

CSR REPORT 2018



**We
Develop
Quality**

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

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.

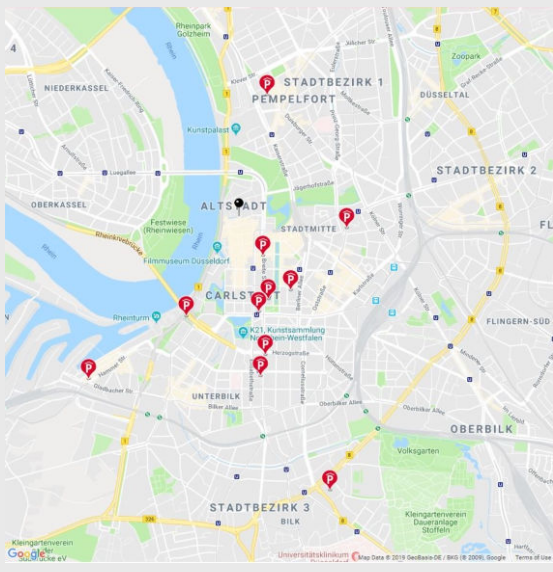
By engaging municipalities in dialogue on these matters, we want to use our expertise to make a contribution to the accessibility and sustainability of cities. We actively seek collaboration with local governments, so that regulated and paid parking become an integral part of urban mobility.

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

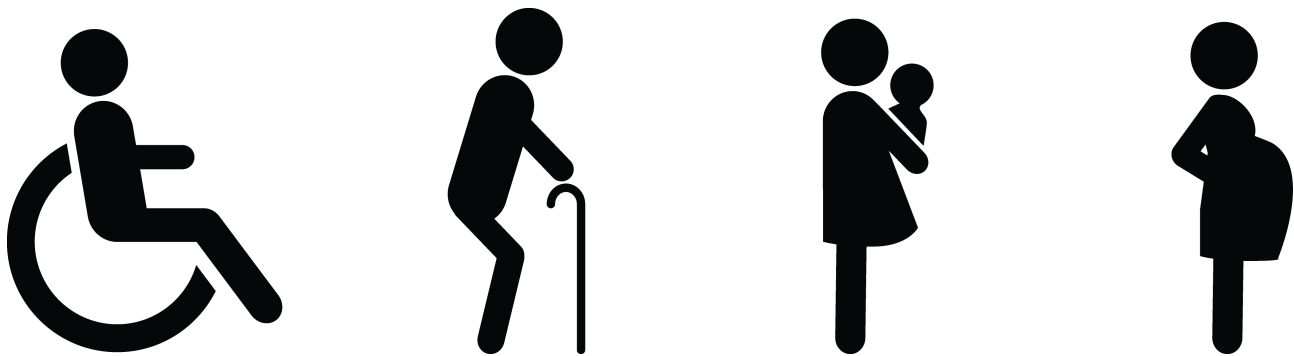
In 2018, Q-Park had a total of 63 parking facilities dedicated to serving hospital parking needs.

[!\[\]\(b64b40baaee5acddc1eab8538ba84754_img.jpg\) Click for nine specialist tips on hospital parking.](#)

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

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



- 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

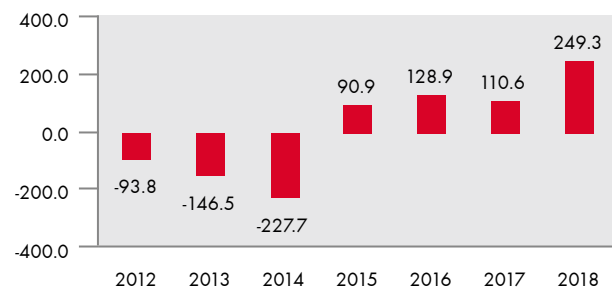
In 2018, Q-Park continued to perform well financially. All major financial indicators show an improvement.

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.