



September 17—22, 2024

FINAL REPORT 2024

Meet the pioneers of transformation at IAA TRANSPORTATION



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1 Executive Summary



“The IAA shows the future of transport.
From electric trucks to autonomous delivery drones
– a must for tech fans!”

amz, September 24, 2024

The IAA TRANSPORTATION 2024 from September 19 to 25 was attended by almost 1,700 exhibitors from 41 countries presenting their latest developments on the exhibition grounds in Hanover. This was an increase of over 21 percent compared with 2022 for the world's leading platform for the commercial vehicle, logistics, and transportation industry. The IAA attracted around 145,000 visitors (9 percent up on 2022) and occupied an area of 258,000 square meters, which was also more than in 2022 (see Table 1).

The proportion of exhibitors from abroad rose sharply to 71 percent, which was a new record in the history of the IAA; never before have so many foreign exhibitors participated in the show. They came from a total of 41 different countries to present their products and services. This underscores very clearly the position of the IAA TRANSPORTATION as a platform with international standing. It also hosted 145 world and European premieres – demonstrating the industry's impressive ability to innovate.

In general, the IAA TRANSPORTATION 2024 produced very positive results. Table 1 shows the key indicators and compares them with the figures from previous events. The following sections of this Final Report present the evaluations of the exhibitors' and visitors' surveys and the press and communication activities.

	2024	Veränd. zu 2022	2022	2018	2016	2014
Exhibitors	1,699	+21,2%	1,402	2,174	2,013	2,066
Countries represented	41	-2,4%	42	48	45	45
Total area occupied in m ²	258,000	+2,0%	253,000	282,000	260,000	265,000
Net area occupied in in m ²	157,359	+1,8%	154,557	212,816	199,457	193,262
Of which:						
Occupied by exhibitors	145,043	-2,0%	148,012	201,358	188,906	182,175
» Hall areas	118,146	-0,3%	118,527	164,357	155,239	150,139
» Open-air areas	26,897	-8,8%	29,485	37,001	33,667	32,036
Special shows	12,316	+88,2%	6,545	11,458	10,551	11,087
Visitors	144,400	+9%	132,740	249,970	248,900	244,200
Journalists	1,415	-3%	1,459	2,130	2,146	1,944

Table 1: Key indicators for the IAA TRANSPORTATION 2024

The claim of the IAA TRANSPORTATION, “People and Goods on the Move,” was used again this year. The new key visual and this year's motto “Meet the pioneers of transformation” for the IAA TRANSPORTATION 2024 expressed the dynamism in the mobility sector: interactive

experiences, a chance to experience the latest vehicles and technologies during test drives, and in-depth insights into the most recent technological advances in the field of mobility.

The IAA TRANSPORTATION 2024 generated an outstanding response in the media (including 16,200 mentions in online media). Over 1,400 journalists from 52 countries visited the exhibition to report on the latest developments and innovations at the event. Half the journalists came from abroad. The exhibitors organized over 80 press conferences in all, whereby a large proportion of the reporting – over 76 percent – was carried by international media from a total of 116 countries.

This year's event hosted the second IAA Conference on three stages with over 80 sessions covering the most important topics in the industry. On the Main Stage, the Industry Stage and in the Speakers' Corner, high-ranking representatives from industry, innovative startups and other experts presented their visions and solutions for sustainable transportation solutions. The conference offered a unique platform for exchanging ideas and developing new partnerships.

One special highlight at the IAA TRANSPORTATION 2024 was the test drives, where visitors had an opportunity to try out the latest zero-emission commercial vehicles both on the exhibition grounds and on public roads. Test drives were offered in 60 vehicles (LCVs, HCVs and buses) from 18 well-known manufacturers. Visitors took vehicles on a total of over 6,300 regular test drives, plus there were over 2,200 test rides on the cargobike circuit and more than 450 test drives in the truck driving school. These figures topped the existing IAA TRANSPORTATION record by nearly 17 percent.

In addition, the IAA showcased the entire transportation value chain. Once again there was a very strong showing by the suppliers. Half (51 percent) of the 1,699 exhibitors were in this category. However, this year they showed very keen growth of 45 percent compared with the last event. They were followed by the manufacturers of trailers, bodies and containers, who accounted for 14 percent and occupied 28 percent of the exhibition area. Especially strong growth was seen among the providers of infrastructure. The number of exhibitors in this group came to 56, which was 70 percent up on the 2022 level.

Both the quality and the quantity of trade visitors to the IAA TRANSPORTATION 2024 remain consistently high. The share of trade visitors was 86 percent, with 34 percent of them coming from countries other than Germany. Almost half of the trade visitors (49 percent) hold senior positions, while among the foreign trade visitors this figure was 72 percent. Seventy-one percent of the trade visitors are involved in purchasing decisions, but among the foreign trade visitors this figure was 84 percent. A more detailed assessment is given in section 2 below.

The successful IAA TRANSPORTATION 2024 provided evidence that the sector is ready and willing to play an active role in shaping the transformation toward climate-neutral mobility. VDA President Hildegard Müller stressed, "The IAA TRANSPORTATION was an impressive demonstration that our industry is actively driving the transformation toward climate-neutral and digital solutions with its investments and innovations, and that we have already developed the products for addressing the many and varied challenges, and they are ready for series production." The IAA TRANSPORTATION remains the central meeting place for the mobility and logistics sector, and going forward it will continue to support the path of transformation.

2 Visitors

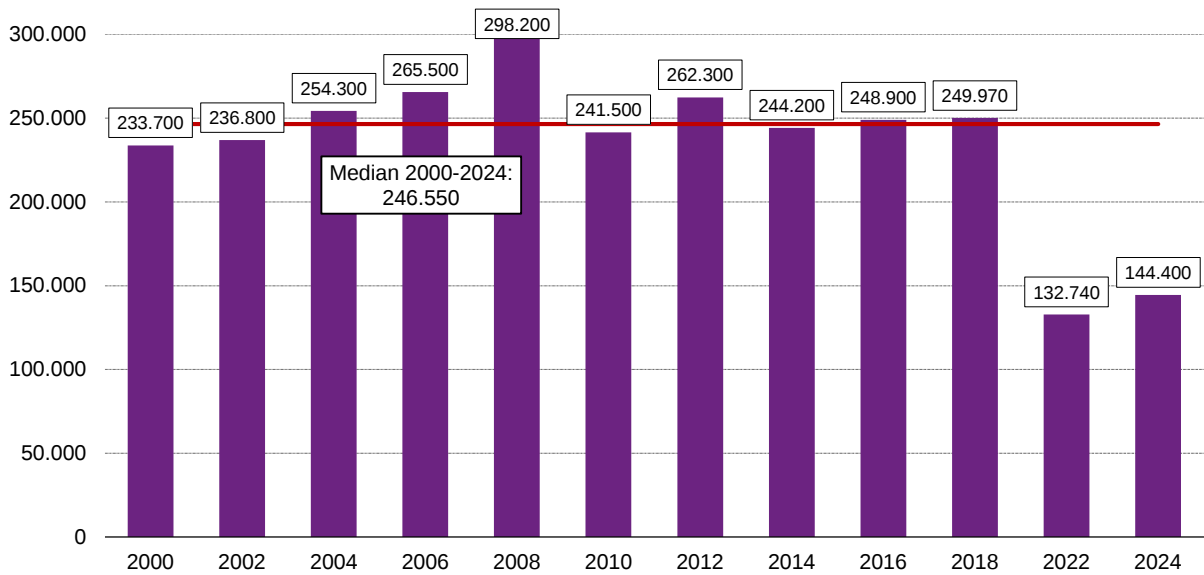
In 2024 the number of IAA visitors came to 144,400, which was a rise of 9 percentage points in comparison with 2022. This is the first time that the figure can really be compared with a previous show, because this year's event was only the second that ran for seven days and ended with a weekend. In the first three days, the visitor figures were well up on 2022, with increases of 12 to 23 percent. The number of visitors on the weekend also rose compared with the previous show.

144,400

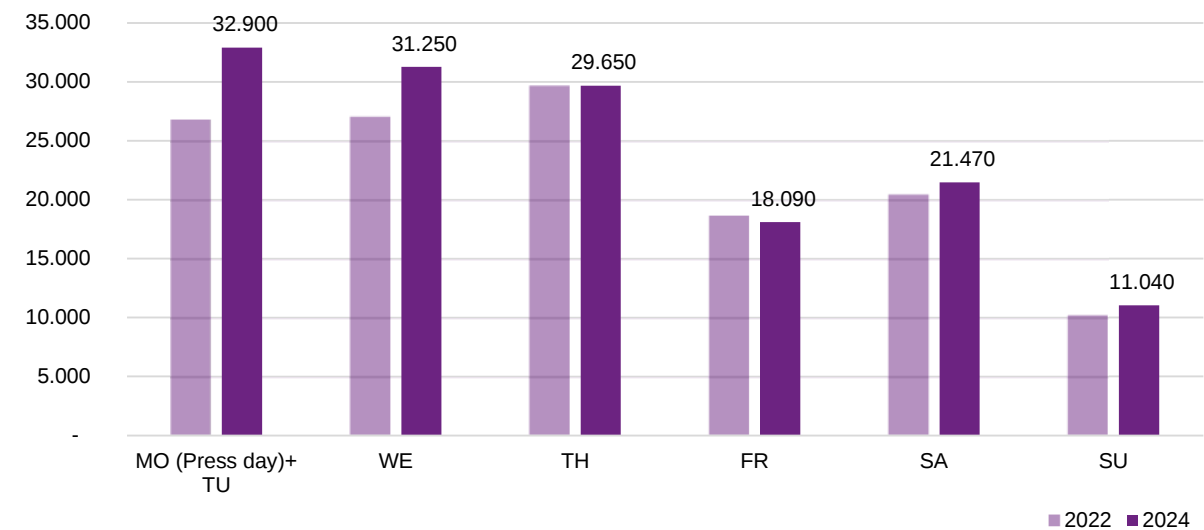
visitors attended
the IAA



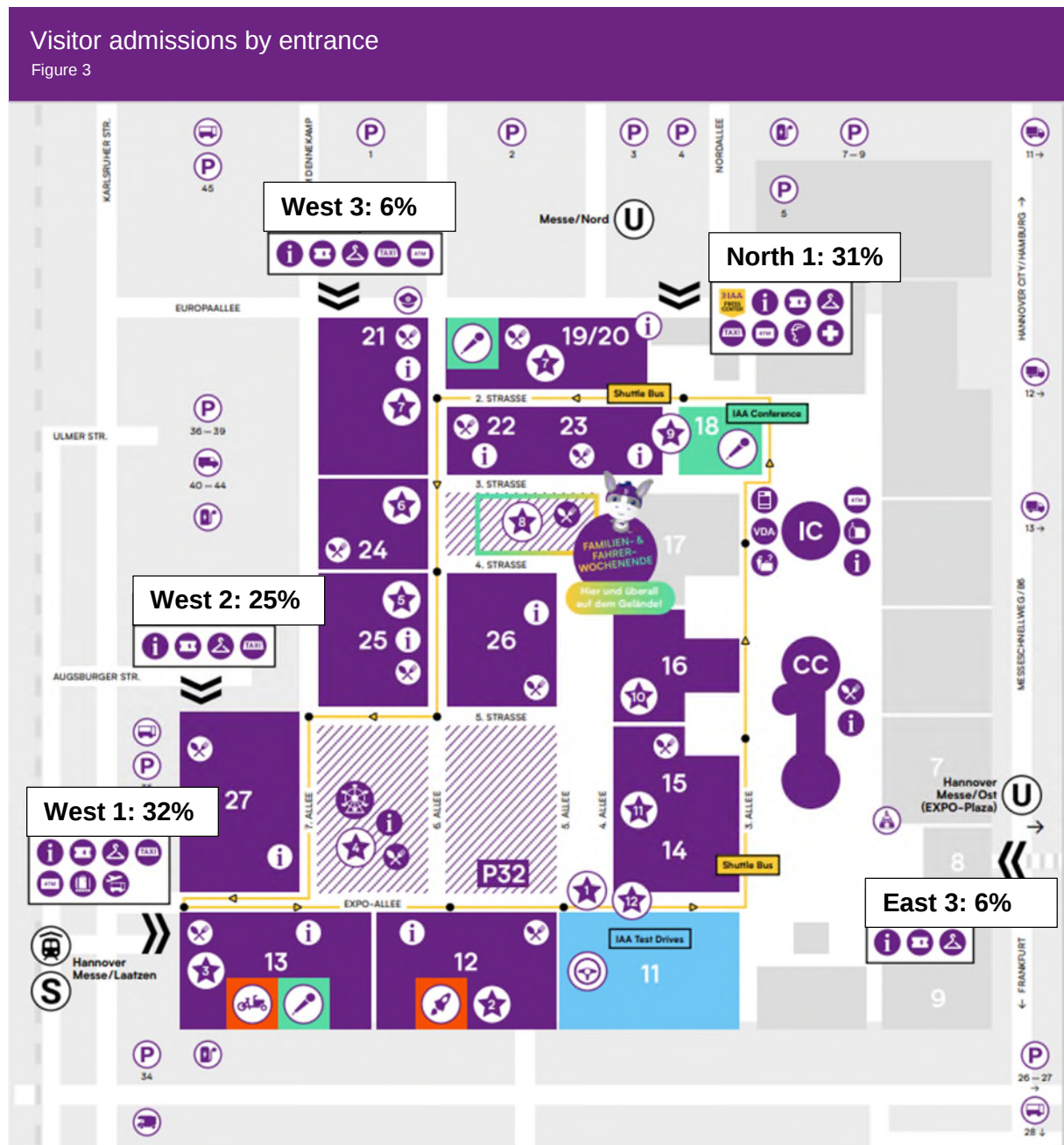
Long-term comparison of overall visitor numbers, including averages
Figure 1



Comparison of visitor numbers on weekdays/weekend
Figure 2



This year, 32 percent of visitors entered the trade show grounds via the West 1 entrance, making it the most popular entry point. The share of visitors choosing this entrance grew by 8 percentage points. The second most popular entrance was North 1, accounting for 31 percent of visitors. Third place went to the West 2 entrance, on 25 percent. The entrances West 3 and East 3 were each used by 6 percent of the visitors. This year the South entrance again remained closed to visitors.



2.1 Visitor structure

Proportion and quality of trade visitors and share of international visitors all remain high – Keen interest in making larger investments

The visitor structure was analyzed using data collected in an extensive, representative visitor survey conducted at various locations on the exhibition grounds during the IAA TRANSPORTATION 2024 on behalf of the VDA by the firm Gelszus Messe-Marktforschung GmbH. The main results are presented below, based on the statistical data collected.

The proportion of trade visitors was slightly lower than it was in 2022 (86% in 2024, 89% in 2022; 86% in 2018; cf. Figure 4). Nevertheless, the share of foreign trade visitors came to 34 percent, which equaled the levels before the pandemic (30% in 2022; 34% in 2018; 31% in 2016). The day with the highest share of trade visitors (95 percent) was the first day (Tuesday) – in contrast to the year 2022, when the highest proportion of trade visitors was recorded on the third day (Thursday). Trade visitors accounted for 93 to 95 percent of the total on the first three days. The weekend figures were 77 percent on Saturday and 72 percent on Sunday and, as expected, lower than during the week (cf. 84% and 82% respectively in 2022). Advertising the IAA Trucker and Family Weekend resulted in the proportions of private visitors rising to 23 percent (Saturday) and 28 percent (Sunday).

Proportion of
trade visitors
86%



The proportion of all visitors who came from outside Germany was 30 percent, matching the record level from 2018 (31%). The proportion of international visitors peaked on the first and second days of the event, reaching 44 and 41 percent respectively.

In 2024, 68 percent of foreign trade visitors came from Europe (68% in 2022), followed by 16 percent from Southern, Eastern and Central Asia (10% in 2022), and 5 percent from South and Central America and 5 percent from the Middle East (cf. Table 2). Two reasons for the rise in visitors from Asia were without doubt the increased number of Chinese exhibitors and the lifting of COVID-related travel restrictions.

	2024	2022	2018	2016	2014
Europe	68%	73%	57%	72%	71%
Southern, Eastern and Central Asia	16%	10%	31%	17%	16%
South and Central America	5%	5%	3%	3%	5%
Middle East	5%	5%	3%	2%	3%
North America	3%	4%	2%	2%	2%
Africa	2%	2%	2%	2%	3%
Australia	1%	1%	2%	2%	2%

Table 2: Origins of foreign trade visitors

The largest contingent of international IAA visitors came from the Netherlands, although it was much smaller than in 2022 (9%; 32% in 2022). China landed in second place, on 6 percent (3% in 2022), while third place was shared by Italy (4% in 2022), Sweden (4% in 2022) and Poland (7% in 2022), all with 5 percent this year. The distribution of the foreign visitors has shifted between several countries, mostly due to the termination of COVID-related travel restrictions, as illustrated by the figures.

Average
age of
visitors

41.8
years

The average age of the IAA visitors was 41.8 years, i.e. around two years higher than it was in 2022 (39.9 years; 37.9 years in 2018). This means that the average visitor age has climbed continually at the last three events. Statistically speaking the average visitor age is below that of the German population (44.7 years, based on calculations of the German Federal Statistical Office in 2023). Private visitors were aged 38.1 years on average, and therefore somewhat younger, whereas trade visitors were somewhat older (42.4 years). Visitors up to the age of 30 accounted for 25 percent of the total (31% in 2022). Foreign trade visitors, with an average age of 44 years, were older than trade visitors from Germany (42 years). Private visitors were 38 years old on average (37 years in 2022) and therefore constituted the youngest group of visitors.

The day with the “youngest” visitors at the IAA was the Sunday, when visitors had an average age of 39 years (in 2022 it was the IAA Saturday, on 37 years).

The public attending the IAA TRANSPORTATION is still largely male, although the proportion of female visitors rose to 17 percent this year (15% in 2022). Disaggregation of the statistics for trade visitors and private visitors reveals that women accounted for 31 percent of private visitors (25% in 2022) and 14 percent of trade visitors (15% in 2022). The increase of 6 percentage points in the female private visitors is a result of the above-average numbers at the IAA weekend (22% on Saturday; 20% on Sunday). Women were less well represented among the visitors from abroad (11%). By contrast, their numbers were above average among the trade visitors from the public sector/authorities (20%) and commerce (18%).

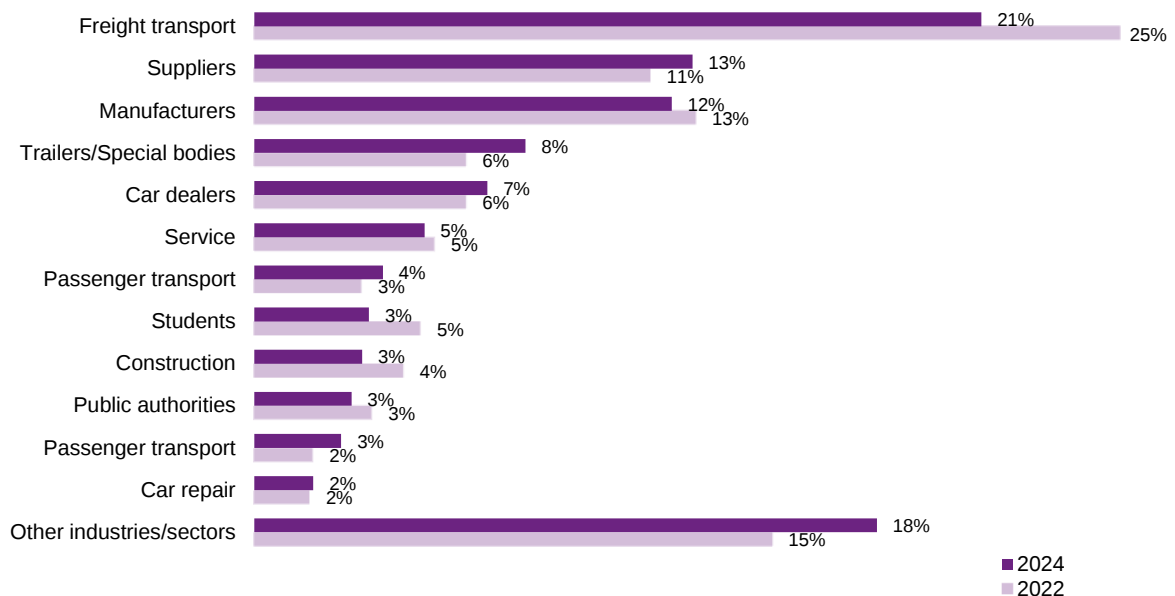
17%
of visitors
were women



The sector sending the highest number of trade visitors to the show was once again commercial transport (forwarding, warehousing, transportation) on 21 percent, despite losing 4 percentage points (25% in 2022). The sectors with the next largest numbers of trade visitors remained very largely unchanged; only the motor vehicle suppliers on 13 percent and the manufacturers of trailers and bodies on 8 percent managed to move up one place in the ranking (cf. Figure 5). Most of the trade visitors came from sectors within the automotive industry (32%; OEMs, motor vehicle suppliers, makers of trailers and bodies). Among the foreign trade visitors, 47 percent came from this overarching segment, but only 25 percent of German trade visitors. Here, however, the commercial transport sector was just as well represented, on 25 percent. Commercial transport was especially well represented on the IAA weekend, accounting for 37 percent on Saturday and 34 percent on Sunday, so the weekend seems to be the best time for this sector.

Trade visitors by sector

Figure 5



18%
of trade visitors
hold management
positions

This year the share of trade visitors who hold management positions at their companies or plants rose to 18 percent (15% in 2022). The proportion of drivers, on the other hand, fell by 2 percentage points (15%; 17% in 2022). However, this figure was way above the average on the weekend, reaching 33 percent on the Saturday and 32 percent on the Sunday. The proportion of visitors from marketing/sales/advertising/PR came to 12 percent, which was an improvement of 3 percentage points compared with 2022. The picture is somewhat different for the foreign trade visitors, 27 percent of whom were from corporate management and 18 percent from research/development/design. It is also interesting to see which fields are the best-represented within the various sectors. For the motor vehicle manufacturers, most visitors were from research/development on 32 percent, for the motor vehicle suppliers the largest group was employees from marketing/sales/PR on 27 percent, and at the makers of trailers and bodies it was corporate managers, making up 30 percent.

The relevance – and with it the quality – of the trade visitors was again very high in 2024. Seventy-one percent of trade visitors are involved in purchasing and procurement decisions (72% in 2022), 25 percent of them have final decision-making powers (23% in 2022), and over one quarter have a say (26%; 28% in 2022), while another 20 percent have an advisory role in decision-making processes (21% in 2022). The proportion of decision-makers was particularly high among the foreign trade visitors, reaching 84 percent. The first day has developed especially well in this regard, as on this day 82 percent of trade visitors were people involved in purchasing and procurement decisions (74% in 2022).

What is more, the visitors are also prepared to invest: 71 percent of trade visitors are planning investments within the next six to 12 months (73% in 2022). Most of the investments are planned in the areas of commercial transport (88%), the public sector (76%) and construction (70%). Above-average shares of trade visitors from the following business fields (51%) indicated that their investment project was the reason for visiting the IAA TRANSPORTATION: the skilled craft trades (70%), makers of trailers and bodies (69%), construction (68%) and IT (64%). The mean value of the planned investments came to around EUR 546,000, which was slightly less than in 2022 (EUR 550,000). Investments of over EUR 1 million remained almost constant, at 23 percent (24% in 2022), and among the foreign trade visitors they accounted for a whole 27 percent. Investments of between EUR 50,000 and EUR 100,000 increased by 4 percentage points this year (11% in 2024; 7% in 2022).

71%
of visitors are
involved in
purchasing and
procurement
decisions



The IAA TRANSPORTATION 2024 welcomed more visitors who had attended a previous IAA. More than half had already visited one of the last IAA TRANSPORTATION shows (56%; 55% in 2022), and 30 percent had attended the IAA TRANSPORTATION 2022. Nevertheless, new visitors were also attracted, and their share rose by 5 percentage points among the private visitors (49%; 44% in 2022). The figure was even higher among visitors from the IT/telecommunications sector (70%), indicating that the new concept for the IAA TRANSPORTATION which has been revised since 2022 was a success. The largest

proportion of first-time visitors was recorded for the foreign visitors from Asia (69%). Forty-one percent of trade visitors were attending the IAA for the second or third time.

1.5 days

average duration
of a visit to the IAA



The average length of time the trade visitors spent at the IAA was 6.3 hours. Foreign visitors stayed at the IAA for a little longer (6.9 hours). Accordingly, the majority of visitors attended the IAA only on one day (68%), with another 20 percent attending on two days. There were some differences in the proportions of foreign guests: 33 percent of them came to the IAA on one day, and 36 percent came on two days. The average duration of a visit remained stable, on 1.5 days (1.4 days in 2022). Foreign trade visitors attended for an average of 2.2 days. Those who came from Asia and Africa spent 2.6 and 2.8 days at the IAA respectively.

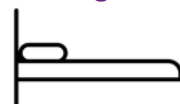
Half the trade visitors traveled more than 300 kilometers to attend the IAA (50%; 47% in 2022). The share of trade visitors traveling this far was highest on the first exhibition day (65%), and also on the second (58%) and third (56%) days more than half of them traveled over 300 km. This reveals another shift toward supra-regional travel to the trade fair, which is roughly equal to the increase in foreign visitors. Twelve percent of visitors came from the immediate region, with journeys of up to 100 km (11% in 2022). On the weekend this figure actually doubled to 24 percent, so the visitor structure is more regional on the weekend than it is during the week. On Saturday 24 percent of visitors traveled between 100 and 200 km to attend the show, as did 25 percent on Sunday.

The three most popular means of transport for the journey to the IAA were as follows: passenger cars still take first place (56%) by a huge margin, despite losing 7 percentage points since the last event (63% in 2022). Rail travel (regional and long-distance trains) came in second place, on 14 percent (16% in 2022). Third place this year went to trucks, which accounted for 13 percent, thus almost doubling the previous figure (7% in 2022). This is mostly due to the IAA Trucker and Family Weekend with reduced ticket prices for these target groups. Most foreign trade visitors (36%) chose to travel by air, followed by passenger cars (24%) and trucks (24%).

Of the visitors who traveled more than 50 kilometers to the IAA, 33 percent combined their visit with an overnight stay in Hanover or the surrounding area, which was 2 percentage points more than in 2022 (31%). Hotels were used more by trade visitors from other countries, 84 percent of whom stayed overnight (83% in 2022). Of the private visitors, 22 percent stayed overnight in and around Hanover (22% in 2022). The number of people staying for one night fell significantly by 8 percentage points (39% in 2024; 47% in 2022). By contrast, the number of visitors spending three (17%) or four (7%) nights in the area rose by 4 and 3 percentage points respectively. The average number of overnight stays was two (mean value 2.2; 2.1 in 2022). Guests from Africa and South and Central America stayed in the area the longest, for an average of 4.4 and 4.3 nights respectively.

1/3

of visitors stayed
overnight in the
Hanover area while
attending the IAA



2.2 Trends in visits

How did the trade visitors become aware of the IAA TRANSPORTATION 2024? Once again, most trade visitors heard about the show directly from colleagues or superiors at their workplace (38%), although this figure fell slightly by 2 percentage points (40% in 2022). The second most common reason for being familiar with the IAA was a previous visit to the show in 2022 (16%), and the third most common reason was admission tickets from exhibitors (15%). The trade visitors are increasingly being made aware of the show through the IAA website (9%), by posts on social media (8%) and through advertising by IAA exhibitors (8%). The IAA website plays a particularly important role for foreign trade visitors, 17 percent of whom indicated this source of information – which is especially important for becoming known internationally. Thirty-one percent of private visitors heard about the IAA TRANSPORTATION 2024 from friends and acquaintances – in keeping with their personal situation. An especially pronounced rise of almost 10 percentage points occurred in the posts on social media that made this target group aware of the IAA. This points up the huge importance of social media in advertising and backs up the decision to establish a dedicated Instagram channel for the IAA TRANSPORTATION. In addition, 11 percent of private visitors had attended the event in 2022. As expected, IAA advertising in the trade press (3%) and schools/universities (1%) were less relevant for private visitors, which is certainly partly explained by their average age of 41.8 years.

38%
of visitors were made
aware of the IAA by
their employers or
colleagues

	2024			2022		
	Total	Trade visitors	Private visitors	Total	Trade visitors	Private visitors
Workplace (colleagues/supervisors)	34%	38%	10%	36%	40%	6%
Familiar with the IAA from the previous event	16%	16%	11%	17%	17%	15%
Invitations/ticket vouchers from exhibitors	14%	15%	7%	15%	16%	6%
Friends/acquaintances	13%	9%	31%	12%	9%	33%
IAA-Website	9%	9%	7%	8%	8%	8%
Reports on social media	9%	8%	14%	5%	5%	3%
Advertising by IAA exhibitors	7%	8%	5%	7%	7%	7%
Reports on the internet	6%	5%	11%	8%	8%	12%
Press reports	6%	5%	11%	6%	6%	9%
Reports on the trade press	4%	4%	4%	3%	3%	4%
IAA advertising in the trade press	4%	4%	3%	8%	9%	7%
IAA-Newsletter	3%	3%	5%	5%	5%	4%
Reports on radio and TV	3%	2%	5%	2%	1%	5%
School/university	2%	2%	1%	4%	4%	2%

Table 3: Visitors' attention drawn to the IAA by... (selection; multiple responses allowed)

Most trade visitors' top priority when visiting the IAA remains obtaining an "Overview of new developments/innovations/trends" (34 percent). The following places in the ranking have been somewhat reshuffled this year. "Sharing experience/information" came in second place, scoring 26 percent and pushing "Training" down to fifth place. This underscores in particular the significance of platforms like the IAA TRANSPORTATION, because only here can visitors engage in this concentrated dialog with the relevant target groups. The third most popular objective was "Collecting information" on 24 percent, followed by a "Professional Must" on 23 percent. Private visitors had different priorities for visiting the IAA. They also wanted to obtain an "Overview of new developments" (32%), but this was followed by "Testing new vehicles" (24%) and "Interest in classic vehicles and US trucks" (20%). For the foreign trade visitors, "Observing the competition" was the second most frequent reason for visiting the show and was indicated by 23 percent of foreign trade visitors. This group also had a much greater interest in "Business contracts/investments," on 21 percent. "Special shows" are not very relevant to this target group and scored only 4 percent.

	2024		2022		2018	
	Trade visitors	Private visitors	Trade visitors	Private visitors	Trade visitors	Private visitors
Overview of new developments/innovations/trends	34%	32%	41%	39%	38%	38%
Sharing experience/information	26%	13%	27%	17%	26%	17%
Collecting information/overview of offers	24%	17%	25%	25%	26%	23%
Professional “must”/come from the industry	23%	2%	27%	2%	27%	5%
Training/gaining knowledge	23%	18%	30%	23%	29%	20%
Testing new vehicles	16%	24%	20%	26%	-	-
Initiating new business relations	14%	2%	12%	5%	11%	1%
Observing the competition	14%	3%	14%	7%	13%	4%
Maintaining/intensifying existing business relations	10%	1%	9%	2%	9%	1%
Business contracts/investments	9%	2%	9%	5%	9%	4%
Interest in classic vehicles/US trucks	6%	20%	9%	37%	10%	29%
Special shows/activities	6%	13%	8%	19%	11%	23%

Table 3: Main reasons for visiting the IAA (selection; multiple responses allowed)

The trade visitors who wanted to obtain an overview and collect information at the IAA TRANSPORTATION had their eyes on the following exhibitor groups in particular. Nearly half of them were interested in the trucks/truck tractors (47%), followed by the makers of trailers and bodies (39%) and vehicle fittings and equipment (25%). There was also interest in obtaining information from suppliers (22%) and about products and solutions for the charging and refueling infrastructure (18%). On the weekend (Saturday), the figures were even higher, with interest directed principally at trucks/truck tractors (58%) and at trailers and bodies (52%). Here again, the private visitors had different priorities, with 42 percent looking for information about vehicle fittings and equipment, 35 percent interested in buses/minibuses, and 28 percent interested in trucks/truck tractors. However, all the target groups produce a clear result when it came to evaluating the information obtained. Ninety-six percent of visitors rated it as sufficient. This means they almost always found the information they were looking for.

The trade visitors have high expectations of seeing innovations above all in the following areas: new developments from the manufacturers (57%), new models/complete vehicles (51%), advances in electromobility/alternative powertrains (35%) and innovations from trailer and body manufacturers (35%).

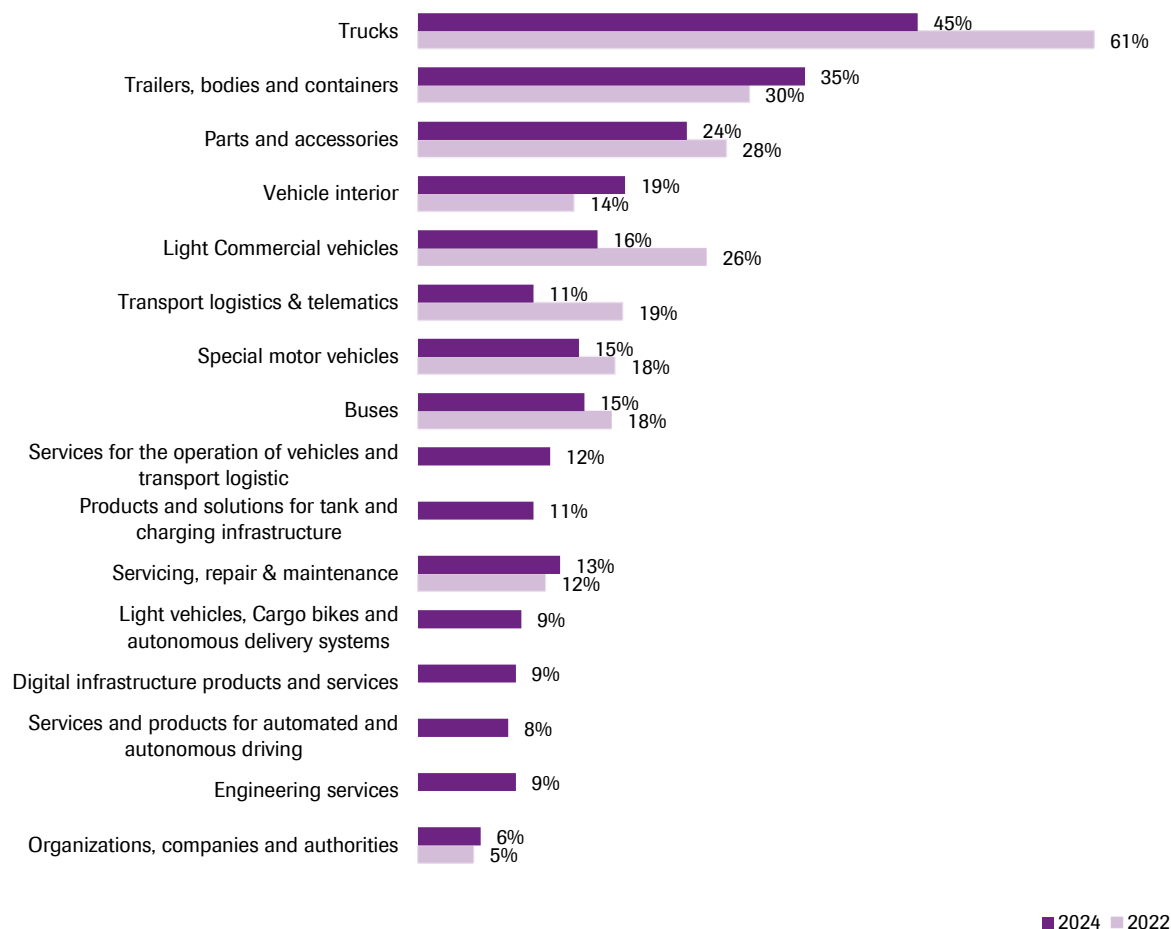
A direct comparison shows that the exhibition areas with trucks/truck tractors attracted the most trade visitors. Nearly half (45%) of them indicated that they had visited or intended to visit

these areas. Thirty-five percent of trade visitors focused on the exhibition areas showcasing trailers and bodies. The suppliers' stands were visited by 24 percent. Figure 6 shows the trade visitors' responses for each exhibition area both for this year and in comparison with the IAA TRANSPORTATION 2022. The ranking has changed in only a few areas: vehicle fittings and equipment, and light commercial vehicles, have become more relevant to the trade visitors than they were two years ago. At the same time, new exhibition areas were established this year as new groups and were immediately rewarded with a high level of interest, for example in transportation and passenger transport services, and products and solutions for the charging and refueling infrastructure. This year's ranking order of the most popular exhibition areas for the foreign trade visitors showed no differences. However, trade visitors from the Middle East were especially frequent visitors (47%) to makers of trailers and bodies, and trade visitors from North America were especially frequent visitors (53%) to trucks/truck tractors. Private visitors' top three targets align with those of the trade visitors: 26 percent were especially interested in special vehicles (38% trucks/truck tractors, 27% makers of trailers and bodies).

Alongside the exhibition areas for trucks and suppliers, 42 percent of trade visitors also found it important to visit other areas. Thirty-seven percent of them visited the stands of commercial vehicle manufacturers and suppliers. A large number of trade visitors from motor vehicle suppliers (51%) and services and skilled trades (56%) visited both of these areas. Only 25 percent visited solely the stands of commercial vehicle manufacturers and only 5 percent restricted themselves to those of commercial vehicle suppliers.

Most popular sections of the exhibition with trade visitors (multiple responses allowed)

Figure 6



Two thirds of trade visitors were either “satisfied” of “very satisfied” with the opportunities for acquiring information and making contacts at the stands of the IAA exhibitors (61%), and another 29 percent were “fairly satisfied.” These options achieved a score of 2.3 (2.3 in 2022; very satisfied = 1; very dissatisfied = 6).

2.3 Evaluation of the IAA formats

In 2022, a new event concept for the IAA TRANSPORTATION was realized with the addition of more formats such as the IAA Conference and the IAA Experience, to supplement the exhibition areas in the halls and on the open-air site. The new sections offered visitors the widest variety of information and experiences surrounding innovations in the transport industry. These formats have been successfully continued and they are described and evaluated below. This year the Trucker and Family Weekend was introduced as a new IAA format.

2.3.1 IAA Conference

Alongside the exhibition of pioneering innovative products from the world’s leading transport companies, the IAA Conference brought international opinion leaders together to present their solutions and visions for the global and regional transportation of the future. The main activities were direct discussions with the visitors, networking between the participants, and discussions on the transformation of the industry.

In Hall 18 (with 320 seats), on the Main Stage next to the North entrance, IAA Conference participants had an opportunity to discuss key topics with the experts, debating aspects such as the charging infrastructure, autonomous driving, hydrogen technology and new technologies from the manufacturers, suppliers, and makers of trailers and bodies. A special focus was placed on what the forwarding and logistics firms need in order to shape this transformation successfully. There were also events on the Industry Stage (with 90 seats) in Hall 19/20 and the Speakers’ Corner in Hall 13 (with 28 seats).

After the official opening on Tuesday, September 17, the three-day conference program started, with top-level experts taking part in specific themed days. Most of them were C-Level speakers from OEMs, suppliers and infrastructure providers, along with some leading figures from politics. From September 17 to 19 a total of 77 speakers took to the Main Stage for 34 discussions and lectures on subjects including the transformation of the industry, infrastructure, autonomous driving, hydrogen, sustainability and technology, which fascinated around 3,000 conference visitors. In addition, the entire program was streamed live on the IAA TRANSPORTATION website and broadcast on its YouTube channel, and afterward was also made available on demand.

The speakers on the Main Stage included Arnd Franz (CEO, Mahle), Dr. Stefan Hartung (Chairman of the Board, Robert Bosch GmbH), Carsten Intra (CEO, Volkswagen Commercial Vehicles), Kim Kohlmeyer (Manager, E-Mobility, Transport & Environment), Olof Persson (CEO, Iveco Group), Dan Priestley (Senior Manager, Semi Truck Engineering Tesla), Karin Rådström (CEO, Mercedes-Benz Trucks), Peter Schäfer (EVP & CSO Automotive at Infineon Technologies), Sara Schiffer (General Manager, hylane), Andreas Schmitz (CEO, Schmitz Cargobull) and many more besides.

77
international
experts as
speakers on the
Main Stage



99
speakers at the
Industry Forum



The Industry Forum was located in Hall 13 close to the Startup Area by the West entrance. The stage had capacity for up to 90 visitors and hosted a four-day conference program. Alongside startup pitches and various sessions curated by partners, exhibitors could book slots for their own discussions or presentations on the stage. Startups could present themselves to the audience for three minutes prior to each Industry Session (30 minutes).

In all, over 900 visitors listened to the 54 lectures, discussions and startup pitches delivered by 99 speakers at the Industry Forum (including 27 startup pitches).

At the Speakers' Corner in Hall 13, the stage was fully booked for the four-day conference program. The 20 sessions with 40 speakers offered deep dives into a range of topics in the transport sector.

The visitors awarded the IAA Conference an overall score of "good." Especially good scores were given for the quality of the speakers, the up-to-date relevance of the lectures and the choice of topics.

Visitors rated the
IAA Conference as
"good"

2.3.2 IAA Experience

IAA Test Drives

The IAA Test Drives enabled comprehensive insights into the latest developments that are driving the transformation toward efficient and connected zero-emission transport solutions. Test drives in both light and heavy commercial vehicles started from the indoor departure terminal in Hall 11. A total of 18 brands provided 60 vehicles (27 light and 33 heavy commercial vehicles). The participating exhibitors could choose between offering test drives on a two-kilometer test track and offering test drives in registered vehicles outside the show grounds. There was also a mobile filling station on the open-air site for hydrogen, and one for renewable diesel fuel. Here refueling processes were demonstrated live using alternative fuels to highlight the objective of having climate-neutral transport available soon.

The overall result broke the record from 2022. Vehicles were taken on a total of 6,415 test drives (5,497 in 2022; ~1,600 in 2018), which equates to an increase of 17 percent in comparison with 2022. Test drives were most popular on the Thursday, when visitors tried the vehicles out 1,262 times.

Out of all the IAA Experience formats, the test drives were the one that visitors noticed most often. Forty-eight percent of visitors noticed them, which was 8 percentage points up on 2022. The rate of participation in IAA test drives also rose by 4 percent (26%; 22% in 2022). Visitors were most aware of the test drives on the weekend, when 53 percent of them noticed the test drives. Over 73 percent of visitors rated the format as either good or very good. The mean score for the test drives was 2. Private visitors rated them on a scale from 1 (best) to 6 (worst) with a score of 1.6, i.e. far better than average.

3/4
of visitors rated
the test drives
positively

IAA Cargobike Parcours

The IAA Cargobike Parcours was fully revised and redesigned on the basis of feedback from the exhibitors and visitors in 2022. For the first time the circuit had a prominent position indoors in Hall 13, close to the West 1 entrance, which greatly improved both its visibility and the flow of visitors. Furthermore, six new modules were developed to create realistic testing conditions, e.g. slopes and inclines, mounting and descending curbs, and cobblestones.

Five exhibitors provided 11 different models for the Cargobike Parcours. An impressive total of 2,216 rides was recorded, whereby 1,489 visitors registered at the check-in. Many of them tested several bikes. Saturday was the day with the most rides (493).

On Thursday, September 19, the testing and award ceremony for the international Cargobike of the Year took place (initiated by the publisher HUSS Verlag). In total, 19 vehicles were admitted for testing, including models from non-exhibitors, which they had brought onto the trade show grounds especially for this particular day.

The new location, the realistic testing conditions and additional events such as the award ceremony succeeded in significantly expanding and optimizing the offerings for visitors and exhibitors.

The new opportunities for trying vehicles out on the IAA Cargobike Parcours were particularly well received by the private visitors, who gave them a score of 1.2. Foreign trade visitors also gave the cargobike circuit a score of 1.9 on a scale from 1 down to 6. The average rating for the cargobike circuit from all visitors was 2.4.

Visitors rated the
Cargobike Parcours as
“good”

Shuttle bus service

A comprehensive shuttle bus service was in operation throughout the IAA TRANSPORTATION 2024 to transport the visitors swiftly and conveniently between the various halls. A large number of bus-stops ensured the best possible service in all parts of the trade show.

The shuttle buses included innovative vehicles both from exhibitors and from external partners: an articulated e-bus from MAN, an articulated hydrogen bus from Solaris and an autonomous electric city bus from Karsan. The other vehicles used were supplied by ÜSTRA, the local transport company, and were a seamless match.

The bus shuttle was noticed by the second largest number of visitors (after the IAA Test Drives), i.e. by 14 percent, which was 5 percentage points more than in 2022 (9%).

Startup Area with 62 innovative companies

As a leading platform the IAA TRANSPORTATION aims to create new impetus. For this reason, the leading platform promotes overarching cooperation through meetings and dialog between key players and young firms. This year the Startup Area was located in Hall 12, between the exhibition areas. This enabled 34 companies from 15 countries to make their presentations in the best possible setting. Throughout the week of the show, the Industry Stage hosted themed curated pitches where the startups presented their innovative solutions to a broad trade public. One special highlight was also the “Pioneers Linkup” on the Thursday evening in Hall 18. This exclusive networking event brought the most innovative minds in the industry together and encouraged dialog between established firms, investors and startups.

Another highlight was the Prototype Club. This initiative offered a platform for visionary ideas and revolutionary prototypes that will shape the future of mobility. The Prototype Club gave innovators a chance to present their concepts and discuss them with experts from the sector in order to obtain valuable insights and feedback. The participants in the Prototype Club presented their prototypes to a wide range of trade visitors at the IAA TRANSPORTATION.

The visitors gave the Startup Area a score of “good” (mean value 2.3). International trade visitors noticed this area most frequently out of all the IAA Experience formats, on 35 percent. This was also the case among trade visitors from the vehicle manufacturers, 48 percent of whom noticed the Startup Area.

2.3.3 IAA Trucker and Family Weekend

The IAA TRANSPORTATION is the most important arena for future-relevant topics in transportation and logistics. Not only trade professionals but also private visitors had the opportunity to dive into this world and discover exciting topics from the industry.

This year for the first time, the IAA TRANSPORTATION was expanded to include a focus on truckers and families from September 21 to 22 in parallel to the B2B offerings, and a world of experiences was created for the B2C sector.

Visitors could enjoy free rides on a solar-powered Ferris wheel, test drives in trucks and buses, and a wide range of entertainment with live music. The weekend centered on the original FIA Goodyear European Truck Racing Championship (ETRC) show paddock, where six teams presented their racing trucks and latest technologies. There was a special “IAA Experience Area” for the youngest guests, offering a large number of activities from the VW ID Buzz bouncy castle and a trampoline to a quad bike track, a kiddie train and mechanized bull-riding – so there was plenty of fun and entertainment to be had. One special highlight on the open-air stage was the various live performances on Saturday and Sunday which included the children’s rock band Heavysaurus. Another highlight was the presentation of the Ehrenblicki award. There was also a special offer for families in the form of the family adventure pass, which was available on the weekend for 20 euros and was valid for two adults and up to three children. Professional drivers also benefited from a special admission ticket costing only eight euros from the on-site cash desks.

Visitors rated the
IAA weekend as
“good”

The Trucker and Family Weekend was noticed as a special activity by one third of visitors (22% on Saturday; 30% on Sunday) on the weekend. On those days 38 percent of private visitors took their families to the special weekend activities, to which they gave a score of 1.8 (on a scale from 1 down to 6). The program on the open-air stage was also well received by the private visitors, who gave it a rating of 1.7.

Once more, the classic cars and US trucks attracted a huge amount of visitor interest. The Nutzfahrzeug Veteranen Gemeinschaft (veteran commercial vehicles association) set up its exhibition in the walkway to the Convention Center between Halls 14 and 15. The US trucks held a prominent position next to the open-air stage of the IAA Trucker and Family Weekend.

The model car fair “Automania” was also held on the weekend from September 20 to 22, in Pavilions A and B of Hall 11. A large number of dealers had a diverse range of objects on offer, which delighted younger and older model car enthusiasts alike.

All the special shows attracted a large number of visitors. One third of visitors noticed the classic cars and US trucks, and among the private visitors the figure was almost half. Nearly one fifth of private visitors noticed the “Automania” that took place only on the weekend.

2.4 Visitors' assessments

The visitor survey concluded by asking the respondents to assess the IAA TRANSPORTATION 2024 using various indicators on a scale from 1 to 6 (1 = best; 6 = worst). The results were good in all categories, and almost all the indicators ended up with similar scores to those in 2022 (cf. Table 5). All of them except the gastronomy on the trade show grounds were in the upper 2 range (from 2.1 to 2.5). The average score for the IAA from the trade and private visitors, and from German and international visitors, came to 2.4.

	2024	2022	2018
Completeness and variety of the offering	2,3	2,3	2,1
Internationality	2,1	2,1	2,0
Clarity of the offering/division into sectors	2,5	2,5	2,4
Innovations/new models on offer	2,3	2,2	2,1
Reaching desired contacts/customers/providers	2,5	2,4	2,3
Quality of the visitor information	2,3	2,3	2,2
Quality of the gastronomy on the trade show grounds	2,7	2,7	2,6
Services offered on the trade show grounds	2,5	2,5	2,4
Sanitary facilities/cleanliness	2,3	2,3	2,2
Overall average	2,4	2,4	2,3

Table 5: Visitors' assessments of the IAA 2022 (scale from 1 down to 6)

More than half (54%) of visitors to the IAA rated their benefit from attending the IAA as large or very large, and 29 percent also perceived a general benefit. Fifty-nine percent of foreign visitors see their visit as especially beneficial. The trade visitors from the following sectors perceived an especially large benefit: makers of trailers and bodies (65%), suppliers of workshop and garage equipment (61%), and commercial transport (forwarding, warehousing, transportation) (60%).

90%
of visitors were
satisfied with their
visit to the IAA

Ninety percent of IAA visitors, i.e. nine out of ten, were satisfied with their visit (90% in 2022). Of these, 21 percent were completely satisfied, 46 percent were satisfied and 23 percent were fairly satisfied. The average level of satisfaction remains unchanged since 2022, on 2.2 (1 = completely satisfied, 6 = completely dissatisfied).

Given that most trade visitors heard about the IAA at their workplace (cf. Table 3), it is very encouraging that after the IAA 86 percent of them would recommend their colleagues or business partners to visit the IAA. Among private visitors, 79 percent would recommend their relatives, friends and acquaintances to visit the show. In both visitor groups, recommendation rates/willingness to recommend maintained the high level seen in 2022 (86% of trade visitors and 80% of private visitors in 2022).

The good result is also reflected in visitors' intentions to revisit the IAA TRANSPORTATION in the future. Eighty-five percent of trade visitors and of private visitors plan to attend the next event. Representatives from commercial transport (forwarding, warehousing, transportation) are particularly keen, with 92 percent expressing an intention to return.

85%
of trade visitors
plan to visit the
IAA again in 2026

3 Exhibitors

Number of
exhibitors
1,699

The second IAA TRANSPORTATION attracted 1,699 exhibitors and thus 21 percent more than at the first show of this type (1,402 in 2022). This underscores the growing importance of the IAA TRANSPORTATION as a central platform for presenting new technologies and developments in the transportation and commercial vehicle industry. This is also reflected in the number of new exhibitors that either came to Hanover this year for the first time or were returning to the IAA TRANSPORTATION after a period of absence.

They included Aptiv, BMC, Canonical, Chereau, Doll, ErnerCharge, here, JAC Motors, Phinia, Shandong Heavy Industries, Sonatus, SuperPanther, Tesla, Windrose and Wisdom Motor.

A more detailed analysis of the exhibitor structure at the IAA TRANSPORTATION 2024 is given below.

3.1 Exhibitor structure

Total exhibition
space occupied
258,000 m²



Record international participation; 21 percent more exhibitors

The number of exhibitors came to 1,699, which represented a rise of 21 percent, i.e. far more than in 2022. The exhibition areas were fully booked and two additional halls had to be taken into operation. This brought the total occupied exhibition space to 258,000 square meters (253,000 m² in 2022).

The share of foreign exhibitors came to 72 percent, which was an absolute record in the history of the IAA, and 11 percentage points above the 2022 figure (61% in 2022; 60% in 2018): 1,228 exhibitors came from outside Germany and occupied 53 percent of the exhibition space. A total of 41 countries were represented. The five countries accounting for the most exhibitors (excluding Germany) were China (38%), Italy (11%), Turkey (10%), the Netherlands (7%) and France (5%). These top five countries have not changed since 2016, although their ranking order has shifted, with China now in first place as the best-represented country by a large margin, on 38 percent. All the other countries have also increased the numbers of their exhibitors and the amount of space they occupy. The IAA 2024 welcomed exhibitors from Croatia for the first time. The returnees included Norway, Pakistan, Slovenia, Slovakia and Vietnam.

Fifty-four percent of the foreign exhibitors came from Asia and Australia (38% of the exhibition space), 40 percent from the European Union (59% of the exhibition space), and 5 percent from America (3% of the exhibition space; cf. Figure 15).

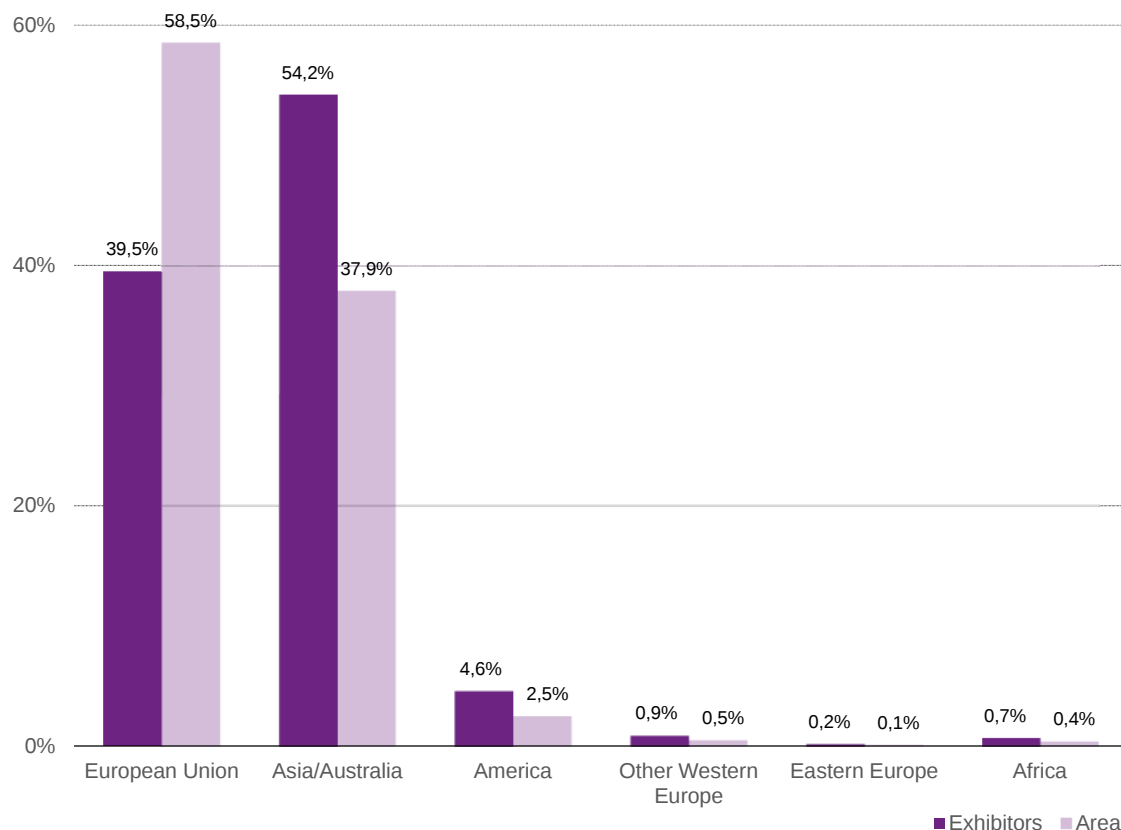
Proportion of foreign exhibitors

72%



Geographical origin of foreign exhibitors

Figure 15

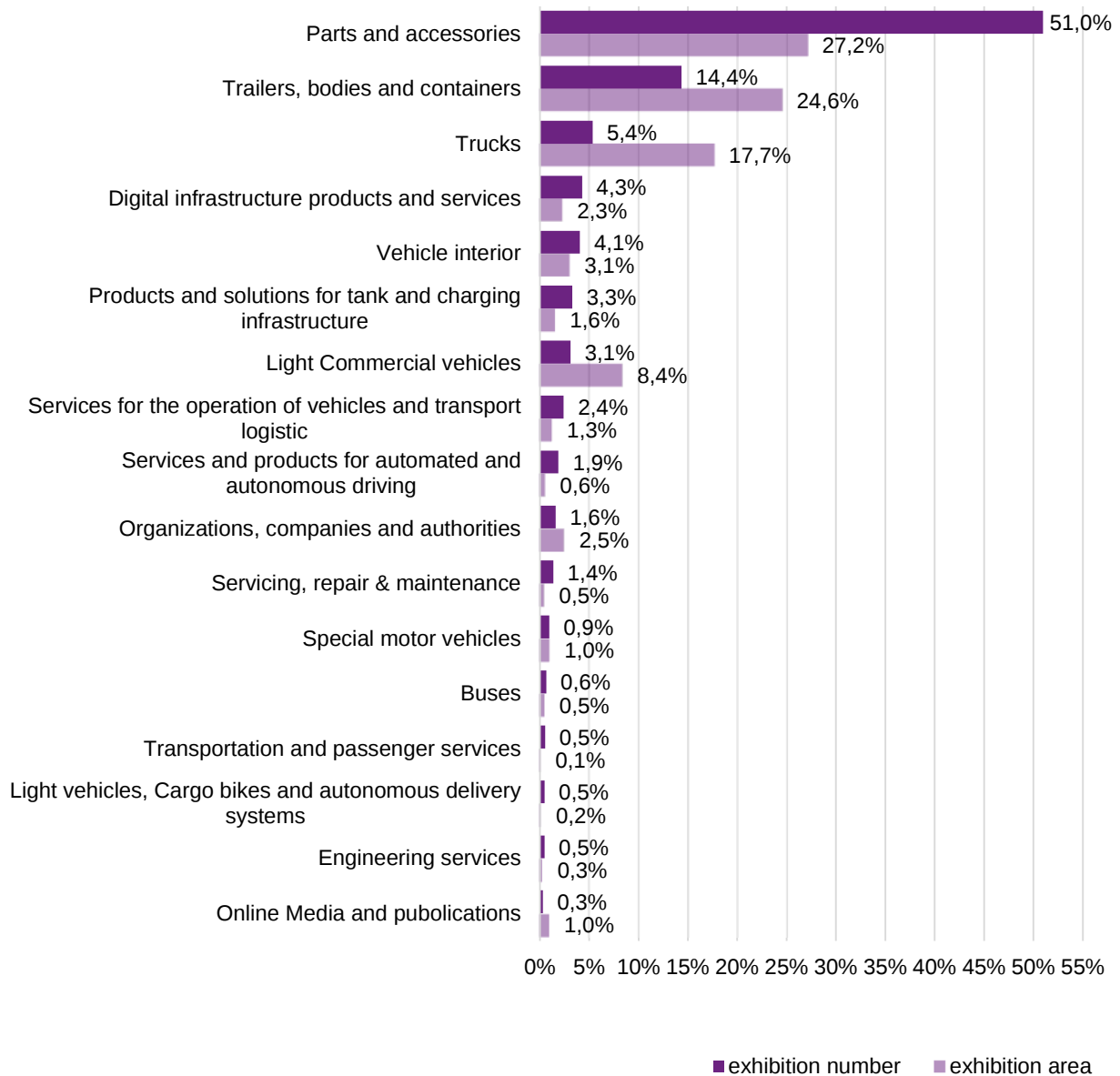


The IAA TRANSPORTATION showcased the entire commercial vehicle value chain. This year the product groups were again revised and expanded to reflect the advances in the industry (e.g. autonomous driving, development services, infrastructure).

The largest group of exhibitors – and thus the foundation of the IAA TRANSPORTATION – was once again the suppliers, accounting for 51 percent of the exhibitors (866 exhibitors) and 27 percent of the exhibition space (70,086 m²). Second place went to the manufacturers of trailers, bodies and containers, which accounted for 14 percent of exhibitors (244 exhibitors) and 25 percent of the exhibition space (63,441 m²). The manufacturers of trucks and truck tractors came in third place, accounting for 5 percent of exhibitors (91 exhibitors) and 18 percent of the exhibition space (45,704 m²). The largest growth in any product group was recorded by the infrastructure providers. They made up 3 percent of the exhibitors and occupied 2 percent of the exhibition space, with increases of 70 percent and 81 percent respectively over 2022 (cf. Figure 16).

Numbers of exhibitors and exhibition space occupied

Figure 16



About three quarters of the companies exhibiting at the IAA have up to 499 employees (71%; 75% in 2022). The proportion of mid-sized enterprises with 100 to 499 employees stayed at a constant 27 percent (27% in 2022). The proportion of companies with 500 to 999 employees rose by four percentage points to 12 percent (8% in 2022). This pushed up the overall average to 402 employees (379 employees in 2022). This year, small companies with a workforce of up to nine constituted 7 percent of the total. The largest group of first-time IAA exhibitors (37%) was firms with 10 to 99 employees, which indicates that smaller companies in particular were attracted to the trade fair. Among German and European exhibitors, the largest group in each case was the firms with 10 to 99 employees, which constituted 36 percent and 44 percent of the total respectively. The largest group of non-European exhibitors (44%) was those with a workforce of 500 or more. Over one quarter of exhibitors (29%) have a workforce exceeding 500, which is especially common among the exhibitors in development services (57%).

3/4
of exhibitors
were making a
repeat visit
to the IAA

Nearly three quarters of the exhibitors (70%; 73% in 2022) were making a repeat visit to the IAA TRANSPORTATION, and 57 percent of them had attended in 2022. So the new concept has established itself and is attractive to the exhibitors. Thirty percent of them were exhibiting at their first IAA TRANSPORTATION. This meant that the share of first-time exhibitors enjoyed another increase of 3 percentage points (27% in 2022; 22% in 2018). The share of first-time exhibitors was particularly high among the foreign exhibitors, on 78 percent, with a rise of 14 percentage points (64% in 2022). Of the regular exhibitors, 80 percent came from Germany and 69 percent had attended in 2022.

This means that the IAA is very clearly fulfilling its aim to be a leading international platform with a high level of exhibitor retention. This aim is also expressed in the share of first-time exhibitors in development services, on 50 percent, and in products and solutions for the charging and refueling infrastructure, on 46 percent. The largest proportion of returning exhibitors was seen in the field of digital infrastructure products and services, where they accounted for 86 percent (81% in 2022). This shows that new target groups have been established at the IAA TRANSPORTATION and they find they are participating on the right platform.

3.2 Exhibitors' assessments

Exhibitors' assessments and feedback were canvassed in an online survey on behalf of the VDA, which ran from September 20 to October 8, 2024. Exhibitors were able to take part in the survey, which contained specific questions and assessment options and also provided an opportunity to give frank feedback. Some exhibitors used this opportunity, resulting in a 24 percent response rate (30% in 2022). The most important results are presented in the following section.

Exhibitors' context: assessment of the state of business in the sector and their own economic situation

In 2022 the IAA exhibitors' assessments of the economic state of the automotive business took a downturn for the first time since 2012. This trend continued in 2024, with only 28 percent of exhibitors rating this as either favorable or very favorable (37% in 2022; 74% in 2018). The mean value was 3.2 on a scale from 1 down to 6, and thus worse than in 2022 (3.0; 2.2 in 2018). Unlike the foreign exhibitors, only 13 percent of German exhibitors rated the economic state of the industry as favorable (22% in 2022). By contrast, the figure was 30 percent of European exhibitors (43% in 2022) and 44 percent of exhibitors headquartered outside Europe (56% in 2022), which was much more positive. The tendency to take a more negative view of the situation in the sector is also seen when the figures are broken down by corporate size. In 2022, 40 percent of the companies with one to nine employees saw their prospects as favorable, whereas in 2024 only 29 percent still took this view. Only 24 percent of mid-sized enterprises with 100 to 499 employees and large enterprises with 1,000 or more employees reported favorable prospects, which puts them below the average. The groups of services and products for automated and autonomous driving (53%), special vehicles (47%), and charging infrastructure (46%) gave the most positive ratings of their prospects.

The exhibitors rated their own economic situation far more positively than that of the industry as a whole. Forty-eight percent of exhibitors assessed their situation as either favorable or very favorable, which was only 3 percentage points down on 2022 (51%). Given that this is a much smaller shift than the change from 2018 to 2022, when the figure slumped by 22 percentage points, one may conclude that the economic situation has only slightly deteriorated or even stabilized. The mean value is more or less stable, at 2.6 (2.5 in 2022). The non-European companies rated their situation as good more often than average (59%), yet this was still a marked fall of 11 percentage points by comparison with 2022 (70%). Companies employing 10 to 99 people rated their economic situation as positive (i.e. very favorable or favorable) far more often than the average (57%), whereas large companies with more than 1,000 employees tend to hold a negative view (31%). The group of charging infrastructure providers also saw their own business prospects as especially favorable (59%).

The exhibitors' expectations of the visitors to the IAA chimed with their expectations of the IAA TRANSPORTATION as a leading international platform. While expectations of the shares of visitors from Germany fell (79% in 2024; 82% in 2022; 83% in 2018), the exhibitors concentrated more on an audience primarily from other European countries and Asia.

The actual numbers of IAA visitors from Asia massively exceeded the exhibitors' expectations, coming in at 24 percentage points higher than expected (cf. Table 6).

Region/country	Visitors expected	Visitors attending
Other European countries	95%	88%
Germany	79%	79%
Asia	34%	58%
America	26%	28%
Other regions	20%	25%

Table 6: Comparison of visitors expected and visitors actually attending, by region (multiple responses allowed)

Regarding specific visitor groups, most exhibitors were interested in visitors from the commercial vehicle manufacturers (59%; 61% in 2022). Second place went to visitors from the makers of trailers and bodies, followed by visitors from logistics and commercial transport (37%; 40% in 2022). In fourth place were the visitors from the commercial vehicle suppliers (32%; 30% in 2022). Visitors from passenger transportation (13%; 17% in 2022) dropped out of this year's top five to land in sixth place, swapping with visitors from the commercial vehicle trade/maintenance (17%; 17% in 2022). Exhibitors were able to contact visitors in all the groups mentioned largely as they hoped. Contacts with the exhibitors from commercial vehicle suppliers were an impressive 10 percentage points higher than expected (42%); here the German exhibitors' results exceeded their expectations by the huge margin of 16 percentage points (45% actual contacts, 29% expected).

93%
of exhibitors
reached their
target group

As the exhibitors actually managed to make contact with the visitor groups in which they were especially interested, they rated their success in reaching their target groups as extremely positive. Nearly all the exhibitors (93%) reached their most important target group. Fifty-five percent of them indicated they had contacted all or most members of the target group, and another 38 percent had contacted part of their target group. Only 7 percent indicated they could not reach their target group at all. The overall value was much higher for

the German exhibitors (95%) and regular exhibitors (99%). One hundred percent of the group of exhibitors in digital infrastructure products and services reached their target group.

The exhibitors pursued the clear objective in attending the IAA of establishing personal contacts with existing and potential customers. In 2024 this objective was rated as the most important one by even more exhibitors than in 2022 (90% in 2024; 89% in 2022). This is particularly evident in the case of the German exhibitors, on 94 percent. Two out of three participating companies (60%) used the IAA to maintain and enhance their corporate image, 53 percent used it to obtain Information about new technical developments and future trends, and 44 percent for general information about the firm's portfolio (cf. Table 7). The ranking order is very similar to that from 2022, except that observing the competition (42%; 42% in 2022) and sharing experiences (41%; 44% in 2022) have swapped places. The clear formulation of the objective of establishing contacts and reaching customers points up once more the importance of platforms such as the IAA TRANSPORTATION both in general and in relation to the objective of obtaining information about technical developments, plus the significance of the IAA TRANSPORTATION as a forward-looking platform in the field of transportation and logistics. For instance, 77 percent of exhibitors from services and products for automated and autonomous driving put obtaining information about future trends in a prominent second place among their objectives.

90%
of exhibitors attend
the IAA to establish
personal contacts with
existing and potential
customers



Objective	%
Creating personal contacts with existing and potential customers	90%
Maintaining and enhancing the corporate image	60%
Information about technical innovations and future technical trends	53%
General information about the firm's portfolio	44%
Observing the competition	42%
Sharing experiences	41%
Business contracts	36%
Orientation concerning the technical function and properties of products on display	20%
Information about prices and conditions	8%

Table 7: Exhibitors' objectives in participating at the IAA (multiple responses allowed)

The exhibitors' most important criterion for achieving the above-mentioned objectives and thus for successful participation at the trade fair was the number of contacts with new and potential customers (85%). Seventy-one percent of exhibitors see this as being largely a result of the quality of trade visitors at their stand, and 65 percent indicated the number of interested trade visitors to their stand (including the exhibitors). The number of concrete technical discussions was less important than it was in 2022, coming in at 4 percentage points down on the last show (55%; 59% in 2022), followed by the quality of the technical discussions on 44 percent. Additional important criteria mentioned by the exhibitors were follow-up business (41%) and successful sales/business contracts (26%), although both have fallen in importance since 2022 – by 9 and 8 percentage points respectively. The number of contacts with new and potential customers was especially crucial to companies with more than 1,000 employees (93%), and to companies from transport logistics (95%), automated and autonomous driving (100%), and development services (93%), for successful participation in the IAA.

Seventy-three percent of the exhibitors were either satisfied or very satisfied with their participation at the IAA (78% in 2022). The larger an exhibitor's workforce, the more satisfied it was. Eighty-seven percent of these exhibitors were satisfied with their attendance at the show. The companies in the product groups light vehicles, cargobikes and autonomous delivery systems (87%) and development services (86%) were especially satisfied. In total, 64 percent of exhibitors were either satisfied or very satisfied with the volume of visitors at the IAA (63% in 2022; 72% in 2018). The larger an exhibitor's workforce, the more satisfied it was also with the volume of visitors to its stand (79%). The firms in the product groups light vehicles, cargobikes and autonomous delivery systems (80%), and development services (76%) were clearly satisfied with the number of visitors at their stands.

73%
of exhibitors
are satisfied
with their
attendance at
the IAA

Seventy-two percent of exhibitors rated their success at the IAA as positive (71% in 2022). Over one third (38%) assessed their individual success as either good or very good, while another 34 percent assessed it as fairly good. Ninety percent of exhibitors with 1,000 or more employees rated their success as above-average.

The exhibitors were also asked to rate the most important aspects of trade fair organization in four themed areas, on a scale from 1 (best) down to 6 (worst) to create a general evaluation of the IAA TRANSPORTATION 2024. Criteria without any direct relevance to costs, such as the VDA as the organizer and the Hanover Fairgrounds, achieved a score of "good." The costs of the show and other aspects were given a score of "satisfactory," with only the hotel and accommodation costs rated as "fair" (cf. Table 8). The scores are comparable with those from the IAA TRANSPORTATION 2022, with changes (positive and negative) in the figures no greater than 0.1.

Category	Score	Category	Score
Organizer	2,5	Trade show costs	3,7
- Availability	2,5	- Stand rental	3,5
- Friendliness	2,2	- Service providers	3,6
- Competence	2,6	- Technical service	3,4
- Cooperation	2,6	- Hotel and accommodation costs	4,3
- Advance information	2,4		
Fairgrounds	2,3	Other aspects	3,1
- Structure/division, in general	2,3	- Hotels available	3,7
- Own exhibition space	2,5	- Gastronomy	3,2
- Technical service on site	2,2	- Supra-regional travel connections	2,7
		- Regional travel connections	2,7

Table 8: Assessments of the organizer and the Hannover Fairgrounds (on a scale from 1 down to 6)

The positive overall evaluation of the IAA TRANSPORTATION presented here is also reflected in the high rate of recommendation and the large proportion of exhibitors that wish to attend again in 2026.

71%
of exhibitors
recommend
the IAA to
others

Almost three quarters of all exhibitors would recommend other companies to participate at the IAA TRANSPORTATION (71%; 77% in 2022). The figure was higher than average (81%) among exhibitors with more than 1,000 employees. The recommendation rate is also especially high in the product groups automated and autonomous driving (88%), light vehicles, cargobikes and autonomous delivery systems (87%) and charging infrastructure (82%). This shows that the concept of the IAA TRANSPORTATION has been particularly well received by these new product groups. Furthermore, over half of this year's exhibitors (54%) have decided to participate at the IAA TRANSPORTATION again in 2026, and another 22 percent regard this as very likely.

3.3 Tickets ordered by exhibitors

This year again, guest tickets were only available as e-tickets. The exhibitors ordered a total of 448,145 guest tickets for the IAA TRANSPORTATION 2024, which equated to a reduction of 15 percent compared with the previous event (528,213 in 2022; 772,223 in 2018). However, more significant for the assessment is the proportion of these guest tickets that were actually redeemed. In all 49,720 were used, which represents a drop of 3 percent as compared with 2022 (51,044 in 2022; 106,930 in 2018). This means that the continued fall in the number of

tickets ordered, and the proportion of exhibitors' guest tickets that were actually used, had a major influence on the total number of visitors.

Guest tickets are an effective way of boosting the numbers of trade visitors to the IAA, so this option and the lifting of travel restrictions will have to be exploited more intensively again in the future.

VDA members were once more able to order discounted admission tickets for their staff. They ordered 15,403 staff tickets, which was 8 percent more than for the previous event in 2022, but only 4,216 of these tickets were used, equating to a 7 percent reduction as compared with 2022.

The largest group of corporate ticket-users were from the top-level management. However, a successful IAA TRANSPORTATION needs employees from all departments, and in particular from the areas of strategy, research and development, purchasing and human resources. Most of all the supply industry depends on attendance by staff from the specialist departments at the manufacturers.

4 Communication and press work

This section gives a comprehensive overview of the strategic media work, public perception and the most important communication activities that contributed to the successful positioning of the event.

PR strategy

The PR strategy for the IAA TRANSPORTATION 2024 was based on a structured and targeted approach aimed at establishing the event as the leading global platform in the commercial vehicle sector. In the first quarter of 2024, the key messages were defined, focusing attention on topics such as zero-emission mobility, digitization and the charging infrastructure. These messages formed the backbone of the PR campaign, and were continually backed up with regular press releases and targeted international media work.

The communication placed a strategic focus on the (charging) infrastructure, whose importance was stressed as a key element for the future commercial vehicle market. Numerous interviews with leading international trade media provided detailed coverage of innovations in the charging infrastructure and its importance for climate-neutral mobility. This media presence supported the overarching objective of positioning the IAA TRANSPORTATION as a key platform for pioneering technological solutions and discussing the future of the transportation industry.

One important component in the PR strategy was the international press workshop held in Frankfurt in June 2024, attended by about 60 relevant journalists from the trade press and business media. The event offered an exclusive opportunity to present the exhibitors' innovations and to highlight the central topics of the IAA TRANSPORTATION 2024 – including electric mobility, digitization and the charging infrastructure. This event laid the foundation for successful reporting and reinforced the media attention surrounding the event.

Another strategic aspect in the PR work was the continual publication of press releases throughout the year in order to ensure a consistent and far-reaching media presence. These regular updates helped to enhance media interest and to manage the expectations of the international journalists in the run-up to the event.

In addition, a digital press conference was held in September 2024, which for the first time was interpreted simultaneously into six languages using artificial intelligence. This innovative

solution made it possible to considerably extend the reach of the press conference and to involve a wider international target group.

Positive reporting during the IAA TRANSPORTATION

From September 13 to 25, 2024, the IAA TRANSPORTATION was mentioned a total of 16,200 times in online media. The potential reach came to 22.9 billion.

The reporting was largely either positive or neutral, with 36% of mentions occurring in a positive context. The dominant topics in the media reports – like “commercial vehicles,” “advanced technologies,” “sustainability” and “autonomous driving” – reflected the drive for innovation and future orientation at the event. The media presence was especially strong in Germany (3,360 mentions), the U.S. (3,150 mentions), Turkey (1,300 mentions) and China (1,150 mentions), which further emphasized the international relevance of the IAA TRANSPORTATION.

The IAA TRANSPORTATION 2024 had a well thought-out and strategically implemented PR campaign with which it successfully strengthened its position as an indispensable platform for innovation and climate neutrality in the commercial vehicle industry. With over 1,400 journalists from 52 countries reporting on-site, more than 80 press conferences and a comprehensive media presence in 116 countries, the event further increased its international visibility and importance.

Press Day/press conferences

This year's IAA TRANSPORTATION had 87 press conferences on the Press Day and the opening day. This virtually maintained the level from 2022, which shows that the drive for innovation remains at a consistently high level even after the dip in presentations due to COVID-19 (91 in 2022). The press conferences took place solely at the exhibitors' stands. The feedback from the exhibitors was all positive.

87
press conferences
were held

Press accreditation

The number of journalists accredited for the IAA TRANSPORTATION 2024 was 1,415. Roughly half of them came from Germany and half from other countries, which maintained the large number of international journalists on site. The stricter accreditation guidelines from 2022 were again applied with the aim of upholding the quality of reporters present. This objective was achieved.

“IAA Stars of the Year” award ceremony

The Press Day finished with an evening event on the Main Stage in Hall 18 at which the awards Van of the Year, Truck of the Year, Bus of the Year, Truck Innovation of the Year and Trailer of the Year were presented. In all over 200 journalists and other industry representatives attended the event. For the first time, all the prizes were awarded at one large stage show. The following dinner offered the attendees a chance to engage in networking and made a grand end to the evening. The reaction from the chairman of the jury was very positive and the

evening event at the IAA TRANSPORTATION also went down very well with high-ranking industry representatives.

Media reporting on the IAA

Targeted media interviews and reports were created at the IAA TRANSPORTATION. This included the TV news program “Morgenmagazin” with three live broadcasts, plus more in-depth reports on the topics and innovations at the IAA TRANSPORTATION, which were also made available on demand. The trade newspaper “Handelsblatt,” NDR radio and HAZ all actively provided additional media reporting. The RTL Group and the leading Chinese TV station, CCTV, also carried TV reports. During the event there were several background discussions with journalists, e.g. a Chinese media roundtable discussion on the Press Day, and a meeting between leading business journalists and VDA President Hildegard Müller.

Website (iaa-transportation.com)

General metrics

The IAA TRANSPORTATION website recorded sharp growth in comparison with 2022. The total number of visitors added 56%, while the number of page visits rose by 34%. As the domain was launched only in 2022, SEO growth was not fully developed at that time, which could explain the smaller number of visits in 2022. During the IAA TRANSPORTATION, visits increased by 31% and page views by 37%. There were slight falls in session duration (-4%) and actions per visit (-9%) in 2024, which could indicate that visitors were able to find the information they wanted more quickly. The number of downloads (+16%) also increased, which points to greater interest in the content.

532,000

visits
(+56%)

1.36 million

page views
(+34%)

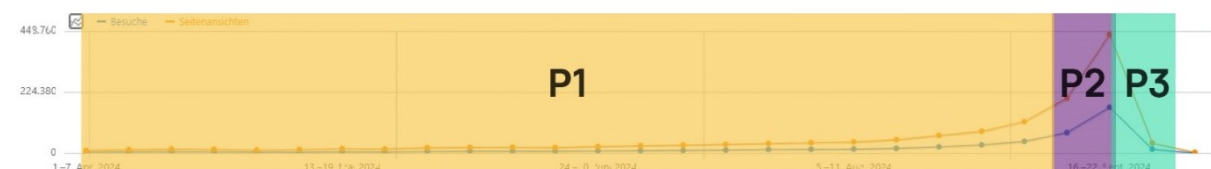
2 min 34 s

average session duration
(-4%)

Measurement period:
May 15, 2024 – Sept. 30, 2024;
Reference period:
May 15, 2022 – Sept. 30, 2022
(data from “Matomo”)

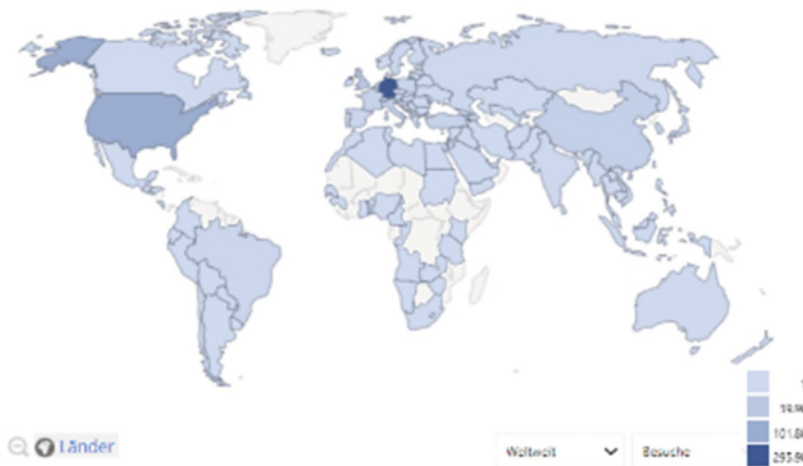


Phases in the page visits:



Website visits peaked during the IAA TRANSPORTATION at almost 170,000 visits and 440,000 page views (P2) with an average duration of 2 minutes and 28 seconds. In advance of the event (P1) there were also around 170,000 visits with nearly 440,000 page views. After the event finished, the number of website visits declined again (P3).

Visitors' origins and locations:



Top five online visitor origins

- Germany (1)**
268,836 visits
- U.S. (2)**
87,611 visits
- UK (3)**
33,212 visits
- Netherlands (4)**
22,816 visits
- China (5)**
20,328 visits

The majority of visitors came from Germany, but there was also a strong showing from the U.S. and from other European countries highlighting the international interest in the IAA TRANSPORTATION.

Top three search engines (external)

- Google (1)**
328,102 visits
- Bing (2)**
37,101 visits
- Ecosia (3)**
3,189 visits

Terms such as “exhibitor list” and “Hallenplan” indicate that visitors search specifically for the platform, information and exhibitors.

The page views are in keeping with the clicking behavior on the quick access bar, which was introduced on the landing page as an additional navigational aid in the summer of 2024.

The highest numbers of page visits were recorded on the landing pages in both languages, followed by the visitors’ and exhibitors’ areas – which indicates that the users’ main interest was in general and event-related information about the IAA TRANSPORTATION. The

most popular news categories were the general “Save-the-Date article” and the “Weekly,” in both German and English. The most popular subpages about planning a visit were “Tickets & Prices” and “Arrival,” which demonstrates that visitors were most interested in finding practical information for making their preparations.



Devices and technology:

The most popular devices used to access the website were desktop computers, followed by smartphones, whereby the Apple iPhone was especially popular. The most frequent screen resolution was 1920 x 1080, which points up the importance of good-quality presentation on desktop devices. Nonetheless, optimization for mobile devices remains important because many visitors also use smartphones to access the website.



Conclusions about the website:

The analysis of the website data for the IAA TRANSPORTATION 2024, based on the information available from the web analytics platform (Matomo), reveals an increase in the numbers of visitors and page visits over 2022, which indicates heightened interest in the event. The constant bounce rate and the large number of downloads underscore the effectiveness of the internet presence.

Deployment of editorial content

8,328 subscriptions
IAA TRANSPORTATION
Weekly

22 episodes
IAA TRANSPORTATION
PODCAST

37,000 subscribers
IAA Newsletter
(in German and English)

The IAA TRANSPORTATION regards itself as a fully comprehensive platform for all topics in the transportation and logistics industry. For this reason a “Weekly” newsletter was established from the beginning of 2024, which provided a digest of the latest news of the week in the transportation and logistics sector. As the IAA TRANSPORTATION approached, more and more brief news articles appeared about the innovations presented at the IAA. Each “Weekly” contained an average of 10 to 15 short news articles of approx. 5,000 characters per topic. The “Weekly” was mirrored on the IAA’s LinkedIn channel, where it also aroused a lot of interest. This led to 8,328 subscriptions to the IAA TRANSPORTATION Weekly on LinkedIn (as at October 30, 2024). The online “Weekly” articles in German

triggered 4,672 page visits, with 8,045 page visits to the English version. (as at October 30, 2024). The IAA TRANSPORTATION Weekly can therefore be seen as a huge success and will continue to be published every week after the IAA TRANSPORTATION.

In addition, the first podcast created especially for the IAA TRANSPORTATION 2024 was developed this year and made available on all commonly used streaming and podcast platforms (Podigee, Spotify, Apple Podcast, Deezer, RTL+, YouTube, Amazon Music, Audible, TuneIn). The format was an interview involving a host and one or two guests who provided an extensive overview of the current and future trends and developments in the transportation and logistics industry, along with information about the various facets of the IAA TRANSPORTATION 2024. The guests included many leading representatives of large transportation and logistics companies, all the way to C-level executives. The topics ranged from electric mobility and the current state of the charging and hydrogen infrastructure to trends

like artificial intelligence and autonomous driving. The podcasts were recorded both before and during the IAA TRANSPORTATION, and from early May 2024 onwards they totaled 22 episodes that were streamed or downloaded 2,098 times (as at October 30, 2024). The podcasts became very popular among industry representatives and are to be continued after the IAA TRANSPORTATION at irregular intervals.

A few weeks before the IAA TRANSPORTATION, as before, numerous IAA VOICES interviews were conducted with exhibitors and speakers, and published shortly before the trade fair on its website. As in 2022, the interviews were received with a huge amount of interest by the exhibitors and speakers and supplied excellent content for the IAA TRANSPORTATION channels.

A “Highlight” article on the IAA TRANSPORTATION also appeared every day, showcasing the highlights at the IAA Conference, IAA Experience and the IAA Trucker and Family Weekend. These articles went down well with visitors and earned a large number of clicks.

News about the IAA TRANSPORTATION 2024 was also sent at irregular intervals to all subscribers to the IAA TRANSPORTATION Newsletter. It focused primarily on the individual formats at the IAA TRANSPORTATION, but also spotlighted all the editorial contents such as podcasts, the IAA Voices and the Weekly. Ultimately it was read by a total of approx. 37,000 subscribers.

Media activities

In 2024 the media activities once more concentrated on national ticket sales in the German-speaking countries (Germany, Austria and Switzerland) and on the 16 international core markets including the Netherlands, Poland, France, Turkey, Italy, the UK, Slovenia and Slovakia. An important new development was the Ticketshop going online at the end of April, to encourage sales of tickets at an early stage. This was an effective strategy, as revealed later by the results. The full-event tickets sold through the Ticketshop increased by 77 percent as compared with 2022. Compared with 2018 the increase was over 354 percent. In 2024 the Ticketshop sold over 32 percent more tickets overall for the IAA TRANSPORTATION than it did in 2022.

The performance phase, which began in May 2024, concentrated on ticket sales and ongoing optimization of the activities in order to maximize the conversion rate and the number of sales. The digital campaigns were outstandingly successful, generating 450,000 clicks and a conversion rate of 3.99 percent. The SEA measures in particular contributed to the high performance. Turkey and the UK stood out at the regional level, even though they were only regarded as medium-priority countries at the outset. Furthermore, a combination of print and digital formats was used, which generated solid results despite some technical restrictions. The successful Facebook campaign was also noteworthy, recording a CTR of 0.51 percent for ticket sales in the Hanover region.

New visuals

An easily adaptable picture with hidden motifs was created to serve as the key visual for the campaign, which turned out to be particularly flexible and therefore suited various advertising formats. It was consciously chosen with a look and feel that broke with tradition, and its unusual, eye-catching design was very successful. From a psychological viewpoint, it makes sense to choose an eye-catching motif because it supports the “interrupt” strategy. This strategy aims to “interrupt” the public in their familiar environment and to attract their attention through unexpected visual or design-related effects. An unusual style like the IAA key visual stands out from conventional advertisements, thus ensuring greater visibility and higher ad recall rates.

An additional, specially adapted motif was devised for advertising the weekend, which was placed both in digital advertising and in numerous OoH locations – such as in Hanover's city center, the surrounding area and the Hanover 96 sports stadium. There was also a special motif for advertising to truckers, which was used primarily at service stations. For the first time the IAA TRANSPORTATION 2024 also used advertisements with 3-D animation to appeal particularly to families and truckers. At the same time, advertisements were broadcast on five radio stations in and around Hanover and in Lower Saxony to expand the reach even further.

Social media and the digital strategy

The following social media analysis for the IAA TRANSPORTATION 2024 presents an evaluation of the activities on LinkedIn, Facebook and Instagram in the period from August 30 to September 29, 2024.

The analysis concentrated on the reach, follower growth, impressions and engagement, which were achieved both through organic content and through targeted advertising measures. Comparison with the data from 2022 also offers valuable insights into the effectiveness of the current communication strategy and the clear progress made over the last two years. The evaluation reveals the success of the social media campaigns and emphasizes the importance of cooperation with influencers such as Christina Scheib, event-related content and paid content.

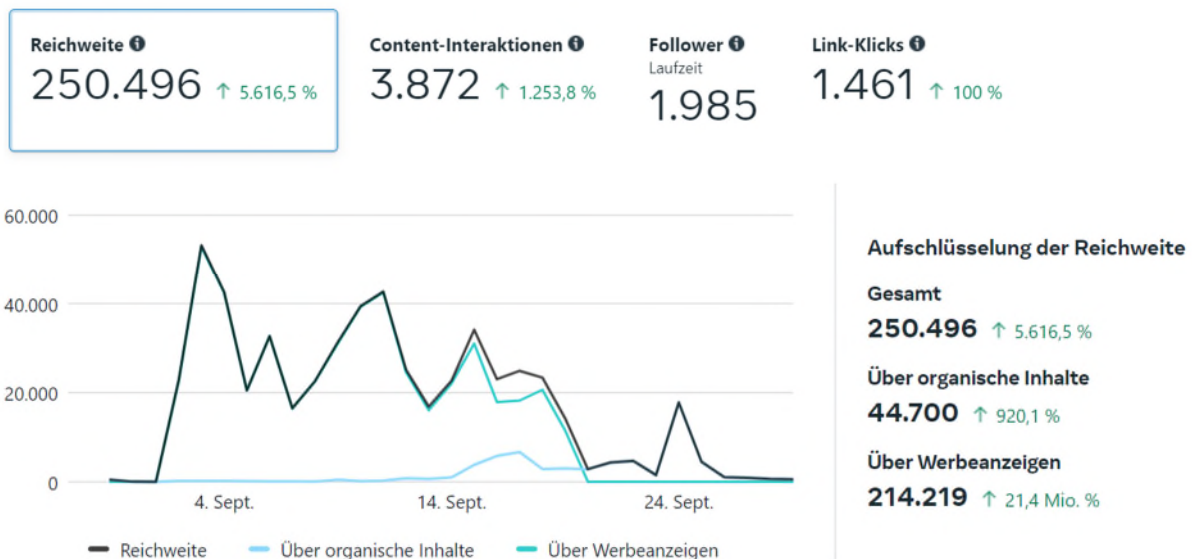
18,700
followers of the
IAA TRANSPORTATION
LinkedIn account

As the IAA TRANSPORTATION is a B2B event, the LinkedIn account was by far the most important one. In particular, the live feature introduced this year greatly boosted the channel. By the end of the last day of the IAA TRANSPORTATION, its LinkedIn account was being followed by 18,700 people, with 6,400 new followers just in the period from August 30 to September 29, 2024. That translates into growth of 53 percent and illustrates the successful expansion of the reach through organic and paid content. On the Press Day alone, 764 new followers came to the site from purely organic sources. In all, 281,000 impressions were recorded, which represents a remarkable increase in reach. During this period the posts were clicked a total of 31,800 times, indicating a huge response to the shared content.



The IAA TRANSPORTATION also achieved a vast reach totaling 7.3 million people on Facebook, the B2C channel, with content in German aimed primarily at truckers, truck fans and their families. The number of followers rose during the period indicated above to 12,117 and visits to the IAA TRANSPORTATION Facebook channel rose to 65,726. It is worth mentioning in particular that paid content made a key contribution to expanding the reach and thus demonstrates the effectiveness of the advertising measures used.

This year the IAA TRANSPORTATION established its own Instagram channel that attracted 1,985 followers as soon as it started. Its reach climbed to 250,496 during the period indicated, which corresponds to a rise of over 5,600 percent.



This shows that Instagram has become an important part of the IAA TRANSPORTATION communication strategy and will remain so. Alongside Instagram, the IAA TRANSPORTATION YouTube channel was also launched this year. This completed the separation from the IAA MOBILITY channel. The YouTube channel started livestreaming the IAA Conference immediately before the event. Unlike other social media channels, YouTube has to be seen more as a substitute for TV. With over 3,500 views solely of the stream of the second day, this was the right step to take.

Official newspaper – “IAA today”

20,000 copies
of the IAA today

35,000 recipients
of the digital
Mornina Briefing

The “IAA today” newspaper was produced on every other show day (September 17, 19 and 21, 2024) in cooperation with the publishers ETM-Verlag with a print-run of 20,000 copies. In addition, the exhibitors were supplied with an electronic version of the newspaper on these three days. Visitors were also informed about all the events and innovations every day in German and English editions of the IAA’s first ever “Morning Briefing”. The number of recipients of this Morning Briefing peaked at over 35,000.

The content of the “IAA today” was also made available electronically. The aim here was to switch the analog newspaper to a digital form.

Detailed survey results and additional information are available to exhibitors upon request, from transportation@iaa.de.

The next IAA TRANSPORTATION will be held in Hanover from September 15 to 20, 2026. It will be preceded by a Press Day on September 14, 2026.

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