ambassadors who were encouraged to share the articles in their own networks in the social media channels of their choice.

Results

As the year progressed the campaign gained 116 unique Q-Park ambassadors who shared articles in their networks, culminating in an estimated interaction with our target audiences of more than 116,000.

OTHER INFORMATION

**We
Develop
Quality**

**More information &
Performance indicators**

