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AMSTERDAM

*New Unique Selling Points based on the
wants & needs of the International
Customer, and comparative research of the
Competing Venues*

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Date: 01-03-2016

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Executive Summary

This research was created as a contribution to the internationalization strategy of RAI Amsterdam. The company wants to bring more international conferences, and exhibitions to Amsterdam. One of the objectives of this strategy is to create an 'international standard', which complies with the basic services, and features a convention center should provide to its international clients. The goal of this research was to create unique selling points with an international focus, which can be used to define the international standard of RAI Amsterdam.

To create an all-encompassing analysis, it was essential to understand the MICE industry, and to investigate if the Netherlands is an attractive market. To establish the current value proposition of RAI Amsterdam, and to point out its strengths and weaknesses. An analysis of academic articles on the needs, wants and demands of the international customer when visiting a venue, resulted in a checklist with the most important rated services and products. The checklist was used for a comparative research of the direct competitors of RAI Amsterdam: Messe München, ExCel London and Fira Barcelona. The comparison showed whether the current value proposition of RAI Amsterdam complies with these features, and how the competing venues score on satisfying the needs and wants of the international customer.

The MICE industry stands for the Meetings, Incentives, Conventions and Exhibition industry, these events have different objectives, such as employee trainings, company sales, education, or displaying products. The developments of technology are important for the industry as it changes the way meetings are held, think of hybrid events, virtual communities, and the use of applications. The findings presented that the Netherlands is an attractive country to host international events, the Netherlands and Amsterdam are ranked in the meetings top 10. The Netherlands is an open-minded and welcoming country, with an excellent infrastructure. RAI Amsterdam is perceived to be an innovative company, with a main focus on sustainability. The checklist showed that there are 4 important categories: the building, the facility services, catering, and staff. RAI Amsterdam scored high on the building, staff, and in-house catering, it lost points, however, on the execution of the social webcare. It lacks extra information on local foodservices, tourism information, and a unique feature of RAI Amsterdam, the hotel and travel service, is difficult to find on the website.

This research shows that the RAI can differentiate itself from the competitors by improving its social webcare, providing brochures, and by engaging the visitors by telling the 'story' of the city. This can be done by combining the technological developments of the industry with the popularity of Amsterdam. The creation of an application, or a local information guide will add value to the customer experience.

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1. Introduction

In 2014, The Netherlands ranked ninth on the world ranking of the meeting industry based on the statistics of the International Congress, and Convention Association, the Netherlands was topped by European countries such as Germany, the United Kingdom, and Spain (ICCA, 2005-2014, p. 5). Not only the Netherlands was awarded a top 10 spot but Amsterdam took the 8th rank of the congress, and convention cities by ICCA (2005-2014, p. 6).

One of the main players in the Netherlands is RAI Amsterdam. This international convention center started out as “Vereeniging de Rijswiel-Industrie”, which was founded in 1893, and in 1961 the first exhibition hall, the ‘Europe-Hall’, opened its doors (RAI Amsterdam, n.d.-b). Since then the organization has grown extensively with a rentable surface of 108.150m², which is divided into 11 halls, 2 auditoriums, 1 ballroom, 22 conference rooms, and 42 meeting rooms (RAI Amsterdam, n.d.-b).

RAI Amsterdam is also a two times winner of the Exhibition News Best International Venue Award. The company was awarded the price because the jury concluded that the RAI Amsterdam is constantly striving to improve their facilities, and services for international events (RAI Amsterdam, n.d.-a).

This focus on improving the facilities can also be seen in the development of the new Nhow Hotel, and a new ‘multifunctional’ parking building (RAI Amsterdam, n.d.-e). The strive for improvement can also be found in the organization of a workgroup in 2015 by the management of RAI Amsterdam. The workgroup was founded to follow a new strategy program: internationalization - RAI Amsterdam wants to expand on the international market, by developing and acquiring large international exhibitions. As well as bringing international conferences, and exhibitions to Amsterdam (RAI Holding B.V., 2014, p. 31).

The internationalization strategy will be used to keep a competitive advantage to other international convention centers based in Europe. The new strategy should also create a more international workplace and should contribute to the realization, and continuation of a satisfactory customer relationship.

One of the goals of the work group is to create an “international standard”. This “international standard” should provide the basis of the services, and features an international convention center should provide to its clients. The International Standard however does not yet exist. In this research unique selling points (USP’s) will be created for RAI Amsterdam, with a focus on the attraction of

international customers. The unique selling points can be used to define the international standard of the organization.

The USP's will be deduced from a comparative research of the value propositions of competing international convention centers, and an analysis of the customer needs of international visitors of convention centers.

The subject, and research questions of this report has been set up with the assistance of the market research team of RAI Amsterdam, however this research will not be a collaboration, and the end result will only be used as a recommendation for the company. The work-group of RAI Amsterdam investigates the same subject but through focus groups, and surveys.

1.1 Central research question, and sub-questions

The main question of this research is:

- Which unique selling points should RAI Amsterdam adopt to attract more international customers from the MICE-industry.

The following sub-questions should help provide for an all-encompassing conclusion:

- What is the MICE Industry?
 - What is the current status of the industry in the Netherlands?
- What sort of company is RAI Amsterdam?
 - What is the mission statement of RAI Amsterdam?
 - What is its current strategy?
 - What are the objectives of RAI Amsterdam?
- What are the needs, wants, and expectations of a client when visiting an international convention center?
- What are the similarities, and/or differences between the competing venues?

1.2 Limitations

This research will mostly be based on desk-research, which could lead to some limitations as the report will be based on an outside-in perspective, and I will not have direct access to the customer or inside information of the competing venues. The information of the venues will be taken from the websites, therefore, if they do not provide significant information it will be difficult to determine which products they do or do not offer. The RAI will provide inside access to company documents, a product list, and a company analysis, plus several reports of associations such as ICCA.

The scope of this research will be focused on the European competitors of RAI Amsterdam. This is because most events rotate between locations and continents. So if an organizer chooses to take the event to Europe, RAI Amsterdam will have to compete with convention centers in Europe. Three competing venues will be considered for the comparative research plus RAI Amsterdam itself.

The venues that are considered to be competitors by the RAI are situated in Copenhagen, Barcelona, Madrid, München, London, Milan, Frankfurt, Genève, Berlin, Vienna, Stockholm, and Paris (RAI Holding B.V., 2014, p. 28). The competing venues that will be considered in the research were decided on by the market research team: Messe München, ExCel London, Fira Barcelona and RAI Amsterdam.

The thorough desk-research, and comparative research provide relevance for the RAI as the outside-in approach might find new evidence that can be overlooked by the organization itself.

In the first two chapters the theoretical framework, and methodology will be explained. After which, the chapters will provide the results, analyses, and subconclusions per subquestion. The subconclusions will be put together in the final conclusion, providing the answer to the central research question.

2. Theoretical framework

In this chapter the theories, that will be used during this research, will be explained, and adapted if necessary. Before designing a unique selling points for RAI Amsterdam it is essential to understand what marketing is, and how the process of marketing works.

2.1 Marketing, and the core concepts

Marketing is used by a business or an organization to realize, and continue customer relationships by satisfying the needs, wants, and demands of the customers. To satisfy a customer, a company has to add value to the products, and services offered, and this should, if done well, lead to a return of value from the customer to the company in terms of profits, and sales (Armstrong & Kotler, 2013, p. 33). The added value of the products is defined in the unique selling point of a company. A unique selling point or unique selling proposition (USP) helps a company differentiate itself from the competing companies. The USP shows the customer why the products, and services of that specific company are better than the products, and services from its competitors (The Chartered Institute of Marketing, 2009). According to Kotler the core concepts of marketing include: needs, wants, and demands; products; value, cost, and satisfaction; and markets (Kotler, 1994, p. 7)

2.1.1 Needs, wants & demands

The needs of a human being are laid out in a pyramid: the “Maslow’s hierarchy of needs”. The pyramid is divided into five levels: 1. Physiological needs (hunger, thirst); 2. Safety needs (security, protection); 3. Social needs (sense of belonging, love); 4. Esteem needs (self-esteem, status); 5. Self-actualization needs (self-development, and realization). When fulfilling the needs of one level a

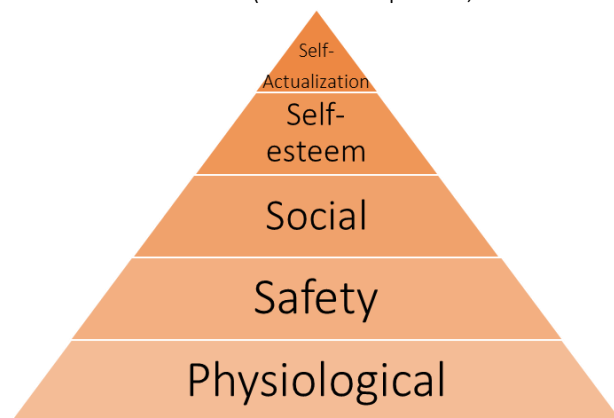


Figure 1: Maslow's hierarchy of needs

person reaches the next level of needs. For a company it is important to understand what needs they have to satisfy or in which level of the pyramid their customers are situated (Armstrong & Kotler, 2013, p. 168). The wants of a customer are based on his/her culture, and individual personality. Everybody needs food but it depends on the person itself what sort of food he/she wants,

and if a person actually has the purchasing power to provide him or herself with these particular wants, these wants turn into demands (Armstrong & Kotler, 2013, p. 34).

2.1.2 Products

Products are the goods, and services offered by a business to satisfy the needs, wants, and demands of the customer (Kotler, 1994, p. 8). Goods are usually physical products, services are intangible, and do not lead to ownership (Armstrong & Kotler, 2013, p. G8).

2.1.3 Value, cost, and satisfaction

A customer buys the product that gives him the best customer perceived value. The customer-perceived value is the difference between the cost of the product, and the benefits the product will deliver compared to the products of the competitors (Armstrong & Kotler, 2013, p. 41). The product delivers customer satisfaction when the 'perceived performance' agrees with the expectations of the customer, when the performance is outstanding it leads to even more satisfaction which creates customer loyalty (Armstrong & Kotler, 2013, p. 42).

2.1.4 Markets

The definition of a market, according to Armstrong, and Kotler in the book Marketing, an Introduction, is: "the set of actual, and potential buyers of a product or service" (2013, p. 36). Marketers have to identify the market in order to understand their customers, and create a competitive advantage by differentiating themselves from the competitors (Armstrong & Kotler, 2013, p. 36).

2.2 The marketing process

The marketing process is set up in five steps, in order to create a customer-driven strategy. As can be seen in figure 1 (Armstrong & Kotler, 2013, p. 34).



Figure 2: Marketing Process for a customer-driven marketing strategy (Armstrong & Kotler, 2013, p. 58).

As explained in the introduction the end result of this report will be a recommendation for RAI Amsterdam, and I do not have the means to take the last three steps. Therefore, only the first two steps of the marketing process will be taken in this research, and the last three steps will be explained briefly.

2.3 Understanding the marketplace, and customer

Step 1 of the marketing process is understanding the marketplace, and the customer (Armstrong & Kotler, 2013, p. 34). In this step the marketing environment of the company will be researched, the

environment is divided into two sections: the micro environment, and the macro environment (Kotler, 1994, p. 95). The micro environment is set up from the factors close to the company that influence the way the customers are served, these factors are: the company itself, the suppliers, marketing intermediaries, the competitors, the publics, and of course the customer (Armstrong & Kotler, 2013, pp. 94-98).

2.3.1 PESTEL analysis

The macro environment is set up from the factors that have an external influence on the marketing strategy. These factors are also known as the PESTEL-framework: Political (governmental role), Economic (exchange rates), Social (demographics), Technological (innovations), Environmental (pollution, and waste), and Legal (constraints). These factors can lead to the success or failure of a strategy, so it is important for a company to make a full PESTEL analysis (Johnson, Whittington, & Scholes, 2012, p. 21).

2.3.2 SWOT analysis

A SWOT analysis shows the strengths, weaknesses, opportunities, and threats of a company that will have impact on the design of the new strategy (Johnson, Whittington, & Scholes, 2012, p. 269). The strengths, and weaknesses are based on the products, and services of a company, what is good, and what can be done better (Kotler, 1994, p. 106). The opportunities, and threats are based on the situation of the external environment of the company, and provide information for new strategic options (Johnson, Whittington, & Scholes, 2012, p. 68).

2.3.3 Customer and business buyer behavior

Before buying a product the following factors influence the behavior of the consumer:

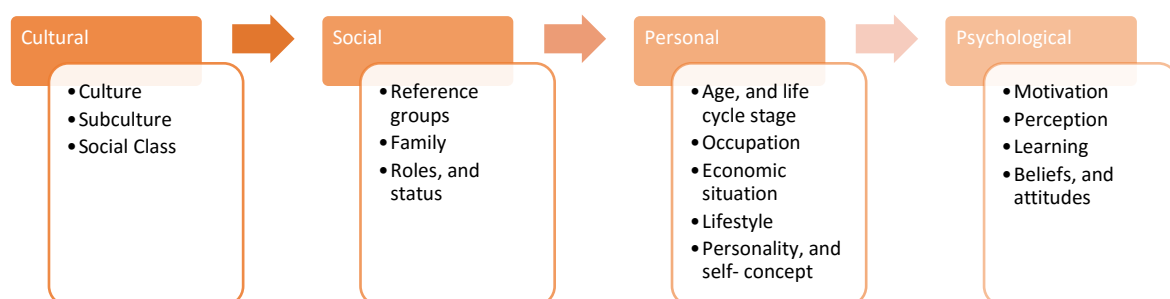


Figure 3: The factors influencing consumer behavior (Armstrong & Kotler, 2013, p. 158)

These influences are the determinants for the buyer decision process. The process begins with the recognition of a need. 'Internal', and 'external stimuli' cause the need to come forward, so that a person will take action to satisfy this need. 'Internal stimuli' are based on the Maslow's hierarchy of needs. 'External stimuli' can be advertisements, and commercials (Armstrong & Kotler, 2013, p. 170).

When the need is recognized by a consumer, and it is a product that needs to be bought, the customer will conduct research to obtain information on the products that he seeks. Information can be found via personal (word of mouth), commercial (advertising), public (social media), and experiential sources (try-outs). Personal sources are thought to be the most reliable during the buyer decision process (Armstrong & Kotler, 2013, p. 171).

A consumer usually takes multiple brands into consideration before making a decision. This next step is the evaluation of alternatives. The evaluation phase depends on the person, and the situation he or she is in. Some think about a purchase for weeks as other might by a product on an impulse (Armstrong & Kotler, 2013, p. 171).

The purchase decision is made on the preferred brand. Before actually purchasing the item, someone can influence you into buying something else when they do not agree with your decision. Other factors that can change your mind are the '*unexpected situational factors*'. These can include for example a change of income, price, or events (Armstrong & Kotler, 2013, p. 172).

After the purchase the customer will show 'post purchase behavior', where the perceived benefits will be compared with the expectations a customer had. Every customer has to make a compromise when making a large purchase, which leads to cognitive dissonance. But a satisfied customer will also provide word to mouth when talking to others, which is positive behavior for a brand as it could lead to more customers (Armstrong & Kotler, 2013, p. 172).

RAI Amsterdam is an international convention center, and thus a supplier of rentable space for other businesses (RAI Amsterdam, n.d.-b), therefore it is important to understand the business buyer behavior. Business buyer behavior is defined in the book "Marketing – an introduction" as: "business buying behavior refers to the buying behavior of organizations that buy goods, and services for use in the production of other products, and services that are sold, rented, or supplied to others" (Armstrong & Kotler, 2013, p. 175).

The decision process is more compound than the customer decision process. The decision is larger, more formal. And a business has more, and other factors that have an effect on the decision. The factors that influence a business can be seen in the table below:

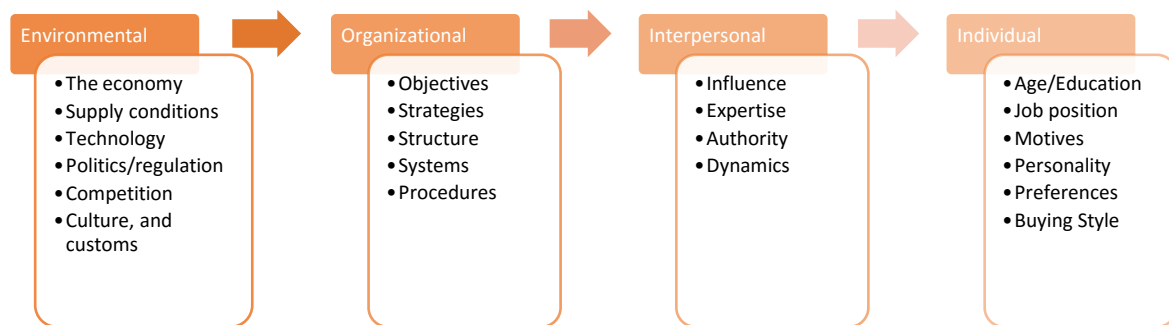


Figure 4: Influences on the business buyer behavior (Armstrong & Kotler, 2013, p. 182)

The buying process for a business contains eight steps, some might be skipped if it concerns a 'rebuy' (Armstrong & Kotler, 2013, p. 182). The business buyer process, as noted by Armstrong, and Kotler (Marketing - an introduction, 2013):

1. Problem recognition: the first step is the same as the buying process for a customer, namely the recognition of a need or problem.
2. General need description: what does the buyer need to solve the problem, and how many products are necessary.
3. Product specification: a value analysis is made to see how more value can be added, for example through rebuilding the product.
4. Supplier search: find the right supplier.
5. Proposal solicitation: chosen suppliers write proposals, the proposals should contain marketing, and technical elements.
6. Supplier selection: choose the final supplier(s), based on several elements: quality, reputation, delivery, attitude, transparency, and prices.
7. Order-routine specification: final order with all specifications.
8. Performance review: evaluation, and feedback to the supplier (Armstrong & Kotler, 2013, pp. 182-183).

2.4 Designing a customer-driven strategy

When designing a new customer-driven strategy a company has to decide on which customer they will serve, how they will serve these customers by delivering more value than its competitors. Deciding on the customer will be done through market segmentation, and market targeting. A value proposition is made through differentiation, and positioning.

2.4.1 Market segmentation

Market segmentation is dividing the market into smaller segments based on matching characteristics. The characteristics of a segment can be based on the following variables: geographical, demographic, psychographic, and behavioral segmentation (Armstrong & Kotler, 2013, pp. 192-200). When segmenting a business market more variables can be used: "operating characteristics, purchasing approaches, situational factors, and personal characteristics" (Armstrong & Kotler, 2013, p. 200). International markets have different variables that help to find the right segment: geographic location, economic factors, political, and legal factors, and cultural factors (Armstrong & Kotler, 2013, p. 201).

2.4.2 Market targeting

The step market targeting is basically the evaluation of the chosen segments. Important components are the size, and growth of the market, as well as the structural attractiveness, and if the market segment matches the objectives, and the resources of the company (Armstrong & Kotler, 2013, p. 202).

After the evaluation, the company can choose how many, and which markets it will target. There are different strategy options based on the quantity of markets. An undifferentiated marketing strategy targets the entire market; no difference is made between the customers. Differentiated strategy is when a company chooses multiple market segments, and develops a different marketing strategy for each market (Armstrong & Kotler, 2013, pp. 202-203). The next version of a strategy is niche marketing, where a company focuses on a large section of a smaller market segment, creating a strong position as the customers' needs are easier to identify. Micromarketing is a strategy where a company targets individuals by tailoring its product to their specific needs (Armstrong & Kotler, 2013, pp. 204-205).

A strategy must be chosen with the following elements in mind: the resources of the company, the product variability, market variability, and the strategies of the competitors (Armstrong & Kotler, 2013, p. 209).

2.4.3 Differentiation, and positioning

The position of a product is defined by the customer through the perceived value compared to the competing product. A company however can plan the positioning of their products by creating a value proposition. A value proposition is the complete 'mix' of how the brand is positioned, and differentiated through its products, and services. With a good value proposition, a business can create competitive advantage by adding superior customer value to the products in the targeted segments (Armstrong & Kotler, 2013, pp. 210-11).

When positioning the brand, a company first has to decide how it wants to differentiate itself from its competitors, this can be done through several elements: products, services, channels, people or image. Product differentiation is based on the features, performance, and style; service differentiation through convenience, and fast delivery; channel differentiation is done through perfecting the performance of the channels; people differentiation is based on the employees of a company; image differentiation is the creation of a personality for the brand through symbols, and advertising. To see how a brand is perceived compared to the competitors a company creates positioning maps (Armstrong & Kotler, 2013, pp. 212-213).

The Ansoff product/market-growth matrix generates the directions a marketing strategy can take. The direction has to be decided on when differentiating the brand. The first option is market penetration, which is aimed at increasing the current market share. Product development is aimed at creating new products or modifying the current products, and offer them to existing markets. Market development is offering existing products to new markets. Diversification is taking new products to new markets (Johnson, Whittington, & Scholes, 2012, pp. 135-139).

<i>Product/Market Expansion</i>	Existing products	New products
Existing markets	Market penetration	Product development
New markets	Market development	Diversification

Figure 5: Ansoff-matrix taken from the *Fundamentals of Strategy* (Johnson, Whittington, & Scholes, 2012, p. 135)

2.5 Implementation of the strategy

The final steps of the marketing process show how to implement the strategy. Step 3 is set to construct an integrated marketing program that delivers superior value. The value will be created through the marketing mix: product, and service design, pricing, distribution, and promotion of the value proposition (Armstrong & Kotler, 2013, p. 58). Step 4 is focused on building profitable relationships: customer relationships, and partner relationships. The last step is the benefit obtained through the execution of the first four steps. Here a company can “capture value” from satisfied customer which will boost the market share of the company (Armstrong & Kotler, 2013, p. 58).

2.6 The Business canvas model

The canvas model is used to describe the business model from a company. The model is set up in 9 blocks, as can be seen below. The model was developed by Alexander Osterwalder (InteMarketing, n.d.). It provides an overview of the most important features of the company.

The business model answers the following questions. Customer segments: For whom do you create value; Value proposition: How do you create value; Channels: How do you deliver value; Customer relationships: What sort of relationships do you have with the customer; Revenue stream: How do you capture value; Key resources: Which resources do you need to capture the value; Key activities: What do you do; and Key partnerships: Who do you need help from (Business Model Generation, n.d.).

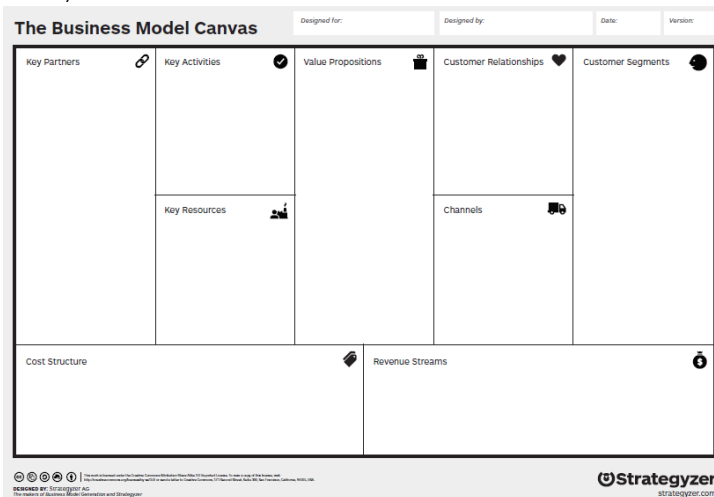


Figure 6: The business model canvas by strategyzer.com (Business Model Generation, n.d.)

An often used model in Marketing is the Michael Porter's Five Forces Framework. The framework provides an overview of the competition in the industry. The five forces that are of influence on the the industry are: the threat of entry, the threat of substitutes, the power of buyers, the power of suppliers, and the extent of rivalry between competitors (Johnson, Whittington, & Scholes, 2012, pp. 25-31). The industry life cycle marks the changes in the industry. There are five stages: the development stage; the shake-out stage; the maturity stage; and the decline stage. Each stage shows different changes for the five forces of the Framework (Johnson, Whittington, & Scholes, 2012, p. 33).

However, for this research the framework and industry life cycle will not be used. As the competition of RAI Amsterdam is already known. The competitors that will be used in this research have been chosen by the market research team of the RAI itself as they have a set group of competitors they keep track of. Furthermore the power of buyers, and suppliers do not have a direct influence on the needs, wants and demands of the customer.

3. Methodology

In this chapter the research methods that will be used to answer the sub questions will be explained. I will explain the methodology per subquestion, connecting the models to the questions.

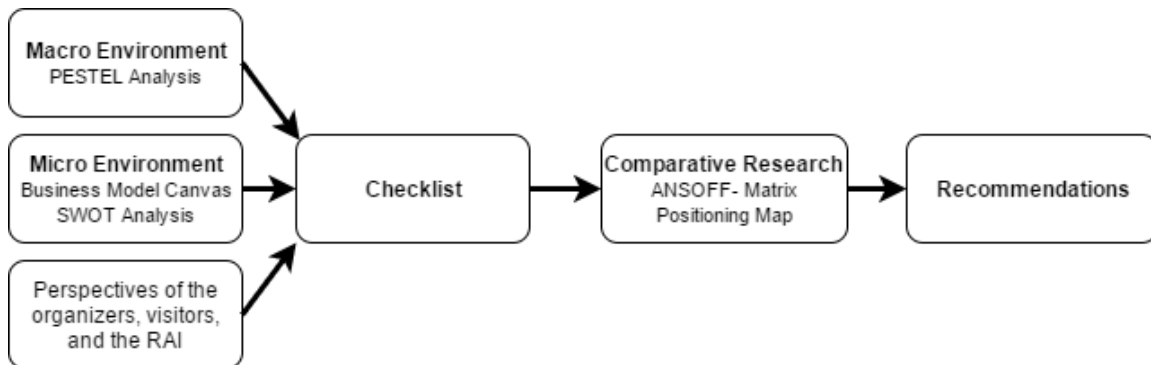


Figure 7: Research Framework

3.1 What is the MICE-Industry?

Before a new USP can be constructed, knowledge needs to be attained on the industry in which the RAI operates, this is the so called MICE-industry, which stands for: Meetings, Incentives, Conferences, and Exhibitions (ICCA). The first subquestion is: What is the MICE-Industry? This question concerns the first step of the marketing process: understanding the marketplace, as the MICE-industry is the marketplace of RAI Amsterdam.

Overall knowledge on the industry will be attained through desk research on reports from the World Tourism Organization: "The Global Report on the Meetings Industry", "Measuring the Economic Impact of the Meetings Industry: developing a tourism satellite account extension" and "Global Report on the Meetings Industry - Volume seven" (2014; 2006; 2014). "CBI: Product factsheet: MICE from the EU" (CBI Market Information Database, 2014). The EIBTM Trends Watch Report provides intel in the world of exhibitions, and what they provide for their customers (Davidson, 2014). Internal access to ICCA has provided several statistics reports with different scopes based on statistics from 2005-2014. The scopes from the reports are worldwide, and the region of Europe as well as the country, and city rankings. The information in the reports are based on recent facts, and statistics, as they are written in 2014. The reports of 2015 are not yet published so the current status of the MICE-industry will be based on the numbers Of 2014.

3.1.1 Current status of the industry in the Netherlands

The information obtained through the desk research on the MICE-Industry will help with answering the next sub-question: What is the current status of the MICE industry in the Netherlands? The market conditions will be acquired with the use of the following models: a PESTEL Analysis. This model contributes to understanding the macro environment of RAI Amsterdam.

The PESTEL analysis of the external environment will be based on the circumstances of business tourism in The Netherlands. As they will have direct influence on the RAI as a company. Information for the analysis will be taken from the “Economic Impact 2015 report” of the WTTC (World Travel and Tourism Council, 2015), and from the “Meetings & Congresses scan 2014” by NBTC (NBTC Holland Marketing, 2014). The scan provides a good overview of the MICE industry in Holland. NBTC is a reliable source as the organization is responsible for the marketing of the Netherlands on national, and international level (NBTC, n.d.-e).

3.2 What sort of company is RAI Amsterdam?

After researching the external environment of RAI Amsterdam it is important to understand the RAI as a company, as it provides a background knowledge before designing a new customer-driven strategy. What is the mission statement, and the objectives, and what is the current value proposition of the RAI? These questions will be answered by filling in the business model canvas, explained in paragraph 2.5. Desk-research will acquire the right information, which will be based on secondary data and primary documentation of the company. The annual reports of RAI Amsterdam show the growth, finances, and strategy of the company. Company documents provide information on the current product list and a company analysis.

The sources can provide a reliable outcome of the research as the annual reports are made in cooperation with independent actors. The annual reports are written on behalf of the executive board in accordance with the supervisory board, all members of the supervisory board are deemed independent.

A SWOT analysis (paragraph 2.3.4) will be made based on the business model canvas of RAI Amsterdam and on a company analysis of RAI Amsterdam (attained through inside access). For the strengths, and weaknesses, the following categories will be taken into consideration: location & accessibility, building, offers, partners & brand image, as they have the largest impact on the customer experience. For the opportunities and threats, the location & accessibility, the building and the developments of the industry will be analyzed. The SWOT analysis is necessary as it shows where the strengths, and weaknesses lie when creating the USP. It would be ineffective to create a USP without knowing the strengths, and weaknesses of the company, risking that the selling points are based on weaknesses of the RAI. The SWOT will also show the threats and opportunities the RAI has to take into consideration when creating a new strategy.

3.2.1 The customer of RAI Amsterdam

It is essential to understand the customer of the RAI before analyzing the needs, and wants. With answering the sub question who is the customer of RAI Amsterdam, a difference between the

organizers of an event, and the visitors of the event will be explained. The results will be based on desk research taken from the website of RAI Amsterdam, and the Annual reports. The website provides up-to-date information, and the annual report shows where the focus of RAI Amsterdam lies.

3.3 The needs, wants, and demands of the customer

The customers' needs, and expectations when travelling to another country will be derived from literature review of academic articles, which provide a visitors' perspective, such as: "Attendees' needs, and service priorities in a large convention center: Application of the importance-performance theory" (Breiter & Milman, 2005), "Convention center facilities, attributes, and services: The delegates perspective" (Wu & Weber, 2005), and the organizers perspective will be analyzed in the article "The determinants of convention site selection: A logistic choice model from experimental data" by Crouch & Louviere (2004). These articles can be deemed reliable as they are published in renowned academic journals. The articles are written after careful examination of the responses from visitors of international convention centers on taken surveys. The perspective of the RAI will be considered through the outcome of a brainstorm session of the "international standard workgroup of RAI Amsterdam". This internal brainstorm session provides a good overview of how the employees of RAI Amsterdam look at the needs, wants & demands of the customers, as the participants all represented a different area of expertise within the company (Yvonne Nassar - Head of Marketing & Innovation, 2015).

3.4 The comparative research of competing venues

Which competing venues will be considered, and why? The centers that have been considered in this report are Messe München, Fira Barcelona, ExCel London, and RAI Amsterdam. These venues were chosen by during my internship by the market research team of RAI Amsterdam, as these venues are seen as highly competitive. The countries of the venues are all positioned in the top 10 of the world statistics report of ICCA (ICCA, 2005-2014).

3.4.1 Checklist

The services, and features of the competing venues will be compared with the use of a checklist that is based on the needs, and wants of the international visitor taken from the literature review (Fisher, 2010, p. 178). The determinants of the checklist will be based on needs, and wants that are found in more than one article, and are rated higher than a 4.0 (rating of 1.0-5.0), and the checklist will be finalized with the expert knowledge of the RAI employees, who attended the brainstorm session. Given that this will provide the features the visitor really does find important as it comes forward in

multiple studies. The checklist will be used to look at the current state of the competing venues, and to the desired state of RAI Amsterdam. Are there determinants missing or can they be done better.

3.4.2 Ansoff matrix and positioning map

After investigating the value propositions of the competing venues a positioning map will be made to see where the RAI is positioned. The axes of the map will be based on the findings on the categories of the checklist. Also important to determine is how the RAI can differentiate itself from the other international convention centers, this will be done with the comparative research of the competing venues. But first the direction of the strategy has to be decided on with the use of the Ansoff Matrix.

These described methods should provide enough information to answer the subquestions that will help to create an overview of the unique selling points for RAI Amsterdam.

4. The MICE Industry

In this chapter you can find the results of this research which will be used to answer the first subquestions: What is the MICE Industry, and what is the current status of the MICE industry in the Netherlands.

4.1 Results on the MICE industry

RAI Amsterdam operates in the so-called MICE Industry. MICE stands for Meetings, Incentives, Conferences, and Exhibitions (ICCA, n.d.). The definitions of the events can be found in Appendix A. The MICE industry is also known as the meetings industry. The definition of a meeting has been defined in the Global Report on the Meetings Industry by several large associations: the UNWTO, Reed Travel Exhibitions, ICCA, and MPI. The term meeting is used as an all-encompassing definition: “a gathering of 10 or more participants for a minimum of 4 hours in a contracted venue. These meetings include conventions, conferences, congresses, trade shows, and exhibitions. Incentive events, corporate/business meetings.” (World Tourism Organisation, 2014, p. 10).

The MICE Industry is also defined as to include: “activities based on: the organization, promotion, sales, and delivery meetings, and events; products, and services that include corporate, association, and government meetings, corporate incentives, seminars, congresses, conferences, convention events, exhibitions, and fairs” (UNWTO, 2006, p. 4).

4.1.1 Segmentation of the MICE-industry

The meetings industry is usually researched in three different segments: meetings, and conferences, exhibitions, and incentives (UNWTO, 2006, p. 5). The meetings, and conferences can be subdivided into two main segments: the corporate meetings, and the associations meetings. Initiators of corporate meetings are companies. The characteristics of the associations are broader. Initiators can be international governmental organizations, and non-governmental organizations with subjects such as medicine, education, social groupings etc. (A Modern History of International Association Meetings, 2013, p. 9). The events of associations are usually repeated, for example annual, biennial, triennial or every other five years. This could mean that the industry itself is “cyclical”, with a peak every five years, when large meetings return (UNWTO, 2006, p. 7). The location however is never the same as most meetings rotate globally or per continent (A Modern History of International Association Meetings, 2013, p. 9). Taken from the CBI Product Factsheet: MICE from the EU are the characteristics of the corporate, and association meetings:

Corporate Meetings	Association Meetings
Work for 'for profit' organizations	Usually employed by 'non-profit' organizations
average meeting size (less than 100 delegates)	Larger average meeting size
Essentially organize meetings simple, creative events, and incentives	Usually organize conferences, congresses, exhibitions, and sports events
Small, Short time between the booking, and the actual date of the MICE event	Long time between the booking, and the actual date of the MICE event
Association Decision-making process is straightforward, and rapid	Decision-making process is complex, and prolonged
Organize a wide range of events	Organize a limited number of events
High per head costs	Lower per head costs
Shorter events throughout the year	Longer events mostly in spring, and autumn

Figure 8: characteristics of the different segments (CBI Market Information Database, 2014, p. 11)

4.1.2 Rankings of the actors of the MICE industry

The report of ICCA – “A modern history of International association meetings” shows that the market share of Europe is the largest in the global meetings industry with a share of 54% between 2008-2012. Followed by Asia/The Middle East with 18.2%. Even though Europe has the largest share, its popularity has decreased as the share has deflated from 72.3% since 1963-1967 compared to an increase of Asia/the Middle East from 8.2% (ICCA, 2013, p. 14). The statistics of ICCA are based on the following criteria: regular meetings, rotation in an area with a minimum of three countries, and at least 50 attendees. In 2014 Europe still takes the highest ranking in number of meetings per region: 6.316 meetings in a year, followed by Asia/the Middle East (2.105), and North America (1.270) (ICCA, 2005-2014, p. 4).

The rotation areas that are important for RAI Amsterdam are the following: the world (international), Europe, and Europe/North America. The ranking is based on the number of meetings that were organized in these rotation areas. The world ranks on top with 5.117 meetings in 2014, followed by Europe with 3.612 meetings. Europe/North America ranks 6th with 390 meetings (ICCA, 2005-2014, p. 13). Spain, and the Netherlands are mentioned as countries with an “Excellent infrastructure”, and a “wide range of products”, providing “value-added conference facilities” (UNWTO, 2006, p. 9)

Rank	Country	# of meetings	Rank	City	# of meetings
1	U.S.A.	831	1	Paris	214
2	Germany	659	2	Vienna	202
3	Spain	578	3	Madrid	200
4	U.K.	543	4	Berlin	193
5	France	533	5	Barcelona	182
6	Italy	452	6	London	166
7	Japan	337	7	Singapore	142
8	China	332	8	Amsterdam	133
9	NL	307	9	Istanbul	130
10	Brazil	291	10	Prague	118

Figure 9: Ranking of the Netherlands and Amsterdam based on held meetings (worldwide scope) (ICCA, 2005-2014, pp. 5-8)

4.1.3 Dimensions of the MICE Industry

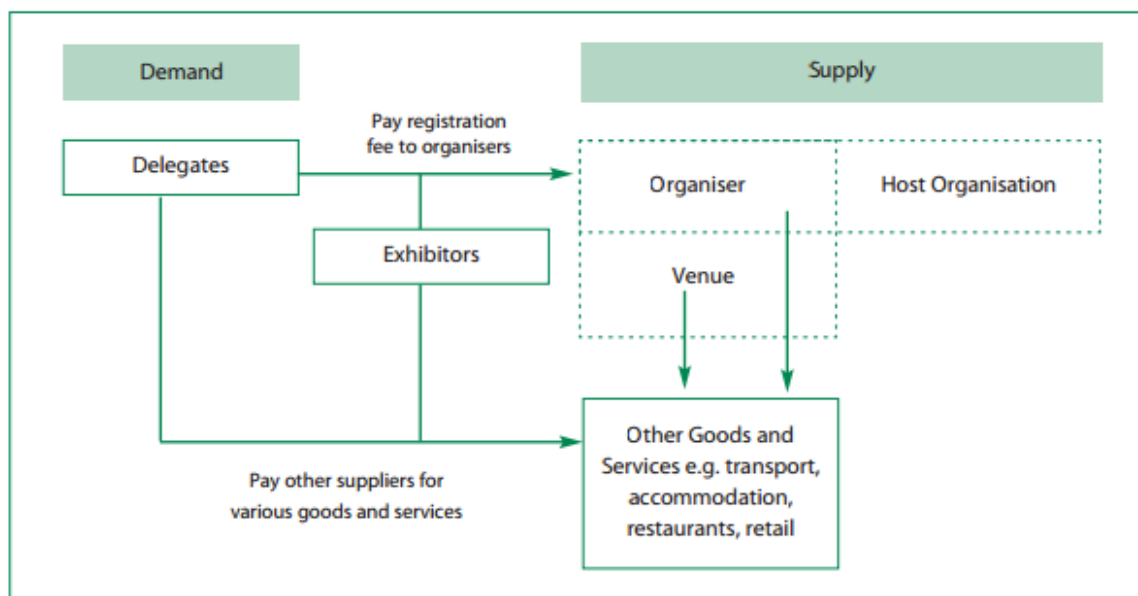


Figure 10: The dimensions of the MICE industry (UNWTO, 2006, p. 12)

The demand dimension represents the delegates, and/or exhibitors of the events. The supply dimension represents the organizer, the host organization, and the venue. In some cases, the organizer and the venue are one company (UNWTO, 2006, p. 12).

4.1.4 Trends in the MICE-industry

The meetings industry is constantly changing, as the way meetings are held is evolving with modern time. Five drivers that change the sector are: hyper-competition, economic cycles, culture,

technology, and new generations (World Tourism Organisation, 2014, p. 13). Nowadays it is not just a get together with a speaker, and a presentation, as the new generation wants to “co-create” the content of the event, visitors want to be engaged in the activities, and an interactive way of networking is a must. Examples for these meetings are hybrid meetings. These meetings are also available through online streaming, people do not have to leave their chairs to attend. (World Tourism Organisation, 2014, p. 17).

The attitude of the customer changes as well. Before they were looking for the lowest price, more tangible goods, and they had a passive attitude towards brand communications. Now they want to be active, co-create content, and seek for ‘meaningful experiences that add total value (World Tourism Organisation, 2014, p. 14). The World Tourism Organization states that destinations need to adapt to these trends by “stop selling the hard facts, and figures, and becoming a ‘storyteller’ or ‘story doer’ instead. Story doers, think of their story as a strategic asset, and a competitive advantage advancing their narrative through action, not communication” (World Tourism Organisation, 2014, pp. 14-16).

The trend tracker report shows what the trends for events in terms of technology are. Organizers of events are creating all-encompassing apps that can be used by the delegates for “registration, scheduling, and social media integration through virtual communities”, organizers are ‘converging’ different technologies to create the best customer experience (GES, Inc., 2014, p. 5). Visitors want to “get closer to what they love”, this can be realized through ‘wearables, and apps’ (GES, Inc, 2015, p. 5).

4.1.5 MICE industry in the Netherlands

The largest urban areas in the Netherlands are: Amsterdam (1,044,000), Rotterdam (1,008,000), and The Hague (629,000) (CIA, 2016).

On the website locaties.nl the supply of all venues in the Netherlands. The website shows that there are around 373 congress locations, 751 hotels, 1450 meeting locations, and 619 other. The map of NBTC shows that there are 535 locations in Noord-Holland (NBTC Holland Marketing, 2015a, p. 1.4).

The NBTC is the Dutch bureau for tourism, and congresses, the organization is responsible for the marketing, and branding of The Netherlands inland, and abroad (NBTC, n.d.-d). The Netherlands wishes to be seen as an International ‘Open Minded Country’. The core values, considered by NBTC, are: inventive, enterprising, colorful, and welcoming; to everyone, regardless of their religion, background or sexual orientation; The Dutch speak many languages; plus, it is easy, and safe to travel within the country (with an emphasis on the bike) (Holland Brandguide, p. 3).

The marketing strategy Holland 2020 is created with the aim to bring less known regions, and attractions to the public eye, as well as reaching a potential of 16 million tourists in 2020 (Holland Branding & Marketing Strategie 2020). The most popular attractions at this point are: Amsterdam, flowers, windmills, Dutch masters such as van Gogh, the shore for watersports, and southern Netherlands (Holland Branding & Marketing Strategie 2020 - Aanpak).

What can be seen as positive features of the Netherlands and its nationals by international visitors, based on visitor target groups: mainstream, upper class, postmodern, traditional & achiever: 'Amsterdam, Landscape, Friendly people, Liberal, Open, Hospitable, Welcoming, Many other Languages, culture, tolerant, freedom'. Negative features are considered: 'Drugs, Prostitution, Language, Expensive, The Weather, Noisy, Arrogance, Stingy, Prejudice, and reserved' (NBTC, n.d.-g).

The organization Amsterdam Marketing is responsible for the promotion of the "metropolitan" area of Amsterdam. Amsterdam Marketing keeps track of the key figures of Amsterdam as a Convention Destination. The aim of the report is to strengthen the market position of Amsterdam within the MICE industry. Criteria for the Amsterdam Marketing Meeting Database are: national, and international meetings, minimum of 10 participants, and 1 day meetings. The numbers for the exhibitions are stated separately (Amsterdam Marketing, 2015b, p. 3). With these criteria an estimated of 2598 meetings took place in 2014 (Amsterdam Marketing, 2015b, pp. 14-15).

	International Corporate Meetings	International Non-corporate meetings
Total	2187 meetings	411 meetings
Average duration	2.5 days	2.8 days
Venue	26% in a convention center 39/35% in a 4/5-star hotel	76% in a convention center 6/13% in a 4/5-star hotel 4% at a University
Popular season	Apr-Jun & Sept-Nov (63%)	Apr-Jun & Sept-Nov (69%)

Figure 11: Summary of international corporate, and non-corporate meetings in Amsterdam 2014 (Amsterdam Marketing, 2015b, pp. 15-19)

The metropolitan area of Amsterdam has more than 2,3 million citizens, and 237,455 businesses. The GDP for the citizens that live in Amsterdam is € 61,490, which is 58% higher than the GDP of an average Dutch person (€ 35,886) (Amsterdam Marketing, 2015b, p. 4).

Other venues in Amsterdam are: The Westergasfabriek, the Beurs van Berlage, and the Passenger terminal Amsterdam (Amsterdam Marketing, 2015b, p. 30).

Airport Schiphol	319 destinations via direct flights 55 million passengers in 2014 5 th largest airport in Europe Most European cities within 2 hours' reach
Trams	213
Metros	105
Taxis	3642
Bicycle paths	619 km
Buses	198
Ferries	17
International Trains	17 connections to Belgium, France, and Germany

Figure 12: Infrastructure of Amsterdam (Amsterdam Marketing, 2015b, p. 5).

The strategy plans by Amsterdam Marketing taken from the Strategic Plan 2016-2020:

For business visitors, and conference organizers: “guidance to find the right locations; business marketing higher on agenda to attract conferences, as well as foreign investors, companies, and talent – they spend more, less of a burden to the city”.

Improvement of the reputation of Amsterdam: “cooperation with other bureaus, and cities; highlight of unique, high quality events; invest in hospitality function – social webcare, and products; more activity on digital media – more use of video” (Amsterdam Marketing, 2015a, pp. 14-17).

4.1.6 Economic impact

The NBTC has collaborated with MPI, Ecorys, and CLC-VECTA, voorfinancierings, and garantiefonds to investigate the impact the MICE industry has on the Netherlands (NBTC Holland Marketing, 2015a, p. 1). The impact on the economy is generated by the revenue of venues, the revenue of organizers, and the expenses of the visitors. In 2014 the multiple day business meetings accounted for 2.3 billion euros in 2014, of which 54% came from the international visitors (NBTC Holland Marketing, 2015a, p. 5.2). A holiday tourist spends around 599 euros for a short stay (180euros a day), a business visitor spends 1.035 euros for a visit (307euros a day) (NBTC Holland Marketing, 2015b, p. 62).

The general report of inbound tourism by NBTC states the following numbers on the MICE travelers in 2014. In total The Netherlands welcomed 3,6 million international business travelers. Around 1 million (27%) of these travelers are here for MICE visits. Within the 27%: 15% is here for corporate meetings, 8% for conventions, and 3% for trade fairs (NBTC Holland Marketing, 2015, p. 18).

1	United Kingdom	665
2	USA	374
3	Germany	366
4	Italy	227
5	Belgium	184

Figure 13: "Top 5 source countries for business as the purpose of visit in 2014" (NBTC Holland Marketing, 2015b, p. 20)

The MICE industry creates 30,400 jobs in the Netherlands, 21,000 direct, and 9,000 indirect employments. 52% of the total employment is generated by international visitors (NBTC Holland Marketing, 2015a, p. 5.3)

4.1.7 Visa application

The website of the Ministry of Security, and Justice of the Netherlands shows that if you are visiting from a country that has the requirements to apply for a visa, you'll have to take care of the following: "a valid travel document (valid for 3 months after visa ends), not to be a risk to public order, domestic security, public health or the international relations of one of the Schengen countries, adequate & valid medical insurance, means of support, show travel purposes, not to be one a list of refusal of one of the Schengen countries, and no risk of settlement (guarantee of return)" (Ministry of Security and Justice, n.d.-b). Purposes for a visit can be business related such as a conference, or a family visit. Costs for a short stay visa are € 60, - (Ministry of Security and Justice, n.d.-c).

A few of the countries that do not need a visa are: the EU/EEA countries, Canada, Japan, Australia, and United States of America (the whole list can be found in Appendix B) (Ministry of Security and Justice, n.d.-a).

4.1.8 Other

The government of the Netherlands has the objective to make disabled access mandatory for all building and companies from 2017 and onwards (NOS, 2016).

The CIA World fact book states that the current environmental issues of the Netherlands are water pollution, air pollution, and acid rain. A natural hazard is flooding, as most of the country is situated below sea level. The Netherlands is party to most international agreements to preserve the environment (CIA, 2016).

4.2 Discussion

In this section the analyses of the first subquestions will be discussed: what is the MICE industry, and what is the current status of the industry in the Netherlands.

The MICE industry is the market for the Meetings, Incentives, Conferences, and Exhibitions. Meetings are held to motivate and conduct business; Incentives are often organized for sales and stimulating the increase of profit; Conferences have a larger attendance and are organized for education, discussion, and/or problem-solving of a certain subject; Exhibitions are for the display of product and services to attract new customers. The events usually have different characteristics based on the organizer of the events: corporate or association organizers. These characteristics are respectively: profit/non-profit, short/long lead time, small/larger average meeting size, high/low costs per head, simple/difficult decision-making process, and the objectives of the event.

The MICE industry can be divided into two dimensions, as shown in the report by UNWTO on the economic impact of the industry. There is a demand side: the delegates, who pay a registration fee, and the exhibitors, who pay suppliers for goods, and services. On the supply side are: the organizer, the host organization, and the venue where the event takes place. An organizer and a venue can be the same organization, like RAI Amsterdam is, when organizing its own exhibitions.

The information of Amsterdam Marketing shows that in 2014 more corporate meetings than association meetings were organized in the city, however association meetings usually take place in large convention centers (76%) due to the larger meetings sizes.

Important for the industry is the fact that it is 'cyclical', mostly due to the rotation time of the large association meetings. These meetings return every year, two years or even five years. And the organization of these meetings have a long 'lead time', which could mean that the location is planned 5 to 10 years in advance, when a meeting returns every 5 years.

4.2.1 PESTEL Analysis

The PESTEL analysis will be based on the business tourism circumstances in The Netherlands and Amsterdam as they have a direct influence on RAI Amsterdam, and the business tourists in the Netherlands.

The political factors

The political environment of RAI Amsterdam is shown through developments of the marketing, and branding strategies of the NBTC, and Amsterdam Marketing. The NBTC has developed a strategy that should attract 16 million tourists to the Netherlands by promoting lesser known areas: Holland 2020. The core values of the Netherlands show that the Netherlands is a "welcoming, and open minded country". The results present that Amsterdam Marketing wants to attract more international business visitors as they spend more than an average tourist (€ 307 to € 180), and they are considered less of a burden to the city. The municipality of Amsterdam is a shareholder of RAI

Amsterdam, and therefore the developments of the city have an effect on the convention center. Attracting more business visitors will be done by launching campaigns, improvement of hospitality, and the guidance to find the right locations through, for example, the use of social webcare, and the distribution of products, and/or videos.

The economic factors

The results show that the GDP of an average Dutch person is € 35,886 euros, the average GDP of a citizen living in Amsterdam is € 61,490 euros. NBTC has calculated the economic impact of the MICE industry on the Netherlands. In 2014 the MICE industry accounted for 2.3 billion euros through the expenses of visitors, and the revenue of the convention centers, and the external organizers. 54% of the total came from the 1 million international business travelers, who came to the Netherlands for MICE related business. The tourism industry, according to the statistics of CBS, is responsible for the creation of 552,000 jobs, of which the MICE industry generates around 55,000 jobs.

In Amsterdam alone 2,598 meetings (based on the criteria of the Amsterdam Marketing Database) took place in 2014, and most meetings had a corporate character (2,187 meetings compared to 411 non-corporate meetings). The criteria of ICCA show that in 2014, 133 large association meetings took place in Amsterdam. The non-corporate meetings most often took place in a convention center with an average duration of 2,8 days. The most popular seasons for both corporate, and non-corporate meetings are Apr-Jun, and Sept-Nov.

The statistics of ICCA show that the Netherlands is a popular destination as the country is positioned on the 9th rank of the countries with the most meetings, and Amsterdam on the 8th rank, respectively 307, and 133 meetings took place in 2014 (based on ICCA criteria). Europe is still a favored continent for the organization of association meetings. The top 5 countries that account for the most international business travelers visiting the Netherlands are: the UK, the USA, Germany, Italy and Belgium.

The social/cultural factors

The NBTC is responsible for branding, and marketing the Netherlands. They stated that the culture of the Netherlands is open-minded and welcoming. Popular attractions are the Dutch masters like 'van Gogh', the shore for e.g. watersports, the flowers, windmills, and of course Amsterdam.

The Dutch citizens are often received as liberal, open, hospitable, and tolerant. Some negative features of the Netherlands are the prostitution, drugs, arrogance, and prejudice.

The technological factors

The technological factors of the MICE industry in the Netherlands can be measured through the technological developments of the meetings. As meetings continue to develop, the convention centers have to adjust to these changes to meet the requirements. The UNWTO states that the Netherlands is equipped with an excellent infrastructure and value-added conference facilities that offer a wide range of products. Amsterdam has four large venues (Beurs van Berlage, Westergasfabriek, Terminal & the RAI).

The trends in technology show that organizers are organizing hybrid-meetings and that they are creating all-encompassing apps to satisfy the needs of the customer. Not only the meetings are changing but the customers as well, they wish to have an active part in the organization, and realization of the event. UNWTO states it is important for destinations to adapt to these changes by becoming a “storyteller or story doer”, instead of just stating the basic logistics. This will engage the customer and make the experience more personal and valuable.

Another technological factor that is important is the infrastructure of the metropolitan area of Amsterdam. The city is very well connected to the world, the results show that the airport alone is directly linked to 319 destinations. Getting around the city center is easy with trams, taxis, metros, and buses.

The environmental factors

According to the CIA World fact book the current environmental issues of the Netherlands are water pollution, air pollution, and acid rain. A natural hazard is flooding. The Netherlands is party to most international agreements to preserve the environment.

Major Urban Areas are Amsterdam (1,044,000), Rotterdam (1,008,000), and The Hague (629,000)

The legal factors

Important for legal environment of the business tourism industry in the Netherlands are the visa regulations for the visitors. All European countries are exempt from the visa regulations, as well as visitors from the United States. The visas for a short stay (such as a business stay) allows the visitor to stay in the Netherlands for 90 days, the costs are € 60, -.

4.3 Sub conclusion

The first question that will be answered is: what is the MICE industry. The discussion shows that the MICE Industry is a very versatile industry with several different characteristics and actors. Firstly, you have the different sort of events: meetings, incentives, conferences and exhibitions, all are organized with different objectives. The organizers are segmented in associations and corporations, as the

characteristics of the event are defined by the organizer, such as: longer lead time, non-profit or profit.

The PESTEL analysis points out that the current status of the business tourism industry in the Netherlands makes it an attractive market to host an international event. Both the Netherlands and Amsterdam are ranked in the ICCA top 10 of hosting the most meetings in 2014, and most countries do not require to apply for a visa. The NBTC and Amsterdam Marketing are constantly looking for new ways to attract the international business traveler and to make their stay a pleasant one through investment in hospitality, and the improvement of social webcare, which would also be a good strategy for the convention centers.

As the technological factors shows that the industry is rapidly changing. Hybrid events are organized to satisfy those who do not want to travel. The new generation of visitors however wants to interact and co-create the events, which means that the destinations have to have an active attitude towards the attraction of these visitors. UNWTO proposes to do this by becoming “a story doer”, attract the customers with a story they can interact with, adding value to the experience. Event organizers attract the customers by creating all-encompassing apps.

The attraction of international business travelers is important for the Netherlands as the economic impact of the MICE industry accounted for 2,3 billion euro's in 2014, and the industry generates 55,000 jobs.

5. RAI Amsterdam

In this chapter you can find the results that will help answer the subquestion 'What sort of company is RAI Amsterdam' and 'who is the customer of RAI Amsterdam?'. The results will be analyzed with a business model canvas, and a SWOT analysis.

5.1 Results

RAI Amsterdam is a company that both facilitates, and organizes events. The company organizes 25 exhibitions that take place in the Netherlands but also in other countries.

The international titles organized by 'RAI Exhibitions' as shown on the RAI website include the Aquatech, INTERCLEAN, Intertraffic, METS, and Greentech. The international titles have spinoffs in China, Turkey, America, Pol, and, and Mexico. Dutch titles are the HISWA, the Horecava, the Huishoudbeurs, and the AutoRAI (RAI Amsterdam, n.d.-f).

As a facilitator RAI Amsterdam has a few recurring international events, such as the IBC (International Broadcast Convention), IS Europe (integrated systems), and the PLMA. The other recurring events are Dutch events: The Provada, PAN Amsterdam, and the MASTERS of LXRY (RAI Holding B.V., 2014, p. 7) .

The structure of the organization of RAI Amsterdam can be found in the organigram below¹.

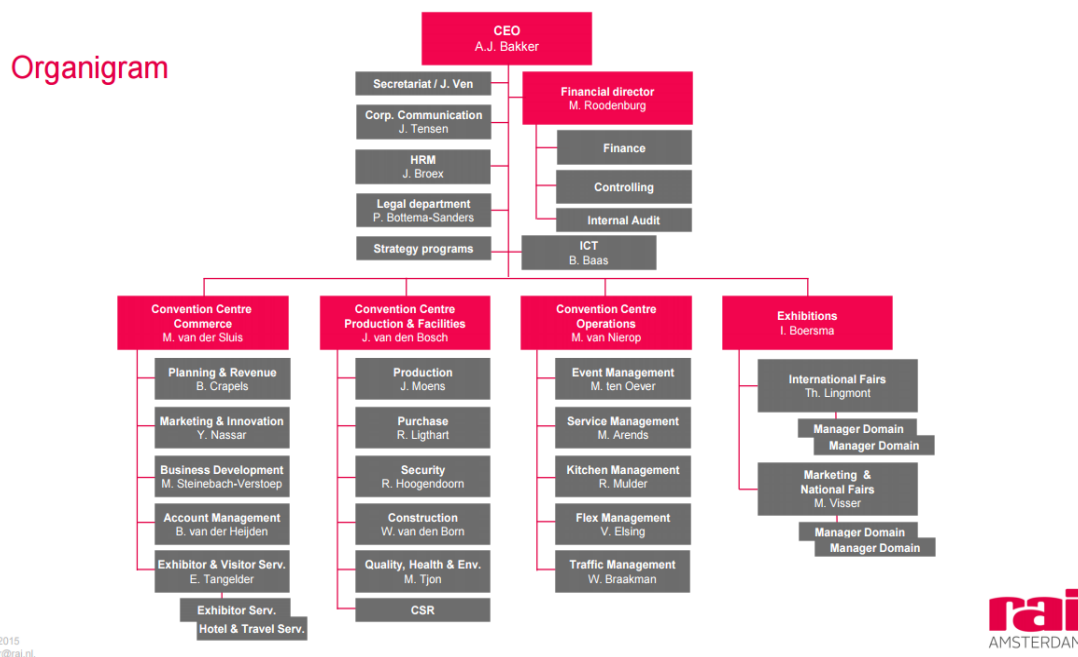


Figure 14: organigram taken from rai.nl (kramer, 2015).

¹ At time of writing a new CEO was announced: Paul Riemens, per the 7th of April. Mr. Bakker will retire. The head of the Convention Center Commerce, M. van der Sluis, is appointed as COO (RAI Amsterdam, 2016).

The shareholders of RAI Amsterdam are the RAI association, and the Municipality of Amsterdam. With an ownership of respectively 75%, and 25%, The RAI association has 550 members, and is for “manufactures, importers, and wholesalers in mobility-related products such as cars, trucks, bicycles, and trailers” (RAI Holding B.V., 2014, p. 6).

5.1.1 The building

The international convention center RAI Amsterdam is located in, as the name implies, Amsterdam. The venue is located at the Europaplein, it has its own train and metro station within 5 minutes' walk of the main entrance, and an own exit of the highway. The RAI has 6,250 available parking spaces and its own small harbor. The ground map can be found in appendix C. The estimated travel time to the city center is 8 min and to the airport 15 min (RAI Amsterdam, n.d.-i).

The Convention Center provides 108,150m² rentable space; with 11 halls (sized: 3,920 – 18,240m²) (RAI Amsterdam, n.d.-h); 69 Meeting rooms, 2 auditoriums (1750 seats), and 1 ballroom plus several foyers, and lounges (RAI Holding B.V., 2014, p. 7).

The annual report of 2014 shows statistics of RAI Amsterdam from 2010 and onwards. In 2014 RAI Amsterdam facilitated 54 international events, in 2010 48 international events. The amount of international visitors has grown from 291,000 in 2010 to 471,000 in 2014. In 2014 there were 672,000 national visitors, compared to 1,058,000 national visitors in 2012. No difference is made between international, and national organizers of events. In 2014 RAI Amsterdam welcomed 521,000 organizers, a slight growth since 2013 (464,000 organizers), but still less than the total number of organizers in 2012, which was 616,000. Of the 18,469 exhibitors in 2014, 63% was international, they rated a client satisfaction of 7.6. In 2013 RAI Amsterdam welcomed 15,389 exhibitors, of which 55% were international, and a client satisfaction rate of 7.4 (RAI Holding B.V., 2014, p. 8).

**THE AMSTERDAM
RAI BRAND**
Client-oriented
Professional
Innovative
Reliable
Passionate
Hospitable

figure 15: Core values (RAI Holding B.V., 2014, p. 15)

The mission statement of the RAI is: “We believe in the power of connecting. To bring people, ideas, and visions together in a world full of opportunities” (RAI Amsterdam, n.d.-c).

The mission of RAI Amsterdam is to create long term, and sustainable added value for the stakeholders by taking on a leading international role in the MICE industry (RAI Holding B.V., 2014, p. 30). In order for the company to reach this goal the RAI has organized three strategy programs.

Strategy program 1: Exploitation – improvement of the services offered, and increase the added value. The improvement will be offered through so-called “complete solutions”. The RAI will offer a total package of the services, and features offered by different departments of the company based on the needs, and wants of the customer (RAI Holding B.V., 2014, p. 31).

Strategy program 2: Internationalization – RAI Amsterdam wants to expand on the international market. RAI Amsterdam wants to develop, and acquire large international exhibitions. As well as bringing international conferences, and exhibitions to Amsterdam (RAI Holding B.V., 2014, p. 31).

The third strategy is created to be able to anticipate to the developments in the industry. These developments are the use of internet, and social media (RAI Holding B.V., 2014, p. 27).

Strategy program 3: Virtualization – improvement of online platforms, and virtual meetings. Key points in this program are:

- Connectivity (up to date technique that can support the connection of thousands of visitors)
- Support (digital services: registration, parking, entrance, and payment services. A client portal for exhibitors, interactive maps, and an application to help with the set-up of a stand)
- Enhance (add virtual features to physical meetings with use of QR-codes, 360 degrees app. New developments on personal narrowcasting, location based advertising)
- Reach (enhance the reach of an exhibition through social media, and online streaming)
- Generate (stimulation of real life interaction set up through social media) (RAI Holding B.V., 2014, p. 31).

RAI Amsterdam has created a marketing campaign which is aimed at the organizers of international exhibition: ‘The Interactive Mayor’s Chain’. When an exhibition is organized in the RAI, the organizer receives a ‘key’ to the RAI, which makes him/her the ‘mayor’ during the exhibition. The key represents the elements of the RAI that help make an exhibition successful – “The Netherlands, Amsterdam, accessibility, knowledge & network, ROI, a flexible configuration, services, meaningful experiences, innovation, and sustainability” (RAI Holding B.V., 2014, p. 48)

The new hotel (nHow RAI Amsterdam) will be opened in 2018, the realization is a partnership with the NH Hotel Group. The 4star hotel will have 650 rooms and will be situated on the complex. Special facilities are a television studio, an art-gallery, and a spa (RAI Amsterdam, n.d.-n).

5.1.2 Services

A summary of the services offered by RAI Amsterdam to enhance the customer relationships with the organizers, exhibitors, and visitors can be found below (RAI Holding B.V., 2014, pp. 52-53):

Organizer Services: ICT solutions, registration, logistics, audio-visual & media, and the RAI can regulate, and enforce event-related licenses (as the first private company in the Netherlands).

Exhibitor services: ready-to-exhibit stands, hostess Service, furnishings, flowers & plants, telecommunication, ICT facilities, parking tickets, electricity, gas, & water, cleaning services, and catering: 4 permanent restaurants (combination deals & timed promotions to spread visitor peaks) + catering outlets.

Visitor services: work & meeting places, a courtesy lounge, a help desk, Samsung Connect: work, and meeting place located on the 'exhibition floor', where visitors can interact, work, and charge their electronics. RAI Amsterdam also has a hotel, and travel service (for booking arrangements). In 2014 they arranged 51,453 bookings, which accounted for 177,576 overnight stays (RAI Holding B.V., 2014, pp. 52-53). The website of the hotel services is a not easy to accessible, the option 'exhibitor' – travel & accommodation provides a link to the website (RAI Amsterdam, n.d.-u). The website is 'https://www.rai-hotelservice.com/compass/external/events_encompass.cfm', the version 'www.rai-hotelservice.com' does not work. Here you can choose the specific event and pick a hotel of choice, the rating and proximity to the event are mentioned.

The parking facilities cost €17,50 per 24h. The RAI offers the P + R option (parking and travel) which can be used for trips into town, to lessen the amount of cars in the city center. The P + R tariff is only valuable for 1 day and does not count during large exhibitions. The RAI is also accessible for disabled, as they offer special parking spaces, and it is possible to reserve a wheelchair in advance. Exhibitions which are organized by the RAI itself, are free for the guides of the disabled (RAI Amsterdam, n.d.-t).

The organization has an 'in-house audiovisual partner', who is able to supply all the equipment for the events (RAI Amsterdam, n.d.-q). Furthermore, RAI Amsterdam provides several media solutions: banners, billboards, flags, and digital newsletters to pre-registered visitors. Digital signage can be managed via 'RAI Live', the 850 screens can also be used to send interactive messages to the delegates at the event (RAI Amsterdam, n.d.-r).

RAI Amsterdam has 5 restaurants on-site. The Roast Room, Grand café, First Floor Restaurant, Holland restaurant, and Café Amsterdam. The Roast Room is open every day, it has a bar and a "fine dining restaurant". Apart from restaurants, the RAI has many outlets available during events, from traditional Dutch products to American, and Italian cuisine. The kitchens of Rai Amsterdam use regional produce for the concept "Heartwarming Amsterdam". Initiated to add value to the region and local society, produce is used from urban greenhouses and local farms (RAI Amsterdam, n.d.-o).

Wi-Fi is accessible for the public area, as a visitor you have to pay for this service, unless the event organizer has compensated the costs. RAI Amsterdam has its own GSM infrastructure, guaranteeing mobile service for the visitors (RAI Amsterdam, n.d.-p).

5.1.3 Revenue Stream

The revenue stream as posted in the Annual Report 2014 of RAI Amsterdam (RAI Holding B.V., 2014, p. 9).

Turnover and results					
(x € 1 mln)					
	2014	2013	2012	2011	2010
Exhibitions and events	47.5	39.4	52.5	53.5	48.5
Letting to third parties	21.8	23.6	23.2	23.5	21.6
Trade journal publications	-	-	3.2	4.0	5.0
Catering	15.1	17.8	16.9	18.1	17.5
Parking	4.5	4.3	5.4	6.2	5.7
Hotel commissions	3.4	3.5	3.1	3.3	2.6
Facility services	21.0	20.8	22.3	18.2	17.3
Other	6.4	7.2	8.1	6.8	6.8
Turnover	119.7	116.6	134.7	133.6	125.0
Outsourced work	45.4	46.0	57.3	58.9	48.1
Wages and salaries, incl. social security and pension contributions	29.2	29.1	31.5	31.0	30.4
Depreciation	14.3	15.3	15.8	14.5	14.7
Other operating expenses *	17.2	19.1	24.1	21.4	20.2
Operating expenses	106.1	109.5	128.7	125.8	113.4
EBITDA	27.9	22.4	21.7	22.8	26.3
Operating result	13.7	7.1	6.0	7.8	11.6
As % of turnover:	11.4%	6.1%	4.5%	5.8%	9.3%
Net result	9.3	3.3	2.1	3.1	5.7

figure 16: turnover, and results in 2014 of RAI Amsterdam

5.1.4 Sustainability

RAI Amsterdam wishes to become one of the main leading convention centers in Europe when it comes to sustainability. Objectives are to: reduce environmental impact, increase welfare for internal, and external stakeholders. The RAI received three golden awards for their efforts: Earthcheck Gold, Green Key, AIPC award, as well as a four-star certificate of BREEAM-NL for the design of the new building the Amtrium, which has its own greenhouse. Each year the RAI publishes its own sustainability report (RAI Holding B.V., 2014, p. 32). (BREEAM stands for Building Research Establishment Environmental Assessment Methodology, and is managed by the Dutch Green Building Council (BREEAM-NL)).

The following charts show the key results of the performance on sustainable resources and waste management, taken from the website RAI.nl (RAI Amsterdam, n.d.-g).



Figure 17: Key results sustainability objectives RAI Amsterdam (RAI Amsterdam, n.d.-g)

5.1.5 Partners

The website of the RAI shows their most important partners: KLM, NBTC, Amsterdam Marketing and Schiphol Airport.

The partnership with KLM offers the organizers a chance to “get the best value for tickets” by installing the AIR France & KLM Global Meeting online booking tool on their websites. The tool provides 5 - 15% discounts (RAI Amsterdam, n.d.-j).

The partnership of NBTC: as partners the RAI and the NBTC have been responsible for “expansion on the North American market, an exploration of the Chinese market and a continuing joint representation in the European and international association market” (RAI Amsterdam, n.d.-l)

The partnership with Amsterdam Marketing: cooperation in the acquisition and research on events (RAI Amsterdam, n.d.-k).

The partnership with Schiphol Airport: helps organizers to “receive and welcome guests”, through for example VIP services or digital screens. It is also possible to have a “check-in desk” at the event (RAI Amsterdam, n.d.-m).

5.1.6 Social webcare

The website of Rai Amsterdam (www.rai.nl) is available in both Dutch and English. The main page starts in Dutch, to change it visitors have to click on “talen”. The RAI has a Facebook, google+, LinkedIn, and a twitter account. The website of RAI Amsterdam provides one brochure with the different packages and prices for the meeting rooms (Amsterdam Rai, 2015), as well as a route description (RAI Amsterdam, n.d.-s). However, there are no other brochures available with details and technological specifications for all event spaces. Some of the pages on the English website are not translated, the options for the English calendar for example, as can be seen below in the screenshot taken from the website (RAI Amsterdam, n.d.-w):

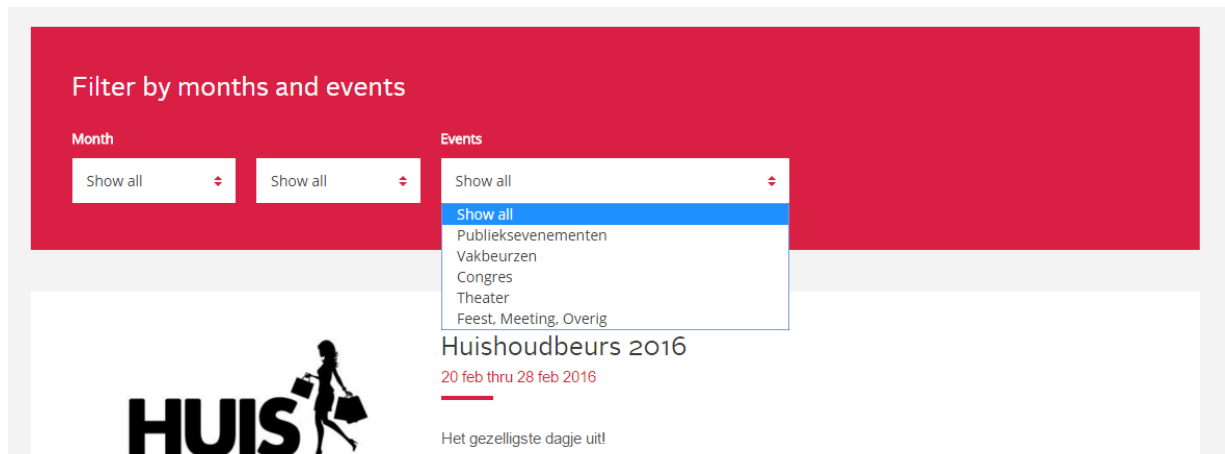


Figure 18: Screenshot RAI Amsterdam website

It is possible to view the venue with the use of google business view, and RAI Amsterdam offers a Virtual Tour App (IPad 2+), which gives an insight into the possibilities of the halls, based on different types of events (RAI Amsterdam, n.d.-v).

The brainstorm session of RAI Amsterdam identified that the first language of communication is Dutch, and the RAI would like to see that changed to English. The English website is written by Dutch employees, which is noticeable in the webpages, as some of the sentences do not read smoothly (Yvonne Nassar - Head of Marketing & Innovation, 2015).

5.2 Discussion

In this section the results above will be discussed. As mentioned in the methodology the results for RAI Amsterdam will be analyzed through the use of the Business Model Canvas, summarizing the important factors of the company in 9 blocks, and a SWOT Analysis.

5.2.1 Business Model Canvas

Value Proposition <ul style="list-style-type: none">• Power of connecting• 108.152m2• Create long term, and sustainable added value• “Complete solutions “(service, and feature packages)• Amsterdam• ROI• Hotel, and travel service	Customer Relationships <ul style="list-style-type: none">• Organizer services• Exhibitions services• Visitor services• Social Media	Customer Segments <ul style="list-style-type: none">• Organizers<ul style="list-style-type: none">○ Corporations○ Associations○ Exhibitions• Exhibitors• Visitors														
	Channels <ul style="list-style-type: none">• Website www.rai.nl• Amsterdam Marketing• RAI Exhibitions• RAI insights• Innovation Lab• Marketing campaign (Mayor’s Chain)• Services per customer segment	Key Resources <ul style="list-style-type: none">• 108.152m2• RAI Exhibitions														
		Costs <ul style="list-style-type: none">• Outsourced work• Wages & salaries• Operational costs														
Key Activities <ul style="list-style-type: none">• Organizing• Facilitating• Catering• Facility services																
Key Partners <ul style="list-style-type: none">• Municipality of Amsterdam• RAI Holding B.V.• Amsterdam Marketing• NBTC• Amsterdam Airport Schiphol• KLM• Suppliers (catering, and stands)	Revenue streams <p>The turnover of RAI Amsterdam is set up in the following categories:</p> <table><tr><td>• exhibitions, and events</td><td>47.5</td></tr><tr><td>• Letting to third parties</td><td>21.8</td></tr><tr><td>• Catering</td><td>15.1</td></tr><tr><td>• Facility Services</td><td>21.0</td></tr><tr><td>• Parking</td><td>4.5</td></tr><tr><td>• Hotel Commissions</td><td>3.4</td></tr><tr><td>• Other</td><td>6.4</td></tr></table> <p>The revenue stream shows that the organization of events is the most beneficial for the RAI, followed by letting space, facility services, and catering</p>		• exhibitions, and events	47.5	• Letting to third parties	21.8	• Catering	15.1	• Facility Services	21.0	• Parking	4.5	• Hotel Commissions	3.4	• Other	6.4
	• exhibitions, and events	47.5														
• Letting to third parties	21.8															
• Catering	15.1															
• Facility Services	21.0															
• Parking	4.5															
• Hotel Commissions	3.4															
• Other	6.4															

5.2.2 SWOT Analysis

For the strengths and weaknesses, the following categories will be analyzed: location & accessibility, building, offer, partners & brand image. These categories have been chosen as they have the most impact on the customer experience. The information is based on the results and on the inside access

of a company analysis of RAI Amsterdam. For the opportunities and threats the developments of the industry will be taken into consideration.



5.3 Subconclusion

The customer of RAI Amsterdam can be divided in three segments as shown above in the business model canvas. The organizers of events, the exhibitors and the visitors of events. The visitors of events are also customers of the organizers, thus is important that the RAI contains a satisfying customer relationship with the organizer, because without events there are no visitors.

The city of Amsterdam is a strength of RAI Amsterdam, as the city is known all over the world, and easy accessible via multiple destinations. Using Amsterdam in the company name will spark instant recognition for visitors. Therefore, the cooperation with the city, and the development of the metroplotan area can be seen as opportunities for the RAI. It can use the reputation of the city to attract customers. The city, however, is also a threat as the RAI relies on the reputation and cooperation of the municipality (25% shareholder). If the reputation of the city drops, the organizers might find a different, more reliable, destination. Amsterdam ranked ninth, meaning there are 8 destinations that are favorable over the city.

The developments in the industry lead to both opportunities and threats. The technological developments lead to less travel, as people are offered the opportunity to stay at home and follow the meetings online. This threat can be turned into an opportunity for the RAI, as the company can take advantage of this development. Hybrid events still need an event space, if the RAI offers the best services and products for the organization of an hybrid event, it attracts the organizers. It can add value to customer journey of the physical visitors by engaging them with the use of virtual communities.

6. Customer' needs, wants, and demands

In chapter 6 you can find the results, and analysis of the question: What are the needs, wants, and demands of a client when visiting an international convention center. The results are based on the findings of three academic articles, and the internal brainstorm session of the RAI work group. The articles and the brainstorm session show what the perspectives of the organizers, delegates, and RAI Amsterdam are on what the needs, wants and demands are of the customers.

6.1 Results

6.1.1 The perspective of the organizer

The article 'The determinants of convention site selection: A logistic choice model from experimental data' by Crouch & Louviere shows the features of a convention center that are deemed important by the organization of an event when selecting a location. The results are based on the Australian domestic convention industry (Crouch & Louviere, 2004, p. 118).

The selection factors are based on 64 studies on convention site selection (Crouch & Louviere, 2004, pp. 119-120). The survey itself was made after in-depth interviews with 25 meeting planners (Crouch & Louviere, 2004, p. 121). The end results are based on 86 responses (Crouch & Louviere, 2004, p. 123).

The following results were measured: the proximity of convention participants to the conference site is highly significant: desirability declines when attendees have to fly further (unrestricted economy, and discount airfares do not affect choices) (Crouch & Louviere, 2004, p. 124). This result is best distinguished when attendees have to fly longer than 2, 5 hours (Crouch & Louviere, 2004, p. 127).

The accommodation facilities are deemed most desirable when the accommodation is connected to the venue site. Off-site accommodation is not favorable. Sites drop in desirability when room rates are high. The convenience of proximity between accommodation, and the local airport is presumed as unimportant (up to 40 minutes) (Crouch & Louviere, 2004, pp. 124-127).

General convention center features that proved to be significant in this research are: "opportunities for entertainment, shopping, sightseeing, recreation, and organized tours, as were physical site attributes, and the social cultural environment". The cost of a convention center is significant, and the attractiveness of a center decreases when it costs are high. But low costs can lead to a negative image of "poor standards", and "unattractive facilities" (Crouch & Louviere, 2004, p. 127).

When selecting a location for the convention, meeting planners consider the following facilities, and services important: “quality of the exhibition space, plenary room, break-out rooms, and the perceived food quality”. The ballroom, and dining facilities are less important (Crouch & Louviere, 2004, p. 127). The table below shows the ranking on the importance of the selected features (Crouch & Louviere, 2004, p. 128).

#	Features selected	#		#		#	
1	Cost of venue	6	exhibition space	11	unrestricted airfare	16	taxi time (max. 40 min)
2	food quality	7	break-out rooms	12	social/cultural setting	17	expected weather
3	plenary room	8	accommodation rates	13	A/V facilities	18	best airfare
4	On-site accommodation	9	physical setting	14	accommodation range (max. 15min)	19	bureau assistance
5	participant proximity (max. 2,5 hours)	10	Entertainment opportunities	15	ball room	20	Chapter assistance

Figure 19: Top 20 selection factors (Crouch & Louviere, 2004, p. 128).

2.1.1 The perspective of the delegate

The second article assessed: “Convention Center Facilities Attributes, and Services: The Delegates’ Perspective” by Wu & Weber is based on the results of a survey taken during the IEEE INFOCOM 2004, and the annual convention of the international federation of air traffic (Wu & Weber, 2005, p. 401). The survey was send to 600 attendees, 168 responded (response rate 28%). Of which 138 were male, and 29 were female (Wu & Weber, 2005, p. 402).

The residence location of the respondents: Asia Pacific: 35, Europe: 60, North America: 33, Central America: 9, South America: 16, and Africa: 11. 104 respondents have visited up to 5 conventions in the last three years. The survey results are based on the following rating: 1 (not at all important) to 5 (very important) (Wu & Weber, 2005, p. 402). Below table 2, as posted on page 404 of the article, shows the importance of the rated facilities, attributes, and services in ranks (Wu & Weber, 2005, p. 402).

Table 2 Importance Ratings of Attributes, Facilities and Services for a Convention Center

Rank	Attributes, Facilities and Service	Mean	Std. Dev.
1	Availability of ventilation in the meeting rooms	4.51	.68
2	Availability of state-of-the-art audio-visual equipment	4.51	.73
3	Comfort of seating	4.49	.67
4	Adequacy of restrooms	4.48	.61
5	Helpfulness of staff	4.41	.67
6	Language ability of staff	4.41	.79
7	Maintenance of the meeting venue	4.36	.82
8	Proximity of the venue to accommodation facilities	4.33	.80
9	Courtesy of staff	4.32	.70
10	Availability of transport to the venue	4.30	1.12
11	Adequacy of the venue's public space & circulation area	4.29	.74
12	Adequacy of staff	4.26	.79
13	Directional signage in the venue	4.25	.91
14	Adequacy of public Internet access	4.24	1.05
15	Ambience of the meeting venue	4.06	.81
16	Proximity of the venue to local food service facilities	3.96	1.01
17	Affordability of in-house outlets	3.91	.96
18	Availability of facilities for disabled access	3.87	1.23
19	Quality of in-house F&B outlets	3.85	1.00
20	Cost of transport to the venue	3.79	1.12
21	Interior decoration of the venue	3.59	.96
22	Adequacy of public telephones	3.59	1.2
23	Unique interior design	3.47	1.1

Figure 20: Attributes, Facilities, and Services in rank (Wu & Weber, 2005, p. 404)

The service, and quality of staff, prior, during, and after the event, is stated to be very important for convention hotels. The services of the convention center itself are low ranked because the main contact is between the convention organizer, and the attendees (Wu & Weber, 2005, p. 404). However, as Wu & Weber (2005, p. 408) state it is important that the “center staff is helpful, and courteous”, as the defiance can be registered in the feedback for the organizer

The third article: ‘Attendees needs, and service priorities in a large convention center: application of the importance- performance theory’ is a research by Breiter, and Milman (2005). The importance of the research is laid out in the following quote: “By understanding the importance from the customers’ perspective, large convention centers will be able to design, and implement quality service assurance programs to maintain a competitive edge in the marketplace” (Breiter & Milman, 2005, p. 1365).

The objective of the article was to “identify tangible, and intangible elements of services that attendees encounter, and to rank the relative importance” (Breiter & Milman, 2005, p. 1365). The research results are based on a survey with 566 respondents visiting five different exhibitions. 70.3% of respondents was male, 29.7% was female. The highest percentage: 18.9% attended 3 exhibitions in the past 3 years. The rating of the determinants is the same as in the second article: 1 (unimportant) to 5 (very important). (Breiter & Milman, 2005, pp. 1364-1366).

Facility services	Mean
Overall Cleanliness of Center	4.50
A well-maintained facility	4.49
Helpfulness of guest services personnel	4.29
Friendliness of guest services personnel	4.22
Assistance of other convention center staff	4.17

Figure 21: Table 7 from p. 1367 of Milman, and Breiter (2005).

Respondents perception of facility features at the convention center

Facility features	Level of importance ^a	
	Mean	Std. deviation
Directional signage within the convention center	4.43	0.84
Availability of high quality lodging facilities near the convention center	4.42	0.87
Sufficient restrooms throughout the convention center	4.38	0.82
Ability to get cell phone signal in the convention center	4.29	1.06
Directional road signage to the convention center	4.28	1.04
Availability of seating throughout the convention center	4.18	0.95
Easy accessibility to local foodservice facilities	4.15	0.96
Affordability of parking	4.03	1.19
Availability of taxi service to and from the convention center	4.00	1.12
Affordability of taxi service to and from the convention center	4.00	1.11
Food service outlets open during all show hours	3.99	1.05
Availability of food kiosks throughout the convention center	3.88	1.08
Proximity of food services to exhibit hall	3.87	1.06
Availability of business services	3.74	1.15
Sufficient public telephones	3.70	1.26
Availability of upscale food service in the convention center	3.69	1.14
Sufficient public Internet access	3.60	1.24
Availability of branded food service in the convention center	3.50	1.22
Other	4.23	0.91

Figure 22: Perspective of the delegates (Breiter & Milman, 2005, p. 1368)

The findings show no significant differences between answers of male, and female respondents, and between the respondents in different age groups. The results show not to be dependent on demographic characteristics, and former experiences with other exhibitions (Breiter & Milman, 2005, p. 1369).

2.1.2 The perspective of the RAI

The brainstorm session of RAI Amsterdam took place in May 2015, the goal of the session was to provide input for the definition and criteria for the international standard, find “low hanging fruits”, and insights for further client research. Defining the ‘international standard’ is part of the strategy

aiming at internationalization. Present where employees of RAI Amsterdam, all with a different area of expertise: domain manager, event manager, account manager, director convention center operations, head of marketing and innovation, operations manager, head of RAI Catering, and the director of international exhibitions. Questions asked where: If an international standard would exist for international venues, what would it entail. Which features should be available at all times in an international venue for the customers (Yvonne Nassar - Head of Marketing & Innovation, 2015).

The following features were thought to be essential for the visitors:

- **Building**
 - o English signage (to/in/from/around the convention center, if possible in multiple languages)
 - o Information points in/around the center
 - o Not only a clean venue but also the route to and from the venue has to be clean
- **Catering**
 - o Multiple catering concepts (e.g. café, on-the-go, and a la carte)
 - o International catering but also local dishes
- **Facility services**
 - o Business center/International lounge – with info points, workplaces and, meeting spots
 - o Pray rooms
 - o Access to package deals outside the venue (e.g. hotels, restaurants, museums, and public transport)
 - o A map/overview of hotels and restaurant in the neighborhood
 - o Multiple charge possibilities
 - o Up-to-date/Free Wi-Fi
 - o Social Webcare – website, social media, app
 - o Overview of products & prices through e-brochures
- **Staff**
 - o Hospitality services
 - o English needs to be first language, for both internal and external communication, instead of Dutch

6.2 Discussion

In this discussion it will be decided which features can be used for the checklist.

The first article by Crouch & Louviere is based on an Australian domestic survey. This could mean that some of the results would not apply to convention centers in Europe. However, the features that are considered for the survey seem neutral and are not specific for the circumstances in Australia. The survey for the meeting planners is important to include as it shows which features are decisive for the organizers. The costs of a venue are imperative when selecting a venue. If a venue has all the necessary means, and extra services to satisfy the visitor, but the costs are too high for the organizer, the organizer will most likely choose another venue.

The table below shows the similar features that were found in the articles of Wu & Weber, and Breiter & Milman, both articles aimed at the perspective of the delegate. The rating of the articles and an average rating per rated feature. The features that score lower than a 4.0 average result (marked red) will be cut, unless they are mentioned in the output of the brainstorm session by RAI Amsterdam, if so the criteria can be found in the column next to the average result.

Features	rating article 2	rating article 3	average result	Brainstorm session
Adequacy of rest rooms/ Sufficient restrooms in the venue	4,48	4,38	4,43	
Maintenance of the venue	4,36	4,49	4,43	
Proximity accommodation to venue/high quality accommodation near venue	4,33	4,42	4,38	
Helpfulness of staff	4,41	4,29	4,35	
Directional signage to/in venue	4,25	4,28	4,27	Info points/signage from venue
Courtesy of Staff/assistance of convention center staff	4,32	4,17	4,25	Hospitality services
Transport to venue	4,3	4	4,15	From/to airport and city center
Ambience of the meeting venue	4,06	4,17	4,12	
Availability/proximity to local foodservices	3,96	4,15	4,06	Map for neighborhood restaurants
Ratings below 4.0				
Availability in-house outlets/affordability in-house food outlets	3,91	3,99	3,95	
Affordability of taxi services/transport to venue	4	3,79	3,90	
Quality of in-house Food & beverage outlets/availability of food outlets	3,85	3,88	3,87	Different concepts: café, on-the-go, a-la-carte

The features that weren't similar in the articles are selected by category.

Staff	Rating	Output RAI brainstorm
Language ability of staff	4,41	Hospitality/multiple languages
Helpfulness of guest services personnel	4,29	Hospitality/multiple languages
Friendliness of guest services personnel	4,22	Hospitality/multiple languages
Catering		
Availability of upscale foodservices in the convention center	3,69	Different concepts: café, on-the-go, a-la-carte
Availability of branded food services	3,50	
Facility services		
Availability of state of the art audio-visual equipment	4,51	
Ventilation in meeting rooms	4,51	
Overall Cleanliness of Center	4,50	Expected high standard in and around venue
Adequacy of public space & circulation area of the venue	4,29	
Cellphone signal	4,29	
Affordability of parking facilities	4,03	
Availability of facilities for disabled access	3,87	
Availability of business services	3,74	International Lounge/Business Center
Sufficient public internet access	3,60	Wi-Fi up to date/Free Wi-Fi
Atmosphere of venue		
Comfort of Seating	4,49	
Interior decoration of the venue	3,59	

The features that will be taken out of consideration for the checklist are: the 'availability in-house outlets/affordability in-house food outlets', 'affordability of taxi services/transport to venue', 'availability of branded food services', and the 'interior decoration of the venue'. The availability of facilities for disabled access should be taken out according to the importance rating, however the results of chapter 4.1.13 show that the Dutch government wants to make the access for disabled mandatory for all companies and buildings. Therefore, the feature will be used for the checklist.

Interesting is that the availability and quality of foodservices, outlet or upscale, in the venue score below a 4.0, while the organizers ranked the food quality of the venue second place for their selection. The availability (3.96) and proximity (4.15) to local foodservices score higher with an average 4.06. Which could mean that the international visitors find it important to get a taste of the local culture. The output of the RAI shows the need for a map of the local foodservices.

The results show that the delegates find the proximity of the accommodation (4.33) essential, which is complementary to the desire of the organizers to have an onsite accommodation (4th rank) available.

The second cut for the checklist will be made based on the features that cannot be tested through desk research, as they are subjective to personal taste or experiences. However, the ratings show that they are important for the customer, as they add value to the overall experience:

- Affordability of parking facilities
- Ambience of the meeting venue
- Cellphone signal
- Comfort of seating
- Courtesy/helpfulness/friendliness of staff/guest services personnel
- Interior decoration of the venue
- Maintenance of the venue
- Overall cleanliness of the center

Even though the affordability of the parking facilities is subjective to personal experience, it is however possible to make a price comparison for the facilities. The same applies to the courtesy, helpfulness, and friendliness of the staff. As Wu and Weber stated the venue staff might not be the first point of contact, but if there is contact, and the service is received as bad, it will be registered in the feedback towards the organizer. Meaning when perceived benefits do not agree with the expectations, it could lead to an unsatisfied customer, and to bad word to mouth. Thus it is important to check if the venues offer hospitality services. Hospitality services are also mentioned in the output of the brainstorm session as an essential service.

An important change in the industry that has been recognized is the change of the attitude of the visitor. Visitors want to interact and co-create the events, which is essential for the venues to react to. Therefore, the social webcare of the venues will be checked as well, with an emphasis on the presentation of the website, social media, and if present an application for the visitors.

6.3 Checklist

After the analyzing the results the following features will be used for the comparative research of the competing venues.

Building <ul style="list-style-type: none"> - Venue <ul style="list-style-type: none"> o Is it compact/easy circulation - Restroom facilities <ul style="list-style-type: none"> o Sufficient o Adequate - Directional Signage <ul style="list-style-type: none"> o To the venue (in English) o In venue (in English) o From venue (in English) - Meeting rooms <ul style="list-style-type: none"> o Availability of ventilation - Audio/visual equipment <ul style="list-style-type: none"> o High quality - Access for disabled <ul style="list-style-type: none"> o Availability 	Facility services <ul style="list-style-type: none"> - Parking facilities <ul style="list-style-type: none"> o Pricing - Business Center/Lounge <ul style="list-style-type: none"> o Available - Wi-Fi <ul style="list-style-type: none"> o Up-to-date/Free - Social Webcare <ul style="list-style-type: none"> o Social Media o Website o App - Transport <ul style="list-style-type: none"> o Availability o To/from airport, city center, and accommodation - Accommodation <ul style="list-style-type: none"> o Proximity o Quality
Catering <ul style="list-style-type: none"> - Food outlets <ul style="list-style-type: none"> o Availability of upscale restaurants o Different sort of concepts o Quality - Local Foodservices <ul style="list-style-type: none"> o Availability o proximity 	Staff <ul style="list-style-type: none"> - Hospitality services <ul style="list-style-type: none"> o Available - Language ability <ul style="list-style-type: none"> o Multiple languages spoken

The features will be checked with the following 5-pointscale, based on how much information on the different services can be found:

<u>1</u>	No Access (no information can be found due to restricted access for externals, or failing website)
<u>2</u>	Not available/unknown (no information can be found)
<u>3</u>	Available (no information can be found on the quality of the service)
<u>4</u>	Available (Extra information can be found, providing good quality service)
<u>5</u>	Available (Extensive information can be found, providing excellent quality service)

7. Comparative research of the competing venues

In this chapter the checklist made in chapter six will be used to compare the competing venues: Fira Barcelona, ExCel London, Messe München, and RAI Amsterdam. Firstly, some of the basic details of the competing convention centers will be discussed.

7.1 Results

7.1.1 Messe München

Messe München GmbH is a company that organizes and facilitates events, founded in 1964 (Messe München, n.d.-d). The company has a portfolio of 40 trade fairs, organized in Germany and other countries, such as China, Russia and South America. The mission statement of the company is "Connecting Global Competence" (Messe München, n.d.-g). Annually 20-25 third party events are hosted in the exhibition center of Messe München GmbH (Messe München GmbH, n.d., p. 3). The economic impact of the MICE-industry in Munich accounts for 1.38 billion euros of the total 2.63 billion euros in all of Germany (Messe München GmbH, 2014, p. 18).

A strategy of Messe München is to expand their business abroad as stated in the annual report: "When it comes to trade fairs, positioning yourself only at your home venue is no longer sufficient. In the age of globalization, exhibitors are anxious to enter rapidly growing markets in other countries as well" (Messe München GmbH, 2014, p. 30).

Building

The report 'Messe München in detail' provides all the specific details of the venue from accessibility, floor space, height per hall to utility connections, and capacity in people (Messe München GmbH, n.d., pp. 6-10). The venue has 180,000m² exhibition space divided into 16 halls, plus 2 press centers, 34 conference rooms, 57 meeting rooms and 12 function rooms. There is also an extra of 425,000m² of outdoor space (Messe München GmbH, n.d., p. 6). The ICM – International Congress Center München - is connected to the exhibition site, and has 1 auditorium (1,430seats), 19 rooms (60m² – 2,730m²) and 18 meeting rooms (Messe München, n.d.-c). The ground map of Messe München can be found in Appendix C.

Facility services

The rooms of ICM are equipped with the following technology: customizable stages, innovative data and video projection options, Mobile screens for multiple projections, digital mixers, separate control room, Simultaneous translation booths, and air conditioning (Messe München, n.d.-f).

Messe München has a download section on the website, where several documents can be downloaded, such as: the Annual Report, Messe München in detail and the brochures summarizing all the services offered (Messe München, n.d.-b).

A brochure with all the facility services available can be downloaded, the brochure is in both English and German. On-site facilities (Messe München GmbH, 2015, pp. 25-29):

- Pharmacy Service (orders & prescriptions with same-day delivery)
- Baggage drop-off (in cooperation with Lufthansa, visitors can check-in their luggage free of charge at the center, where it will be transported to the airport)
- Exhibitor services (multiple access point, open during event times)
- Kiosk/trade show supply shops
- Business center (meeting and charge opportunities, office services available)
- International visitors' lounge
- Shipping & courier service/postal services
- Childcare (depends on the event)
- Prayer room
- Lockers and cloakrooms
- Tourist information spots
- Free Wi-Fi on exhibitions grounds

The ground map shows that each entrance has access to one restroom, each exhibition hall has two restrooms. Access for disabled in all buildings and special restrooms in all entrances, halls, and all restaurants on the first floor. Parking is free of charge for disabled (Messe München GmbH, 2015, p. 25), and they are given the opportunity to rent a wheelchair for a € 50, - deposit (Messe München GmbH, 2015, p. 28). Each entrance has an international visitor lounge (Messe München GmbH, n.d., p. 11).

Infrastructure of the venue: the venue has two subway stops, and the city center can be reached within 18min. Accessible via two exits from the highway, and the airport is a 45 min drive. The center has 12 open space parking areas and 1 parking garage. The costs are € 8,- for the open-air parking areas, and € 10,- for the parking garage, both per 24h. (Messe München, n.d.-e).

Social webcare

The website of Messe München gives access to all information needed, everything can be easily found. The event calendar shows events planned to 2018. The section 'Getting There' provides extensive information on directions by plane, train, car and public transport. The locations of Messe München GmbH can be explored through a virtual tour, available via the website and smartphones.

The virtual tour shows that the signage within and outside the building is in German and English (Messe München, n.d.-h). The website is available in English and German. The venue has a Facebook page, which is operated in German.

Messe München has special websites for hotels, restaurants and sightseeing: www.messe-muenchen-restaurants.de; www.messe-muenchen-hotels.de; www.messe-muenchen-cityguide.de. Here the visitors can search for available hotels, and restaurants and a guide to the city center (shopping, events, tips from a-z) and the regions around the city.

Accommodation booking site Tradefairs.com is a service partner of Messe München offering special rates during the trade fairs in München. Visitors can book hotels based on their own preferences (Messe München, n.d.-a).

Messe München also has an application available for its visitors (for both apple & android):

"It comes with picture galleries of the fair locations, arrival information, site plans, and contact options. Always up-to-date event calendars list all upcoming fairs and events. A city guide provides information about a large number of hotels and restaurants that are suited for fair visitors and can be sorted by price range, distance from the fair, and other criteria. Some special tips of the Cool Cities series are also included." Languages available: German, English, and Simplified Chinese. (teNeues Digital Media GmbH, 2015).

The staff of Messe München speaks over 23 languages, to improve the communication with clients. Some languages the sales managers speak are: Russian, Arabic, Türkisch, Greek, Danish, Hungarian and Hindi (Messe München GmbH, 2014, p. 17)

Collaboration with Taxi-München to provide enough cars at all exits during the events, doubling the taxis that are normally 'on duty' (Messe München GmbH, 2014, p. 18).

The website provides information on agencies that can deliver hosts and hostesses for the trade fairs (Messe München, n.d.-i).

Catering

The venue is equipped with the following catering services: 34 restaurants and catering areas (self-service, full-service restaurants, bistros & cafés) with 5,000 seats operated by three different restaurateurs (Michael Käfer, Alfons Schuhbeck, and Josef Able); 2 beer gardens; different cuisines available: Asian, Italian, American and local Bavarian (Messe München GmbH, n.d., p. 12).

7.1.2 FIRA Barcelona

Fira Barcelona was founded in 1932, and is an organizer and facilitator. Fira Barcelona is set up in two large venues: 'Montjuïc and Gran Via' with a combined space of 405,000 m², the venues are

situated 3km apart. The economic impact of the organization on the city Barcelona per year is estimated to be 2,600 million euros. The strategy of Fira Barcelona is aimed on “on promoting the presence of international exhibitors, organizers and visitors and attracting large European and global events” (Fira Barcelona, n.d.-a). The organization has a portfolio of 70 events (Fira Barcelona, 2013, p. 3)

Building

The Montjuïc has an exhibition area of 165,000 m² (50,000m² outdoor space) divided into 6 halls, 1900 parking spaces available, and a conference center. The conference center has 5,800 m² exhibition space, 11 meeting rooms, an auditorium (1,650 seats). This venue is located in the city center (Fira Barcelona, 2013, pp. 4-7).

The Gran Via has an exhibition area of 240,000 m², situated close to the airport of Barcelona. The venue has over 135,000 m² of solar panels on the roof. The area is divided into 8 exhibition halls, and a convention center with room for 3,000 – 12,000 people. The Gran Via has 4,580 parking spaces and 2 heliports available. The ground maps of the venues can be found in Appendix C.

The website ‘www.firabarcelona-guestevents.com’ provides detailed information and downloads of floorplans, information on hotels and transport, and a virtual tour of the venues. The venues are accessible by both national and international trains, busses, metros, airport shuttlebuses, and taxis.

The detailed floorplans of both venues shows that all rooms and halls have access to one or more restrooms (depending on the size of the space). The floorplans of the conference center at the Gran Via venue shows that the meeting rooms are equipped with air condition and ventilation, the floor plan of the Montjuïc does not show availability of air-conditioning in the meeting rooms (Fira Barcelona, n.d.-g; Fira Barcelona, n.d.-k). The document ‘Digital Signage’ shows that organizer have the possibility to use digital signage points (screens, projections) using their own signage (Fira Barcelona, n.d.-j).

The Gran Via venue is 12 km situated from the airport and 2,5km from the city center. The venue has 6 parking facilities with a total of 4,562 spaces (Fira Barcelona, n.d.-h). Another document shows the hotels nearby the venue, within walking range, 10 min/20 min taxi ride. Within walking distance there are five 4star hotels available (Fira Barcelona, n.d.-i).

Catering

Fira Barcelona has a special website for the catering www.gastrofira.com. The link to the restaurants in the venues however does not work. An upscale restaurant on the grounds of Gran Via is Nucló Restaurant, with a à la carte menu with 25 dishes, and a wine list with 200 wines. Exhibitors have

access to an online services catalogue (Fira Barcelona, n.d.-b). The basic figures of the two venues show that Montjuïc has 20 restaurants, and Gran Via 45 restaurants (including Nuclo) (Fira Barcelona, 2013, pp. 7-9).

Facility services

The websites of Fira Barcelona are available in three languages: English, Spanish and Catalanian. The main page of www.firabarcelona.com provides links to the following pages: 'The institutions', 'Trade show calendar', 'venues', 'International', 'Barcelona', and 'press'.

The section 'Barcelona' on the website provides links to a hotel booking site, and restaurant search engine: www.barcelonahotelbookings.com & www.bcnrestaurantes.com. Other links provide information on e.g. the city, events, shopping, sports and the weather (Fira Barcelona, n.d.-c).

The website www.servifira.com provides information on the services of Fira Barcelona. The organization has the exclusive right to supply the basic services: "telephony, network line, electricity, water, drainage, compresses air, rigging etc." (Fira Barcelona, n.d.-d). Servifira offers support staff: hostesses, translators, and security (Fira Barcelona, n.d.-e).

Internet services of Fira Barcelona are laid out in the file 'IT services Fira Barcelona'. The Wi-Fi network has the capacity to hold 64,000 users, plus 16,000 available cable ports. The internet services are available for organizers and exhibitors to rent during their events (Fira Barcelona, n.d.-l, p. 1).

The main page of Fira Barcelona 'visitors' states that the following services are available: "a business center, cloakroom, an ATM, a dispensary, and many more". No further information (Fira Barcelona, n.d.-m).

Social webcare

Fira Barcelona has several ways to connect with their customer:

- an online blog for news, and behind the scenes stories on current events, which can be found on blog.firabarcelona.com.
- an online magazine with articles on the changing industry and recent events, the magazine can be found on fira-news.com.
- a twitter account: twitter.com/fira_barcelona

7.1.3 ExCel London

ExCel London is located on the Royal Victoria Dock Site, the exhibition venue was opened in 2000 and has generated 2,3 billion pounds for the British economy (ExCel London, n.d.-a). The organization is part of the Adnec group (Abu Dhabi National Exhibitions Company) which was founded in 2005.

Building

The venue of ExCel London has exhibitions halls, a training and meeting facility (CentrEd), and the International Convention Center (ICC London) (ExCel London, n.d.-c).

CentrEd has a separate entrance, 29 training rooms (20-400 people), built in audio visual services, air conditioning, free Wi-Fi and on-site parking. The website provides an online brochure with detailed information on the rooms, on-site hotels, how to get there and direct contact information (ExCel London, n.d.-d).

The exhibition halls are 87,328m² (with changeable walls) and have “configurable toilet blocks, with ability to flex to male/female ratio” (ExCel London, 2016). Next to the halls are 33 gallery meeting rooms, equipped with “AV equipment, sun blinds, natural daylight, dimmable house lighting” (ExCel London, 2015, p. 7). The ExCel Campus Map can be found in Appendix C.

The International Convention Center has a large auditorium with seating for a maximum of 4,500 guests, and extra hall space of 4,603m². As well as 23 meeting rooms (50 – 1200 persons), with Wi-Fi, AV equipment, digital signage, cloakroom and an organizer's office (ExCel London, 2016b).

The section “getting there” provides information on transport to the venue. The venue has two underground stations ‘custom house’ and ‘prince regent’ (ExCel London, n.d.-h). From London airport city it takes 15 min by public transport to get to ExCel London, from Gatwick it takes 1 hour, from Heathrow Airport 1h30min, from Stansted Airport 1h10min, Luton Airport 1h40min, and Southend 1h34min. The directions are laid out per airport (ExCel London, n.d.-g). Another way to access the venue is by cable car – ‘the Emirates Air Line’ – which travels 90m above the Thames (ExCel London, n.d.-m).

The venue has three parking garages, a total of 3,070 parking spaces, and the price rate for a normal car is £ 15,- per 24hours (ExCel London, n.d.-n).

A partnership with Europcar provides the following services for visitors, exhibitors and organizers: “one-way vehicle hire, car & van hire, car wash and valet parking, chauffeur services, executive coach service and shuttle busses, golf buggy hire, and mobility scooter hire” (ExCel London, n.d.-o).

The website section “accessibility” shows that the venue of ExCel London is built to allow easy access for visitors in wheelchairs, the entrances have low ramps, all floors are level, each area is reachable by elevator, and there are 40 disabled restrooms throughout the building. As well as 158 disabled parking spaces on-site, and guidance for the visual impaired. ExCel London requires all exhibitors to make their stands accessible to visitors in a wheelchair. The venue also provides wheelchairs, free of charge but with a security deposit. They also have a partnership with ‘Europcar’, who provides mobility scooters for £ 20,- a day, and a partnership with ‘Changing Places’, offering a “accessible changing facility” (ExCel London, n.d.-e).

ExCel London offers free Wi-Fi, for social media, email, and browsing. Mobile phones can be charged in the special ‘ChargeBox’ locker for a small price (£ 1,50 – 3,00, depending on the time) (ExCel London, n.d.-f).

Catering

ExCel London offers catering packages by Leith’s@ExCel. Leith’s makes use of local produce, and fair-trade certified products (Leith's Excel London, n.d.-b). Leith’s@ExCel offers the following catering options to organizers:

- Different day packages for customers with refreshments (Leith's Excel London, 2016)
- Complete event and stand catering with the menu and prices available on the website (Leith's Excel London, 2016b)

ExCel London has multiple restaurants (‘The Bridge’ and ‘The Tavern’), cafés (‘Costa’ and ‘E16 Bakery’), and outlets (‘Delice de France’, ‘The Italian Kitchen’, and more) available. Cuisines offered are: Italian, French, American, Mexican and Indian. The website also provides a link to restaurant search engine ‘Zomato’ for restaurants near the center (Excel London, n.d.-p).

Facility services

The website section “visitor services” provides an interactive map, showing where each of the services can be found. Services offered are (ExCel London, n.d.-i):

- ATM
- Baby changing facilities
- Cloakrooms
- Convenience store
- Business services (e.g. photocopying, printing, courier, and bookable meeting rooms)
- Information desks
- Prayer room

- Taxi and chauffeur services
- Dry cleaners, Beauty & Hair salon, and a florist (third party)

There are seven onsite hotels available (total of 1,600 rooms): Aloft London Excel, Crowne Plaza London Docklands (4star), Novotel London ExCel (4star), DoubleTree by Hilton (4star), Sunborn Yacht Hotel (4deluxe), Ibis (2star), and the Premier Inn London Docklands (2star) (ExCel London, n.d.-i). The website of ExCel London provides further information (which hotels, rating, and rooms available) on hotels off-site from a walking distance to 30 minutes by public transport (ExCel London, n.d.-j).

Blitz | GES is the official partner of ExCel London for audio and visual equipment and services, such as sound systems, LED screens, headsets, projectors, and staging (ExCel London, n.d.-l)

Social webcare

As can be seen on the homepage of <http://excel.london>, the organization has a Facebook, a twitter, and a LinkedIn account to keep customers up to date. Main options on the homepage are: 'visitor', 'exhibitor', 'organizer', 'what's on', 'about ExCel', 'getting here', 'food&drink' and 'venue information'. As well of a search engine. The website is only available in English.

The 'After Hours' guide provides information on attractions and site-seeing, the nightlife, theatre shows and restaurants in London (ExCel London, n.d.-k).

The website has a lot of documents with extra information, that can be downloaded, from parking facilities and a travel times map, to all technical details and specifications concerning the rentable spaces (ExCel London, 2015).

7.2 Discussion

Building

The category building shows that the venues are all well-equipped. The venues are all compact, the halls are inter-connected and the conference centers are all integrated into the exhibition area. Fira Barcelona has two venues which makes it less compact, however the transport to and from the venues is well organized, and rendered on the website.

All venues have digital signage inside the venues, however there was no information found on the signage to, and from the venue. Customers find signage an important feature as it makes the journey easier.

Messe München, ExCel London and Fira Barcelona all have brochures, which can be downloaded from the website. The brochures give extensive information on the rentable spaces, such as

information on ventilation or air conditioning. The product file of RAI Amsterdam shows that the RAI has ventilation available, however it cannot be found on the website. The RAI does provide a brochure with the prices of the meeting room packages, which is an important factor for the organizers of an event.

All venues, except for Fira Barcelona, provide information, which can be easily found on the website, on the access for disabled, they provide disabled parking spaces and wheelchair rental. Extra services are: Messe München provides free parking, ExCel London obligates all exhibitors to make their stands accessible, provide guidance for the visual impaired, and they have mobility scooters for rent.

Catering

The score of the in-house catering is similar. All venues have food outlets available with different concepts and different kind of cuisines. ExCel and the RAI both have special concepts for the catering, ExCel uses certified products and the RAI uses local produce to support the region. Fira Barcelona has a special gastronomy website of which the pages either do not work or are restricted for externals.

The RAI scores high on in-house catering, but the website does not provide any information on local foodservices nearby the venue. The checklist proves that visitors find this important, Messe München and ExCel London both provide an online guide with information on the venue, hotels, restaurants and the city. Messe München also provides an application for mobile phones with extensive information. Fira Barcelona has a webpage with links to other websites, which can help visitors plan their trip to the city.

Facility services

The pricing of the parking facilities shows that Messe München has the cheapest parking spaces (free for disabled). However, it might be worth discussing that the parking of RAI Amsterdam needs to be more expensive as it is close by the city center, people might use the parking places for long time stays, to take a trip into town or it might be used by the neighborhood. They do offer P + R parking, but that is only valuable for 1 day.

All venues have a business center, equipped with the essentials. Messe München also has an international visitor's lounge available. ExCel London provides, next to the business center, so-called charge-boxes where visitors can charge their devices during the day, safe in a locker. All venues have Wi-Fi available on exhibition grounds, but only Messe München and ExCel offer Free Wi-Fi.

All venues offer an online virtual tour through the building. The execution of the social webcare differs per venue. Both websites of ExCel London and Messe München are very approachable, all

information thought necessary for visiting the center can be found: from the event calendar, and a detailed floorplan to information on sightseeing. It has a clear download section with important documents such as an image brochure and the annual report. The language switch can be easily found on the main page. The website of Fira Barcelona and RAI Amsterdam provide all basic information, such as directions and floorplans, however some of the pages do not seem to work, or are not translated into English.

All venues use social media to keep in contact with their customers. RAI Amsterdam makes use of the most channels to reach the customers. Messe München is the only venue that has an app, which is aimed at informing the visiting customer.

Excel London has a special partnership with Europcar providing extra transport option, which can also be used for trips into the city and back. All websites give instructions for directions, for all sorts of transport. RAI Amsterdam has a partnership with a taxi company, making sure there are enough taxi's available when visitors leave the venue. The Tax-München doubles its taxis in service when an event takes place in Messe München.

RAI Amsterdam is the only venue with an in-house hotel & travel service, however, the website of the hotel service is not easily found on the main website of the RAI. Messe München has an official service partner – tradefairs.com. The other venues provide links to hotel search engines or PDF files with the nearest and best hotels.

Staff

The sales managers of Messe München speak an accumulated 23 languages. The first language within the RAI is Dutch, which shouldn't be a problem as the RAI is a Dutch company, however, more attention should be paid to the external communication, which is done in English. An example is the English version of the website, of which it is clear that the content isn't written by native speakers.

Checklist	Messe München	ExCel London	Fira Barcelona	RAI Amsterdam
Building				
Compact venue	5	5	4	5
Sufficient restrooms	3	3	3	3
Directional signage	4	4	4	4
Ventilation	3	3	3	3
AV Equipment	3	3	3	3
Disabled access	5	5	2	5
Catering				
Food outlets	4	4	3	4
- Upscale restaurants	3	3	5	5

- Different concepts	4	4	1	4
- Quality	3	4	1	4
Local Foodservices (map)				
- Availability	5	5	4	2
- Proximity	5	5	4	2
Facility Services				
Parking facilities (prices)	€8, -/€10, - 24h	£15 – 24h	2	€17,50 – 24h
Business center/lounge	3	3	3	3
Wi-Fi	3	3	3	3
- Free	3	3	2	2
Social webcare				
- Social media	4	5	4	5
- Website	5	5	4	4
- App	5	2	2	2
Transport				
- Availability	3	4	3	4
- To/from	3	4	3	3
Accommodation				
- proximity	4	4	4	5
- Quality of hotel	4	4	4	5
Staff				
Hospitality services available	3	2	3	4
Multiple languages	5	2	2	4

The average results calculated per category and total score:

Average result	Messe	Excel	Fira	RAI
Building	3,83	3,83	3,17	3,83
Catering	4	3,83	3	3,5
Services	3,7	3,7	3	3,6
Staff	4	2	2,5	4
Total	3,79	3,63	3	3,67

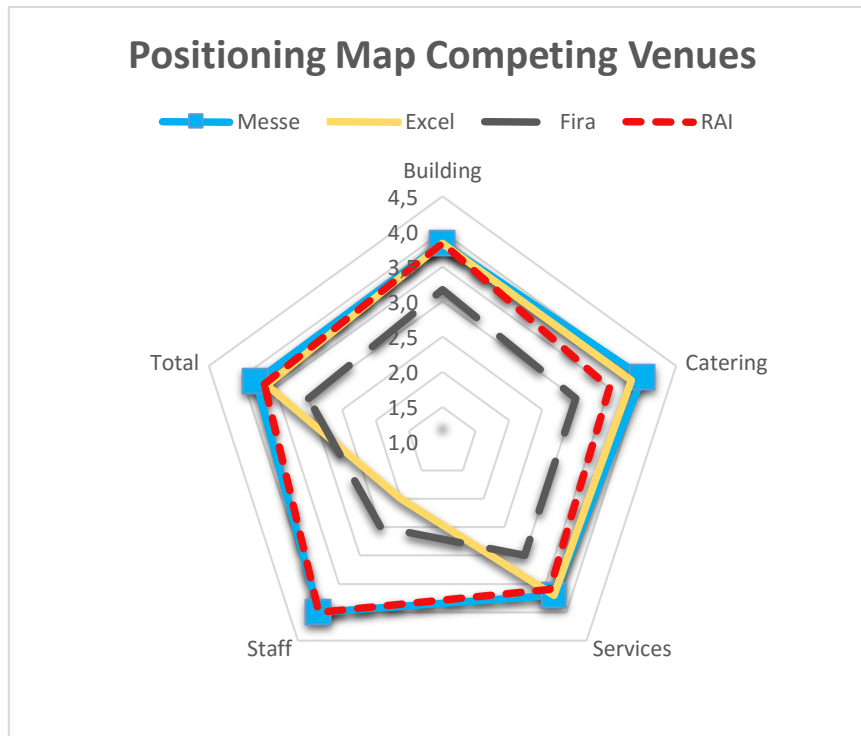


Figure 23: Positioning Map

With the average results per category, a positioning map has been made. The spider chart shows that RAI Amsterdam has a large competitive advantage over Fira Barcelona, however this is only the case because some of the features of Fira Barcelona are found to be unknown. ExCel London scores low on the Staff category, as there is not much

information available.

The overall score of the RAI is good compared to the competing venues. However, the RAI lost points in the category social webcare and the information offered to visitors. If the RAI wants to attract more international clients, the direction for the marketing strategy could be product development. Creating new products, or modifying existing products for the current market. The website needs to be modified, as there is a lack of consistency in the translation. Plus extra information needs to be added, to provide the visitors with information on local foodservices and sightseeing. The RAI is also the only company that does not provide brochures on the website with extensive information on the venue. The RAI could create an application, using it as an extra channel to reach the customer, and to make the customer journey even easier.

The feature directional signage could only be checked on sufficient signage in the venue, as there was no data available on the quality of the directional signage to, and from the venues.

7.3 Subconclusion

The conclusion of the comparative research of the competing venues is that RAI Amsterdam needs to work on product development to gain competitive advantage over ExCel London and Messe München. As the five-point scale shows that Messe München scores the best in the comparison of the venues, closely followed by RAI Amsterdam, and ExCel London. This is mostly because every feature of the checklist is available in Messe München, and the venue has an exceptional website,

with all the information available a visitor might need when going to an event in München, as well as an the application.

Excel London also offers some extra features which would add value to the experience of the customer, such as the charge-boxes, guides for 'after event hours', free wi-fi for simple browsing, social media and email, and information how to get into the city center.

Eventhough there was no information available on the quality of the directional signage, it is an essential service, that adds value to the overall customer experience.

RAI Amsterdam loses a few points, even though it provides all the standard features such as signage, AV equipment, and in-house foodservices. This is because the company does not provide the extra information visitors find important, such as the availability and proximity of local foodservices. It is also the only venue that doesn't provide brochures with details on the event spaces, information on how to get into the city center, and. The website itself lacks consistency in the translation and important links such as the hotel and travel service website, which is a unique service of the venue, are not prominently present on the main website www.rai.nl.

8. Conclusion

In the conclusion the answer to the main research question will be given: which unique selling points should RAI Amsterdam adopt to attract more international customers from the MICE-industry.

The research shows that RAI Amsterdam has all the basic services and product available, such as in-house catering and a compact building equipped with the essential technologies, which are indispensable for creating customer added value. Services on which no information could be found, is the directional signage, to and from the venue. It is however an important to make sure the signage is clear, consistent, and available in English.

One unique selling point of RAI Amsterdam is hotel & travel service, offered to organizers, exhibitors, and visitors. This service should be made to stand out on the website, in order communicate the usp clearly to visitors.

Technology has proven to be very important for the MICE industry, the hybrid events are becoming more popular, as has online streaming during events. Visitors of events depend on their device for networking and interacting via virtual communities. Devices' batteries run out of power, therefore, it is almost imperative to offer charge opportunities, such as the charge-boxes of ExCel London.

Eventhough the MICE industry is very versatile, as the industry is segmented into different events, and within the segments the events have different characteristics due to the nature of the organizer: corporate or non-corporate. The findings on the MICE industry show that all visitors, no matter which event they are attending, want to be engaged in the organizational process, before, during, and after the event. As the visitor wants to be co-creative, RAI Amsterdam has to have an active attitude towards attracting the visitor. RAI's partners 'Amsterdam Marketing' and the 'NBTC' are improving their webcare, and have invested in hospitality to attract the international visitors, and RAI Amsterdam should not fall behind on these developments.

RAI Amsterdam relies on the reputation of the city of Amsterdam, and that's why the company should take advantage of the prominence of Amsterdam by telling the story of the city, instead of letting the visitors find their own information on the attractions, local foodservices, or basic information needed when planning a trip abroad.

However, the comparative research shows that the social webcare of the RAI is somewhat inadequate in providing the extra wanted information for the visitor, thus the unique selling point should be aimed at improving the webcare for the international customer.

This could be done through a mobile application, or through providing guides with tips and tricks by locals and favorites of the RAI employees. Another option could be opening an on-site information

tourist point, where customer can plan tours and buy tickets for museums. The unique selling point should let the customers experience a taste of Amsterdam, before they even set foot in the country.

Concluding: RAI Amsterdam already has many positive features, which add value to the customer experience. However, by increasing and improving the social webcare, and engaging the customer in the journey, the company can gain competitive advantage over the competing venues.

9. Recommendations

The conclusions of this research are based on an outside-in perspective. The features of the checklist have only been tested through desk-research, and the results are dependent on the available information provided on websites or in reports. To fully understand the importance of the features and examine how customers rate the features of RAI Amsterdam, it would be fundamental to distribute a similar survey amongst the customers. With a customer survey, the features which could not be tested through desk-research, as they are subjective to personal taste, can also be included.

- Affordability of parking facilities
- Ambience of the meeting venue
- Cellphone signal
- Comfort of seating
- Courtesy/helpfulness/friendliness of staff/guest services personnel
- Interior decoration of the venue
- Maintenance of the venue
- Overall cleanliness of the center

The answers will provide a good overview of the points in which the RAI excels, or which points are in need of improvement.

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Appendix A

Definitions of events

Definitions of the different sort of events as found in appendix D of the UNWTO report: Measuring the Economic Impact of the Meetings Industry.

Meetings: definition by ICCA, and IAPCO: “a meeting is a general term indicating the coming together of a number of people in one place, to confer or carry out a particular activity.” “The key purposes of meetings are to motivate participants, and to conduct business. Frequency can be on an ad hoc basis or according to a set pattern, as for instance annual general meetings, committee meetings, etc.” (UNWTO, 2006, p. 63).

Incentives: programs organized by corporations to: “drive sales, increase profits, improve service, enhance morale, retain staff or provide high-profile recognition” (UNWTO, 2006, p. 11). In this segment confidentiality plays a big role, thus not much is known about the scope of the incentives, other than that it is a highly competitive, and profitable segment for the destinations (UNWTO, 2006, p. 11).

Conference: definition by ICCA, Participatory meeting designed for discussion, fact-finding, problem solving, and consultation. As compared with a congress, a conference is normally smaller in scale, and more select in character – features which tend to facilitate the exchange of information. The term “conference” carries no special connotation as to frequency. Though not inherently limited in time, conferences are usually of limited duration with specific objectives.” (UNWTO, 2006, p. 63).

Exhibitions: defined by the Convention Industry Council in the UNWTO report as followed: “An event at which products, and services are displayed. The primary activity of attendees is visiting exhibits on the show floor. These events focus primarily on b2b relationships”. The exhibition segment is less researched than the associations segments. Exhibitions are mostly assessed on the amount of rented space without defined criteria's (UNWTO, 2006, p. 9).

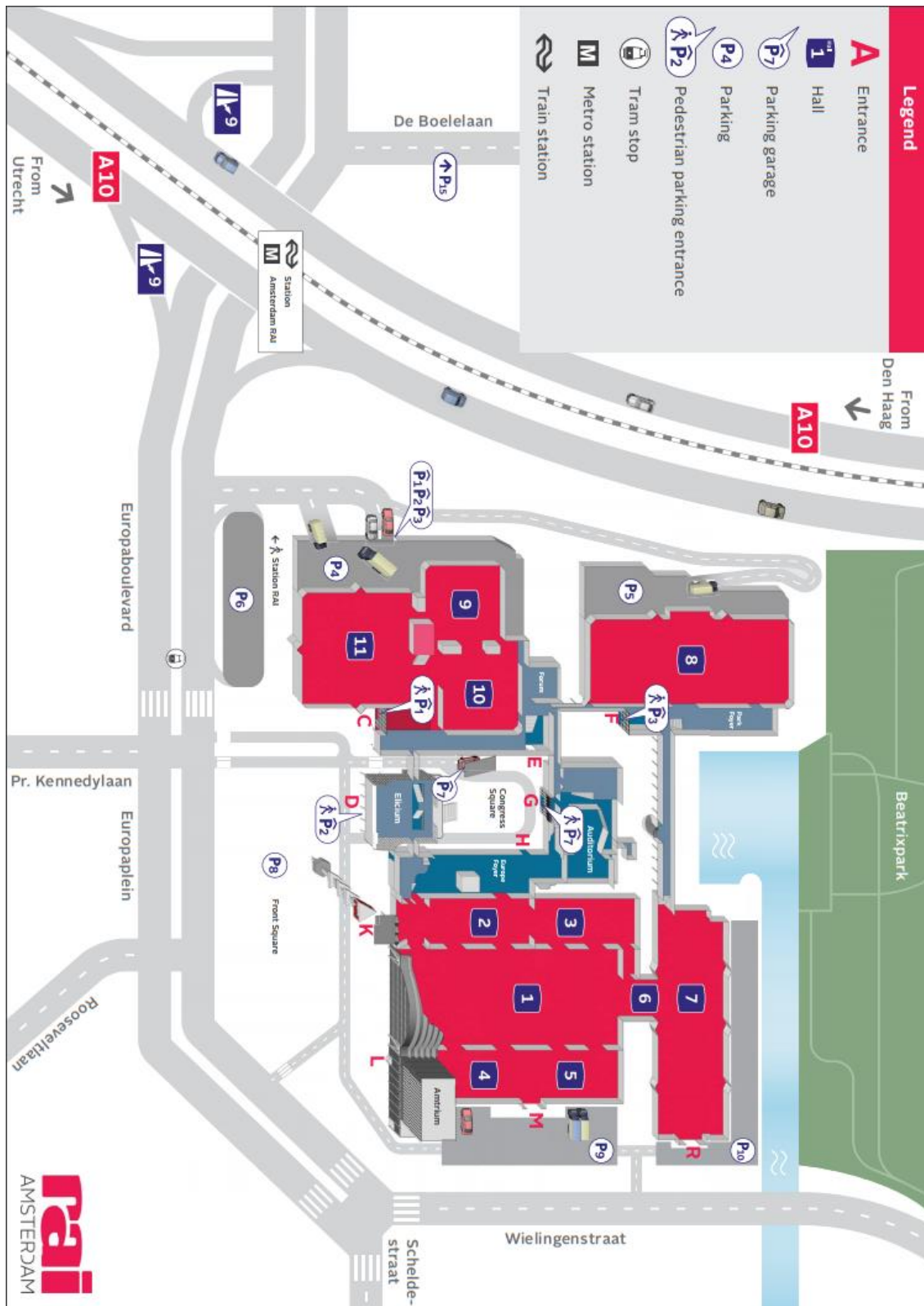
Appendix B

Taken from the website of the Dutch ministry of Security, and Justice are the countries that do not require a visa when visiting the Netherlands for a max stay of 90 days (Non Visa Countries, n.d.-a):

<p>Nationals of EU/EEA countries</p> <p>Albania*</p> <p>Andorra</p> <p>Antigua & Barbuda</p> <p>Argentina</p> <p>Australia</p> <p>Bahamas</p> <p>Barbados</p> <p>Bosnia-Herzegovina*</p> <p>Brazil</p> <p>British citizens who are not nationals of the United Kingdom of Great Britain, and Northern Ireland for the purposes of Union law:</p> <p>British nationals (Overseas)</p> <p>British Overseas Territories citizens (BOTC)</p> <p>British overseas citizen (BOC)</p> <p>British protected persons (BPP)</p> <p>British subjects (BS)</p> <p>Brunei</p> <p>Canada</p> <p>Chile</p> <p>Colombia</p> <p>Costa Rica</p> <p>Dominica</p> <p>El Salvador</p> <p>Grenada</p> <p>Guatemala</p> <p>Honduras</p> <p>Hong Kong (holders of BNO (British National Overseas)</p> <p>Passports, and Hong Kong SAR passports (Special Administrative Region))</p> <p>Israel</p>	<p>Japan</p> <p>Macau SAR</p> <p>Macedonia (former Yugoslavia) *</p> <p>Malaysia</p> <p>Mauritius</p> <p>Mexico</p> <p>Moldova*</p> <p>Monaco</p> <p>Montenegro*</p> <p>New Zealand</p> <p>Nicaragua</p> <p>Palau</p> <p>Panama</p> <p>Paraguay</p> <p>San Marino</p> <p>Saint Kitts, and Nevis (St. Kitts)</p> <p>Saint Lucia</p> <p>Saint Vincent, and the Grenadines</p> <p>Samoa</p> <p>Serbia*</p> <p>Seychelles</p> <p>Singapore</p> <p>South Korea</p> <p>Taiwan (Republic of China)**</p> <p>The Bahamas</p> <p>Timor-Leste</p> <p>Tonga</p> <p>Trinidad, and Tobago</p> <p>United Arab Emirates (UAE)</p> <p>United States of America</p> <p>Uruguay</p> <p>Vanuatu</p> <p>Vatican City</p> <p>Venezuela</p>
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Appendix C

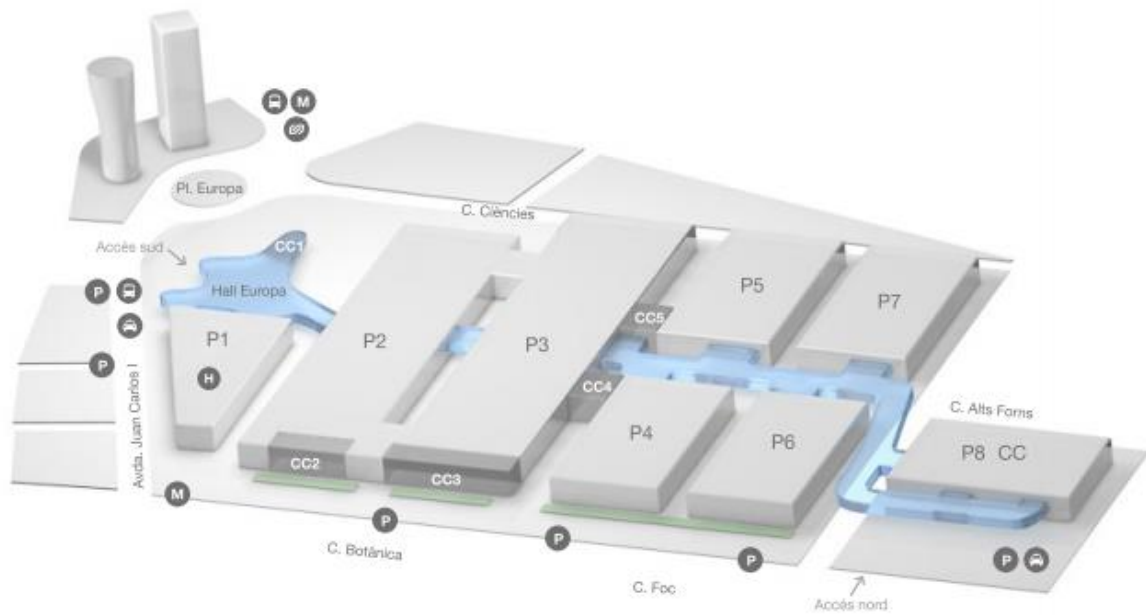
Ground Map RAI Amsterdam (RAI Amsterdam, 2015)



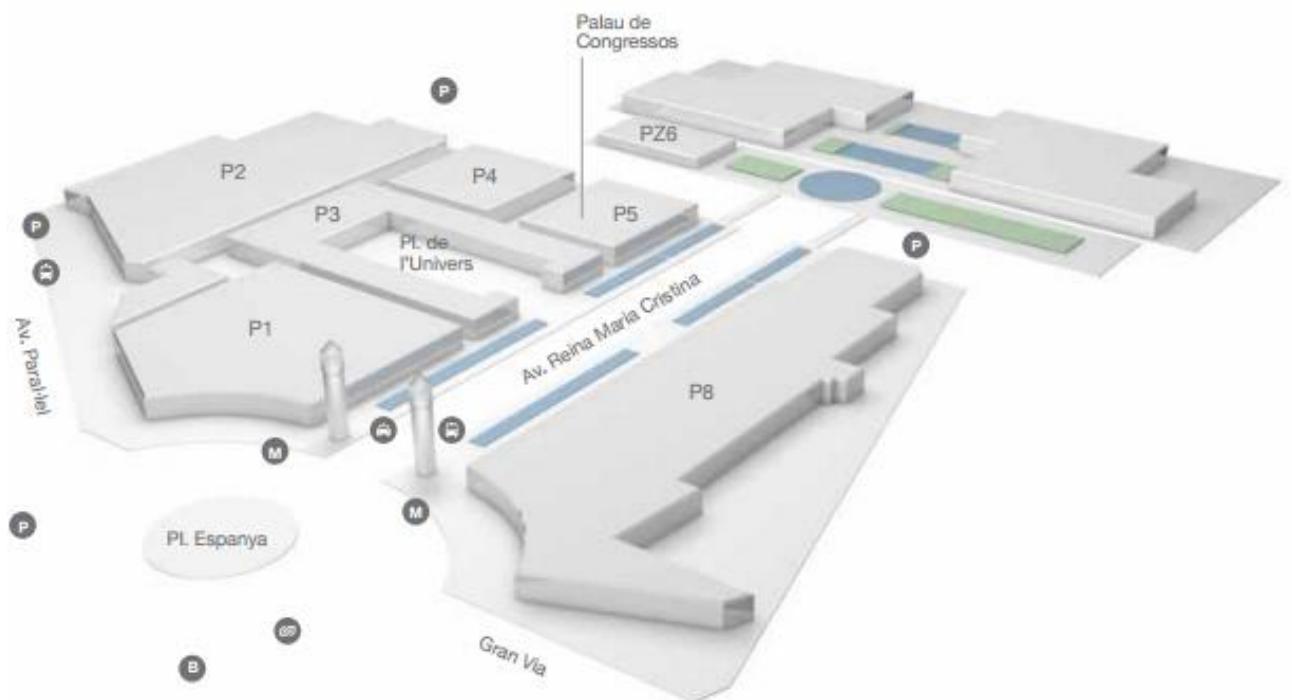
Ground Map Messe München (Messe München GmbH, n.d., p. 15)



Ground map Gran via – Fira Barcelona (Fira Barcelona, n.d.-o)



Ground map Montjuïc – Fira Barcelona (Fira Barcelona, n.d-n)



Ground map ExCel London (ExCel London, n.d.-q)

