

# WHO WE ARE

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## PROFILE & TIMELINE

Q-Park is a leading off-street parking infrastructure owner and operator with well-managed commercial parking facilities across seven western European countries. We operate off-street parking spaces we own, have under concession or with long-term lease contracts from public and private landlords. We focus on off-street purpose-built parking facilities at strategic locations.

We operate more than 3,600 parking facilities comprising over 706,000 parking spaces in the Netherlands, Germany, France, Belgium, United

Kingdom, Ireland and Denmark. Based on publicly available industry data for our competitors, we estimate that we are a top three player, based on the estimated off-street revenues, in all the countries in which we operate.

- I We are present in over 320 cities.
- I We provide a leading EV charging point offering with over 4,000 charging points.
- I We have a 25-year track record of consistent revenue growth with a strong rebound post-Covid.

### Q-Park market position

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Based on (estimated) off-street revenues.

We demonstrate that effective regulated and paid parking combined with smart tariff plans, pre-booking propositions, combined with digital access and payment services make an economic and sustainable contribution to cities and society, positively impacting how people enjoy their urban visit, journey, shopping, commute or residence.

We have consistently secured long-term contracts and built a portfolio of prime parking locations, including multifunctional<sup>1</sup> parking facilities near inner-city areas, public transport interchanges, airports and hospitals.

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## STRENGTHS & TRENDS

We distinguish ourselves from competition with our quality portfolio of predominantly owned and long-leased off-street parking facilities in prime western European city centre locations, with our local market leadership positions, with our proprietary digital platform PaSS (Parking as a Smart Service), with our value-added EV charging propositions, with the longevity of our cash flow and a scalable parking-infrastructure platform which has tangible growth opportunities across our core parking business.

Together with key parking and digital infrastructure features underpinning our business model and the continuing regulatory shift in favour of off-street parking, our business benefits from a high level of stable and recurring cash flows.

### Trends

We expect to benefit from the following key trends;

- | urbanisation - growing urban congestion driving the shift from on-street to off-street parking;
- | mobility mix - personal car ownership and private journeys continue to grow;
- | city as an experience - inner-city off-street parking ideally suited for longer stays;
- | liveability - shifting parking from on-street to off-street;
- | growth of paid parking - parking operators are important partners in creating accessible city centres;
- | digitalisation - off-street parking can offer smart digital solutions which customers want such as pre-booking, and
- | energy transition - off-street parking facilities are ideally suited to offer EV charging and energy management at scale.

### Strengths

We are well positioned to take advantage of these trends given our;

- | continued focus on off-street parking;
- | strategically located parking assets to capture continued demand;
- | highly-developed and mature PaSS platform providing a digital parking ecosystem and seamless customer services, and
- | EV charging programme which substantially increases the number of EV charging points in our owned and long-leased parking facilities.