

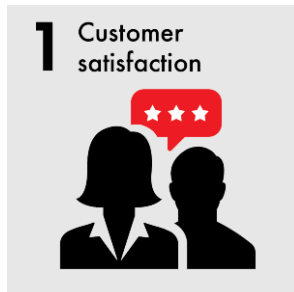
**We
Develop
Quality**

Urban liveability



Expertise

Our expertise contributes to customer satisfaction and in our 2020 Materiality Analysis, customer satisfaction is considered the most material topic.



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

We participate in the following industry platforms:

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

Research

The research we continually conduct helps us stay ahead of developments in the parking industry and to be a leader and proactive player. We follow digital trends and conduct research to develop our partnerships and benefit the customer experience.

Our research is designed to help us better meet the needs of our stakeholders: public and private landlords, partners and our customers.

We focus on topics to help improve the economic and societal performance of our parking facilities. Of the research topics we worked on during 2020, we report here about:

- | research into EV charging;
- | research into urban mobility plans.

EV charging

Our extensive research in 2020 into EV charging resulted in a draft EV charging policy. The Q-Park EV Charging Policy is designed to enable us to realise EV charging infrastructure in our parking facilities.

The policy will enable us to meet the EV charging challenges in the coming years. Aspects taken into account include:

- | legislation and regulations;
- | constraints to power capacity available;
- | fire safety;
- | different types of charging demand.

The policy also defines what we outsource to partners and what we do ourselves, it defines the EV market, our EV charging definitions and EV charging customer groups.

We expect the Q-Park EV Charging Policy to be approved in Q1 2021.

Figure 24: EV charging customer groups



Customer satisfaction

The Materiality Analysis conducted in 2020 shows that customer satisfaction is the most material theme for Q-Park. Because products and services, parking habits and cultures differ across the Q-Park countries, it does not make sense to have a group-wide customer satisfaction programme or to conduct international customers satisfaction surveys.

Instead, each Q-Park country conducts its own localised Customer Satisfaction Survey (CSS). A country approach means survey techniques and questionnaires are aligned with the circumstances and differing parking markets.

Google reviews

Q-Park Germany, Belgium, UK and Ireland monitor Google reviews. These give customers the opportunity to leave comments about a business they have visited.

The review includes giving a score from one star (poor performance) to five stars (excellent service). Google reviews can be a useful customer feedback tool, as they:

- I improve local search ranking and online exposure;
- I increase trust, credibility and provide essential feedback;
- I influence purchase decisions, improve click-through rates and convert more customers.

Google reviews can be a monologue of complaints but sometimes useful comments can be incorporated in refurbishment or other plans.

For example, in the UK, specific feedback given about EV charging resulted in changes to the EV charging roll-out.

In 2020 we introduced the Partoo app in the Group, to develop and manage our online visibility and e-reputation. Q-Park Netherlands, Belgium, France and Denmark are already operational. Q-Park Germany, UK and Ireland will follow in 2021.

The Partoo solution enables us, internationally, to:

- I Automatically broadcast our parking facility information in the main directories, GPS, search engines, social networks and opinion websites.
- I Centralise the customer reviews, whether they come from Google, TripAdvisor or Facebook.
- I Report on reviews, analyse them and respond from a single interface.

Results

- I On average we have a 3.6 Google Review Rating in Partoo countries.
- I On average we have a 3.8 Google Review Rating in UK and Ireland.

Formal CSSs

More formal customer satisfaction surveys are conducted, often using external agencies. Q-Park Netherlands and Q-Park Denmark select specific locations or parking facilities and people entering or leaving the car park are approached to complete a questionnaire on the spot. In France, car parks display posters with a QR code, inviting customers to give feedback about their parking experience.

In 2020, the introduction of flexible season tickets and shorter minimum season ticket contracts was a major group-wide innovation in response to customer satisfaction survey results.

Q-Park France uses CSS feedback to adapt cleaning procedures and investment plans.

They also noticed that customer satisfaction regarding access and exit for pre-booking online was considerably higher at car parks with ANPR than for car parks where a QR code had to be presented at the barrier.

In 2020, this information prompted Q-Park France to install ANPR at all new sites where pre-booking is available and to launch a plan to install ANPR equipment in most existing parking facilities to create a better customer experience.

In 2020, customer survey feedback prompted **Q-Park Germany** to rework all offline communications. These now include QR codes making it easier for customers to get to the right products.

The customer service department reduced season ticket order processing time from 7 to 4 days.

A new user manual is provided for Q-Park Card customers, including an explainer video. Customer Service may suggest customers to view the video to help solve their parking problems.

Figure 25: On-site customer survey in France



Votre avis compte pour nous !

Votre satisfaction est notre priorité.

- I Nous vous invitons à répondre à ce questionnaire qui vous prendra 5 minutes et qui nous permettra de mieux répondre à vos attentes.
- I Merci de flasher le code pour commencer le questionnaire.



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Q-PARK Quality in parking

Figure 26: On-site communication in Germany



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Dauerparkkarte

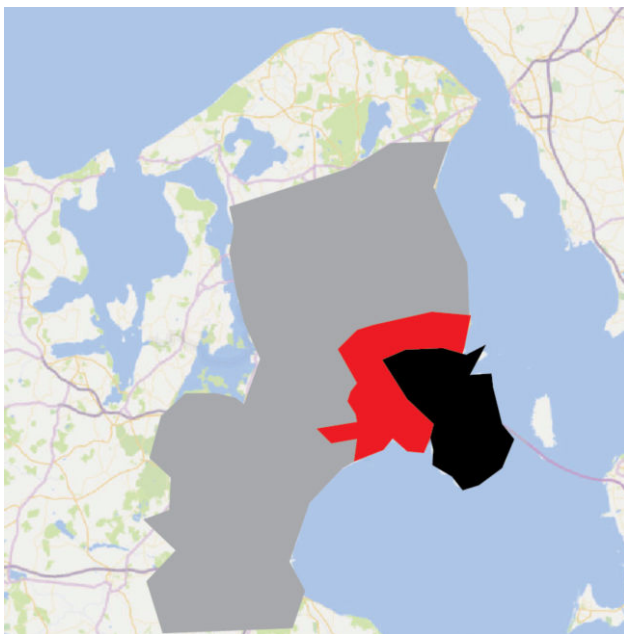
Q-PARK Quality in parking

The Q-Park Denmark Customer Satisfaction Survey (CSS) was very informative as motorists from a variety of geographical areas were asked about their parking preferences (for inner city Copenhagen).

A few key lessons which we can use moving forward in our sustainability programmes:

- I Motorists who look for an on-street parking space before driving to a parking facility spend 5 to 10 minutes driving around searching for somewhere to park.
- I People with a preference for on-street parking are motivated by **price** and **proximity** to their destination.
- I People with a preference for off-street parking are motivated by **time** and parking space **availability**.

Figure 27: Copenhagen area and customer groups



Black = Group1, Red = Group 2, Grey = Group 3

Figure 28: On-street searching time

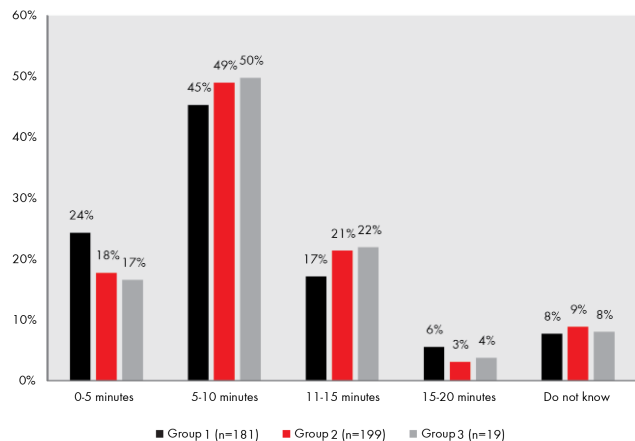


Figure 29: Why on-street preference

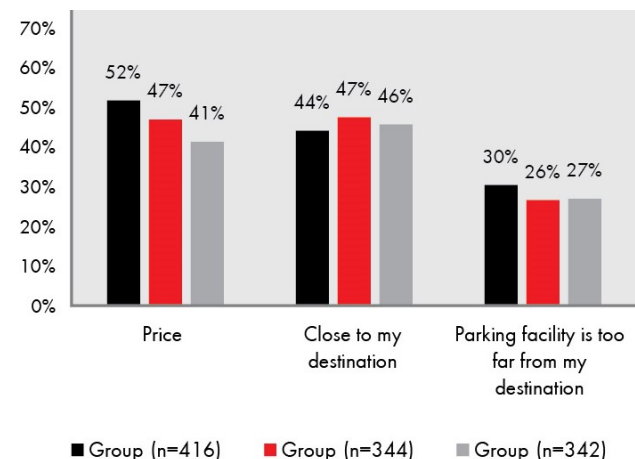
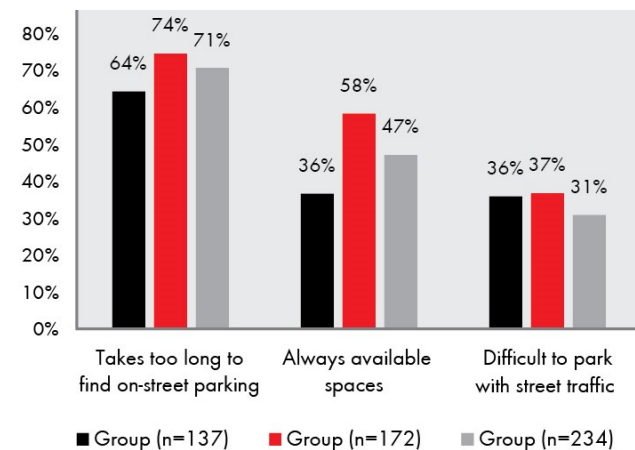


Figure 30: Why off-street preference



Awards & Certificates

To support our 'Quality in parking' ethos and to pursue best practices, the Q-Park country organisations have attained ISO certificates. The ISO certificates relevant to our business are:

- | ISO 9001 – Quality management
- | ISO 14001 – Environmental management
- | ISO 45001 – Occupational health and safety
- | ISO 50001 – Energy management systems



Park Mark awards

The British Parking Association established the Park Mark awards scheme to promote safer parking. It has become a national standard for UK car parks that have low crime rates and measures in place to ensure the safety of people and vehicles.



A Park Mark is awarded to each car park that achieves the challenging standards. The distinctive Park Mark signage helps motorists find car parks where they can confidently leave their vehicle, knowing the environment is safer. Naturally, Q-Park UK is proud of the 79 Park Mark awards their parking facilities have received.

Student Award & Thought Leadership

The Q-Park Student Award & Thought Leadership event has become a recurring item in the Q-Park annual calendar. The award and thought leadership event could not take place in 2020 due to the coronavirus pandemic measures in the Netherlands. This has been rescheduled for 2021.

European Parking Association Awards

The European Parking Association has two award schemes to set standards and to demonstrate the high quality of parking facilities and services. The two schemes are:

- | European Standard Parking Award (ESPA)
- | EPA Award competition



ESPA

The ESPA defines a set of minimum standards required to provide good basic quality in parking facilities and services. An extensive checklist serves as a reference for parking operators, municipalities and others who provide parking services. Car park operators can apply to their national parking association for the award.

Two parking facilities operated by Q-Park UK and six parking facilities operated by Q-Park Netherlands have been granted ESPAs in 2020.

EPA Award

The EPA Award competition is organised biannually and is awarded to the most outstanding and excellent car parks, services, on-street solutions, innovations and communication schemes. The last EPA Awards were in 2019, the next EPA Awards are scheduled for 2022 (the original congress for 2021 has been postponed due to the coronavirus pandemic).

9 INDUSTRY, INNOVATION AND INFRASTRUCTURE



Our efforts to expand our knowledge and expertise, as well as our research and customer satisfaction, in particular, contribute to SDG 9.

OTHER INFORMATION

**We
Develop
Quality**

Q-Park Steendok
Original dock wall visible

