

WHO WE ARE

VISION & MISSION



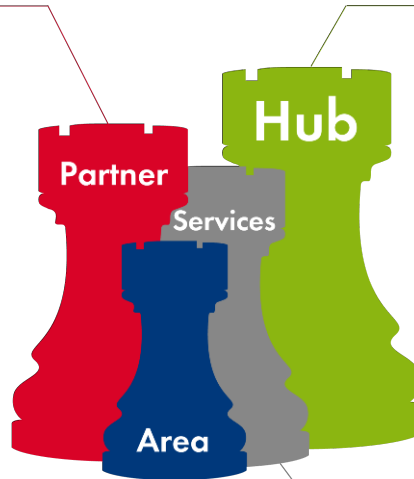
Operator to Partner

Q-Park moves from traditional parking operator to sustainable **mobility partner**



Location to Area

Q-Park moves from parking facility perspective to **area perspective**



Facility to Hub

Q-Park moves from operating parking facilities to building **Mobility Hubs**



Space to Services

Q-Park moves from providing parking spaces to enabling **mobility services**.

We are one of Europe's leading parking infrastructure owner and operator with more than 677,000 parking spaces in over 3,400 well-managed commercial parking facilities across seven Western European countries.

We mainly operate off-street parking spaces owned by us as well as parking spaces under concessions and long-term leases from public and private landlords.

We demonstrate that effective regulated and paid parking make an economic and sustainable contribution to cities and society, and that a positive parking experience impacts how people enjoy their visit, journey, shopping, commute or residence.

We have numerous mobility hubs which provide access to a variety of sustainable mobility services. Supporting urban accessibility, sustainability and liveability.

We provide sustainable mobility services such as:

- | last mile logistics and locker walls;
- | EV charging points and EV fleet charging hubs;
- | public transport, car sharing and bicycle parking.

Sustainable Mobility

Mobility hubs are the solution

We seek to combine public and private modes of transport with public and private parking facilities. When transport nodes converge, they form a hub, making individual and sustainable mobility feasible. Meeting the needs of residents, commuters, visitors and the economic function of an urban area.

Sustainable Mobility Partner (SMP)

As sustainable mobility partner, Q-Park helps get SUMP's moving in the right direction. We contribute our considerable knowledge and experience. Together with our partners we seek ways to make sustainable mobility in urban areas successful. Measures we can help introduce include:

- | transitioning from on-street to off-street parking;
- | transforming search traffic to destination traffic with smart navigation and pre-booking;
- | facilitating EV charging and shared mobility;
- | providing bicycle parking solutions;
- | offering logistics services at the edge of the city and before low- and zero-emission zones.

Vision

We aim to be the most preferred and recommended parking partner at strategic locations in Western Europe, based on functional quality, operational

excellence, customer satisfaction, and sustainable financial performance.

Mission

We enhance urban liveability by providing clean and safe parking facilities, based on convenience, reliability and hospitality.

Strategy

To provide a response to external events and market trends our plans are built on five strategic areas:

- I portfolio of strong locations;
- I differentiated contract types and propositions;
- I digital, commercial and pricing capabilities;
- I operational excellence, and
- I sustainable mobility partnerships.

By applying innovative technology and by working together with strategic partners, we offer profitable and sustainable parking solutions.

Value

By offering a substantial portfolio of parking facilities in urban areas throughout Western Europe, we contribute to fulfilling sustainable mobility needs.

On the one hand, there is an individual need to go to places for educational, economic, social, living and leisure purposes – whenever possible and without any hassle. On the other, there is a societal need to improve the liveability of cities, increase safety for pedestrians and cyclists, provide access to green and public spaces, support economic development, and offer affordable and equitable access for all.

Value for customers

We create value through our portfolio of parking facilities at strategic locations: in or near multifunctional inner-city areas, at public transport interchanges, and at hospitals. And through an increasing number of electric vehicle charging points.

Value for partners

We seek partnerships with other sustainable mobility providers to collectively offer flexible solutions for residents, commuters and visitors of urban areas, encouraging active travel (walking and cycling) and the use of public transport.

Value for landlords

We offer public and private landlords a range of contract types and value propositions, which are supported by our business intelligence, unique digital solutions and pricing optimisation capabilities.

Value for society

We operate with a long-term perspective and from a solid financial basis. Our Corporate Sustainability Report (CSR) provides insight into how we serve society and improve liveability for years to come.

QUALITY IN PARKING



People above ground - cars and coaches below ground

The need for parking solutions

Throughout the developed world, cars continue to be the preferred mode of transport for large numbers of people, as cars have the very significant benefits of door-to-door capability, 24-hour availability, flexibility, privacy and at relatively low cost.

The downside, however, becomes apparent when large numbers of people want to be in the same place at the same time – this leads to traffic congestion and competition for available parking space.

Parking solutions that are intelligently designed and well located, and that are integrated with the public transport system, can help to address these challenges, and so make a major contribution to society's well-being.

Customer focus

Quality aspects that play a major role for customers are:

- | Available and well-organised space to park
- | Value for money
- | Safety and security
- | Cleanliness and tidiness

Q-Park is mindful of these customer quality requirements. Our customers know what they can expect from a Q-Park parking facility as we have a strong and recognisable quality brand. We invest in design, development and renovation of car parks and all our effective products and services meet the needs and wishes of our customers.

The strength of our brand also makes us an attractive party for existing and potential partners.

Key activities

- I We focus on value development by providing high-quality services in purpose-built parking facilities and off-street parking at strategic locations.
- I We provide services related to parking in or near multifunctional inner-city areas, at public transport interchanges and at hospitals.
- I We supply services that fulfil customers' demands, and their need for convenience, reliability and hospitality.

Connected to our customers 24/7



We're there to help customers whenever they need us. We have improved the range and efficiency of our services by linking our car parks to Q-Park's Control Room (QCR).

Our QCR also offers support to car parks not operated by us.

Great locations

We choose our locations with great care, to provide services that meet our customers' demands while yielding a return that is sustainable and allows ongoing investment and maintenance.

To realise this, we work with local authorities, developers, institutions and investors to design, upgrade, renovate, operate and manage parking facilities that enhance the overall value of cities and regions.

Quality reputation

We are proud of the reputation we have built for quality, integrity and customer service. We believe in open communication with all stakeholders, and act on their feedback.

We strive to provide better parking facilities: better for the customer; better for the cities in which they are located; and better for the environment.



MARKET POSITION



Q-Park's market position across seven West European countries.

HOW WE ARE DIFFERENT



Modern technology in historic city centre - Q-Park Coeur de ville in Chartres, France

We set ourselves apart by our continual focus on making a positive contribution to urban life, to optimising the role played by parking in the mobility chain, and to making the parking experience a pleasurable one.

Quality, technology, hospitality

Quality is the reason customers keep using Q-Park. The combination of modern technology and well-trained, professional employees, the quality of our facilities at **Q-Park Control Room**

strategic locations, and efficient, value-added services, results in high customer satisfaction.

We provide mobility solutions for a variety of customers, ranging from offering parking spaces to motorists to developing quality upgrades for landlords. Our solutions utilise paid and regulated parking to add value and create efficiency.



The Q-Park Control Room (QCR) is an international help desk, available 24/7. It gives customers instant access to multi-lingual parking hosts in our central control room who can provide help and support with queries relating to the payment system or accessing or exiting the parking facility.

QCR employees also have direct access to onsite employees, service technicians and the customer service department. If customers have a query when they are in one of our parking facilities, the QCR will be able to help.

CSR



Future of parking; underground parking at the inner ring road with an attractive green recreational park on top.

A strong sense of corporate social responsibility (CSR) is embedded in everything that Q-Park does as a company. It underpins every major management decision, every new project, and every engagement we have with our community of users. It's part of our Quintessence, which is how we bring together all of our ideas about regulated and paid parking, and about how we work with our partners and stakeholders to contribute to the quality of life in our cities.

Please click [here](#) for the Annual CSR Report 2022.

The fundamental choice for functional quality forms the core of our vision on our corporate social responsibility. With our parking facilities and associated services for our parking customers, Q-Park wants to be an integral part of the sustainable mobility chain. Regulated and paid parking - preferably in clean and safe facilities, with a variety of sustainable mobility services - offers an answer to the current and future challenges posed by the urban environment. It is on these topics that we engage in dialogue with local authorities.

The five major challenges faced by cities today relate to mobility, facility, society, economy and environment. In each of these areas paid parking has a role to play. We have a programme of CSR actions designed to meet these challenges, and we monitor our progress

against well-defined benchmarks and performance indicators. For more details, please read our Annual CSR Report online.

Supporting responsible mobility

Cities have to contend with limited space to facilitate mobility, while the number of cars continues to grow. Together with its partners, Q-Park is committed to a coherent sustainable mobility policy in which economic growth, quality of life, sustainable development, and environmental protection go hand in hand.

A regulated parking and a well-thought-out pricing policy as part of the city mobility policy helps to manage the growing demand. It also shifts the cost to the user and limits unnecessary car use. Additionally, linking parking facilities with public transport, for instance by creating sufficient parking spaces for those who continue their journey by public transport and combining paid parking and public transport season tickets, also offers opportunities.

The ideal parking tariff

Ideal parking tariffs are part of the mobility policy. They encourage motorists to look for cheaper alternatives, such as another means of transport (public transport or bicycle) or to park away from the centre.

A parking tariff set by market forces helps to distribute parking spaces efficiently. There is therefore always sufficient space for those who want to pay to park in the inner city. Q-Park has extensive knowledge of this topic and advises city councils in this area.

Practical solutions

All around Europe, local authorities and other policy makers are coming up with practical solutions that seek to ensure sustainable mobility within the urban space. Q-Park actively endorses such initiatives and seeks to play its part in a number of ways:

- I By providing parking spaces that integrate with public transport provision – at public transport nodes such as bus and train stations;
- I By integrating with navigation systems to guide motorists to available parking spaces;
- I By working within public–private partnerships (PPPs) to develop appropriate and sustainable parking facilities that meet the needs of motorists.

Responsible facility: enabling access

Parking facilities are the showpiece for a city, shopping centre, station or hospital. At least, if they offer hospitality, because it is an art to make them both functional and attractive. Q-Park is committed to making parking facilities which are easy to find and accessible, available and easy to use, and which are also clean and safe and fit in with their surroundings.

Good use of limited space

Many private parking facilities are empty in the evenings and at weekends. To make better use of the limited space available, we work together with the owners of these locations to open them up for short-term parking. For this, we have developed a specific service whereby we also create value.

Part of the attractive city

The user or the local authority pays for the facilities which are essential to an attractive, accessible and viable city. Parking is not an end in itself. It is the shops, cafés and restaurants, offices, culture, nightlife and centres of education that attract people.

Visitors want to park their car near their destination. For them, the price is less important than being able to park nearby. Currently, some cities are developing into magnets, and for these centres, offering free parking is not the solution.

All of our parking facilities work within cities to facilitate access to homes, workplaces, offices and shops, and to places of leisure and recreation. Many of our facilities integrate with public transport hubs and facilitate transfer from the private car to public transport.

We make sure that our facilities are easy to use and provide parking customers with as pleasant an experience as possible. Friendly staff, appropriate and visible security, generous parking bays, a clean and well-lit environment, and clearly marked parking routes – these are all qualities that set Q-Park apart, but they also make it easy for customers to access their destinations, and they are part of the way we meet our responsibilities to our customers and to the destinations we serve.

Thinking of the wider society

Parking facilities are more expensive and more sustainable than on-street and off-street parking. Compared to the higher cost of construction, operation and maintenance, a car park contributes to pedestrian-friendly and high-quality public spaces.

Viable public space

A well-organised urban area offers ample space and encourages people to move around on foot, by bike or by public transport, which has a positive influence on their health and wellbeing. Q-Park is not in favour of unnecessary car usage, but promotes good parking facilities that function as nodes. Squares and streets change from traffic areas to places where people can move informally, safely and socially. In addition, a clean and safe parking facility seems to encourage responsible behaviour, not only in the facility but also in the surrounding area.

Jobs for practical people

As parking company, Q-Park offers interesting attractive work for people who like to take a practical approach. Our Parking Hosts and call centre staff are the local face or the familiar voice of Q-Park. They have direct contact with the customer and make the difference. We ensure that our employees are well-trained and have customer focus. We also work on improving their resilience to aggression or violence, because that occurs occasionally.

The great convenience and increased mobility that the car brings comes at a price. We need to think of the costs of maintaining the roads and infrastructure as well as the economic and environmental damage caused by traffic congestion. And we must also consider the loss of usable public space that occurs when we allow cars to park 'for free' on our city streets.

Increasingly, civic leaders are realising that the more public space we make available for cars, the less there is for people. This is especially the case where there is no charge for on-street parking. We need to remind ourselves that there is no such thing as free parking: somebody always pays.

With paid off-street parking, however, some of that balance is redressed. This is part of the wider social and community function of paid parking that enables us to:

- I Move towards a more sustainable and socially responsible model of car use;
- I Liberate urban streets for more exclusively human use; and
- I Encourage responsible behaviour among users who are influenced by our clean, safe and welcoming environments.

Furthering economic well-being

The population is still growing and urbanisation continues. More than two-thirds of all Europeans live in urban areas. This is also where approximately 85 per cent of the GDP (Gross Domestic Product) is generated. This increasing economic activity also has consequences for the quality of life.

Cities have to contend with congestion, traffic cruising for a place to park, reduced accessibility, air pollution, and unattractive and unsafe streets and squares, full of parked cars. To prevent economic activity coming to a standstill, it is essential to develop and pursue an integral mobility policy.

Well-designed paid parking facilities at strategic locations, such as transport hubs, have a key role to play in ensuring mobility and accessibility. The rates that customers pay for parking facilities are also very important, and by setting these appropriately, we can:

- I Help achieve a sustainable balance between private and public transport – in particular, by encouraging the use of public transport alternatives where these are available; and
- I Reduce the gap between the cost of parking to society and the costs that users pay – effectively, users of parking facilities are making a contribution towards the full cost of providing the road and parking infrastructure.

Improving the environment

Air quality

Paid parking helps reduce car usage in cities, thus also reducing CO₂ emissions and fossil fuel consumption. Good traffic flow, for instance with parking route information systems, has a positive effect on air quality. Dynamic parking tariffs - more expensive during peak hours - help to channel car usage.

Electric cars and shared vehicles

In an increasing number of Q-Park parking facilities, customers can recharge their electric car. We also reserve special parking spaces for partners who offer car sharing programmes.

Own operating activities

Q-Park endeavours to improve the environmental performance of its own parking facilities, its fleet, and its offices. In addition, we seek to influence the environmental performance of our major business partners in the value chain.

For Q-Park, care for the environment consists mainly of creating the conditions for more sustainable urban mobility and accessibility. But we are also committed to making a contribution to environmental sustainability in our own operations.

- I When designing, constructing and renovating parking facilities, we use the most sustainable methodologies available.
- I In saving energy, we install LED lighting and emphasise operational measures, such as lighting sensors and time switches. We make all of our staff aware of the costs of energy consumption and of how they have a role in reducing these costs.
- I We are actively committed to making our own mobility more sustainable. We travel less frequently than in the past; and when we do, we use more sustainable modes such as public transport or more environmentally friendly cars.

Quintessence

Cities are the undisputable engines of Europe – and these engines are increasingly becoming choked. Regulated and paid parking are therefore logical choices for cities faced with the following five challenges: Mobility – Facility – Society – Economy – Environment.

The Q-Park Quintessence is about regulated and paid parking as a solution for these five urban challenges as it is a particularly effective instrument for influencing mobility and keeping the urban engine from ticking over.

Quintessence – literally - fifth essence, the **idea**.

Our Quintessence is to guide those who are interested along the way of understanding 'the logic of regulated and paid parking'. As a mnemonic, Quintessence is illustrated as a five point guiding star, where each point in itself is a good reason to regulate or pay for parking.



Quintessence - The logic of regulated and paid parking

HOW WE CREATE VALUE



We create value through our portfolio of parking facilities at key locations. We offer public and private landlords a range of contract types and value propositions supported by our unique digital platform and our capacity, revenue and pricing optimisation functionality.

We contribute to societal value with our parking products: they improve the quality of life in urban areas and help reduce air pollution generated by traffic cruising for a place to park. We enhance our employees' job satisfaction and their competences by providing relevant training.

And for the parking customer, we add value by providing functional products and services and by involving them in our activities.

Products & Services

Products

Season tickets

Season tickets offer excellent value for money and are a very convenient option for those who frequently park in the same car park, for instance: employees at local companies, residents and regular visitors to the area.

Some of the benefits:

- I You always have a parking space
- I You pay the most favourable rate
- I Easy access and exit - often based on ANPR

Value cards

Value cards are prepaid cards with a parking value in time or money. These value cards enable motorists to park for a reduced tariff or other promotional offer in a specific Q-Park car park. Value cards are an ideal way of making life easier for customers of shops, restaurants, cinema's, gyms, public transport, and the like!

Pre-booking

We enable our customers to pre-book a parking space at selected locations, be it for a lunch, an evening at the theatre, a weekend city trip or for a vacation. We have multiple options in various markets. Please visit the appropriate country website to see what's on offer.

Services

Real-time information

Q-Park supports the growing need for static and real-time parking information, ensuring that the parking information provided is correct and consistent over all channels and readily available. Our own systems, such as Q-Park websites, apps and parking route information systems, already display consistent and correct information.

Our information is also available for third party systems (i.e. local authorities' websites, mobility apps, route planners and navigation systems). With regard to external systems and their operators, we seek to establish Service Level Agreements together, ensuring

that our mutual customers are not misinformed nor have access to outdated information.

Onsite services

Each of our Q-Park car parks is equipped with a unique set of convenient services so that our customers feel superbly looked after from arrival to departure and enjoy an exceptionally positive experience.

My Q-Park

My Q-Park is a support portal that enables customers to view their invoices, their loyalty programme progress and, where appropriate, their flex credits online. The portal also enables our customers to pay their invoices online.

Parking tariffs

Why we should embrace paid parking

Few people are familiar with the added value of deploying the right parking tariff strategy. There appears to be much negative public opinion about paying for parking, although a customer survey we conducted in 2014 shows that most of our customers are very aware of the principle of paid parking.

Setting the right price

Setting the right price, at a given location, on a given day, at a given time, and for the time used, is part of our daily work. Our three guiding principles are:

- I Profit - to ensure sustainable financial performance

Added value– to integrate mobility and other essential urban needs

- I Proactive approach – to enhance fair pricing for commuters, residents, people parking for short periods, and our partners

We need to find the perfect balance between price and demand. We work on the principle that it is unfavourable for an urban area if the occupancy rate of a parking facility exceeds 85%. Not having to queue to enter a parking facility is more economical for all involved; it is safer for cyclists and pedestrians, and better for the environment.

Price differentiation

We aim to have a variety of parking/price combinations available for our customers to consider. For instance: highly valued and high-priced parking within 300 metres of their final destination, reasonable priced parking slightly further away, and smart parking within a healthy walking distance.

Price differentiation enables us to benefit certain groups over others. For example, at shopping centres the cheaper rates for the first two or three hours favour shoppers rather than commuters, but at train stations, the daily tariff favours commuters.

Economic insight

We gain insight into the impact of various pricing strategy options by using proprietary calculation models. For example; our educational calculation model provides clear insight into why EUR 0.50 per



fifteen minutes is, from an operator 's perspective, not the same as EUR 2 per hour.

Would you like to do the maths and know the difference? Contact qurius@q-park.com.

Fair pricing

Wherever possible, we like to implement fair pricing strategies for the people parking, the surrounding communities as well as for the operator. For more information e-mail qurius@q-park.com.

Capacity optimisation

For detailed information on parking capacity optimisation please [click here](#).