
CONTENTS

ABOUT Q-PARK	4
Review of business	4
Profile	6
Quality in parking	7
Notable projects in 2018	8
Future outlook	14
STRATEGY	16
Sustainable development goals	16
How we create value	18
Materiality analysis	19
CSR strategy	20
RESULTS	23
Performance highlights	23
Value Creation	25
Value Capturing	36
Value Sharing	47
Value Retention	54
OTHER INFORMATION	63
Supply chain	64
Governance, policies and codes	65
Risk management	66
What we can do better	73
OVERVIEWS	74
GRI Content Index	74
Stakeholders	80
GLOSSARY	84

Expertise

We aim to retain value by sharing our expertise. We do this with our We Develop Quality (WDQ) campaign, Annual Q-Park Thesis Award & Thought Leader events, and our contribution to parking industry bodies.

We participate in the following industry platforms:

- | Danish Parking Association
- | Norwegian Parking Association, and Parking Complaint Team
- | Board member at Vexpan, and Stichting Maatschappelijke Projecten Maastricht
- | Member of Communication Partners
- | Member of GBN platform
- | CROW
- | EPA

We Develop Quality

In 2019 we continued publishing articles under the WDQ campaign umbrella. These articles are designed 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 expertise 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 2019 we published 15 articles. Various topics were aired including:

- | LED lighting transformation
- | energy-neutral parking facility
- | e-charging dilemmas
- | various new parking facilities were also showcased

Using the social sharing tool 'Social Seeder', the articles are 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

In the second year of the campaign we now have 102 unique Q-Park ambassadors who share articles in their networks, culminating in an estimated interaction with our target audiences of more than 64,000.

Figure 30: WDQ results



Awards

The Q-Park Thesis Award & Thought Leadership event has become a recurring item in the Q-Park annual calendar.

In cooperation with the Erasmus University Rotterdam, Q-Park established the Q-Park Thesis Award in 2014 for the best master's thesis on parking and mobility written at a University in the Netherlands or Belgium.

When we established this award in 2014 our purpose was twofold: on the one hand we wanted to mark the retirement of our founder, Ward Vleugels. On the other, we sought to bridge the considerable gap between academic research on parking and practitioners in the parking sector.

As a parking operator, Q-Park has welcomed the rise in academic literature on parking but we also noted the knowledge mismatch between what professionals in the field actually need and what academics in universities have produced. Put simply, the two are driven by different goals.

In 2019, to mark the fifth anniversary of the Q-Park Thesis Award and to give an overview of the winning theses a book containing the abstracts of all the award winning theses in the period 2014–2018 was published.

The theses presented in the anniversary book show that the two worlds can converge to generate new knowledge which combines both academic rigour and new ideas for practitioners to tackle current and future challenges.

 [More about the thesis award lustrum book.](#)

Research

Customer satisfaction survey

Customer satisfaction Surveys (CSSs) are conducted in the countries in which we operate.

- I Q-Park Netherlands conducts CSSs on selected parking facilities. They report both an average



general opinion (AGO) as a net promoter score (NPS).

- | On average, the AGO was 7.5 which is similar to previous years.
- | On average, the NPS was -3 which shows an improvement compared to 2018 (-13).

Q-Park France conducts a CSS annually.

- | They gather feedback from season ticket holders, those pre-booking or paying for parking at the car park itself (short-term parking).
- | They solicit feedback on aspects of the parking facility, such as:
 - | lighting and other installations, smell, ease of access;
 - | signage, guidance, information, elevators;
 - | parking tariffs and payment options;
 - | sense of security.
- | Interesting facts to note:
 - | the overall rating in 2019 was slightly better than in 2018;
 - | the rating regarding light quality increased;
 - | short-term parking motorists have improved their rating regarding signage and guidance.

Q-Park Germany, Belgium and Denmark do not conduct CSS, they monitor Google Reviews*.

- | Q-Park Germany: of the 2,879 reviews, 59.8% provided a 4 or 5 star rating.
- | Q-Park Belgium:
 - | 584 Google Reviews were given on a total of 16 parking facilities, with a 3.31 average star rating;
 - | a customer interaction programme is planned for 2020.
- | Q-Park Denmark gets a lot of Google Reviews but is not analysing the results. They do take note of the overall tendencies and will start analysing the results in 2020.

Q-Park UK and Q-Park IE:

- | UK & IE Google Reviews combined; 4,363 reviews with a 3.83 average star rating;
- | UK pre-booking survey;
 - | 84.2% would use our pre-booking service again
 - | easy to use had a score of 8.55 on a 10-point scale
 - | satisfaction with the quality of the parking facility scored 8.38 on a 10 point scale
- | UK season ticket survey;
 - | overall satisfaction scored 8.06 on a 10-point scale
 - | satisfaction with the payment process scored 8.34 (10-point scale)
 - | satisfaction with the use season ticket scored 8.87 (10-point scale)
 - | satisfaction with the cleanliness of PFs scored 8.14 (10-point scale)

*Google Reviews as a customer feedback tool:

- | improves local search ranking and online exposure;
- | increases trust, credibility and provides essential feedback;
- | influences purchase decisions, improves click-through rates and converts more customers.

Google Review Star Rating

Customers are given the opportunity to leave a business review, which includes giving a score from one star (poor performance) to five stars (excellent service).

Digital strategy project

A digital strategy project was initiated to get an outside-in view on past digital transformation efforts and to develop a business case for a future digital road map.

We engaged strategy consultants EY-Parthenon to:

- | provide an independent opinion of our competitive position;
- | assess Q-Park's current innovation strategy against the backdrop of:
 - | future mobility
 - | shifts in customer behaviour
 - | ecosystem development (smart cities, digital players, etc.)
- | prioritise development of new functionality;
- | help formulate Q-Park's digital road map.

The customer survey conducted in our four biggest markets (the Netherlands, Germany, UK and France) confirmed that a digital customer journey and digital ecosystem for parking is emerging.

It confirmed that customer journeys differ significantly between leisure and business purposes, and between spontaneous trips, such as shopping and social visits, and planned trips such as business meetings, onward journeys by train or plane, or going to an event.

Some insights

Rates at which customers look up information prior to:

- | leisure city trip 22%, business city trip 39%;
- | leisure event 39%, business event 47%.

Customers select a parking facility based on:

- | proximity and easy to reach 58%;
- | price i 21%;
- | pre-booking 7%;
- | easy payment method 6%.

Proximity is still by far the key decisive criterion to select a specific parking facility, yet price and digital services including pre-booking and easy payment may persuade customers to change.

Q-Park's digital strategy should aim to provide:

- | relevant information (navigation, parking tariffs, capacity, e-charging stations, etc);
- | payment options as well as invoicing schemes;
- | choice in the customer journey;
- | easy interface between new business and new technology.

In addition, Q-Park will be innovating to leverage customer insights. Once customers have more choice and we know more about our customers, we will be able to refine commercial propositions and increase customer satisfaction.

Figure 31: Customer journey elements by EY-Parthenon

