
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

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. Locations we service include local government offices, hospitals, schools and universities, points of interest 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.

Figure 5: Economic access with P+R and P+W solutions



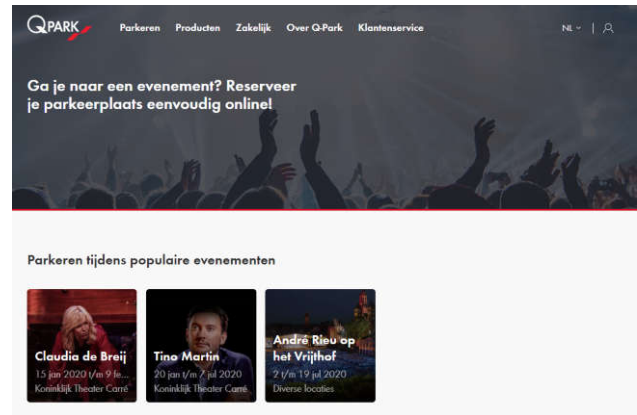
Even though municipalities throughout Europe are increasingly imposing restrictions on city centre access by cars, some access is required to be inclusive to all sections of society. Some visitors prefer to travel as close as possible to their final destination by car and are willing to pay for that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

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.

Towards the end of 2019, Q-Park Netherlands introduced Event Parking. Event organisers can include a link to the Q-Park Netherlands website event parking page where they can purchase parking for the theatre, concert or sports event they will be attending.

Figure 6: Q-Park NL - Event Parking



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 regulated and 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 car 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 in line with that of the hospital's own policy and procedures;
- | separate parking areas for staff and visitors.

Figure 7: Diagnosing parking needs for hospitals



Results

In 2019, Q-Park added one hospital parking facility in France to the hospital portfolio, bringing the total number of parking facilities dedicated to serving hospital parking needs to 52.

 Why free parking at hospitals is not a great idea.

 [Click for nine specialist tips on hospital parking.](#)

Mobility inclusion

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

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

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:

- | wide walkways that provide ample space for wheelchair users and people using walking aids such as a walking stick, crutches or a frame;
- | spaces for disabled motorists are always located close to the pedestrian exit to minimise walking distances;
- | threshold-free access from the pedestrian area to the parking deck;
- | wide doorways;
- | ramps with gentle incline and lifts suitable for wheelchairs and buggies;
- | safe handrails and protection under tapering constructions;
- | easy to read signage with sufficient colour contrast;
- | 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.

Figure 8: Inclusive mobility for PRMs



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

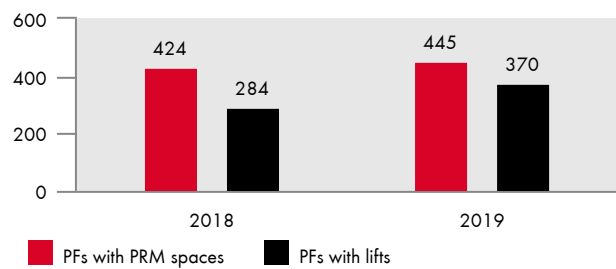
Results

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 back-office systems for display on the country websites per parking facility.

In 2019 we allocated more parking spaces in our owned and long-leased (O+LL) parking facilities (PFs) to people with reduced mobility and more of these PFs have lifts.

Chart 4: O+LL PFs providing access for PRMs



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.

Mobility hubs also feature:

- I **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.
- I **Lockers:** Customers can leave luggage and shopping while using amenities in the vicinity.
- I **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 increase accessibility and liveability include:

- I **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 to collect their goods on their way out.
- I **Refrigerated lockers:** for perishable goods. At some inner-city locations this service is used by restaurant suppliers to make early-morning deliveries, avoiding congestion.

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.

We also engage in talks with potential partners wanting to offer car sharing, e-bikes or car charging services.

Results

Our proximity to alternative mobility options has increased further, particularly in France. We now have 160 owned and long-leased Park+Ride (P+R) parking facilities (2018: 110). The number of PFs with bicycle parking has increased considerably, from 11 in 2018 to 94 in 2019.

Chart 5: Park+Ride and bicycle parking

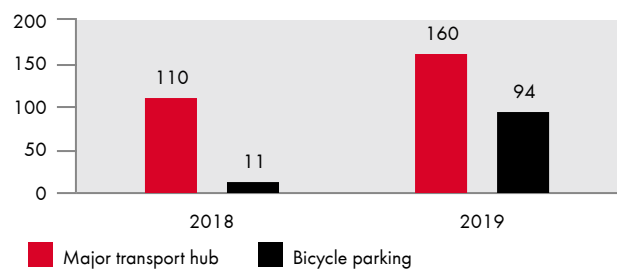


Figure 9: Mobility hubs with Lockers & Pickup points



Figure 10: Proximity to alternative mobility options

