

17th EPA Congress and PARKEN

International congress and trade exhibition
on planning, construction and operation
of on- and off-street parking
Berlin, 23 – 25 September 2015



Analysis 2015



Host:



National host:



mesago
Messe Frankfurt Group

17th EPA Congress and PARKEN



Concept of the event

Title	17th EPA Congress and Parken 2015
Date	23 - 25 September 2015
Place	Estrel Convention Center, Berlin
Interval	biennial, 2015 unique combination of EPA Congress and Parken
Organizer	mesago Messe Frankfurt Group



17th EPA Congress and Parken under one roof

At the Estrel Center in Berlin, Germany, the 17th Congress of the European Parking Association (EPA) and the German Parken exhibition took place under one roof once in 2015. The combination of both industry events created the ideal structure for the exchange of knowledge and information around parking.

From **21 - 22 June 2017** the next Parken takes place in Karlsruhe, Germany. Moreover, from **20 - 22 September 2017** the 18th EPA Congress and Exhibition takes place in Rotterdam, the Netherlands.



17th EPA Congress and PARKEN



Concept of the event

Parken

Parken is the only German exhibition which exclusively covers the planning, construction and operating of parking areas. The event offers visitors a compact overview of products and service providers of the parking industry. Exhibitors meet a well informed and specialized audience of planners, architects, operators of parking and garage houses as well as state representatives. The German Parking Association is the patron of the event.

Thematic Scope

- Turnkey multi-storey car parks and parking roofs
- Multi-storey car parking systems
- Cleaning
- Signage
- Lighting
- Self-service pay stations
- Guidance systems
- Entry and exit control systems



EPA Congress

The EPA Congress which takes place biennially in selected European cities always offers a forum for inspiring discussions, a possibility for networking and meeting new people from the parking world and is a great opportunity to look beyond the everyday work routine. It is one of the most important events focusing on Parken in Europe and is to be organized by the respective association of the country. In 2015 the German Parking Association invited to Berlin as a host under the title „Parking in the world of tomorrow“.



Thematic Scope

- Parking as an essential part of the mobility chain
- Parking management
- The future role of the parking operator
- Parking in the digital era
- Parking and retail
- Parking, politics and emotion
- Parking and human behavior
- The payment process
- On-street parking
- Park and ride



17th EPA Congress and PARKEN



Summary of the event

Parken

The Parken exhibition 2015 closed with a significant increase in visitor numbers by 77 %. 2,237 visitors gathered information from 112 exhibitors about the current offer of the industry. In comparison to the preceding year, the total number of exhibitors has increased by 23 %. The number of international exhibitors raised by 46 %. There was a positive atmosphere at the exhibition booths that was characterized by intense expert discussions. The quality of the visitors was on a high level which indicates a successful follow-up business.



17th EPA Congress

The diversified and top-class congress program offered insights into the latest trends and developments of the parking industry to the 546 delegates. The presentations focused on the chances and challenges of digitalization, new business models and techniques, parking policies and human behavior. Around 30 speakers examined these topics from scientific and economic points of view. At the end of the first congress day, the prestigious EPA Awards in the categories new constructions, renovations, on-street parking, innovation and marketing were announced. On the second day, Joachim Hauser, Vice President Parking and Charging, BMW Group – which presented itself as a main sponsor with the premium parking service ParkNow at the event – discussed the global trend of an increasing digitalization in urban mobility. The highlight of the last congress day was the Round Table. In this context participants from cities from all over Europe as well as car park operators presented their visions of a lively city and illustrated the role of parking today and in the future.



Evening events

Welcome Reception

In the evening of the first day exhibitors, congress delegates and speakers had the opportunity to end the day in a relaxed atmosphere and to establish networks at Spindler & Klatt - one of the most popular clubs in Berlin. From a culinary point of view the evening was fully adjusted to the capital Berlin.



Gala Dinner

The highlight of the 17th EPA Congress and Parken was the Gala Dinner at Germany's national historical museum (Deutsches Historisches Museum) in the second evening. Here, exhibitors, congress delegates and speakers met partners and enjoyed the evening in a historical ambience.



17th EPA Congress and Parken 2015 in numbers

Exhibition space	4,903 sq m
Exhibitors	112
International exhibitors	19 (17 %) from 13 countries
Visitors	2,237
International Visitors	700
Congress delegates	546





Exhibitor Statements

BMW Group

Joachim Hauser, Vice President Parking and Charging

»At the 17th EPA Congress and the Parken exhibition the analog and the digital world met. Old school and new thinking together created a space for ideas and prospects. The professional exchange was throughout on a high-profile level.«

Scheidt & Bachmann GmbH

Martin Kammler, Managing Director

»Parken 2015 in combination with the 17th EPA Congress was a well-organized and successful show for Scheidt & Bachmann. The product presentation in addition to the great networking possibilities at one of the leading trade shows and congresses is a big value for us. We are looking forward to our participation in 2017.«

Skidata Deutschland GmbH

Ralf Klomp, General Manager

»The combination of Parken exhibition and EPA Congress offers the perfect platform to present our product portfolio and service range to the international audience.«

Analysis of the exhibitor structure

Of the total of 112 exhibitors 19 companies (17 %) came from abroad. These are distributed over 13 countries worldwide.

International distribution of the exhibitors according to countries

Country	Number of exhibitors
Great Britain	2
Netherlands	4
Austria	2
Switzerland	2
Other*	9

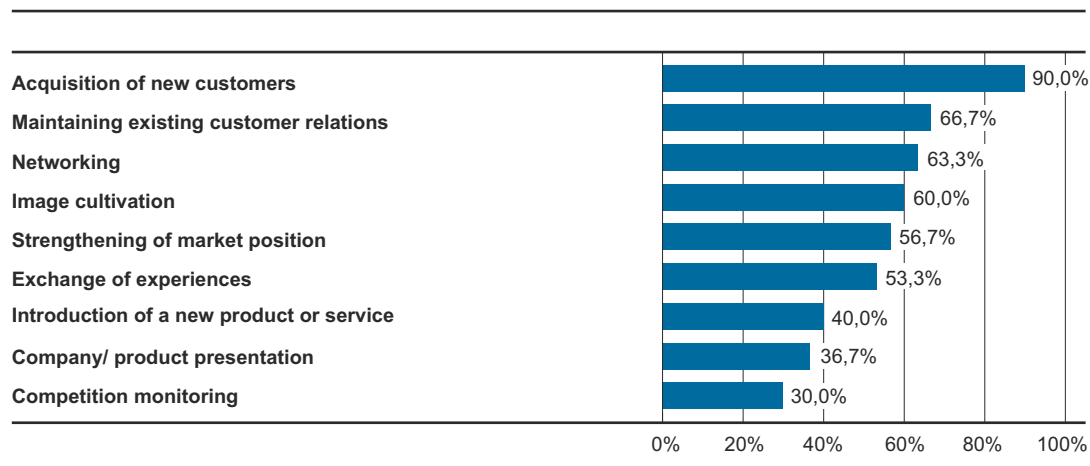
* Other: all countries with one exhibitor: Belgium, Italy, Canada, Lithuania, Luxembourg, Poland, Sweden, Spain, Taiwan



Results of the exhibitor survey*

Main reasons for participating as exhibitor in Parken 2015

(multiple answers possible)



High willingness to recommend the event

100 % of the exhibitors recommend Parken.

Great interest in the next event

93 % of the exhibitors plan to participate in Parken 2017.

The quality of the visitors is good

84 % of the exhibitors evaluate the quality of the visitors with very good/good.

Expert discussions on a high level

73 % of the exhibitors judged the scope of the contacts/discussions as very good/good.



Visitor statements*

Dürr Liegenschaften GmbH & Co. KG

Iris Dürr, Employee

»Good and compact exhibition.«

N.W.T Solutions OÜ

Thomas Kaarjärv, Owner

»Compact event where all important companies are present.«

Projekt w - Systeme aus Stahl GmbH

Burkhard Kahl-Pfeiffer, Team Leader Distribution, Parking Technology

»Fantastic event and great platform to establish contacts, keep it up!«

Servicegesellschaft für Diakonie GmbH

Andreas Maus, Managing Director

»Informative and clearly structured exhibition with competent exhibitors.«

Survision

Giovanna Piras, Business Developer

»Good opportunity to understand the german access control market and to meet the main actors.«

Analysis of the visitor structure**

National distribution of the visitors according to postal code areas

Of the total of 2,237 visitors 1,537 (68,7 %) came from Germany.

Postal code area	
Zone 9	6,5 %
Zone 8	7,4 %
Zone 7	8,7 %
Zone 6	8,6 %
Zone 5	7,7 %
Zone 4	10,9 %
Zone 3	7,7 %
Zone 2	7,7 %
Zone 1	30,0 %
Zone 0	4,6 %



* Source: visitor survey of Parken 2015

** Differences to 100% on the basis of roundings are possible



Analysis of the visitor structure**

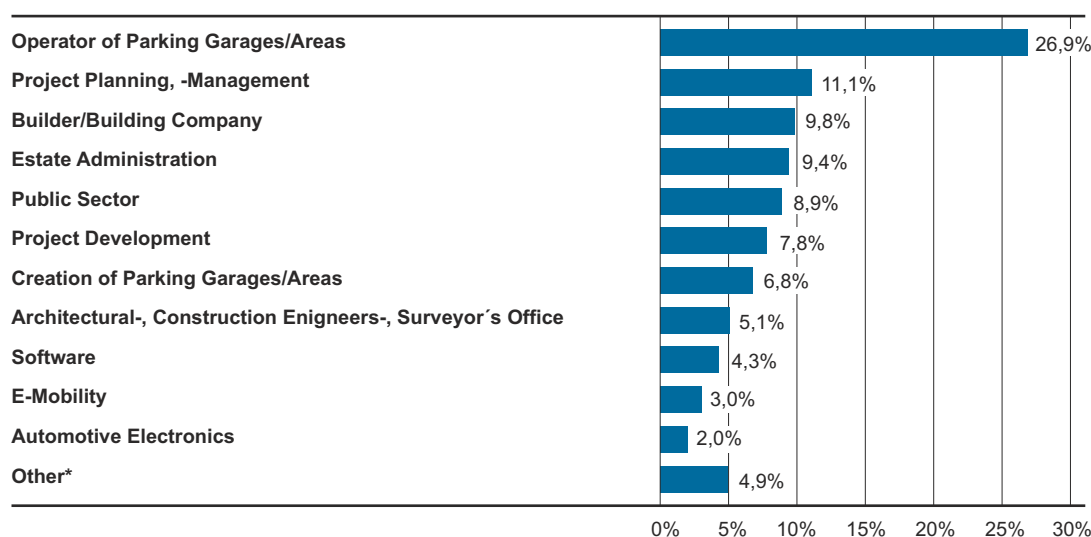
International distribution of visitors according to countries

Of the total of 2,237 visitors 700 (31,3 %) came from abroad. These are spread over 43 countries worldwide.

Country		Country	
Netherlands	12,1 %	Czech Republik	2,6 %
Great Britain	8,6 %	Finland	2,3 %
Poland	8,4 %	Ireland	1,6 %
France	7,2 %	Sweden	1,6 %
Spain	7,2 %	Slovakia	1,6 %
Austria	7,0 %	China	1,4 %
Switzerland	6,8 %	Portugal	1,4 %
Italy	5,1 %	Romania	1,4 %
Belgium	4,9 %	Russia	1,2 %
Denmark	3,2 %	United States	1,2 %
Norway	3,2 %	Other*	9,1 %

* Other: further countries with < 1 %: Bulgaria, Chile, Estonia, Greece, India, Iran, Iceland, Japan, Canada, Korea, Croatia, Lebanon, Lithuania, Luxembourg, Macedonia, Serbia, South Africa, Turkey, Ukraine, Hungary, United Arab Emirates, Vietnam

Visitor structure according to industry



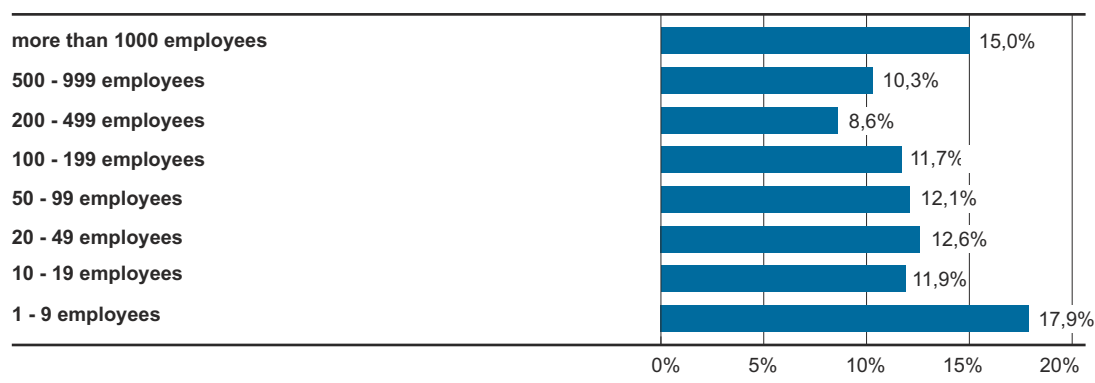
* Other: further industries with < 2 %: Automotive Electronics, Estate Administration, Facility Management of Parking Garages/Areas, AIDC, Mechanical and Automatic Park Systems, Project Finance/ Project Funding

** Differences to 100 % on the basis of roundings are possible



Analysis of the visitor structure**

Visitor structure according to company size



Visitor structure according to department

Department	
Executive Management	28,7 %
Sales	20,7 %
Project management	8,8 %
Technology	8,6 %
Administration	6,0 %
Marketing	4,5 %
Maintenance	3,4 %
Facility Management	3,3 %
Design & Construction	3,2 %
IT	3,0 %
Production	2,5 %
Other*	7,4 %

* Other: further departments with < 2 %: Research, Purchase, Utilities Management, Production Planning, Human Resources/Legal Department, Controlling, Public Relations, Publishing, Editorial department, Quality Management

Visitor structure according to function

Function	
Managing Director	27,5 %
Employee	18,9 %
Owner	10,1 %
Head of Department	8,7 %
Head of Division	8,4 %
Project Manager	8,4 %
Team Leader	5,0 %
Expert	3,9 %
Sales Representative	3,6 %
Board of Management	2,1 %
Other*	3,3 %

* Other: further functions with < 2 %: Freelancer, Pupil/Student, Designer/Product Developer, Trainee

** Differences to 100 % on the basis of roundings are possible



Results of the visitor survey*

Good reasons for participation in the exhibition

Presentation of product innovations and trends

65 % of the visitors use the exhibition to gather information about offers, product innovations and trends of the industry.

The exhibition as a networking platform

56 % of the visitors stated that they visit the exhibition mainly to maintain existing business relationships.

Gain a market overview

52 % of the exhibitors use Parken to gain a market overview.

Satisfaction of the visitors

Good intention to recommend Parken

95 % of the visitors recommend the event.

The exhibition provides an optimal offer for visitors

95 % of the visitors reported that they found products and solutions for their company.

High quality of the expert discussions

80 % of the visitors evaluate the discussions that were held with exhibitors as very good/good.

Extensive range of exhibitors, products and services

77 % of the visitors rate the range of exhibitors, products and services as very good/good.

Great interest in the next event

75 % of the visitors plan to visit Parken 2017.

Decision-making competency of the visitors

Involvement in procurement decisions

80 % of the visitors are involved in the procurement decisions of their companies.



Statements of delegates*

British Parking Association **Kelvin Reynolds, Director of Policy and Public Affairs**

»The EPA Congress 2015 provided a fascinating insight to all parking related topics across the EU and with some valuable information shared. The opportunity to network with professional colleagues on an international European wide basis is unique.«

Parking Co. **Herr Smith, Manager**

»A very qualitative event that is the perfect mix between commercial and academic approach to the parking industry. Something unique that should be maintained! Congratulations to the organizers, the German Association and to the EPA for offering this to our industry!«

PICONET/RoPark **Claudiu Suma, CEO**

»I was happy to participate in the 17th EPA Congress in Berlin. The industry networking was good and some very good presentations impressed me.«

Analysis of the delegate structure**

Of the total of 546 delegates 247 delegates (45,2 %) came from abroad. These are distributed over 31 countries worldwide.

International distribution of the delegates according to countries

Country		Country	
Netherlands	16,1 %	Italy	5,1 %
Spain	9,8 %	Norway	4,2 %
Great Britain	9,3 %	Slovakia	3,0 %
Austria	8,1 %	Denmark	2,5 %
Belgium	7,6 %	Portugal	2,5 %
Switzerland	7,6 %	Other*	18,2 %
France	5,9 %		

* Other: further countries with < 2 %: Chile, Estonia, Finland, Greece, Ireland, Iceland, Canada, Croatia, Lithuania, Luxembourg, Macedonia, North Korea, Poland, Romania, Sweden, Serbia, Taiwan, Czech Republic, United States

* Source: delegate survey of the 17th EPA Congress

** Differences to 100% on the basis of roundings are possible



Results of the delegate survey*

Good reasons for participating in the EPA Congress

The 17th Congress offered the optimal opportunity to talk to experts from the parking industry and to inform about current trends.

The five main reasons for participating in the 17th EPA Congress (multiple answers possible)

Networking with experts from the industry	68,5 %
Information about recent trends	65,7 %
General market overview	55,9 %
Keep up-to-date with the latest technology	52,0 %
Gather specific knowledge	36,3 %

Satisfaction of the delegates

The expectations of the delegates were met

93 % of the delegates say that their expectations in the 17th EPA Congress were met.

High willingness to recommend the event

91 % of the delegates recommend the EPA Congress.

Great interest in the next event

81 % of the delegates plan to participate in the EPA Congress 2017.

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Result 17th EPA Congress*

In the following the final statement of the European Parking Association (EPA) is listed.

The 17th EPA Congress, held in Berlin, gave us a glance of the future of parking:

- Parking is playing an increasingly important role in the strategic plans of modern city administrations, as seen at the EPA Congress in Berlin.
- Digitalization is about to change markets, customer behaviour and the roles of the players on the market.
- Modern concepts of identification and payment are going to shake up old fashioned structures.
- New players are entering the market with radically new concepts.
- Standards will help the European parking industry and local authorities to unveil the full potential of parking, but different legal system all over Europe are hindering some of the possible progress.
- The academic network is constantly growing, delivering new insights.
- Parking infrastructures are developing into smart mobility centers.

The congress also showed the influence of human behaviour and its analysis on the parking sector. Digitalization and the huge amount of data collected will lead to products and services that will be tailored to smaller customer groups, or even individuals. Customers, on the other hand, will be able to access better information in less time, putting them into a position to make smart and informed decisions.



* Source: EPA Board

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Result 17th EPA Congress*

The congress recognizes that the key messages for the next future will be the following:

- ➔ The cooperation of local city authorities and the parking industry has to be improved.
- ➔ It is evident that only a combined view on on- and off-street parking will result in successful communities.
- ➔ New digital approaches with open standards will revolutionize the market.
- ➔ The use and connection of big data will require new technologies and a responsible approach.
- ➔ As customers are getting smarter and better informed, even more emphasises has to be placed on the improvement of services and the customer journey itself.
- ➔ The parking industry has to keep the strong focus on the collaboration with the final target of their customers (like hotels, airlines, restaurants, offices and retail).
- ➔ New means of payment have to be easily accessible for the industry.
- ➔ The parking industry needs to work on better use of existing parking facilities before construction of new capacity.
- ➔ The parking industry needs to prepare for autonomous driving (shared) vehicles coming to the market.
- ➔ The parking industry has to build a sustainable platform for their customers in order to avoid other players to take over the customer relationship.

The EPA congress proved that the parking industry in Europe made giant leaps to professionalization during the past few years. It moved to a service-oriented and value-creating part of Europe's community. In fast moving times, it will be even more necessary to closely monitor the world wide developments and to build a trustful relationship with the parking sectors in the other parts of the world.

Berlin, 25 September 2015





Contact

mesago

Messe Frankfurt Group

Mesago Messe Frankfurt GmbH

Rotebuehlstr. 83–85

70178 Stuttgart

mesago.com

Organizer



Simone Pfisterer

Vice President

Phone/Fax: +49 711 61946-21 / -1121

simone.pfisterer@mesago.com

Exhibition/Congress



Nadja Raff

Project Manager

Phone/Fax: +49 711 61946-251/-11251

nadja.raff@mesago.com

Exhibition



Mara-Jennifer Ruof

Project Assistant

Phone/Fax: +49 711 61946-505/-11505

mara-jennifer.ruof@mesago.com



Claudia Göhler

Project Manager

Phone/Fax: +49 711 61946-14/-1114

claudia.goehler@mesago.com

Congress



Donata Pfender

Project Assistant

Phone/Fax: +49 711 61946-503/-11503

donata.pfender@mesago.com



Sabrina Steck

Senior Project Manager

Phone/Fax: +49 711 61946-58/-1158

sabrina.steck@mesago.com

Service



Petra Buss

Project Manager

Phone/Fax: +49 711 61946-38/-90

petra.buss@mesago.com

Press