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# 65<sup>th</sup> IAA Commercial Vehicles 2014 Report



## 1. General overview of the exhibition

The 65<sup>th</sup> IAA Commercial Vehicles held in Hannover from September 25 to October 2, 2014, attracted 2,066 exhibitors (nine percent more than the IAA 2012) from 45 countries presenting a diverse range of products. The net exhibition area occupied was 193,262 m<sup>2</sup> – a modest increase of two percent compared with the previous IAA Commercial Vehicles. This year's show covered a total area of 265,000 m<sup>2</sup>, which was also up by two percent. Once again around a quarter of a million visitors attended the IAA, placing it squarely on the average level of the two last IAA Commercial Vehicles. Table 1 summarizes the results from the IAA 2014 and compares them with those from the previous events.

	65 <sup>th</sup> IAA CV 2014	% change from 2012	64 <sup>th</sup> IAA CV 2012	63 <sup>rd</sup> IAA CV 2010	62 <sup>nd</sup> IAA CV 2008
Exhibitors	2,066	+ 8.5%	1,904	1,751	2,084
Countries represented	45	- 2.2%	46	43	48
Total area occupied (m <sup>2</sup> )	265,000	+ 1.9%	260,000	235,000	275,000
Net area occupied (m <sup>2</sup> )	193,262	+ 2.2%	189,046	176,504	214,185
of which:					
- occupied by exhibitors	182,175	+ 1.1%	180,230	161,945	196,181
» Hall area	150,139	- 0.1%	150,274	136,447	165,677
» Open-air area	32,036	+ 6.9%	29,956	25,498	30,504
- Special shows	11,087	+ 25.8%	8,816	14,559	18,004
Visitors	244,200	- 6.9%	262,300	241,500	298,200
Journalists	1,944	- 6.9%	2,087	2,185	2,289

Table 1: Results for 2014, incl. visitors and journalists

A total of 1,944 accredited journalists from 58 countries reported on the trends, highlights and new developments at the IAA. Representatives of the media obtained information at 85 press conferences held either in the Convention Center (CC) or at the stands of the exhibitors. There were 322 world premieres, 78 of which were European premieres and 52 were German premieres, demonstrating the huge drive for innovation in commercial vehicles. The suppliers alone accounted for 70 percent of the world premieres, but also the manufacturers of trailers, bodies and buses had many innovations on display.

This year's IAA recorded 244,200 visitors, which was a slightly better result than at the IAA 2010 (+1%). However, it did not equal the level recorded at the IAA 2012. Whereas the number of visitors increased on the first two exhibition days, the final total number remained almost seven percent below the value from the previous event. Yet the number and quality of visitors were again very good, which underscores the consistent interest on the part of politicians both in Germany and at the European level.

The 65<sup>th</sup> IAA Commercial Vehicles fully lived up to its slogan "Driving the Future". Connectivity, efficiency and flexibility – these three forward-looking topics formed the focus of this exhibition. The IAA presented the entire commercial-vehicle value chain on an area of 265,000 square meters. At the IAA's final press conference VDA President Matthias Wissmann drew a positive conclusion for the show and stressed, "The IAA has demonstrated its position as the world's most important trade show for mobility, transport and logistics. This is pointed up by all the exhibitors. They have shown impressively that the trends and topics are set here at the IAA! This is the only place where the entire industry is on display. Innovation and internationality – these two exhibition features are inextricably linked at this IAA."

The IAA has enhanced its position as a professional trade show for decision-makers. Even more than in preceding years, the exhibitors appreciate the high quality of the visitors and now the even greater intensity of meetings with customers. The IAA Commercial Vehicles is a must for managers from the industry, as found by the representative exhibitor and visitor survey whose results are presented in sections 4 and 5 of this report.

## 2. IAA press work

- Accredited journalists

For journalists the 65<sup>th</sup> IAA Commercial Vehicles was once more the world's most important trade show for mobility, transport and logistics. A total of 1,944 journalists from 58 countries reported on the IAA; 44 percent of the journalists came from countries other than Germany, which is unchanged from 2012. The number of accredited journalists was nearly seven percent lower than the 2012 figure. This fall is principally due to the introduction of a new, electronic accreditation program that involved even stricter checks on the journalistic activity of the applicants for accreditation.

	2014	2012	2010	2008	2006
Journalists					
» Total	1,944	2,087	2,185	2,289	2,449
Origin					
» Germany	56%	56%	59%	58%	59%
» Other countries	44%	44%	41%	42%	41%
Countries represented	58	56	55	54	55

Table 2: Basic data on journalists

- IAA communication concept – three topics for the future

A communication concept was developed for the IAA press work containing the following points:

- Positioning the IAA Commercial Vehicles as the world's most important trade show for mobility, transport and logistics;
- The IAA as the commercial vehicle show that is more international than any other commercial vehicle fair.

Three topics relevant to the future were selected for exhibition content (in line with the IAA slogan “Driving the Future”):

a. Efficiency

Meeting Euro VI, heavy-duty vehicles have finally shaken off their reputation as polluters. This means that compared with Euro V, their nitrogen oxide emissions (NOx) are down by 80 percent and particulates are down by around two thirds. Euro VI trucks have therefore become “clean machines”. Furthermore, at the same time fuel consumption – and with it CO<sub>2</sub> emissions – of the new vehicles has been successfully either kept constant, or even slightly reduced. High levels of investment went into this technological tour de force.

b. Connectivity

One very major focus of this IAA was connectivity. The commercial vehicles of the future will be “always online” – in continuous contact with other vehicles, with the haulage companies and also with customers. It is true that fully automated driving will be realized on a broad scale only in the medium term, yet developments are already becoming apparent today. The existing driver assistance systems can be consistently extended and expanded. The next step will be partially automated driving that takes some of the burden off drivers during routine tasks, warns them about hazards, and thus helps to bring about further reductions in the accident figures. Connectivity also offers enormous opportunities in logistics.

c. Flexibility

Only commercial vehicles can deliver door to door, and this is their great strength. Commercial vehicles transport goods needed for people’s daily lives. The increasing volume of online orders from private households is pushing up the need for transport, and especially for light commercial vehicles. Further upstream in the logistical chain there are the heavy commercial vehicles (for long-distance freight traffic). The deregulation of long-distance buses has triggered a sharp rise in scheduled bus services, and brought a major improvement in the image of buses. The many passengers travelling by long-distance bus appreciate (alongside the price) the flexibility most of all.

These three significant future-related topics were given special emphasis at the IAA’s advance press conference in Berlin on September 2, 2014, and were consistently and successfully communicated over the succeeding weeks both before and during the exhibition. The way the IAA developed provided impressive confirmation of these

trends. The subject of “connectivity” in particular became the dominant innovation topic.

- Press workshop

The International Press Workshop on the IAA Commercial Vehicles took place in Frankfurt am Main on June 25 and 26, 2014. It was attended by 129 journalists (54 percent of them from abroad), i.e. a greater number than in 2012. The event was chaired by Wulf Schmiere from the German broadcaster ZDF. The response in the media lived up to expectations. Major German daily newspapers and news agencies reported from the workshop, which generated many articles in trade media both in Germany and abroad. The communication objective was thus achieved – a prelude to the coming IAA Commercial Vehicles, determining the strategic commercial vehicle topics, and creating a positive starting point.

For the first time, the three keynote speeches at the press workshop (delivered by Matthias Wissmann, VDA President; Dr. Wolfgang Bernhard, member of the Board of Management at Daimler AG and Head of Daimler Trucks & Buses; and Anders Nielsen, Chief Executive Officer of MAN Truck & Bus AG) were broadcast by livestreaming on the internet. The results of the livestream were very satisfactory. Despite the short time for advertising it and a limited target group (journalists), the livestream was accessed 307 times. A large proportion of the viewers watched the complete livestream. The time on site of 21 minutes per view was above-average. The livestream was accessed from 21 countries, including China, South Korea, Canada and Israel, although most viewers came from Germany, Italy, Finland, France, the Netherlands, South Korea and Sweden.

- Interviews – press releases – press conferences

The communication concept was implemented in numerous interviews with the VDA president and at several press conferences. Interviews with VDA President Wissmann appeared in the following media (not an exhaustive list): DIE WELT, MPC-Magazin, AUTOMOBIL-PRODUKTION, BRAUNSCHWEIGER ZEITUNG, Süddeutsche Zeitung, Börsen-Zeitung, Automobilwoche, Hannoversche Allgemeine Zeitung HAZ, Verkehrsrundschau, DVZ, trans aktuell (from ETM-Verlag), lastauto omnibus, and Transport (from Huss). The IAA press releases were launched in week 30.

- Trade show newspaper “IAA aktuell”

As in 2012, the trade show newspaper IAA aktuell was compiled by the publishers ETM-Verlag. It had eight daily issues (from September 25 to October 2) of at least

twelve pages (including one page in English) in four-color printing, with a print-run of 20,000. The newspaper was distributed each morning at the entrances and at the exhibitors' stands. The IAA aktuell was also published online every day as a PDF file on [www.iaa.de](http://www.iaa.de).

- Audio PR

Nationwide audio PR for the IAA 2014 in Hannover was provided by all4radio. The German radio stations were supplied with comprehensive audio material from the IAA on the widest range of topics surrounding the show.

all4radio created up-to-date news bulletins and features ready for broadcasting from the press conferences of the VDA and those of various exhibitors. As in the preceding years, the reporters also produced "lighter" articles, for example about celebrities or curiosities at the trade show.

This year again, there was a very large demand from the radio stations for regional audio material. Many exhibitors from the respective reception areas were visited at their own press conferences or at their stands. This resulted in the IAA in Hannover becoming a topic for radio stations all over Germany, thanks to regional focus.

An article about the "Bus of the Year" award was produced and disseminated on the Evening of the Commercial Vehicle Press on September 23, where once again the "Stars of the Year" prizes were presented.

all4radio produced a total of 53 different reports from the IAA for the German-language radio stations (three advance reports and 50 reports during the IAA, 26 of them adapted for the regions). The articles reached a total of 222 million listeners (figure for "listened yesterday" based on MA 2014/II) with a net reach per hour of 103.1 million listeners. In all 115 radio stations carried these reports.

- Cooperative media projects

The following cooperative media projects concentrated on the IAA 2014. Just as in previous years, ticker reports were issued via a dpa original text service and "news aktuell" for press releases from the VDA and exhibitors. news aktuell was responsible for livestreaming the IAA opening ceremony. all4radio was responsible for original sound recordings before and during the IAA. The German Handelsblatt newspaper carried an IAA supplement about commercial vehicle suppliers with contributions from VDA President Wissmann and several supply firms. A cooperative TV project with the station N-TV allowed crawls in business programs to advertise the IAA. There was also detailed reporting on the IAA with around three articles, reports or advertisements per

day, which also continued in the second week of the IAA when there is usually less other reporting.

This year again, cooperation with the trade newspaper Norddeutsches Handwerk enabled intensive contact with an important target group – especially for the van sector – over a period of four months.

A joint project with the publishers Vorwärts-Verlag brought a group of municipal decision-makers to the IAA for a walking tour. This target group was also reached through reporting and advertisements in the publication DEMO.

A cooperative project with the radio station Antenne Niedersachsen was aimed at private visitors in the German state of Lower Saxony. Together with the two morning show presenters, ten listeners arrived at the trade fair grounds on Saturday for the “IAA Truck Challenge” to pull a truck tractor. Throughout the whole week up to the contest on the Saturday, there were two opportunities a day for people to join in, cheer on the teams, and win tickets. The station’s website also advertised the activity.



### 3. Communication activities

- Claim and key visual

The key visual and the claim “Zukunft bewegen / Driving the Future” were used extensively by German and foreign exhibitors in their advertising. Exhibitors received additional key-visual formats upon request. This ensured that exhibitors and the organizer all used the same IAA communication materials around the globe.

- Classical visitor advertising

The IAA Commercial Vehicles was publicized in the typical trade media, both in print and online. Guided by the analysis of visitors to the previous exhibition, the print advertising concentrated on Germany and Western Europe (Austria, Belgium, Switzerland, Denmark, France, the Netherlands, Sweden and the UK). Advertising was placed in the Central and Eastern European countries sending the most visitors (the Czech Republic, Poland, Romania, Russia and Hungary), and also for the first time in trade media in China, India and Japan. This year’s visitor survey found that the Chinese made up 29 percent of the professional visitors from Asia, with the Japanese accounting for nearly another 15 percent.

Online advertising began two months before the trade show on trade-related German internet pages of the automotive industry and the skilled crafts. Placing these advertisements resulted in very good access rates for the IAA website.

- Facebook and social media

For the first time the IAA fan page on Facebook also carried a link to the IAA Commercial Vehicles, thus connecting the fans of passenger cars and those of commercial vehicles. Now more than 45,000 people follow the IAA Facebook fan page, and with it topics surrounding the IAA.

During the show, posts on the Facebook page had over 300,000 accumulated contacts. Compared with the competitors there was a higher rate of interaction with the visitors (likes, comments and sharing posts). Just having a pointer to the IAA Instagram account generated 686 interactions and a net reach of over 40,000 contacts. Moreover, on the first Press Day an extensive image database was rapidly offered to visitors and others interested in the IAA through the new Instagram account. Over 1,000 followers were reached via Instagram within three days. On Facebook it was possible to watch the opening ceremony in a livestream. On the Press Days attention

was drawn to the livestreams of the exhibitors' press conferences. Exhibitors' prize competitions and events were also publicized.

Advertising for the IAA began on May 6 on Facebook, Google+ and YouTube and continued consistently at shorter intervals right up to the exhibition. This generated more visits to the ticket shop, with over 1,900 contacts. The Facebook page continues to be heavily used by the visitors as a service channel for questions, criticism and praise.

The target group was composed of 82 percent men and 18 percent women. Their ages ranged from 13 to 65 and over, whereby the age group from 18 to 34 was the largest. Germany is the country with the most fans and comes in front of Italy, Austria, India, the Netherlands and the USA, which are followed by Poland, France, Brazil and Romania. From Germany, the Hessian region was well represented (with the most fans: 2,738) for example, while Munich has 1,067 fans, Stuttgart has 924, Berlin has 885, Hamburg has 663, and Cologne has 608.

- IAA Commercial Vehicles App

The official IAA Commercial Vehicles App heads the ranking of automotive apps, and this year for the first time it replaced the printed site map and the Walk of Innovations. The IAA App 2014 was offered free of charge in German and English for iOS (iPhones and iPads) and Android smartphones. The download figures increased by over 50 percent compared with 2012, exceeding the 10,000 mark.

The app offered exhibitors several different advertising options. The iOS version recorded 66,430 page impressions, and the Android version recorded 82,349 page impressions. The list of exhibitors, the ticket function and the exhibition program were especially popular. The app's usability was further improved with a very user-friendly menu matching the latest standard. The new functions included mobile ticket registration.

- Schools' campaign & teaching materials

Before the summer holidays approximately 11,000 teachers throughout Germany were contacted about participating in this year's IAA activities for schools and invited to visit the IAA at a reduced price (available to school groups that register in advance). In addition, the teachers received suggestions for what to cover while on their excursions to the exhibition, and they were also offered advice on teaching preparation. Again significantly more than 4,000 schoolchildren and teachers registered to visit the show through the schools' campaign this year.

Following the successful premiere in 2012, teaching materials were created for the IAA Commercial Vehicles in 2014, on the current topic of "urbanization and transport."

In the early summer 12,500 copies of the teacher's folder were sent out to secondary school teachers up and down the country. The material was also available for downloading from [www.iaa.de](http://www.iaa.de) and [www.unsere-autos.de](http://www.unsere-autos.de).

- Local IAA advertising

In cooperation with Deutsche Messe AG and the Hannover association City-Gemeinschaft Innenstadt, an intensive out-of-home advertising package was realized to highlight the message that the IAA is "in town" and welcomes its visitors. The following welcome measures were implemented over a period of two weeks: branding at all elevators to the tracks in the central railroad station, posters for inner-city shop windows, posters in restaurants, stickers for taxis, and IAA flags in front of hotels and in the city center.

To activate private visitors on the weekend in particular, on Friday, September 26 full-width advertisements were placed in the local newspapers Hannoversche Allgemeine Zeitung and Neue Presse, on the front page where they would get a lot of attention.

- Re-launch of the IAA website [www.iaa.de](http://www.iaa.de)

The IAA website is the organizer's main communication medium and the principal port of call for all the information for exhibitors and visitors to the exhibition. For the IAA 2014 the website was completely overhauled and re-launched in a responsive design (HTML5/CSS3), so now it is available in an appropriate form on all mobile devices. Taking account of user behavior, the new design paid special attention to the search function that has been made very powerful by Elasticsearch. For the first time there is now also an interactive site plan and a watch list function. Quick links, a slide show and modular teaser elements on the homepage enable editorial adjustment of the homepage so that the information currently being requested can be presented right away on the landing page. The numbers of hits and unique visitors to the website have accordingly climbed again, and users have found the information they wanted more quickly.

## 4. Exhibitors

### 4.1. Exhibitor numbers and structure

The 65<sup>th</sup> IAA Commercial Vehicles kicked off in Hannover with very good indicators. This applies to the exhibition area, the number of exhibitors and the international nature of the show, which is a defining feature of the IAA. In fact we overshot our own target of coming really close to the very high level from 2012 – with 1,904 exhibitors – and the IAA 2014 came “within striking distance” of the absolute record dating from 2008. So it is all the more welcome that the 65<sup>th</sup> IAA Commercial Vehicles has turned in the second strongest participation figures since the IAA Commercial Vehicles has been a separate show, that is, for the last 22 years. This created in advance a very good starting position for a successful IAA.

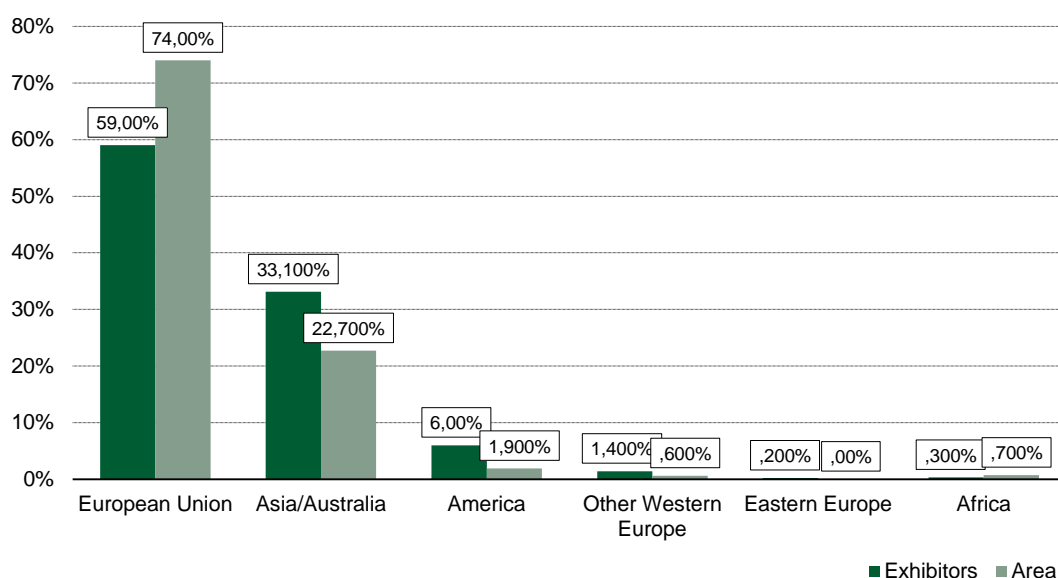
This year again it was possible to attract new exhibitors, and above all international ones, for instance Dongfeng from China and Hyundai from South Korea. But there were also some firms from Germany that decided to take part in the IAA – either after taking a break or for the first time, which bears witness to the growing attractiveness of the trade fair. It is also very welcome that the exhibitor figures are climbing in nearly all segments: among manufacturers of heavy trucks, for vans, buses, trailers and bodies, and even in the workshop business, in services and in electric mobility.

- The number of exhibitors came to 2,066, i.e. nine percent above the final figure from 2012. A whole 59 percent of the exhibitors (1,216) came from abroad, setting a new record. Since the IAA was divided into the IAA Cars and the IAA Commercial Vehicles, it has never been more international than it is now in relation to the exhibitors, so it fully lives up to its aim of being the world’s most important trade show for mobility, transport and logistics. Taken together, the foreign exhibitors occupied 38 percent of the total area.
- This year the foreign exhibitors came from 44 countries and together they occupied 38 percent of the total area. Almost 60 percent of them (i.e. over half) came from the European Union, followed by Asia, which was the origin of one exhibitor in three (cf. Figure 1). The number of Asian exhibitors remains high, at over 400 in absolute figures.
- This year the country sending the most exhibitors was, as seen for the first time in 2012, the People’s Republic of China, accounting for 16 percent of all foreign exhibitors. The number of Chinese exhibitors rose by 32 percent as compared with 2012. China was followed at some distance by Italy with eleven percent, and Turkey and the Netherlands with nine percent each. The top five countries also included France with

eight percent. There was welcome growth in visitor numbers from Denmark, Finland, Japan, Lithuania and Romania. These values are all at least double the 2012 figures, even if the growth was occurring at relatively modest levels.

### Geographical breakdown of foreign exhibitors

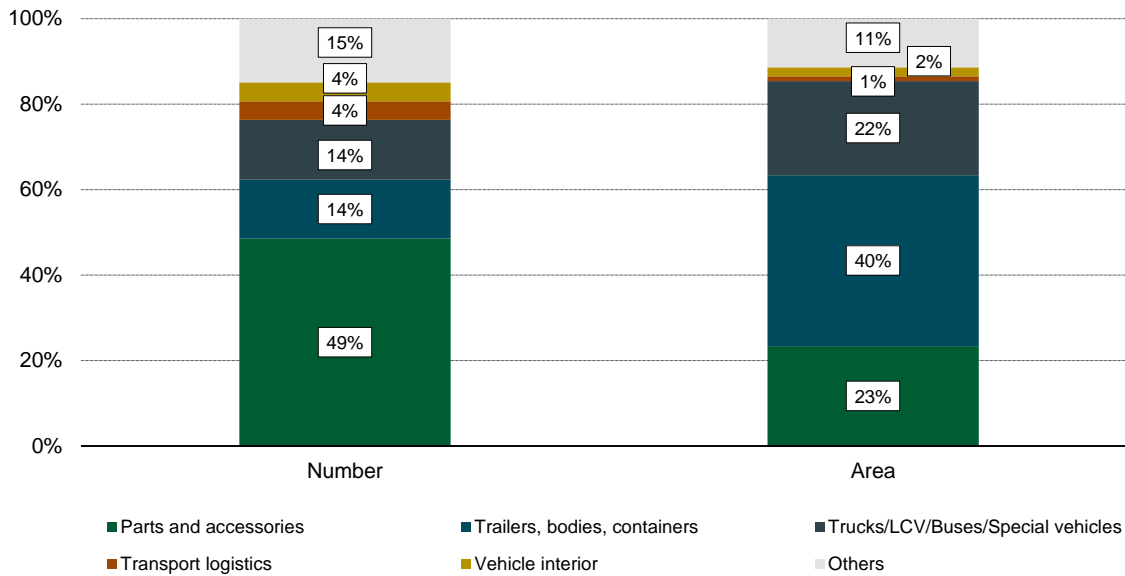
Figure 1



- One unique feature of the IAA is that it is the only place where the entire value-added chain is presented to visitors. This is expressed primarily in the correspondingly high proportion of suppliers. Again the suppliers were the most numerous exhibitors and therefore formed the core exhibitor group. Over 1,000 firms from this important area were represented at the IAA (cf. 1,012 in 2012). These often small or medium-sized producers of parts and accessories made up 49 percent, i.e. almost half, of all exhibitors and occupied 23 percent of the total exhibition space. The firms manufacturing trucks, light commercial vehicles, buses and special vehicles were the second largest group, accounting for 14 percent of exhibitors but requiring 40 percent of the exhibition space (cf. Figure 2). The makers of trailers and bodies contributed an equally high proportion of exhibitors; their total number increased to 285 (+24%; cf. 229 exhibitors in 2012) and they used 22 percent of the exhibition area.

## Comparison of proportions of exhibitors and space occupied (selection)

Figure 2



- Just under three quarters of exhibitors (73%; cf. 78% in 2012) indicated that they had 499 employees or less. This result is especially frequent in the exhibition groups “special motor vehicles” (86%) and “manufacturers of trailers and bodies” (74%). More than one quarter of exhibitors (27%) employ over 500 people, while one fifth of exhibitors are companies with 1,000 or more employees (20%; cf. 15% in 2012), whereby this is most common among the makers of trucks/truck tractors (58%) and buses (33%). The average size of the workforce is roughly 410 employees (cf. 350 in 2012).
- A whole 79 percent of exhibitors indicated that they had already taken part in a previous IAA Commercial Vehicles; 67 percent had attended in 2012, 58 percent in 2010, and 58 percent at an earlier IAA. The groups “vehicle fittings and equipment” and “truck manufacturers” are especially loyal in this respect; at least 90 percent of these exhibitors were not visiting the IAA Commercial Vehicles for the first time. The figure was also over 90 percent among companies with more than 1,000 employees. More than one fifth of companies (21%) were participating for the first time. This was most commonly the case among the manufacturers of light commercial vehicles and in the group “electric mobility”, which recorded especially good figures (35% in each case).

## 4.2. Exhibitors' assessments

Exhibitors' assessments of the 65<sup>th</sup> IAA were evaluated in an online survey by the market research company Gelszus Messe-Marktforschung GmbH on behalf of the VDA. The exhibitors could take part from the end of the IAA up to the middle of October. The level of response was 30 percent, which itself is a good figure. The most important results are presented in the following section.

- The aim of the exhibitors' presence at the IAA Commercial Vehicles was clearly to make personal contacts with existing and potential customers. This objective was even more important this year than it was last time, scoring 91 percent (cf. 85% in 2012), which is once again close to the result in the 2010 survey (93%). Seven out of ten participating companies (72%) used the IAA to maintain and/or enhance their image, while 50 percent came to obtain information about technical innovations and trends, 46 percent came to present general information about their portfolio, and 39 percent to observe the competition (cf. Table 3). Although the relative significance of the objectives remained virtually unchanged (only "information about technical innovations and trends" climbed one place higher), the objectives of generating personal contacts and maintaining the corporate image have become more important to the exhibitors. The objectives of obtaining information about technical innovations and trends and distributing general information about the firm's portfolio scored slightly less well than before. The principal objective is identical across almost all exhibitor groups (and for all exhibitors in the group "maintenance, servicing and repairs") and companies of all sizes. The only groups for which maintaining/enhancing the corporate image was more important were the companies with 500 to 999 employees and the truck manufacturers.
- Given the above results, 80 percent of the exhibitors measure their exhibition success by the number of contacts with new, potential customers. Additional major criteria for the exhibitors are the number of interested trade visitors at their stand (63%), follow-up business after the show (60%), the number of specific technical discussions (59%), and successful sales and/or purchase agreements (27%). The number of contacts was the prime indicator taken by all exhibitor groups for gauging their success at the IAA, although this was most significant for the manufacturers of trailers, bodies and transport containers, and for providers of solutions in transport logistics (90 and 89% respectively).

Objectives	2014	2012
Creating personal contacts with existing and potential customers	91%	85%
Maintaining / enhancing firm's image	72%	66%
Information about technical innovations and future technical trends	50%	55%
General information about the firm's portfolio	46%	62%
Observing the competition	39%	39%
Sharing experiences	36%	35%
Orientation concerning technical function and properties of products on display	25%	26%
Concluding purchase agreements	21%	20%
Information about prices and conditions	14%	14%
Other	8%	11%

Table 3: Exhibitors' objectives in participating at the exhibition (multiple responses allowed)

- Exhibitors' expectations relating to their visitors' geographical origin were very largely realized (cf. Table 4). Only the numbers of guests from Germany and the other European countries were not as high as expected. On the other hand, there were 14 percent more Asian visitors, three percent more American visitors and five percent more visitors from other regions, than the companies had expected.

Region/country	Visitors expected	Visitors attending
Germany	95%	87%
Other European countries	84%	80%
Asia	35%	49%
America	19%	22%
Other	28%	33%

Table 4: Comparison of visitors expected and visitors actually attending, by region



- Two thirds of exhibitors indicated that they were able to reach all or the great majority of the target groups most important to them at the IAA. Another 30 percent reached at least some of their target groups. Only for less than four percent was this not the case. The reason why so many exhibitors rated the degree of contact with their target groups so positively becomes especially obvious when the most important visitor groups (for exhibitors) are juxtaposed with the ones actually contacted at the IAA. The comparison (cf. Table 5) shows that the exhibitors had contact with nearly all the visitor groups they were interested in. In almost all cases actual contacts more than equaled the level of interest, especially among the commercial vehicle suppliers, other industries, and services/skilled trades.

Visitor group	Interested in this group	Contacted this group
Commercial vehicle manufacturers	52%	55%
Trailer and body manufacturers	46%	47%
Commercial transport (forwarders, haulers)	40%	41%
Commercial vehicle suppliers	27%	42%
Commercial vehicle trade/skilled crafts	21%	25%
Construction	15%	14%
Trade (not incl. trade in automobiles)	15%	19%
Passenger transport	15%	15%
Other industries	14%	21%
Services, skilled crafts	13%	19%
Public bodies (authorities), associations	13%	16%
Other sectors	12%	19%
Suppliers of workshop and garage equipment	9%	12%

Table 5: Comparison of visitor groups in which exhibitors were interested and those with which exhibitors had contact at the IAA

- As well as a venue for contacting visitors, exhibitors also regard the IAA as an important platform for sharing views and information, where they can enter into dialogue with one another. Based on the exhibitors' assessments, on average 33 percent of visitors to their stands came from other exhibiting companies. Exhibitors from non-European countries and the providers of special motor vehicles rate the proportion even higher – 41 percent in each case – but also the manufacturers of trucks and light

commercial vehicles, and exhibitors in electric mobility, indicated a figure of at least 37 percent, which was higher than average. This is also expressed in the fact that at 67 percent, more than two thirds of exhibitors confirm their employees held discussions with other IAA exhibitors about products that could be bought by their own company. In detail it is noticeable that the IAA is used even more frequently for discussions between exhibitors by the Germans (73%) and by smaller businesses with up to 99 employees (75%). However, this is most often the case among the manufacturers of special vehicles, 91 percent of which indicated that they used the IAA for this purpose.

- The most popular discussion partners were exhibitors from the supply industry (69%), makers of trailers and bodies (36%), and suppliers of vehicle fittings and equipment (31%). In comparison with 2012, the suppliers gained in popularity (58% in 2012), whereas truck manufacturers managed only fifth place this year (28%; second place in 2012, at 41%). Suppliers were the most visited by exhibitors of all sizes, by domestic (71%) and foreign exhibitors (approx. 65%), and by almost all exhibition groups. The only exceptions were the groups “transport logistics”, which primarily held talks with other providers in this group (65%), and “electric mobility”, where the exhibitors spoke first and foremost with suppliers and other electric mobility providers (59% in each case). The exhibitors’ second most popular discussion partners were nearly always other exhibitors from their own exhibition group. Only among suppliers and service companies was this not the case. They principally sought representatives from the manufacturers of trucks (32%) or trailers and bodies (42%) for their discussions.
- The fact that the IAA Commercial Vehicles takes place regularly in Hannover is either important or very important to more than half the exhibitors (54%). It has above-average importance for suppliers of vehicle fittings and equipment (77%), truck manufacturers (68%) and transport logistics firms (61%). The IAA venue is of lesser importance to 16 percent.
- As indicated in section 4.1 above, the IAA enjoys a broad base of regular visitors who wish to continue participating at the show in the future. Two thirds of IAA exhibitors this year are certain that they will attend the 66<sup>th</sup> IAA Commercial Vehicles 2016. Another 29 percent of exhibitors have not yet decided whether to do so. Among the manufacturers of light commercial vehicles, suppliers of vehicle fittings, and makers of buses, the values ranged from 71 to 77 percent, and among the truck producers the figure reached a huge 84 percent. On this basis, 53 percent of exhibitors, that is over half, would either probably or very probably recommend participating at the IAA Commercial Vehicles, and for one quarter this is fairly probable. It is even more significant among exhibitors in light commercial vehicles, vehicle equipment and fittings, and trucks. For example, three quarters of exhibitors of light commercial vehicles would either probably or very probably recommend participating at the IAA Commercial Vehicles on the basis of their experience in 2014.

- To provide a general evaluation of the 65<sup>th</sup> IAA Commercial Vehicles 2014, the exhibitors were asked to assess – in four thematic areas – the most important factors surrounding the IAA which could be awarded grades ranging from 1, “very good”, down to 6. The venue Hannover (trade show grounds), and the German Association of the Automotive Industry (VDA) as the organizer scored “good” on all dimensions. It is noticeable that apart from the hotel and accommodation costs, all the indicators scored somewhere from “good” to “satisfactory.” Aspects that due to their relevance to costs tended to have negative connotations (hotel costs, stand rental) are in the range from “satisfactory” to “fair.” Table 6 shows the average scores.

Category	Score	Category	Score
Organizer	2.1	Trade show costs	3.4
» Availability	2.2	» Stand rental	3.4
» Friendliness	2.1	» Service providers	3.0
» Competence	2.1	» Technical service	2.8
» Cooperation overall	2.2	» Hotel & accommodation costs	4.2
» Information supplied in advance	2.1	Other	2.8
Trade fair grounds	2.3	» Hotels available	3.4
» Structure / division, in general	2.2	» Gastronomy	2.8
» Own exhibition space	2.5	» Supra-regional travel connections	2.4
» Technical service on site	2.1	» Regional travel connections	2.4

Table 6: Assessment of the organizer and the venue Hannover (on a scale from 1 down to 6)

- The overall success of the exhibitors’ participation at the IAA Commercial Vehicles received an average grade of 2.7. Almost half of the companies (49%) rated their success as either good or very good (cf. 41% in 2012). Companies in the exhibitor groups “trucks”, “light commercial vehicles”, “vehicle fittings” and “electric mobility” gave their IAA participation a score that was above average. In all of these groups, over 60 per cent found the IAA to be either successful or very successful. Moreover, three quar-

ters of the participating exhibitors (77%) were satisfied with their participation at the IAA Commercial Vehicles 2014.

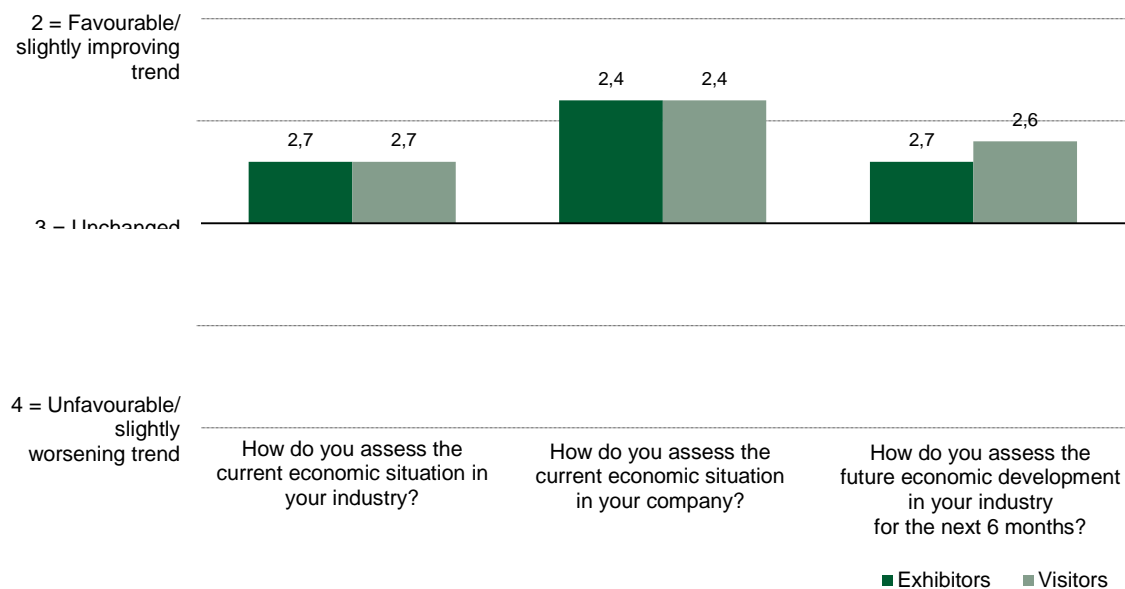
This year for the second time, exhibitors and trade visitors were asked to assess the current and future economic situation in their sector and the economic state of their company, to provide a quantitative indicator of the mood in the commercial vehicle industry at the time of the IAA. Possible responses were on a scale from 1, “very favorable/strongly improving trend”, down to 5, “very unfavorable/worsening markedly”. One interesting finding is that visitors and exhibitors gave largely identical ratings to both aspects – the current economic situation in the industry and that of their own company (cf. Figure 3). Only the economic outlook for the next six months was seen as marginally more positive by the visitors. It is also noticeable that the situation of the respondents’ own company was regarded as better than the general state of the industry. Whereas the sector in general was rated as “stable”, assessment of the situation in one’s own company tended toward “favorable”. Overall, however, every item was rated as better than 3, “stable”. This represents a welcome, more optimistic assessment than that at the IAA 2012. In 2012 the responses were all more negative, and exhibitors and visitors gave different responses. For example among the exhibitors the average assessment of the current economic situation in the industry has improved from 3.1 to 2.7, and the expected economic development in the coming six months has improved from 3.2 to 2.7.

All three points received in some cases much better scores from trade visitors from North America and the Middle East than the averages presented (for instance, North Americans gave a score of 2.0 for all aspects). Exhibitors from the field of transport logistics also always awarded a better score than the other exhibition groups did (as in 2012).

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**Assessment of the economy/industry by exhibitors and visitors**

Figure 3



### 4.3. Tickets ordered by exhibitors

The guest tickets ordered by exhibitors in advance of the IAA and the guest tickets actually used by the visitors show a different situation than the one seen two years ago. In total eleven percent more guest tickets were ordered, but only 14 percent of them were used by visitors. In 2012 the use rate was higher, at 17 percent (cf. 11% in 2010; 13% in 2008). At the previous IAA, the exhibitors were able to distribute over nine percent more tickets to visitors who then also attended the IAA. So the efforts of the exhibitors were more effective in 2012 than they were this year. This discrepancy is all the more striking because the number of visitors fell by seven percent this year (cf. section 5 below).

Guest tickets sent to customers or partners in electronic form as PDF files (e-tickets) have once again become more popular with visitors. One third more tickets of this type were ordered, but the proportion of tickets actually used soared by 114 percent. However, the tickets by far the most frequently ordered and used (15% use rate) remain the printed guest tickets in A6 format, which several exhibitors overprinted with their individual designs.

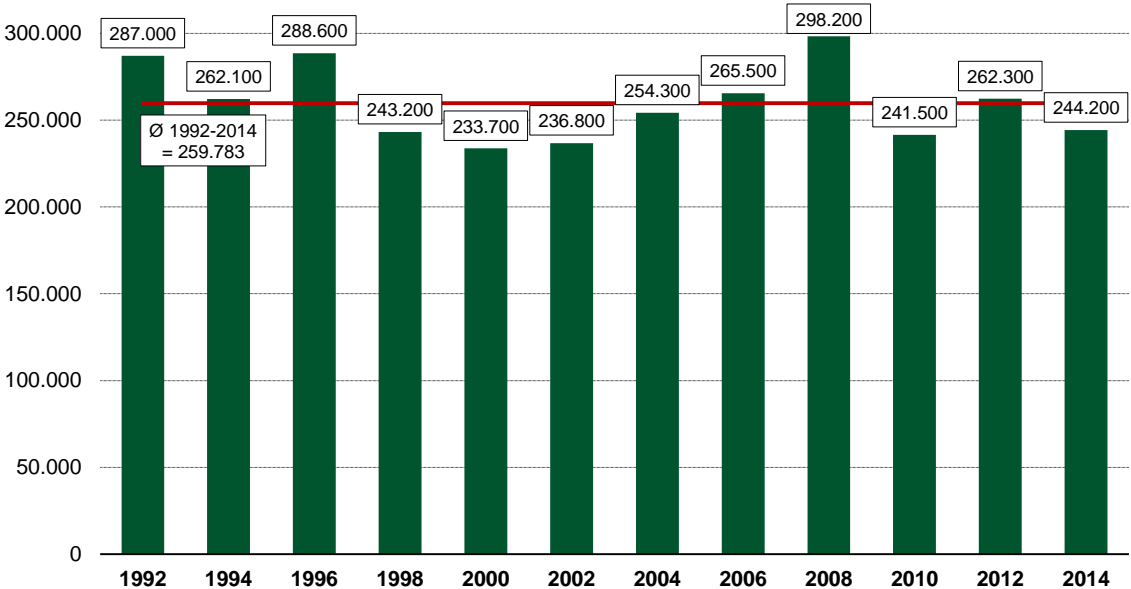
The campaign offering reduced ticket prices for employees of exhibiting VDA members was repeated this year. The companies used a total of 21,093 tickets, which was 15 per cent down on the 2012 figure (24,790 tickets).

## 5. Visitors

The number of visitors to the IAA Commercial Vehicles 2014 stayed at a very high level, but could not match the result from 2012. At around a quarter of a million visitors (cf. Figure 4), the result for this year's IAA was nearly seven percent below that from 2012, although it was still above the final figure from 2010.

### Long-term trend in visitor numbers incl. averages

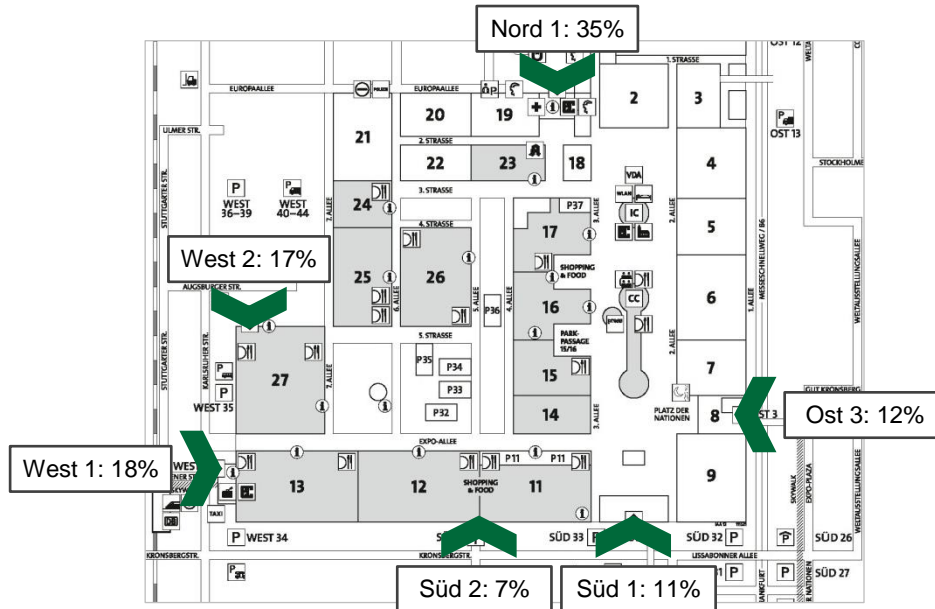
Figure 4



Once again the largest number of visitors (35%) entered the IAA grounds through the entrance North 1. The second most popular entrances were West 1 (18%) and West 2 (17%). The entrances on the south and east sides of the grounds were chosen by the remaining 30 percent of visitors. Overall, the distribution showed very little change compared with 2012.

## Access rates by entrance

Figure 5



## 5.1. Visitor structure

The visitor structure is described below on the basis of statistical data. This information was collected during an extensive, representative survey of visitors – likewise conducted by the firm Gelszus Messe-Marktforschung GmbH – at various locations on the exhibition grounds during the IAA.

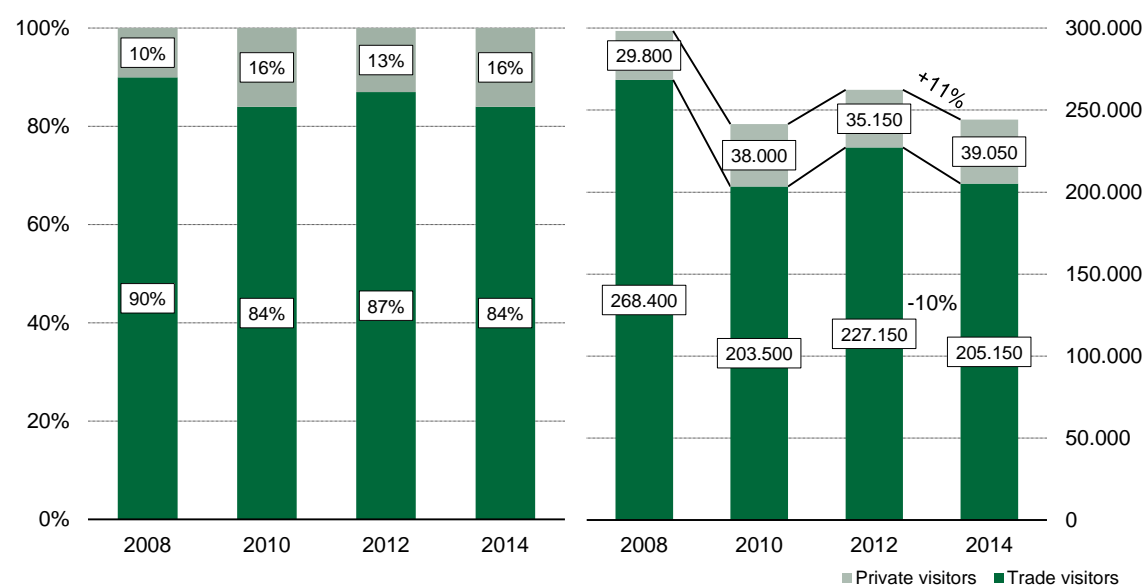
- This year the share of trade visitors exceeded 80 percent on weekdays, and only on the weekend did it fall to around 75 to 78 percent. On the opening day 91 percent of visitors were trade visitors. On average 84 percent of visitors were professionals, a result close to the good level seen at the last IAA Commercial Vehicles (cf. Figure 6). For the exhibitors, the quality of the trade visitors is generally an even more important criterion for the success of a trade fair than their absolute number. In the online survey, half the exhibitors indicated that they were either satisfied or very satisfied with the quality of the visiting specialists, and another 28 percent were fairly satisfied.



- The IAA 2014 recorded 205,150 professional visitors, ten percent down on the 2012 figure. However, the result is higher than the total from 2010. By contrast, there was a rise of eleven percent in the number of visitors attending the IAA out of private interest, to 39,050 visitors.

Trend in share of trade visitors since 2008 (percentages and absolute figures)

Figure 6



- The international character of the IAA is illustrated not only by the exhibitors, but also once again by the share of trade visitors arriving from abroad. Following the record proportion of foreign professional visitors in 2012 (29%), this time their share was only slightly decreased, amounting to 27 percent. The majority of trade visitors arriving from abroad came from the European Union (59%). This share has risen once more to equal the 2010 level (cf. Table 7). In contrast, the proportion of Asian trade show visitors showed a slight fall from 18 to the current 16 percent. The Asians were especially strongly represented in the sectors of motor vehicle manufacturers and dealers, and the skilled trades. The proportion of foreign visitors reached its overall peak (42%) on the second exhibition day.
- Most foreign visitors to the 65<sup>th</sup> IAA Commercial Vehicles again came from the Netherlands (9%; cf. 10% in 2012), followed by Poland (7%; cf. 3% in 2012), Italy (6%; cf. 3% in 2012), the People's Republic of China (5%; cf. 8% in 2012) and Spain (5%; cf. 2% in 2012). This means that Poland and Italy, which managed to at least double their

share of the visitors, moved up to second and third place. This year China was somewhat less well represented, so it slipped from second position in 2012 to fourth in 2014. Almost five percent of visitors came from France and Switzerland, four percent came from Austria and from Denmark, and three percent from the United Kingdom, Sweden and Turkey.

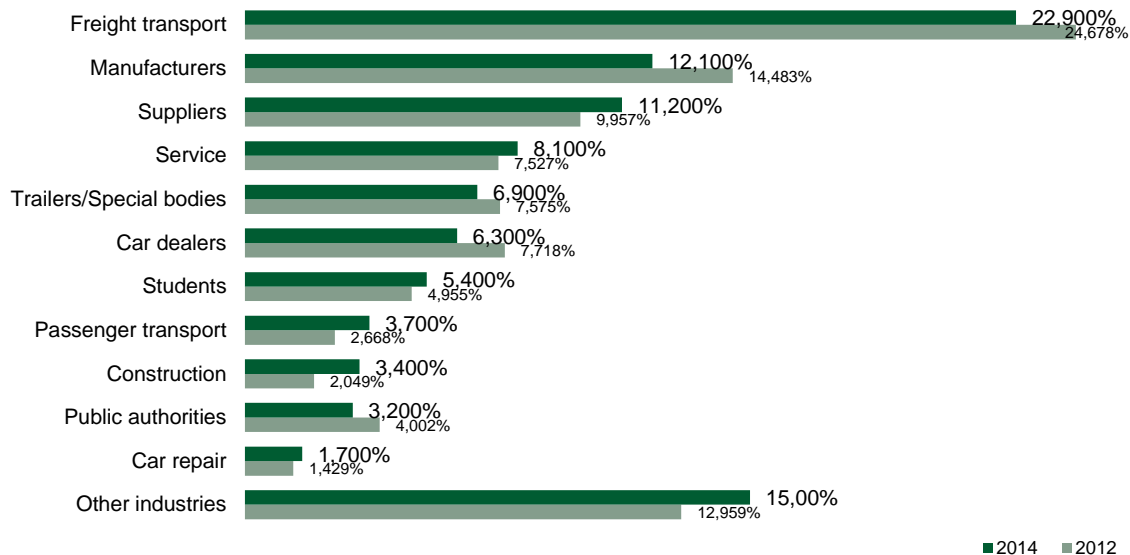
	2014	2012	2010	2008
European Union	59%	55%	59%	63%
Other European countries	12%	13%	16%	15%
North America	2%	3%	2%	3%
South and Central America	5%	4%	5%	5%
Middle East	3%	4%	2%	3%
South/East and Central Asia	16%	18%	10%	6%
Africa	3%	2%	3%	3%
Australia	2%	2%	2%	3%

Table 7: Origin of trade visitors from abroad

- One third of trade visitors came from sectors of the automotive industry (30%; motor vehicle manufacturers and suppliers, plus trailers and bodies). Among the foreign visitors this share was even higher, totaling 52 percent. Nearly one quarter of IAA trade visitors (23 percent) again came from the field of commercial transport (forwarders, storage firms and transportation) (cf. Figure 7). However, among the German trade visitors far more people came from this branch of industry (27%; from abroad: 12%).
- Of the trade visitors, 42 percent held senior positions. The figure is slightly less than in 2012 (49%), but this year for the first time the category “truck driver” was available as a response, to which a certain percentage of the self-employed entrepreneurs could have been assigned in the past. This year the truck drivers accounted for 16 percent. Among the German visitors, 21 percent were in this group. Among the foreign professional visitors the share was greater: this year 70 percent of them held a senior position (cf. 69% in 2012). On the second exhibition day most trade visitors were in senior positions.

## Trade visitors by sector

Figure 7



- The trade visitors attending this year's IAA were once again highly relevant. The fact that the show remains a meeting point for decision-makers is emphasized by the 75 percent of trade visitors whose work involves corporate purchasing and procurement decisions (cf. 78% in 2012). More than one fifth of them (23%) have the last word on such decisions, 30 percent are co-decision-makers, and another 22 percent have advisory functions. It is less surprising that the proportion is even higher among foreign visitors: 90 percent of them are involved in decision-making.
- Two out of five guests were visiting the IAA Commercial Vehicles for the first time this year (41%; cf. 37% in 2012). Among foreign visitors the number of new attendees was even higher, totaling 54 percent. By contrast, trade visitors (especially those from Germany) and visitors from the Middle East (ranging from 61 to 82 percent) are among the regulars at the IAA and had visited at least one previous motor show. More than half of all trade show visitors (58%) were attending the IAA Commercial Vehicles for the second time, and 42 were already attending for at least the third time.
- In accordance with the slight fall in the share of foreign trade visitors, somewhat fewer IAA visitors travelled longer distances to reach the trade show. This year, a total of 47 percent of trade visitors travelled over 300 km to attend. Of the other visitors, one in ten came from the immediate region (up to 50 km) or had a journey of between 51 and 300 km (43%). The transportation of choice for arriving at the IAA remains the passenger car (60%). In 2014 for the first time a separate ticket was offered for truck driv-

ers. Eight percent of the “specialist” visitors accordingly travelled to the event by truck. On the exhibition weekend, values of ten to twelve percent were recorded. Special truck parking lots and parking bays were available for the trucks.

- The trade visitors spent an average of 6.8 hours at the IAA. Private visitors spent nearly one hour less at the trade fair (5.9 hours). Accordingly, 70 percent of professionals and 77 percent of private visitors remained at the IAA for one day only. Yet 20 percent of trade visitors still chose to stay for a two-day visit. The average length of stay remained constant at 1.5 days. Foreign trade visitors remained for an average of two days. Those travelling from South or Central America visited the IAA on three days.
- A total of 25 percent of visitors combined their IAA visit with an overnight stay in Hannover or the surrounding area. This time visitors from abroad made more use of the available hotels (81%). It is surprising that alongside 25 percent of trade visitors (especially those from supply companies: 39%), also 19 percent of private visitors stayed in and around Hannover overnight. In all 44 percent of visitors stayed for one night, while 31 percent stayed for two nights and another 26 percent for three or more nights. The average number of overnight stays came to 2.1.
- The average age of this year’s visitors to the IAA was 39.2 years, hovering just below the 40 mark (cf. 39.3 in 2012). The overall average is more strongly influenced by the trade visitors, with their average of 39.4 years, than by the private visitors (at 37.9 years). However, 32 percent of trade visitors were no older than 30 (cf. 30% in 2012); the largest age group was the visitors aged from 41 to 50 (26%; cf. 28% in 2012). The “average visitor” was youngest on the last trade show day, at 36.2.
- As before, the IAA attracted more male visitors (83%) than female visitors. Nonetheless, this year’s event improved its attractiveness to female visitors, whose proportion rose from twelve to 17 percent. This increase of almost five percentage points was identical among both professional and private visitors. The share of women among visitors from abroad actually climbed by 100 percent, although the figure of twelve percent remains below the overall average. Among private visitors only, women made up one third of the visiting public (33%).

## 5.2. Visitors’ behavior and visitors’ assessments

- More than one quarter of trade visitors (28%; cf. 23% in 2012) were made aware of the IAA via their workplace (colleagues or supervisors). The five percent increase indicates that this means of contacting trade visitors has now overtaken the other most important channel: the attention of 25 percent of trade visitors was drawn to the IAA by

admission tickets from exhibitors (cf. 24% in 2012). This corresponds with the distribution of fewer guest tickets by the exhibitors (cf. section 4 above), but also confirms the huge importance of these tickets for the success of the IAA when it comes to generating visitors. One fifth of trade visitors were familiar with the IAA from their previous visit (21%; cf. 22% in 2012). Advertising by IAA exhibitors motivated only one trade visitor in ten to come to the exhibition; furthermore, this factor lost three percent of its relevance (9%; cf. 12% in 2012). Table 8 shows the distribution for each medium and the differences between trade and private visitors in more detail. The ranking of the media that were most effective at drawing attention to the show is quite different for the professional and private visitors.

	2014			2012		
	Total	Trade	Private	Total	Trade	Private
Via the workplace (colleagues / supervisors)	25%	28%	11%	21%	23%	6%
Invitations / ticket vouchers from exhibitors	24%	25%	19%	23%	24%	16%
Familiar with the IAA from the previous event	21%	21%	18%	21%	22%	17%
Advertising by IAA exhibitors	9%	9%	5%	11%	12%	4%
Specialist events	9%	10%	3%	10%	11%	3%
School / university	9%	9%	5%	6%	7%	4%
Press reports	8%	7%	13%	13%	13%	14%
IAA advertising in the trade press	7%	7%	8%	6%	7%	3%
Reports on the internet	6%	5%	9%	10%	10%	13%
IAA advertising on the internet	5%	5%	6%	4%	4%	7%
TV reports	4%	3%	8%	3%	3%	5%
IAA or VDA website	3%	3%	2%	-	-	-
Radio reports	3%	2%	5%	3%	2%	6%
Reports on social media	2%	2%	3%	-	-	-
IAA fan pages on social media	1%	1%	1%	-	-	-

Table 8: Visitors' attention drawn to the IAA by... (multiple responses allowed)

- The main motivation for visiting the IAA remains gaining an overview of new developments and innovations (cf. Table 9). Around one quarter of trade visitors came to the IAA for training or to expand their knowledge because the IAA is regarded as a professional “must,” to share experience or to obtain a comprehensive overview of what was on offer. For private visitors, the main reasons for visiting the show were the innovations, followed by the classic vehicles and the special activities. The foreign professionals had hardly any interest in these parts of the exhibition. Only two percent of them attended IAA with this motivation, whereas among German trade visitors the proportions were higher, at 13 and ten percent respectively. On the other hand, as a platform for initiating new business relations the trade show is much more important to foreign professionals (25%) than it is to those from Germany (8%).

	2014		2012		2010	
	Trade	Private	Trade	Private	Trade	Private
Overview of innovations	43%	49%	45%	48%	55%	58%
Training / expanding knowledge	27%	21%	25%	19%	-	-
Professional “must”	27%	2%	27%	3%	37%	1%
Sharing experience / information	24%	16%	23%	13%	-	-
Collecting information / overview of offers	23%	18%	25%	24%	34%	30%
Special shows / activities	12%	24%	9%	23%	12%	25%
Observing competitors	11%	2%	13%	3%	-	-
Initiating new business relations	10%	2%	10%	2%	14%	1%
Interest in classic vehicles	9%	28%	8%	30%	10%	38%
Specialist events	9%	6%	8%	6%	12%	9%

Table 9: Main reasons for visiting the IAA (selection; multiple responses allowed)

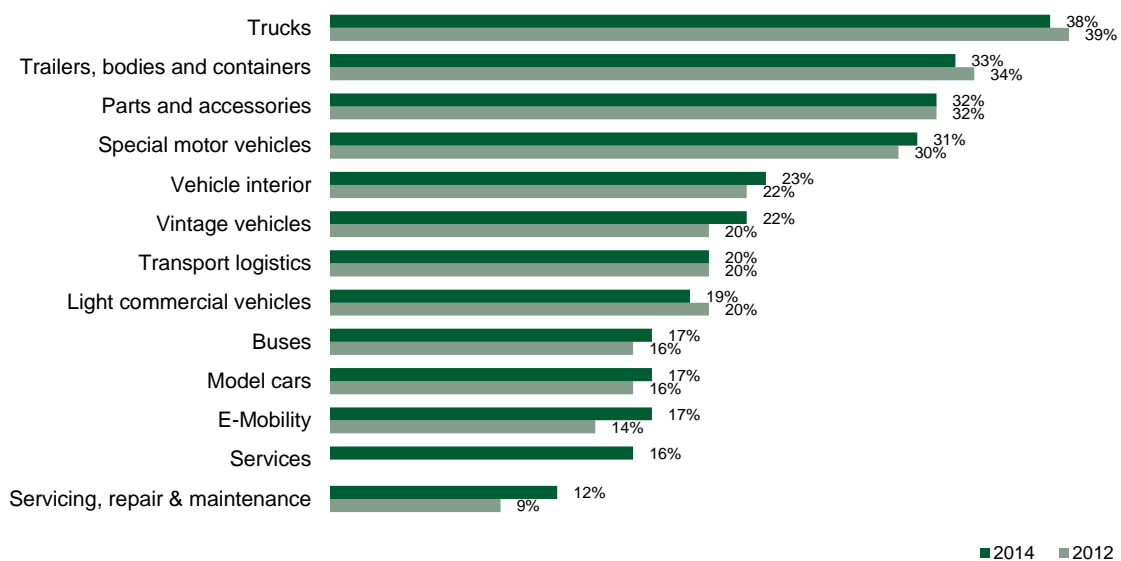
- The exhibition section devoted to trucks and truck tractors attracted 38 percent of trade visitors. Exactly one third of them (33%) visited exhibitors in the trailer and body section. Attendance at the suppliers’ presentations was only slightly lower (32%). The sections most popular with private visitors were classic vehicles (38%) and model vehicles (35%). However, one third of private visitors also visited sections displaying trucks. Here again, the picture is different for foreign professional visitors. In contrast

to the Germans, 35 percent visited sections of the exhibition focusing on parts and accessories (suppliers), while their second most popular section was trailer and body manufacturers, followed by special vehicles in third place. Sections about trucks attracted 26 percent of foreign professional visitors.

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Most visited exhibition sections (trade visitors only; multiple responses allowed)

Figure 8

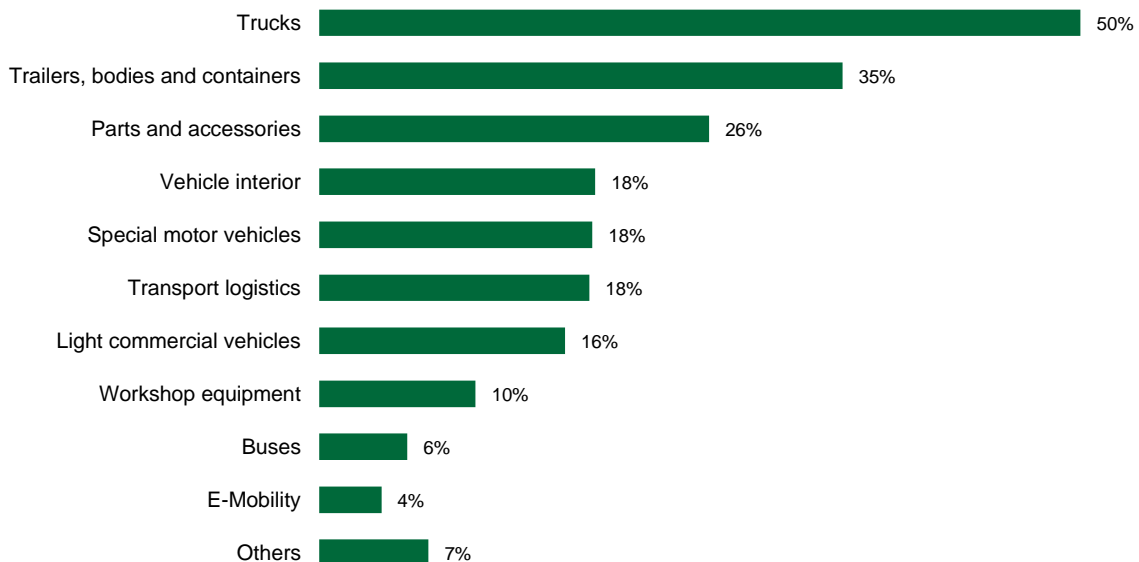


- Although the exhibition sections relating to trucks were the most heavily frequented, the visitors also found other areas very important. For 37 percent it was very important to visit the suppliers' stands in addition to the truck manufacturers. Half of trade visitors (52%) stated that they also intended to visit other exhibitors' stands.
- The trade visitors' willingness to make investments was somewhat greater this year than it was two years ago. A total of 56 percent, i.e. over half, of trade visitors with influence on purchasing decisions were planning to invest in the field of commercial vehicles within the next six to twelve months (cf. 54% in 2012), and another 17 percent were still undecided (cf. 16% in 2012). The prognosis is much better among trade visitors from Germany than those from other countries (57% and 48% respectively). By far the greatest willingness to invest was found among visitors from commercial transport firms (73%) and passenger transport (64%), and once again among visitors from the Middle East (73%). Half of the visitors (52%) considering new procurements attended the IAA in Hannover to prepare for this investment. Here the greatest interest

is in trucks (50%), although 35 percent would like to invest within the next six months in trailers, bodies and containers, and one quarter (26%) would like to acquire parts and accessories (cf. Figure 9). This year products from suppliers were more popular candidates than in 2012 (23%); among foreign visitors the second most common objects of planned investment were parts and accessories (32%). Not only visitors' willingness to make investments, but also the average size of their planned investments has again increased, even if the rise was not as large as that from 2010 to 2012. The scope of planned investments averaged out at EUR 387,675, which was up by approx. EUR 9,800, or nearly three percent (cf. rise of EUR 70,000 in 2012). While investment volumes of up to EUR 200,000 were especially noticeable (48%; cf. 47% in 2012), another 15 percent of visitors could envisage investing amounts of over one million euro this year (cf. 13% in 2012). Foreign professionals were once again planning far higher sums, of EUR 474,219. A whole quarter of this visitor group was expecting to have a budget of over one million euro.

Planned investment projects by exhibitor group ("In which areas are investments expected?"; multiple responses allowed)

Figure 9



- Alongside the exhibition itself, the IAA Commercial Vehicles has a wide range of accompanying events. This year the activities, special shows and specialist events on offer were noticed by nearly three quarters of visitors (72%; cf. 61% in 2012). The US trucks again took first place, followed by the special show of classic vehicles. This



time these two special shows were organized together with the special show of the German Red Cross in a separate hall. Table 10 shows the proportions of trade and private visitors noticing the special shows along with the proportions of respondents actually visiting them.

Special show	Noticed		Took a closer look	
	Trade	Private	Trade	Private
US trucks (Hall 22)	24%	35%	20%	32%
Classic vehicles (Hall 22)	21%	31%	20%	27%
Test drives in light & heavy commercial vehicles	16%	13%	10%	9%
Test drives in electric vehicles (south of CC)	13%	13%	7%	8%
job and career (Hall 23)	8%	5%	9%	5%
VDA Innovation Stage	7%	8%	4%	4%
German Red Cross' special show on disaster aid (Hall 22)	6%	11%	7%	10%
Automania model vehicle collectors' fair	6%	8%	3%	5%
Specialist events (in CC)	5%	4%	3%	3%
Expert days for workshops (Hall 23)	3%	3%	8%	3%

Table 10: Attendance at special shows (multiple responses allowed)

- Overall, this year's accompanying events included more than ten special shows and activities, and 30 specialist events. The exhibitors also held numerous events of their own. Therefore the IAA was once again a major international mobility congress with an exciting program of action. Some of these activities are described briefly below.
  - The VDA Innovation Stage presented several hosted dynamic demonstrations every day showcasing the technical innovations of 18 exhibitors. On a specially installed stand on the open-air site, visitors could watch fascinating displays with a very wide range of vehicles illustrating five special topics. This year's demonstrations were dedicated to the topics of telematics and connectivity, transport efficiency, environmental protection and action on climate, driver assistance systems, and road safety.

- The test drives again increased in popularity, both with the participating exhibitors and with the visitors. This time 55 vehicles with conventional drive trains were available for test drives, i.e. nearly twice as many heavy and light commercial vehicles as there were two years ago (28 vehicles). During the exhibition, the vehicles were taken on over 2,000 test drives, which was an increase of almost 60 percent (cf. 1,265 in 2012). This year more than 2,750 visitors utilized the opportunity of a ride in one of the 21 electrically powered vehicles (a rise of 83%) on the test track for electric vehicles, which was on the trade show grounds (starting south of the CC). These vehicles included not only light commercial vehicles but again some buses and, for the first time, heavy trucks. On Sunday, September 28, the starting point for the electric test drives formed the backdrop for the live recording of the NDR TV-program “auto.welt.” During the introductions the test vehicles were always prominently visible in action. The beginning of the program was broadcast from the cab of one of the electric trucks.
- They are now a fixed item on the agenda and are popular with visitors from all industries, and with trade and private visitors alike (cf. Table 10): the classic commercial vehicles and US trucks. The Nutzfahrzeug Veteranen Gemeinschaft (veteran commercial vehicles association, NVG) and the firm Fehrenkötter Transport & Logistik GmbH, acting in cooperation with the publishers EuroTransportMedia Verlags- und Veranstaltungs-GmbH, presented historic trucks, buses, construction machines and trailers, including many vehicles from the “German Unity Tour” (14<sup>th</sup> Historic Vehicles’ German Tour). This year Hall 22 was dedicated solely to special shows, including the presentation of spectacular US trucks by American Truck Promotion, and a special exhibition on worldwide disaster aid by the German Red Cross.
- Together with various exhibiting manufacturers and suppliers, the VDA organized activities during the IAA for attracting young talent to the automotive sector. One of them was goING directed at youngsters still at school, and the other was workING, intended to give students of all subjects insights into the world of work in the automotive industry. The goING campaign welcomed 320 schoolchildren, and workING attracted approx. 60 students who got into conversation with exhibitors’ employees and were then able to obtain more detailed information during their visit to the show.
- The “Automania” model vehicle collectors’ fair was held on the exhibition weekend (September 27 and 28) in Pavilion 11. This year again, it was the meeting point for the model vehicle collector community, which has been gathering at the IAA for two decades now and includes car and commercial vehicle enthusiasts of all ages. The range of model vehicles encompassed historical and modern passenger cars along with commercial vehicles and other souvenirs from the automotive world.

- The “Expert days for workshops” were held in Hall 23 on the exhibition weekend exclusively involving exhibitors from the field of maintenance, servicing and repairs (for workshops). During guided walking tours through the exhibition area, visitors took a look at the special developments and offers of the participating manufacturers. This event established itself among the participating exhibitors in 2012; visitors from workshops were contacted in advance of the IAA and invited to the “Expert days”. Three tours were available on both days.
  - The IAA 2014 offered its first ever career-information and recruiting section entitled “job and career at IAA Commercial Vehicles”. This new platform in Hall 23 supplemented related activities such as workING, offering a point of contact for all specialists from automotive occupations who were seeking a new challenge or wished to develop professionally, and for entry-level employees. The area also had a stage with an attractive lecture program including keynote lectures by well-known experts on careers, training seminars and workshops, and presentations by selected employers. An online job portal was set up especially for the IAA, listing the job advertisements of all the companies involved even before the show. Exhibitors could book their specific options for making presentations in a coordinated overall setting.
  - Around 4,500 participants attended roughly 30 specialist events with the most varied topics and focuses. Furthermore, the VDA-QMC expert forum was on offer in Hall 13.
- Finally, the trade and private visitors were asked for a general assessment of the 65<sup>th</sup> IAA Commercial Vehicles. They could award scores in seven categories on a scale from 1 (“very good”) down to 6. The assessments have hardly changed in comparison with the two previous events. Professionals gave the IAA 2014 an average score of 2.4, while private visitors awarded it a score of 2.3. Table 11 gives a more detailed breakdown of these marks. All the indicators maintained a rating of “good”. Only the quality of the gastronomy at the exhibition was rated as merely “satisfactory”. The completeness and breadth of the offering, its international nature, and the innovations obtained above average scores.

	2014	2012	2010
Completeness and breadth of the offering	2.1	2.1	2.1
Internationality of the offering	2.1	2.2	2.2
Innovations / new models on offer	2.2	2.2	2.3
Quality of visitor information	2.4	2.3	2.4
Clarity of the offering / division into sectors	2.4	2.4	2.5
Services on the trade show grounds	2.5	2.5	2.5
Quality of gastronomy on the trade show grounds	2.8	2.8	2.8
Overall average	2.4	2.4	2.4

Table 11: Assessment of the IAA Commercial Vehicles 2014 (scale from 1 to 6)

- In total, 94 percent of trade visitors were satisfied with their visit to the IAA (unchanged from 2012). Within this group 18 percent were completely satisfied, 51 percent were well satisfied and 25 percent were satisfied. The average satisfaction score has remained at a constant 2.2 (1=completely satisfied, 6=not satisfied at all) since 2008. Guests from the Middle East and North America awarded even better scores of 1.4 and 1.9 respectively. Of the trade visitors, 93 percent also indicated that they would recommend colleagues or business partners to visit the IAA.
- The majority of visitors to this year's show also wish to revisit the IAA Commercial Vehicles in the future. This intention is either strong or very strong among nearly three quarters of visitors (73%; cf. 70% in 2012), and probable among another fifth (20%; cf. 22% in 2012).

The **66<sup>th</sup> IAA Commercial Vehicles** will be held from September 22 to 29, 2016, on the Hannover trade show grounds.

Berlin, November 7, 2014/JH