The complementing value of consumer travel exhibitions as information and distribution channels

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By Dennis Hermans

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A case study of the Vakantiebeurs in Utrecht

Leisure, Tourism and Environment: Thesis Proposal

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Abstract

In this thesis, the complementing value of a consumer travel exhibition have been studied. The emergence of the Internet has offered both exhibitors and visitors of consumer travel exhibitions an alternative information and distribution channel. Scientific literature has often focused on exploring the advantages of online channels while recent research into the continued popularity of offline channels, such as consumer travel exhibitions, has been lacking. For that reason the aim of this study was to explore why offline intermediation through consumer travel exhibitions has continued to be popular in an era of increased usage of the Internet for planning and booking holidays.

An interpretive case study was used to uncover participation motivations of exhibitors and consumers, to investigate the influence of the Internet on these motivations and to explore the future of consumer travel exhibitions. A literature review was carried out in order to create a theoretical framework which served as preparation for the data collection and as a source of information for reflection on the results of this study. Semi-structured interviews among exhibiting and non-exhibiting tourism companies and organizations were employed as the main method of data collection. The case study involved the annual 'Vakantiebeurs' in Utrecht, the Netherlands.

The main findings offer several explanations for the continued popularity of the Vakantiebeurs as an offline channel and, more specifically, a consumer travel exhibition. These include, among many others, the ability of the Vakantiebeurs to establish a relationship of trust between consumer and exhibitor and the ability to exchange information between consumer and exhibitor in a very effective way. The discussion chapter includes an extensive argumentation for the importance of the relatively complex nature of travel products at the event with respect to its complementing value. The report also elaborates a number of topics that illustrate how the rise of the Internet has changed, decreased or reinforced particular motivations. And finally, the report discusses a number of viewpoints about the future of the event and consumer travel exhibitions in general.

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1. Introduction

Over the last fifteen years the Internet has expanded enormously. In 2000, there were only 360 million people around the globe who used the Internet (Internet World Stats, 2016a). When considering that the world population at that time was 6.1 billion, this results in a penetration rate of just 5.9% (U.S. Census Bureau, n.d.). The total amount of Internet users has increased to more than 3.6 billion in 2016, which means that the current penetration rate has grown to 49.2% (Internet World Stats, 2016a). Especially in countries of the global north the Internet has become an important part of people's lives. This can be illustrated by the fact that countries such as the United Kingdom, the Netherlands and Germany all have penetration rates of around 90% (Internet World Stats, 2015b). This increase of Internet usage has resulted in changes in the tourism sector. The Internet has gained popularity among consumers as a medium for planning and booking holidays (Buhalis & Law, 2008). In 2013, 25% ($590 billion) of all travel related sales worldwide were made online and this is expected to continue to increase in the years to come (Euromonitor International, 2014). In Europe, 52% of all internet users have used the Internet to purchase travel products in 2015 (Eurostat, 2015). In comparison, seven years earlier in 2008 this was just 21% (Eurostat, 2013). Countries with high Internet penetration rates such as the United Kingdom (63%), the Netherlands (63%) and Norway (71%) have many more consumers that purchase travel products online (Eurostat, 2015).

These developments have not gone unnoticed in research within the academic field of tourism. According to several authors, the Internet has made consumers less dependent on traditional offline intermediaries, such as tour operators and travel agents, in their decision-making and information search about destinations (Hjalager, 2007; Jacobsen & Munar, 2012). Previously, tourists relied on these traditional intermediaries to get access to the products offered by suppliers (Law, Leung, Lo, Leung, & Fong, 2015; Del Chiappa, 2013). The Internet has enabled the concept of disintermediation, which entails the elimination of middlemen, because it empowers consumers to select, customize and buy tourism products (Buhalis & Law, 2008; Del Chiappa, Alarcón-del-Amo, & Lorenzo-Romero, 2015). This is supported by Del Chiappa & Zara (2015), who mention that a large portion of European tourists look for information online and also purchase their trips online. Several scholars argue that because of this the role of traditional intermediaries is diminishing because tourists can now engage directly with suppliers (Buhalis & Law, 2008; Del Chiappa, 2013; Papathanassis & Knolle, 2011).

Traditional offline intermediaries, however, are still often valued for a number of reasons. First, it is argued that consumers appreciate the human interaction that traditional intermediaries can offer (Law et al., 2015). According to Cheyne, Downes & Legg (2006) they can offer a service which is more personalized than the Internet. Furthermore, traditional intermediaries are able to provide better service than online alternatives, in particular when consumers are looking for complicated travel products (Cheyne et al., 2006). Law et al. (2015) state that they are valued because they have professional knowledge to match customers' needs. Finally, traditional intermediaries are still often preferred because consumers are concerned about issues such as online security, privacy and information overload on the Internet (Law et al., 2015).

Nevertheless, many traditional intermediaries have expanded their presence on the Internet and many are now offering their services online (Law et al., 2015; Buhalis & Law, 2008; Jacobsen & Munar, 2012). According to Law et al. (2015) they have to integrate the Internet into their

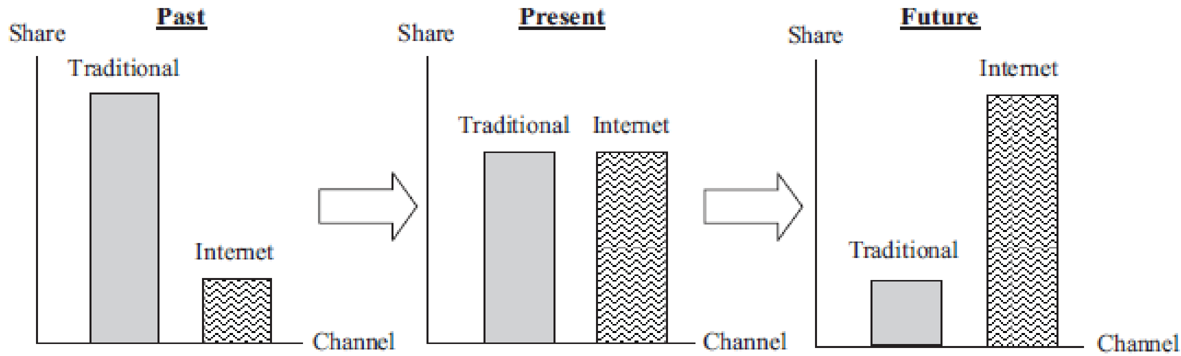

Figure 1: Transformation of the share of hotel and travel reservations (past, present and future) (Law et al., 2015)

marketing strategies in order to stay competitive. As can be seen in Figure 1, the importance of online intermediaries has increased, according to Law et al. (2015), in comparison to traditional intermediaries. Law et al. (2015) argue that this trend towards a further decline of the role of traditional offline intermediaries will continue in the future because of the advantages of online distribution channels. Offline distribution channels, such as agencies of intermediaries in shopping streets, are therefore expected to decrease in numbers (Del Chiappa et al., 2015). Several newspapers and news sites have devoted articles in the past decade to this development (Stil, 2014; West, 2014). The United Kingdom experienced an increase of 45% of travel agent closures in 2014 and it is reported that high street offices are suffering from the proliferation of online alternatives (West, 2014). A Dutch newspaper, furthermore, reported that the commercial director of one of the largest Dutch tour operators expects that 50% of all offices of intermediaries where consumers can acquire information and book their holiday will close in the next years (Stil, 2014). Additionally, the French Association of Tour Operators/Travel Agencies (CETO) reported in 2011 a significant decrease in offline intermediation. They stated that the amount of French travelers that used offline travel agencies for planning overseas travel dropped from 63% in 2006 to 45% in 2011 (Prayag & Del Chiappa, 2014). Also, Italy experienced the bankruptcy of 2,000 traditional travel agencies between 2010 and 2012, which brought the total number of high street travel agencies to 12.000 (Del Chiappa et al., 2015). And finally, in terms of information search, the amount of tourists who visited Spain and have used the Internet to plan their visit went up from 25% in 2002 (IET, 2002) to 65% in 2012 (IET, 2012).

Hence, both from academic literature as well as from practice it seems that the physical presence of traditional intermediaries, such as travel agents and tour operators, is decreasing due to the development of the Internet. There is, however, one specific type of face to face interaction between intermediaries and consumers that continues to be popular. Every year, several hundred thousand people attend consumer travel exhibitions (CTEs) all around Europe. Consumers pay around 10 euro to enter the exhibition and during the day they can acquire information and buy travel products at exhibitors' stands (ITB Berlin, n.d.). Some of the biggest exhibitions include: ITB Berlin with 60,000 consumers in 2015 (ITB Berlin, 2015), FITUR Madrid with 97.467 consumers in 2015 (IFEMA, 2015), EMITT Istanbul with 77.750 consumers in 2015 (EMITT, n.d.) and the Dutch 'Vakantiebeurs' in Utrecht with 98.194 consumers in 2015 (Q. de Maat, personal communication, 21 July, 2015). As can be seen in Table 1, these CTEs have managed to retain more or less the visitor numbers that they had five years ago. Unfortunately, it was not possible to get access to data about earlier years. In order to understand the continued popularity of consumer travel exhibitions in an era of increased usage of the Internet for acquiring information and purchasing travel products, this research focusses on how these consumer travel exhibitions complement the use of other offline distribution channels and of the Internet the rest of the year.

Table 1: Visitor numbers of some consumer travel exhibitions in Europe

	2011	2012	2013	2014	2015
ITB Berlin[1]	±60.000	±60.000	±60.000	±60.000	±60.000
FITUR Madrid[2]	89.599	91.555	91.082	97.549	97.467
EMITT Istanbul[3]	61.000	71.000	72.100	73.500	77.750
Vakantiebeurs Utrecht[4]	101.428	111.274	87.253	98.717	98.194

This report combines existing knowledge about disintermediation in tourism due to the Internet with theories about participation motivations of visitors and exhibitors at CTEs. This combination has been incorporated in a theoretical framework that explores the added value of consumer travel exhibitions for both exhibitors and consumers. Semi-structured interviews were employed with companies that exhibit at the Vakantiebeurs in order to better understand how consumer travel exhibitions complement the use of other offline distribution channels and the Internet. The

[1] All data for ITB Berlin were obtained through their official website and through news articles at http://www.hospitalitynet.org
[2] All data for FITUR Madrid were obtained through personal communication with Pilar de la Calle on September 8, 2015.
[3] All data for EMITT Istanbul were obtained through their official website: http://www.emittistanbul.com
[4] All data for the Vakantiebeurs were obtained through personal communication with Quint de Maat on July 21, 2015.

main objectives of this case study are, first, to add to the existing academic debate on disintermediation in tourism by studying an event where offline intermediation remains popular and, second, to contribute to existing knowledge about participation motivations at consumer travel exhibitions by examining the influence of the Internet on these events.

1.1. Problem statement

Intermediation in tourism occurs when an organization, such as a tour operator, is used by consumers and/or the supplier of the travel product to act as a middleman on their behalf. Disintermediation involves a decreasing use of intermediaries due to more direct interaction between consumers and product suppliers. Although many scholars have studied the concept of intermediation in tourism in relation to the development of the Internet, the focus has been on case studies that illustrate the decreasing popularity of traditional, offline intermediation and the increasing popularity of online alternatives (e.g. Grønflaten, 2009; Ginanneschi, 2014). Recent research into examples that seem to embody the continued demand for offline intermediation is lacking. In order to create a better understanding of the concept of intermediation in tourism it is vital to include research about the sustained popularity of offline intermediation. Also, to my knowledge, there have not been any case studies within intermediation literature that were conducted in the Netherlands. Therefore, this research contributes to the existing body of knowledge on the disintermediation debate in tourism studies by analyzing a Dutch consumer travel exhibition as an event where offline intermediation continues to be popular.

Additionally, there has also been a general lack of recent research from the perspective of companies. Most scholars have tried to contribute to the disintermediation debate by studying the viewpoints of consumers. Law et al. (2015) was the first, and to my knowledge the only one, in recent years to study the concept of disintermediation from the perspective of companies. Many companies have been active in the tourism industry for an extended period and subsequently have consciously experienced the proliferation of the use of the Internet as a platform for consumers to plan and book holidays. They are therefore a good source of information when it comes to the subject of this thesis.

Finally, research into consumer travel exhibitions has been scarce. There are some scholars who have studied participation motivations, but none of them has incorporated the influence of the Internet. There is however significant importance to this issue because the Internet could affect consumer travel exhibitions. Rittichainuwat & Mair (2012) argue that information search and purchasing travel products are important reasons why consumers visit these travel exhibitions. As I have mentioned before, the Internet has become increasingly popular for these purposes and therefore it is a potential threat for offline intermediation events such as consumer travel exhibitions. Hence, it is important for exhibition organizers to know more about the influence of the Internet on participation motivations of both exhibitors and consumers. Also, a better understanding of tourist information search and purchase behavior in general can benefit tourism businesses’ marketing communication with potential customers (Grønflaten, 2009).

1.2. Research objectives and questions

The main objective of this research is to explore why offline intermediation through consumer travel exhibitions has continued to be popular in an era of increased usage of the Internet for planning and booking holidays. In order to achieve this, a case study is used to understand how consumer travel exhibitions complement the use of other offline distribution channels and of the Internet the rest of the year. The case study focusses on identifying the specific strengths of the Vakantiebeurs compared to other channels, on examining whether and how participation motivations of exhibitors and visitors of the Vakantiebeurs have changed due to online channels and finally on exploring the future of the Vakantiebeurs as a popular information and distribution channel.

Main research question: How does the Vakantiebeurs complement the use of other offline distribution channels and of the Internet for booking and planning holidays the rest of the year?

Sub-Question 1: Which strengths does the Vakantiebeurs possess that other distribution channels do not offer or offer less?

Sub-Question 2: How did participation motivations of consumers and exhibitors at the Vakantiebeurs change due to the proliferation of online distribution channels?

Sub-Question 3: In what way will the Vakantiebeurs be able to continue to serve as a complementing information and distribution channel, in light of the growing use of the internet and other technologies, in the future as it does today?

1.3. Structure of this thesis

The report is built up in the following way. In this chapter, chapter one, the report was initiated through an introduction, a problem statement, research objectives and questions. The chapter will end by introducing the main characteristics of the Vakantiebeurs, which will serve as valuable background information for the report. The next chapter, chapter two, introduces and elaborates the theoretical framework that, among others, contains the topics of participation motivations of CTEs and the disintermediation debate. This chapter explores existing knowledge and serves as the theoretical backbone of the report. Chapter three explains the methodology of the research; which methods were used to collect and analyze data, what was the sample and how was it derived? In chapter four the results of the research are extensively elaborated through six main sections. Chapter five, the discussion, focusses on answering the research questions and aims to connect the theoretical framework with the results of this research. This chapter also includes some remarks about the theoretical and managerial implications, and some recommendations.

1.4. The Vakantiebeurs

This section explores the Vakantiebeurs, mostly in terms of its visitors and exhibitors. Some basic statistics are provided in order to understand the event and a detailed analysis of the exhibition map allows this research to reflect on certain topics which were brought up during the semi-structured interviews. Hence, the purpose of this section is to provide the reader of this report with some valuable background information which will be referred back to in the results and discussion chapters.

The Vakantiebeurs is an annual event in the city of Utrecht, which is located very centrally in the Netherlands. The location of the exhibition, the Jaarbeurs, hosts numerous other big exhibitions and events throughout the year. The event is organized by an organization called 'Jaarbeurs' and in the remainder of this report they will be called 'the organization of the event/Vakantiebeurs'. For five days in mid-January, the venue is used for the Vakantiebeurs and during these days the event attracts around 100.000 consumer visitors (Q. de Maat, personal communication, July 21, 2015). In addition to the visitors there are more than 1.200 exhibitors who are spread out over almost 70.000 square meters and 9 halls (Vakantiebeurs, 2014; Vakantiebeurs, 2016a). Exhibitors can buy one of the predetermined stand locations, which vary greatly in size (the smallest booth fits 340 times in the largest booth according to the exhibition map). During the event, visitors walk through the halls and they can engage in all sorts of activities. If they want more information about a particular destination, product or organization they can go to one of the booths and ask the exhibitor. In many cases the exhibitor tries to tempt the visitor towards the booth, for example by food, music or by providing an interesting activity. Besides the booths of exhibitors there are also numerous places to eat and drink, and other facilities such as toilets and seating areas. This section will continue by giving more detailed information about the Vakantiebeurs and it will be structured through two main themes: exhibitors and visitors.

1.4.1. Exhibitors

Figure 2: Map of the Vakantiebeurs (Vakantiebeurs, 2016c)

If you look at the map (Figure 2), you can see how the different halls of the exhibition are essentially grouped in two major clusters, separated by the grey hallway. The right side of the venue represents everything outside of Europe and it consists of hall 2 (Africa), hall 3 (North and Central America) and hall 4 (South America, Asia, the Caribbean and Oceania). The left side represents the different regions of Europe and it consists of hall 7 and 8 (Southern Europe), hall 9 (Germany, Austria and Switzerland), hall 10 (Eastern and Northern Europe) and hall 11 (Italy, France and Belgium). Hall 7 also has a big section which is designated for booths related to foreign food. And finally, hall 12 is entirely used for the theme of camping, a space where people can find information about camping vehicles and camping in general. Across the halls there are also some themed spaces with booths, such as the cruise area, the hike and bike area and the world aid market, where products from developing countries are sold for ‘fair’ prices.

Furthermore, there is a significant difference between the amount of large tour operators which mainly offer European holidays and tour operators which mainly focus on global destinations outside of Europe. Table 2 shows the nine biggest tour operators (in terms of the amount of consumers) for both European and global destinations.. The table clearly shows that it is very common for the large tour operators in the market for global holidays to be present at the

Vakantiebeurs, while only a few of the large tour operators offering European holidays were present at the Vakantiebeurs that year. It must be said that Arke and Holland International are part of TUI Group which actually was present at the Vakantiebeurs. However, it is not clear whether the brands of Arke and Holland International were being promoted at the stand of TUI. This insight will be valuable later on in this report when it is discussed that participants of this research speak about the complexity of travel products at the Vakantiebeurs.

Table 2: Biggest tour operators (based on number of customers) for European and global destinations and their presence at the Vakantiebeurs in 2014

Europe		Global	
Name	Vakantiebeurs 2014?	Name	Vakantiebeurs 2014?
Arke	No	Kras	Yes
Holland International	No	Fox Reizen	Yes
Bookit	No	Tenzing Travel	Yes
Thomas Cook	No	Riskja Travel	Yes
Corendon	Yes	333 Travel	Yes
@Leisure	No	ITG Companies	Yes
Sundio Group	No	Djoser	Yes
Vacansoleil	No	Jan Doets	No
Vacanceselect	Yes	Sawadee	Yes

Source: The list is based on data from the Dutch 'Travmagazine' of 2014 and data about the participation of exhibitors from the Vakantiebeurs (Travmagazine, 2015; Vakantiebeurs, 2014)

The exhibition accommodates several different types of exhibitors. In order to get some insight into the composition of the Vakantiebeurs in these terms, an analysis was done. This analysis classified each company according to a number of categories, which are explained in the methodology section of this report.

The analysis showed that tour operators, direct sellers and destination management organizations are almost equally present at the exhibition in terms of the number of exhibitors. Destination management organizations accounted for 31%, tour operators for 28% and direct sellers for 26% in 2014. However, it is important to note that these statistics only offer one way of looking at the Vakantiebeurs. In order to get a better picture of the exhibitors at the event it is necessary to consider two other variables: booth size and booth sharing. As mentioned before, some stand locations are much bigger than others and this greatly affects the visibility of the organization. Additionally, the price of a stand depends on its size and therefore booth size shows what kind of organizations are willing and able to spend the most amount of money on the event. Besides the fact that some stand locations are much larger than others, it is also the case that exhibitors sometimes share a stand location with one, two or even 40 other organizations. This could be a national DMO which allows regional DMOs to exhibit at the stand, or a DMO which wants to offer visitors the opportunity to book a trip through a tour operator.

In order to give more insight into the variables of booth size and booth sharing, two more analyses were done. The analysis concerning booth sharing will be elaborated, before moving to the analysis of booth size.

Booth sharing

As explained in the methodology, a fifth category (combined) was added, which includes all stand locations shared by multiple organizations from different categories. In total, 92 (15%) of the 628 stand locations are shared by multiple organizations. These shared locations can include a wide range of different combinations of organizations. The most common clusters of organizations include multiple tour operators, tour operators with direct sellers, tour operators with national DMOs and tour operators with national DMOs and direct sellers.

Figure 3 shows how the categories are distributed between the halls.

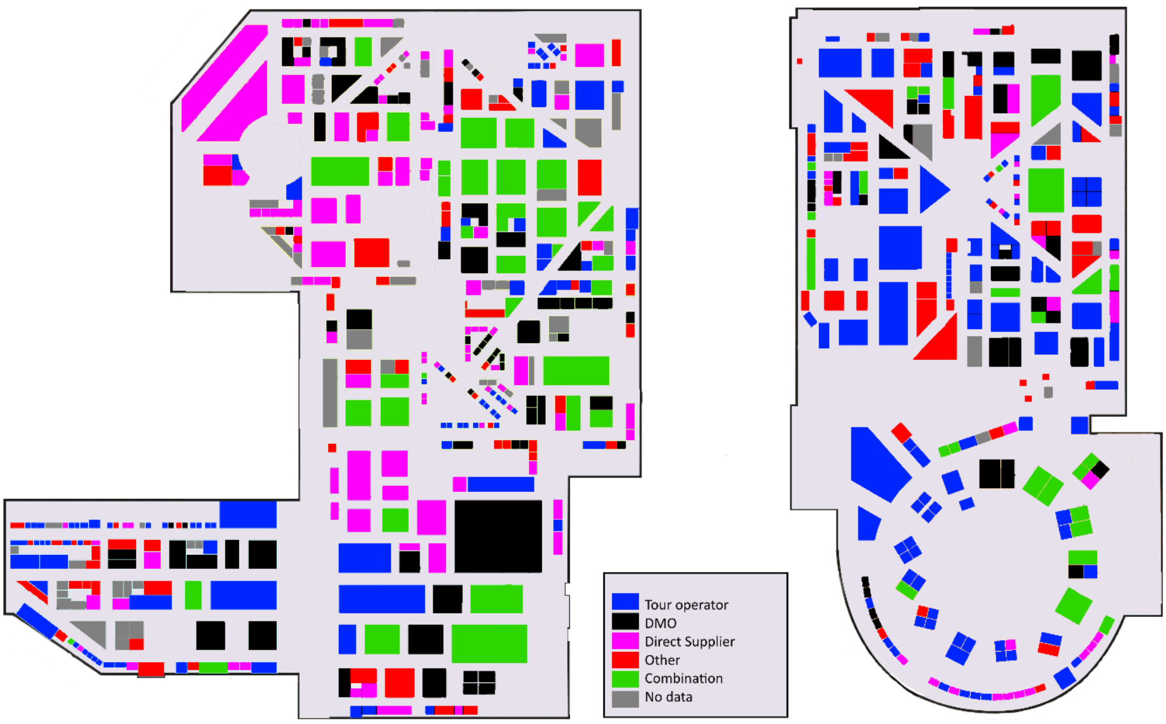

Figure 3: Exhibition map in terms of type of organizations at each stand location

The map suggests that there are significant differences between certain areas at the exhibition.

In order to explore this a bit further, a few figures were produced.

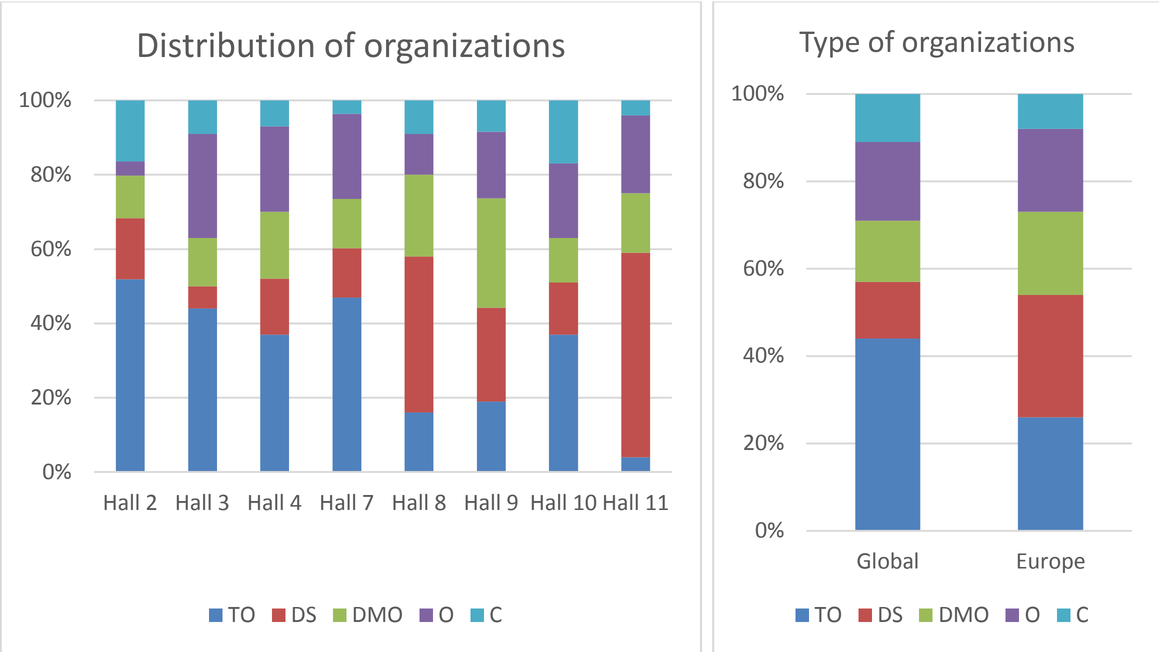

Figure 4: Distribution of organizations (left) and Type of organizations (right) at the Vakantiebeurs in 2014

Figure 4 indicates that there a much more tour operator booths in certain specific halls than in others. As mentioned before, halls 2, 3 and 4 focus on holidays outside of Europe. Figure 4 also shows that these halls have a much larger concentration of tour operator booths (44% opposed to 26%). Instead, the halls of Europe have much more direct seller booths (28% opposed to 13%), while the other categories are comparable. This seems to imply that visitors of the Vakantiebeurs are much more able to buy, or find information about, a complete holiday (transportation, overnight accommodation, etc.) when they are looking for destinations outside Europe. Instead, for European destinations there are much more direct suppliers which could mean that consumers have to put the different components of their trip together themselves. This could be explained by the fact that it is much easier to take care of your own transportation for a trip in Europe (e.g. own car or camping vehicle) than for a trip outside of Europe.

Booth size

As explained in the methodology, each stand location was assigned to one of the four different kinds of booth size: small, medium, large, very large. Figure 5 shows the relative amount of exhibitors for each exhibitor type, depending on the booth sizes. Tour operators are most present among the small stand locations, but their share decreases when booth size increases. The latter also applies to the categories of direct sellers and others. The figure also shows that the relative amount of DMOs and especially shared stands increases when booth size increases. The combined share of these two categories amounts for only 15% among small stands and 47% among very large stands. In the case of shared booths this could be explained by the fact that larger locations are more expensive, which causes a desire to share the costs with other exhibitors.

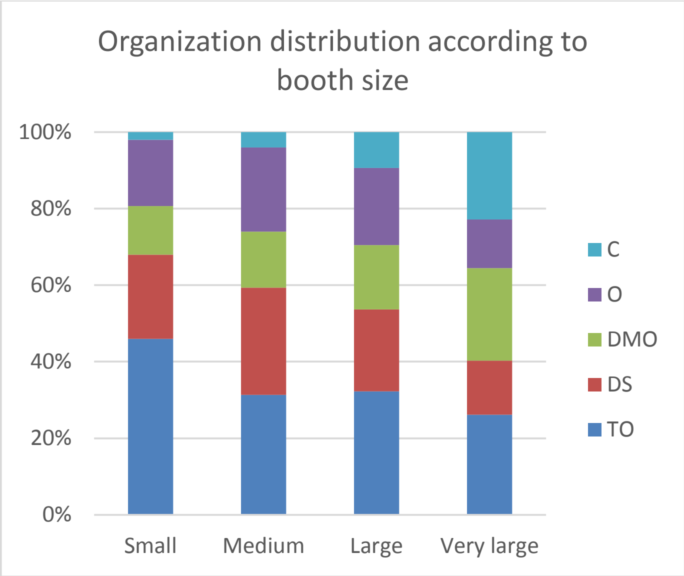

Figure 5: Organization distribution according to booth size

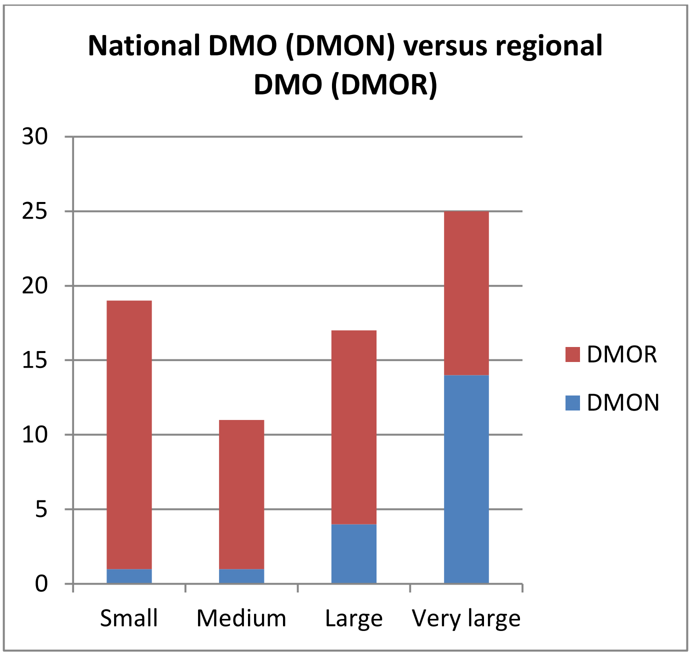

Figure 6: DMOR and DMON ratio

Figure 6 shows the ratio between the national DMOs and the regional DMOs. It clearly illustrates how the relative amount of national DMOs increases when the size of the booth also increases. This could be explained by the fact that larger booths are more expensive and national DMOs probably are more capable of paying those fees. Figure 5 gives a good overview of booth sizes for every category of exhibitor, but it does not show any potential differences between the European halls and global halls. In other to explore these differences a table was produced, which can be seen in Table 3. The red boxes represent the highest percentage in each column and the blue represent the second highest percentage. Tour operators are most present in the global halls, regardless of their booth size. In contrast, in the European halls they are only the biggest category among small booths. Direct sellers dominate the European halls among medium and large stands, while combined stands are by far the most popular among very large stands (42%). These combined stands in the European halls often include a large DMO of a particular country that allows regional DMOs to exhibit at a small part of the entire stand location. This insight shows that the European halls are dominated (62%) by very large stand locations owned by a combination of exhibitors or DMOs, while the global halls mostly accommodate tour operators in very large stand locations. The share of shared booths increase in both European and global halls, but it seems to be the case that exhibitors in the global halls feel less of a need to share locations, and thereby costs, than exhibitors in European halls.

Table 3: Organization distribution in terms of booth size and destination

	Small		Medium		Large		Very large	
	Europe	Global	Europe	Global	Europe	Global	Europe	Global
TO	44%	49%	17%	46%	22%	42%	13%	42%
DA	23%	19%	35%	20%	33%	8%	16%	4%
DMO	16%	3%	14%	15%	19%	14%	20%	22%
O	14%	27%	31%	12%	16%	23%	8%	16%
C	3%	3%	3%	7%	10%	14%	42%	16%

Most important:

- Relatively more tour operators in global halls and relatively more direct sellers in European halls.
- Shared stands and DMOs increase when booth size increases. Tour operators, direct sellers and other organizations decrease when booth size increases.
- Tour operators especially present in small locations in European halls, while no significant difference among booth sizes in global halls.
- Shared stands especially popular in large stand locations in European halls.

1.4.2. Visitors

The organization of the Vakantiebeurs collects annual information about its visitors and presents this data in a yearly report. All the information in this section, unless stated otherwise, is based on their reports from 2013 to 2016 (Vakantiebeurs, 2013; Vakantiebeurs, 2014; Vakantiebeurs, 2015; Vakantiebeurs, 2016a). As can be seen from Table 4, the average age of Vakantiebeurs visitors is much higher than the average age of the Dutch population. This could be because young people have to work during the week and because elderly people have more free time to travel. Figure 7 shows the age composition of Vakantiebeurs visitors in 2014. The average visitor at the Vakantiebeurs also spends considerably more money on travel products than the average Dutch citizen (Table 4). Visitors come from all over the country, but they are mostly traveling from the provinces of Utrecht, Gelderland, Noord Brabant, Noord Holland and Zuid Holland. The main motivation for visitors is to collect information about possible travel destinations and products (mentioned by 70% of all visitors). The event is also considered to be a source of entertainment by 47% of the visitors in 2016 (43% in 2014, 45% in 2015), while only 4% of the visitors state that they want to book a holiday at the Vakantiebeurs. Table 5 shows that the Vakantiebeurs attracts relatively many visitors who aim to travel to destinations outside of Europe. It is important to note that the data of the Vakantiebeurs shows some overlap as visitors were able to check multiple boxes. This can also be supported by the fact that 40% of all stand locations at the event are in the global halls while only 12% of all holidays in 2014 went outside of Europe (CBS, 2016a).

Table 4: Demographics of Vakantiebeurs visitors and the Dutch population

	Vakantiebeurs visitors (2016)	Dutch population
Average age	52 years old	41 years old (CBS, 2016b)
Average annual spenditure on travel	€3,376	€1,260 (NBTC-NIPO, 2015)

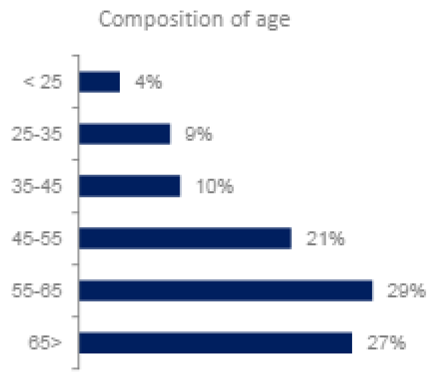

Figure 7: Age composition of visitors in 2014 (Vakantiebeurs, 2014)

Table 5: Travel destinations of Vakantiebeurs visitors and the Dutch population

	Vakantiebeurs visitors (orientation in 2016)		Dutch population (actual travel in 2014) (CBS, 2016c)	
Destinations	Europe	Outside Europe	Europe	Outside Europe
	68%	61%	88%	12%

2. Theoretical framework

2.1. Consumer travel exhibitions

There are several terms that are being used in academic literature to describe events where exhibitors promote tourism products or destinations. In order to avoid any confusion about the terminology in this thesis report I will use this subchapter to describe the different terms and their meaning in the remainder of this report.

The focus of my research will be on travel exhibitions which focus on bringing business and consumers together, a so-called business-to-consumer event (B2C). The term which is most often used in academic literature is a ‘consumer travel exhibition’ (CTE), which is defined by Rittichainuwat & Mair as *“open to the public to provide information and sell products directly to consumers” (2012, p. 1237)*. In contrast, trade shows are accessible only for customers and suppliers that have received an invitation (Rittichainuwat & Mair, 2012). Exhibitors at trade shows focus on other businesses, or ‘business-to-business’ (B2B). Finally, there is a third category which is a combination of the previous two categories. Rittichainuwat & Mair (2012) call this category ‘trade and consumer exhibitions’ or ‘trade and consumer shows’. Trade and consumers shows are open for business visitors during the first days of the show and open for consumers during the final days (Rittichainuwat & Mair, 2012). Table 6 illustrates the terms that I will use in the remainder of this report in order to make a clear distinction between these three categories.

Table 6: Definitions used in this report

Consumer travel exhibition (CTE)	Focus on providing information and selling directly to consumers (B2C)
Travel trade show	Open only for invited customers and suppliers (B2B)
Trade and consumer show	Combination of B2C and B2B

2.2. Existing research summary

To date, there are not many scientific articles written about consumer travel exhibitions (CTEs). Rittichainuwat & Mair (2012) examined the people’s main motivations for participating in CTEs and, because they are the only ones to study this subject until this date, it will serve as an important source of information for this thesis (Rittichainuwat & Mair, 2012). In the next subchapter, I will further elaborate their findings. The only other scientific article which has its main focus on consumer travel exhibitions studied non-industrial buyers’ consumption behaviour during exhibitions is Wong, Li, Peng, & Chen (2014). Wong et al. (2014) use the term 'tourism trade show', but in the article it becomes clear that they actually focus on B2C instead of B2B exhibitions. They found that being competitive in price and having a variety of promotional offers and products are the most effective ways to realize sales during CTEs (Wong et al., 2014). Contrary to what was expected the quality of service at the stands does not moderate visitors' buying processes. The most important contribution that Wong et al. (2014) potentially give to my study is that they argue that the *search for products* and *promotional deals* are the primary reasons for visitors to attend CTEs.

Besides these two sources, there are no scientific articles which focus their research on consumer travel exhibitions. There are, however, two studies on travel trade shows. Yuksel & Voola (2010) examined participation motivations of exhibitors at these events. Their findings will be further elaborated in the next subchapter. Additionally, Pizam (1990) evaluated the effectiveness of the travel trade show as a place to promote products and make sales. Finally, there are also two scientific articles which focus on trade and consumer shows. Kozak studied exhibitor objectives at these events in 2005 and visitor objectives in 2008 (Kozak, 2005; Kozak & Kayar, 2008). The next subchapter will discuss all the relevant information from these scholarly sources for my research into the complementing value of CTEs.

2.3. Participation motivations

2.3.1. Participation motivations of visitors

As mentioned before, there is not much research on why people attend consumer travel exhibitions. Rittichainuwat & Mair (2012) were the first and, to my knowledge, the only scholars to examine participation motivations of consumer travel exhibition visitors. In their research they identified a wide range of different reasons for consumers to participate in the CTE, which I will discuss briefly.

Firstly, they argue that people visit CTEs in order to get discounts and special promotions. This is closely connected to the second motivation of making an actual purchase of a product or service at the CTE. Both these activities are also mentioned by Wong et al. (2014). Besides motivations related to purchasing, Rittichainuwat & Mair (2012) also argue that people participate to acquire information. People use the exhibition to learn more about the products and services that they could potentially buy, and the destinations they could potentially visit in the near future. By doing this, the consumer reduces the dissonance between what is expected from the purchase and the actual experience of the purchase (Rittichainuwat & Mair, 2012). Tourism products are experiences and because of the intangibility of these services there is more perceived risk and uncertainty involved, and subsequently a bigger potential dissonance

(Elliott, Fu, & Speck, 2012). Furthermore, Rittichainuwat & Mair (2012) argue that visitors are looking to observe the companies that are selling travel products. All of these elements appear to be straightforward and unsurprising inclusions in the list of participation motivations of visitors at CTEs. They do not, however, seem to explain why people value CTEs because all of these activities can also be performed through other information and distribution channels.

Rittichainuwat & Mair (2012) also mention three visitor motivations that seem to be more specifically applicable to just CTEs. First, they argue that consumer travel exhibitions are able to distinguish themselves because they are able to offer a personal element (Rittichainuwat & Mair, 2012). Consumers can talk face-to-face with booth personnel about their travel wishes. Second, CTEs offer the opportunity to visitors to involve all their senses while searching for information and making purchases (Rittichainuwat & Mair, 2012). They can look at pictures of destinations, listen to music demonstrations, taste and smell food samples, and feel how it would feel at a certain destination through other stimuli. People enjoy receiving information in this way, because "it provides intrinsic gratification, arousal, and emotion" (Vogt & Fesenmaier, 1998, p. 559). Rittichainuwat & Mair (2012) call this experiential marketing and it is something that is hard to replicate through online channels. And third, they argue that consumers may "simply enjoy a visit to a consumer exhibition as a leisure experience – pleasant way to spend an afternoon" (Rittichainuwat & Mair, 2012, p. 1237).

Although Rittichainuwat & Mair (2012) have given some valuable insights into the factors that trigger people to visit consumer travel exhibitions, they do not clarify why people would consider a visit to CTEs as a leisure experience. Grønflaten explains it a bit more (not specifically related to travel) by stating that "research has shown that many consumers regard searching for and purchasing products offline as a source of enjoyment and an opportunity for social interaction" (2009, p. 3-4), but does not provide any further details. In order to find a more elaborated explanation about this potentially distinctive quality of consumer travel exhibitions, we have to turn to information search literature within tourism studies. Jacobsen & Munar (2012) discuss the leisure aspect of travel information search by stating that people sometimes continue their information search even when there is no functional benefit. They mention how Parrinello has emphasized that anticipation is a pivotal aspect of travel experiences, because it includes both the recollection of earlier enjoyment as well as the prospect of future events (Jacobsen & Munar, 2012). Information stimulates people to fantasize, imagine, and envision places that are real and can be visited (Vogt & Fesenmaier, 1998, p. 561). Jacobsen & Munar (2012) also argue that people might enjoy looking for travel-related information, such as looking at appealing photographs, because of aesthetic reasons. According to Vogt & Fesenmaier (1998), not all consumers who obtain travel-related information in fact visit or intend to visit the destination. They argue that consumer behaviour models have shortcomings, because they do not attach enough significance to the phenomenological, subjective, and emotional aspects of consumption. Consumers are not only looking for information because of functional reasons, they “may be satisfying other needs to entertain themselves, to share with others, to view pictures to familiarize themselves with places, or simply to satisfy their curiosity” (Vogt & Fesenmaier, 1998, p. 552). Vogt & Fesenmaier (1998) have identified five categories of needs related to travel information search and used them to expand the tourism information procession model. The five categories include functional, hedonic, innovation, aesthetic and sign. Hedonic, for example, considers how people can experience pleasure from prepurchase activities and product usage (Vogt & Fesenmaier, 1998). Existing literature regarding attendance motivations of consumer travel exhibition visitors barely considers other factors than the assumed functional benefits of a visit. These insights by Jacobsen & Munar (2012) and Vogt & Fesenmaier (1998) provide me with the opportunity to explore other visitor motivations and to expand the existing knowledge about CTEs.

2.3.2. Participation motivations of exhibitors

Similar to the literature about consumers’ attendance motivations, there is very limited existing knowledge about participation motivations of exhibitors. The only article which focusses on consumer travel exhibitions while also discussing exhibitors’ motivations (Rittichainuwat & Mair, 2012) argues that there are four important factors shaping why exhibitors value participation in CTEs. Exhibitors use the events to “establish brand image, address potential buyers’ needs, observe competitors and make direct sales” (Rittichainuwat & Mair, 2012, p. 1237). However, these claims originate from the literature review of the article, and the original source is in Polish which I therefore cannot verify. There has not been any empirical research done by scholars which focusses specifically on consumer travel exhibitions, so I have to turn to research in the two other categories: travel trade shows, and trade and consumer shows. Yuksel & Voola (2010) examined exhibitors’ motivations at travel trade shows and deny the importance of making direct sales at the exhibition. Instead, they found that the main reasons to participate are: “to improve relationships with customers and to understand their requirements, to influence demand via personalized and direct communication, and to create and/or maintain a product/service/country image” (Yuksel & Voola, 2010, p. 296). Kozak (2005) focussed on trade and consumer shows and agrees with the importance of comparing products and services with competitors. Additionally, she argues that enhancing the morale of company’s personnel and collecting information for marketing activities are important reasons for exhibitors to participate (Kozak, 2005). As these two empirical studies have not taken place in a consumer travel exhibition context, the conclusions should be used with some caution. I will use them in order to explore whether they are also applicable in the case of CTEs.

2.4. Disintermediation debate

Disintermediation is a concept not only extensively studied in tourism but also in many other commercial disciplines. Newspapers, movies, music, books and television are all examples of industries which were transformed due to the technological changes brought by the development of the Internet (Waldfogel & Reimers, 2015). It is argued that the new communicational possibilities have made producers better able to target their customers directly (Doherty & Ellis-Chadwick, 2010). Consequently, both producers and consumers would then benefit from these new interactions, which allow the removal of traditional intermediaries from the supply chain (Doherty & Ellis-Chadwick, 2010). Scholars in favour of disintermediation argue that the Internet is able to offer certain distinctive qualities in comparison to traditional physical channels (Wang, Song, & Yang, 2013). For example, Wang et al. (2013) elaborate how online channels offer a significantly wider selection of products than their so-called *brick-and-mortar* competitors in shopping streets. Therefore, offline channels are only able to compete when selling mainstream products, while online companies do not experience substantial competition from them in respect to niche products (Wang et al., 2013). Other examples of presumed advantages of the Internet are the reduction of time spend on browsing and purchasing products, and the lower prices associated with products offered online (Doherty & Ellis-Chadwick, 2010). As Schoenbachler & Gordon (2002) argue, consumers have gained a considerable power increase due to the Internet:

> “Consumers now have access to databases and tracking technologies that allow them knowledge about products, inventories, profit margin and competitive offerings. They are no longer at the mercy of retailers who set the rules and prices.” (Schoenbachler & Gordon, 2002, p. 44)

However, some scholars argue that the benefits of the Internet have been largely overblown and exaggerated. They might exist, but arguments in favour of the Internet taking over the retail arena do not consider some valuable qualities of brick-and-mortar enterprises (Keen, Wetzels, de Ruyter, & Feinberg, 2004). Shopping street shops were believed to diminish greatly in number, but they have largely survived despite increased competition from online alternatives (Doherty & Ellis-Chadwick, 2010). Recently it has become increasingly clear that online channels are complementing already existing qualities of offline channels, instead of substituting their services (Schoenbachler & Gordon, 2002; Doherty & Ellis-Chadwick, 2010). Retailers are now offering their products and services through multiple channels, such as “physical stores, catalogues, call centres and e-commerce sites” (Doherty & Ellis-Chadwick, 2010, p. 951). Before zooming in on the specific aspects of the disintermediation debate within tourism and leisure, I want to illustrate how other industries relate to this debate.

2.4.1. Other industries

One of the industries that has greatly been affected by the introduction of online channels is books. According to Waldfogel & Reimers (2015), there have been two main consequences of digitization in the book industry. To start with, the opportunity to publish and distribute books digitally instead of on paper has reduced the production costs. And secondly, because of the Internet, authors are better able to promote their books to the public without the help of traditional intermediaries, such as publishing houses and bookstores (Waldfogel & Reimers, 2015). These two aspects are also two supposed advantages of online channels within the tourism industry, as I will further explain in the next subchapters. Related to the enhanced promotional possibilities that online channels offer authors, is the opportunity for readers to learn about new books from other sources than professional book reviews. As Waldfogel & Reimers (2015) argue, the Internet has allowed consumers to share opinions with each other at both retailer sites, such as Amazon, as well as non-vendor sites such as BookPage, AllReaders or Goodreads. This trend is not just present in the book industry but also very relevant in leisure and tourism.

Additionally, the influence of online channels has also been subject to debate within scientific literature about governmental issues. Pieterson, Teerling & Ebbers (2008) have examined whether people prefer online or offline channels to communicate with governmental agencies and found that many citizens still appreciate traditional service channels such as the telephone. They also explored the reasons behind this and concluded that offline channels are better in so-called MRT factors, which include personalization, language variety, multiple cues and immediacy of feedback. Online channels score higher on so-called TAM factors, which include ease of use and perceived usefulness (Pieterson et al., 2008). Similarly, Frambach, Roest & Krishnan (2007) found out that consumers also prefer offline channels when shopping for home mortgages, even though there are differences between individuals depending on their internet experience. They do also note that consumers might value offline channels greatly in this industry because home mortgages are complex products with high risk, which causes consumers to trust their own judgement less and instead prefer to rely on professional help at a consulting office (Frambach et al., 2007). I will now move to explain the disintermediation debate in tourism studies specifically, while referring back to other disciplines where possible.

2.4.2. Historical development of debate

The beginning of this century marked the introduction of the Internet as a force that started to significantly transform the tourism industry (Buhalis & Law, 2008). More and more consumers, especially in the global north, were making use of computers and their ability to connect with other computers all around the world. The Internet offered tourism companies the opportunity to reach out to potential consumers without being dependent on traditional intermediaries, such as travel agencies and tour operators, for marketing and distribution purposes. In the first years of the 21st century, this transformation gave an impulse to the debate regarding disintermediation in the tourism industry. Many scholars started to question the future role of traditional intermediaries due to the proliferation of internet use as a tool for information provision about, and distribution of, tourism products. For example, Ginanneschi (2014) found that the expansion of the Internet has caused a decline of the number of travel agencies in Italy. However, some other scholars argued that the Internet was not going to substitute the role of travel agencies and tour operators because consumers would continue to prefer them for a number of reasons. Bogdanovych, Berger, Simoff & Sierra (2006), for example, found that customers value the combination of both travel agents and online booking experiences. And Cheyne et al. (2006) studied which factors have an impact on travel consumer choices between using a travel agent and/or the Internet. Even though these two groups of scholars differed very much in how they envisioned the future of traditional intermediaries, they also had one thing in common. All of them portrayed the disintermediation debate as a choice between the Internet and the travel agent or tour operator. None thought about challenging this dichotomy until Grønflaten made his contribution to the debate in 2009.

2.4.3. Information sources & channels

In my opinion, Grønflaten (2009) made a very important improvement to the discussion by splitting it into two distinctive choices. He argued that disintermediation or intermediation is a choice between an information source and a choice between an information channel. The inducement for making this contribution was the fact that many travel agencies and tour operators were increasingly offering their services through the Internet (Grønflaten, 2009). Grønflaten (2009) argued therefore that the previous discussion of disintermediation as a choice between Internet and a traditional intermediary was outdated. The new conceptualization of disintermediation includes two choices, which I will briefly discuss further. First, Grønflaten (2009) argues that it is a choice between whether people use an intermediary, such as a travel agent or tour operator, or that they have direct contact with the service provider. Grønflaten (2009) called this a choice of information source, but it can also be used when discussing matters of distribution. Second, there is a decision to be made whether people want to use an online platform or an offline platform. Grønflaten (2009) named this a choice of information channel. The choice is again also applicable when discussing matters of distribution, but it is however important to realize that these are two distinct discussions. As Cheyne et al. (2006) argue, consumers can make extensive use of online information channels but still prefer the use of offline distribution channels for making the actual purchase.

Now that Grønflaten's conceptualization of the disintermediation debate is clear, I can also better illustrate why he thought that the 'old' debate was incorrect. Previously, scholars were arguing about whether consumers preferred the Internet - which is an information channel - or a travel agent - which is an information source. The problem with this conceptualization is that travel agents nowadays also offer their services online, which denies the two options of being distinctive (Schoenbachler & Gordon, 2002). The 'new' approach of Grønflaten to the disintermediation debate expands the discussion to four options (Table 7): 1) the consumer uses an intermediary through an online channel; 2) the consumer uses a service provider through an online channel; 3) the consumer uses an intermediary through an offline channel; and 4) the consumer uses a service provider through an offline channel. As mentioned before, the choice that consumers make can differ depending on what the purpose of that person is: information search or making a purchase. Also, it is worth mentioning that consumers often do not solely use one combination of channel and source. Instead, several scholars have found in several case studies that people combine multiple methods when looking for information about, and purchasing, travel products (Del Chiappa et al., 2015; Ho, Lin & Chen, 2012). Thus, Grønflaten has contributed to changing the disintermediation debate from a choice between a travel agent and the Internet to a more elaborated understanding of reality in which consumers combine different information and distribution channels and sources. I think that this has improved our knowledge of reality and therefore I will use his conceptualization of the disintermediation debate to build my research upon.

Table 7: Categorization according to Grønflaten (2009)

	Online	Offline
Intermediary	1	2
Service provider	4	3

2.4.4. Values of online and offline channels

In both the old and the new conceptualization of the debate scholars have tried to grasp why people prefer certain channels and sources. This has resulted in a wide range of already existing knowledge in tourism studies which can be used. As mentioned before, this research focusses on how the offline Vakantiebeurs event is a valued complement in the tourism industry and therefore the focal point of this study will be on the choice of information and distribution channels. The existing knowledge on the values of both offline and online information and distribution channels will be explored to understand why consumers value certain channels. As most scholars focus on experiences by consumers, this will also dominate the next pieces of text in terms of word count. However, where possible I will also use information from scientific sources about the preferences of companies. The complete exploration will serve as input for the data generation through semi-structured interviews and this will be further explained in the chapter about methodology. I will now start with an elaboration of the values of online channels and thereafter I will explore the values of offline channels.

Online channels

Even though Grønflaten argued that the disintermediation debate needs to be divided into two distinct choices, it should be noted that they are closely interconnected. This becomes clear when discussing the first of many advantages that online channels have over offline channels for information and product distribution. Many scholars argue that online channels have reduced the costs associated with information search and product distribution (e.g. Del Chiappa et al., 2015; Ho et al., 2012). For example, Cheyne et al. (2006) argue that online channels have made it possible for suppliers to bypass traditional intermediaries, such as travel agencies and tour operators, and subsequently sell their products directly to customers. In this case, the addition of a new choice of distribution channel (the Internet) assists and stimulates consumers to use other distribution sources (suppliers instead of intermediaries). The associated cost savings originate because of the elimination of the commission that intermediaries ask for their services. Consequently, companies can sell their products for lower prices because they are able to retain a bigger share of the revenue and through this consumers can also benefit. Internet prices are in many cases slightly lower than their offline counterparts, but this also depends on which website is used because online prices for the same product vary (Doherty & Ellis-Chadwick, 2010). Cheyne et al. (2006) did however not mention that many intermediaries also sell their products through the Internet (Law et al., 2015). Only when consumers buy directly from suppliers through the Internet cost savings can occur. When the customer uses the new distribution channel (the Internet) but still makes his or her purchase through the same distribution source (an intermediary) it will not necessarily lead to cost savings. Hence, all of this shows on the one hand that Grønflaten's argument (2009) for a new conceptualization of the disintermediation debate is helpful and on the other hand that the two elements resulting from his contribution are closely linked.

Besides the cost savings that arise in terms of product distribution, it is also argued that online channels reduce the costs associated with information search. Frias, Rodríguez & Castañeda (2008) state that the new options for obtaining information through the Internet stimulate people more to look for information than traditional media do, because of the potential cost savings.

However, none of the scholars who bring this argument to the table explain how the Internet reduces the costs of information search. It seems logical to assume that they are referring to the price of printed travel information such as guidebooks and maps, which can be substituted by freely available alternatives on the Internet. At this point, this is an assumption that will be further examined during field work.

The second advantage of online distribution and information channels that scholars argue for is the unbiased advice that online channels can offer (e.g. Law, 2009; Papathanassis & Knolle, 2011; Del Chiappa, 2013). Previously, consumers were much more limited in their access to travel related information. A common way to obtain information in an offline environment was to go to the office of a travel agent or tour operator. These intermediaries are, however, biased towards their suppliers and this affects which information they provide to customers (Del Chiappa et al., 2015). Research among online consumers in Hong Kong has shown that consumers consider intermediaries to be biased because they are business-minded and therefore attach more importance to their financial incentives than the interests of their customers (Law, 2009). Instead, these consumers indicated that they prefer to receive travel information from peer reviews at websites such as TripAdvisor and Foursquare (Papathanassis & Knolle, 2011). I believe that these alternative sources are not necessarily unbiased, but they are more independent from commercial interests than traditional intermediaries. Consumers normally do not have anything to gain from sharing information, while organizations like tour operators could manage the communication of information carefully in order to serve their interests. Before the development of the Internet, people could turn to word-of-mouth sources or to guidebooks and travel shows on television for alternative information. The Internet, however, has improved consumers' access to non-commercial content. In the first ten years of the twenty-first century consumers have made more use of electronic word-of-mouth and other Internet sources for acquiring travel information than before (Huang, Chou, & Lin, 2010). It has enhanced consumer power as people have access to more information and means, and are no longer at the mercy of retailers (Schoenbachler & Gordon, 2002). Consumers in countries with high internet participation are nowadays users and co-creators of websites with travel related content and this has attracted the attention of many scholars. At the end of this chapter I will further discuss the scientific views on this topic.

Besides these two advantages which are described in relative detail, scientific articles also mention several others without going into depth. Firstly, Ho et al. (2012) argue that online channels enhance the opportunity for people to compare different travel products. On the Internet you can easily look around at multiple intermediaries and suppliers, without having to visit every physical office of these companies. Secondly, Ho et al. (2012) also mention the 24-h accessibility as an advantage of online channels. Many offline channels restrict access to their opening hours but consumers can always make use of online information and distribution channels. Additionally, Cheyne et al. (2006) state that there is also more information available on online channels than on offline channels. Respondents of their research explained that they believed *“the Internet can be more convenient and can provide more extensive information than a travel agent”* (Cheyne et al., 2006, p. 51). Additionally, Buhalis (1998) argued that online channels empower the traveller by making it possible to create tailor-made products through online information and booking systems. Finally, scholars also mention two reasons why companies could prefer online channels for the distribution of their products. Firstly, because of the Internet suppliers are better able to sell their product without the help of intermediaries and therefore they can also retain a bigger share of their turnover (Buhalis, 1998). Secondly, because online channels especially enable small companies to promote their products among a big group of potential consumers for relatively low costs (Buhalis, 1998). Through the online technology these firms can increase their virtual size and subsequently their competitiveness (Buhalis, 1998).

Thus, scholars argue that online channels have a number of advantages over offline channels and these include the following. First, they argue that online channels allow for considerable cost savings for consumers in the stages of information search and product purchase. Second, they state that the Internet can offer more unbiased advice than offline channels. Furthermore, scholars mention a few other advantages: ease of product comparison, 24-h accessibility, more available information and the possibility to create tailor-made products. Finally, scholars also mention two advantages for companies: cost savings and the opportunity to increase their virtual size and competitiveness.

<u>Offline channels</u>

Besides the advantages of online channels there are also a lot of reasons that consumers still prefer offline information and distribution channels for their travel arrangements. First, scholars argue that many consumers worry about certain safety issues of online channels and therefore rather make use of offline channels. These safety concerns include on the one hand problems with electronic payment which consumers do not always trust (Del Chiappa & Zara, 2015). As Buhalis & Law (2008) argue, people might be reluctant to pay online and provide credit card information because of computer crimes in the past.

On the other hand, safety also includes concerns of consumers about security issues of online channels. According to Del Chiappa et al. (2015) people are hesitant to provide their personal information because they are worried that it is not safe. Wolfe, Hsu & Kang (2005) and Buhalis & Law (2008) argue that this is one of the main reasons why consumers are reluctant to use online channels for purchasing travel products. Offline channels, such as travel agencies in high streets, are better at managing the relationship of trust which is needed between them and the consumer (Del Chiappa et al., 2015). It is nevertheless expected that online consumption will continue to increase because online security will be improved by technological advancements (Wolfe et al., 2005).

Second, offline channels are deemed better than their online counterparts in providing a human touch and building a relationship with the customer (Del Chiappa et al., 2015). According to Cheyne et al. (2006) travel consumers in New Zealand value this relationship and the resulting bond of trust between the organization and the consumer. On the Internet it is much harder to realize the same relationship because there is no face-to-face interaction. Law et al. (2015) adds to this by stating that certain customer segments prefer this relationship more than other segments, such as *"organized tour travellers, business travellers, people with low income, senior citizens, people with low educational level and customers who buy complex travel products and services"* (Law et al., 2015, p. 435). The human touch of offline channels can also result in a personalized service offered by these companies, in which customers receive a product that is adjusted to their specific wishes and demands (Cheyne et al., 2006). According to Wolfe et al. (2005), online channels lack this personal service.

Furthermore, one other advantage of offline channels is that the chance of information overload is lower than with online channels, especially for people who are not very experienced with the internet. As I have explained earlier, one of the advantages of online channels is the large amount of available information. However, when the ability of a consumer to process all of this information is limited then it could result in a so-called information overload (Del Chiappa et al., 2015; Frias et al., 2008). One of the main qualities that offline channels, such as guidebooks and traditional intermediaries, possess is the ability to collect, arrange and communicate large amounts of travel information (Frias et al., 2008). Several scholars briefly mention that offline channels are more suitable, because they are less time-consuming (Del Chiappa et al., 2015; Wolfe et al., 2005).

Finally, scholars briefly mention one other advantage of offline channels. Cheyne et al. (2006) argue that online channels are less able to provide good service to customers. They state that offline channels provide better service, especially with complex travel arrangements, answering questions and handling problems (Cheyne et al., 2006). Cheyne et al. (2006) employed interviews and found that respondents were more comfortable to use the Internet for countries where they had been before or where the main language is English than for new and more exotic destinations. Frambach et al. (2007) add to this by stating that "potential losses may be more evident in case of purchasing a complex service" (2007, p. 36) and therefore consumers might prefer offline channels especially when making complex travel arrangements.

To conclude, academics state that offline channels still have a number of advantages over online channels. First, they argue that consumers are concerned about several safety issues when using online channels. Second, consumers appreciate the human touch and personalized service that offline channels can offer them. Third, scholars argue that the large amount of information at online channels could result in an information overload for consumers. One of the main qualities of offline channels is to manage this and provide consumers with exactly the amount and type of information they need. Lastly, it is also argued that offline channels provide better service to customers than their online counterparts.

Even though the summarized advantages for both online and offline channels might be valid at this moment in time, it raises some questions for the near future as the world is complex and ever-changing. Scholars especially question whether the supposed advantages of offline channels will continue to be relevant in the years to come. In order to better understand why consumers would use offline or online channels and how this might change in the near future, I will now continue to discuss why scholars question some of the previously mentioned advantages of offline channels. Subsequently, I will discuss how scholars see the future of online and offline channels in the tourism industry. Will offline and online channels continue to exist and complement each other, or will the use of offline channels further diminish or eventually even disappear?

One of the proposed advantages of offline channels in tourism is the human touch that face-to-face interactions can offer. There is, however, a recent development on the Internet which scholars believe can substitute the personal contact of offline channels. In the last decade numerous websites have arisen on which people can share their travel experiences with others. Ho et al. (2012) call these networks of travellers *'Virtual travel communities'* (VTCs) and argue that technological advancements have enabled the emergence of social media as a place for the distribution of travel information. People post pictures and videos of their holidays on Facebook, write reviews of visited accommodations on TripAdvisor and share their travel experiences through blogs on a wide range of websites. This new source of travel information is called User-Generated Content (Del Chiappa, 2013), Web 2.0 (Buhalis & Law, 2008), Travel 2.0 (Buhalis & Law, 2008) or electronic word of mouth (Huang et al., 2010). For the remainder of this thesis, I will use the term User-Generated Content (UGC)

Scholars acknowledge the significance that these information sources already have and argue that User-Generated Content will further increase its influence in tourism (Buhalis & Law, 2008; Ho et al., 2012). Papathanassis & Knolle explain that these information channels have the potential to offer consumers an alternative to the *"personal contact and individualised consultation" (2011, p. 216).* Research in 2013 by Del Chiappa showed that 31% of his sample of Italian tourists stated that UGC has had an influence on their travel decision-making (Del

Chiappa, 2013). Within the total sample he differentiated between three groups, based on how often they purchase travel products online. Among consumers who indicated that they frequently buy online, 50% says that UGC influenced their decision-making while only 27% said the same among occasional buyers (Del Chiappa, 2013). Hence, this shows that the propensity to use UGC increases with the use of online channels for purchasing travel products (Del Chiappa, 2013). At the same time, online travel related sales are expected to further increase in the years to come so consequently the same can be hypothesized about the use of UGC (Euromonitor International, 2014).

Besides their value of being a substitute for face-to-face interaction, UGC also offers consumers better access to unbiased travel information (Buhalis & Law, 2008). People indicate that they consider UGC sources more likely to change their travel decisions than information from suppliers and intermediaries because it is “more credible and trustworthy than market-provided information” (Del Chiappa, 2013, p. 56). Authors looking at other sectors have also dedicated scientific articles to this trend. Doherty & Ellis-Chadwick, for example, state that “word of mouth has greater impact on product judgements, attitude formation, and decision making than formal marketing communications” (2010, p. 956). Consumers in the book industry are sharing opinions on sites such as Amazon and Goodreads, which transforms the accessibility of book reviews (Waldfogel & Reimers, 2015). People are currently increasingly making use of online channels to share experiences and this will have great effect on the modern consumers’ shopping behaviour (Doherty & Ellis-Chadwick, 2010). It is therefore questionable whether the human touch of offline distribution and information channels will remain one of the reasons why consumers prefer them over online channels in the future. In order to better understand this potential development, it is necessary to further examine it in future scientific research.

2.5. Debates about the future of online and offline channels

The proliferation of Internet use has caused significant changes in the distribution of tourism products and the information provision in the tourism industry. It can be said that scholars generally agree that significant changes will continue to take place in the near future. However, there is some discrepancy among academics about the future of offline and online channels. Some extensively highlight how certain current advantages of offline channels will further diminish in importance, because they believe online channels will be able to offer the same or comparable services. Others argue that online channels will never be able to fully substitute the experienced values that offline channels currently provide to consumers. They therefore presume that both channels will continue to exist and complement each other. I will now first discuss the latter in detail, before moving on to the former.

Complementing channels

Although Law et al. (2015) believe that the importance of offline channels will inevitably decline due to the increasing advantages of their online counterparts; they argue that both channels will remain prominent while complementing each other. Consumers also do not have to choose between the two, they can use multiple channels while planning and purchasing their trips (Ho et al., 2012). Del Chiappa et al. (2015) add to this by stating that it not an exclusive choice, because many tourists use online channels to browse for information while afterwards using an offline channel for making the actual purchase. The tendency among consumers to continue purchasing offline was also highlighted by Buhalis & Law (2008) in their review article about published articles on eTourism in the past 20 years, and by Cheyne et al. (2006) in their article about what influences the choice between a travel agent and the Internet. Finally, Del Chiappa & Zara (2015) argue that offline channels will continue to serve at least certain specific segments within the tourism industry because online channels are not sufficiently capable of offering the same assistance. Therefore, consumers will mix online and offline channels while searching for information and purchasing tourism products (Del Chiappa & Zara, 2015). There are, however, also numerous scholars who believe that online channels will be able to substitute the believed advantages of offline channels.

Diminishing advantages of offline channels

As mentioned in paragraph 2.4.4, security issues are one of the most important reasons why some consumers are hesitant to use online channels for purchasing travel products. Wolfe et al. (2005), however, also mention that they believe technological improvements will make significant improvements in online safety. These advancements could therefore weaken one of the advantages of offline channels; the greater experienced safety, and subsequently increase usage of online channels for tourism product distribution. Additionally, one other important reason why consumers do not use online channels for information and purchasing purposes is their limited experience with using online channels. For example, when a person does not know how to solicit required information from the huge amount of data which the Internet contains, information overload can occur (Frias et al., 2008). However, as consumers gain familiarity with online channels, their lack of experience will diminish and so will the chances of occurrence of information overload (Wolfe et al., 2005; Frias et al., 2008). The amount of people who have limited experience with the Internet slowly matures as young people, especially in the global north, are generally well educated in terms of information technology. This new generation uses online channels frequently and is therefore called the *Net generation* or *digital natives* (Jacobsen & Munar, 2012). Several scholars acknowledge that the propensity to use online channels for tourism purposes, either for purchasing products and looking for information, decreases with age. Wolfe et al., for example, found that "respondents who purchased travel accommodations from a travel agent or both an agent and online tended to be older, whereas the Internet group had a higher representation from the younger age categories" (2005, p. 57). Also, Del Chiappa & Zara (2015) argued that older people are more likely to use an offline channel than younger people. Hence, it seems like lack of experience with online channels slowly decreases and therefore information overload will also less often occur. Finally, it is also argued by scholars that the human touch of offline channels could become a less important distinctive quality as User-Generated Content can be a substitute at online channels.

Opinions about the future of online and offline channels differ among scholars. As shown, some believe offline channels have certain qualities which will retain their importance in the tourism industry. Others argue that these qualities will diminish due to developments and improvements in online channels. Both groups agree that the future will see further changes in how offline and online channels are being used in the tourism industry. It is therefore important to continue research into this subject.

3. Methodological framework

This chapter provides an elaborated explanation about my research design, data generation and data analysis. It discusses how particular methods and techniques form a systematic procedure through which my research aims to be transparent. At the end of this chapter there is a brief reflection of my role as a researcher in the production of knowledge. The focus of this chapter is mostly on the use of semi-structured interviews as the main method of data generation. However, some other data was also used during this research and this chapter starts by elaborating this.

3.1. Survey data and exhibitor characteristics

Each year the organization of the Vakantiebeurs employs surveys at the event in order to collect information about visitor characteristics such as age and annual travel expenditure. This data is used in the results and discussion chapters in order to reflect on particular topics which resulted from the interviews and the data was also used to describe what kind of consumers visit the Vakantiebeurs in chapter 1.4. Additionally, a small analysis was done in order to explore and describe what kind of exhibitors participate in the Vakantiebeurs. This analysis uses a list of exhibitors who participated in the 2015 edition of the Vakantiebeurs, published by the organization of the event. In order to collect data about exhibitor characteristics, each exhibitor was classified according to a number of categories, which will be explained briefly. Firstly, there are the companies who combine tour and travel components to create a package holiday. These organizations were labelled as ´tour operators´ (TO). Another category of organizations also sells products, but they focus more on one particular product or type of product. This includes, for example, hotel chains, airlines and websites for booking a camping. These organizations were labelled as ´direct sellers´ (DS). Thirdly, there is a category of organizations who promote a particular country, region or city. These organizations were labelled as ´destination management organizations´ (DMO). And finally, there is a wide range of other organizations who participate in the Vakantiebeurs, such as travel magazines, governmental agencies and catering companies. These companies were labelled as ´other´ (O). A quantitative analysis in Excel was performed in order to explore some general remarks about the event which were presented in chapter 1.4. In order to collect data about booth sharing each stand location was labelled. When the location only had one organization, the existing categories (TO, DMO, etc.) were used. When a location had multiple exhibitors it was labelled as ‘combination’ (C). In order to collect data about booth size each stand location was labelled according to four different sizes: small, medium, large and very large. In order to reduce the subjectivity of this categorization each category included 25% of the total number of stand locations. Hence, ‘small’ includes the smallest 25% of all stand locations and ‘very large’ includes the biggest 25%. The relative size of each stand location was based on the Vakantiebeurs map and a Photoshop programme was used to measure the size.

3.2. Research design

In the process of developing the methodological framework for this thesis, I have decided that qualitative research was the most appropriate given the research questions that need to be answered. Qualitative research allows me to uncover motives, experiences and thoughts which are necessary to learn more about the topics of this thesis. As Boeije argues, it allows participants to “describe the subject of study in their own words and to do so largely on their own conditions” (2010, p. 32). Qualitative research departs from the assumption that individuals actively produce social reality and therefore there are methods needed that can capture this process of social construction (Boeije, 2010). This is also in line with the foundations of interpretivist thinking, which considers the world as something that is “constructed, interpreted and experienced by people in their interactions with each other and with wider social systems” (Gorton, 2010). Knowledge is therefore something that cannot be obtained solely by observing, but should also aim to uncover subjective beliefs, values, reasons and understandings (Gorton, 2010).

Additionally, the flexible approach of qualitative research can serve studies that have an explorative nature, as is the case with my thesis (Boeije, 2010). There has not been much research done on my topic and qualitative methods can therefore offer the best means to answer the research questions. In qualitative research it is most common to work inductively, which means that a theory is developed through empirical patterns that are found by exploring a particular social phenomenon (Boeije, 2010). However, it is also possible to use existing theory in order to explore whether it applies to other places and contexts, as I did in my thesis (Boeije, 2010). As Gorton (2010) argues, theories can be useful but are sensitive to context because they are shaped by social and cultural circumstances.

3.3. Data generation

The main method that I have used to generate data is semi-structured interviews. This method enabled me to learn about experiences and perspectives of participants on a particular topic (Boeije, 2010). By predetermining the structure of the interview to some extent I was able to discuss relevant issues during the limited time available, but by also allowing participants to determine the course of the interview I aimed to solicit the information that they consider most relevant to discuss. This type of interview is called semi-structured and is often prepared by developing an interview guide (Boeije, 2010). Before I am going to present the interview guide and explain how I have developed it, I will elaborate my research sample.

The sample

Scholars in qualitative research often make use of purposive sampling, which is contrary to the most common way of sampling in quantitative sampling: random sampling. In purposive sampling you predetermine which characteristics your respondents should have in order to improve the suitability of your data (Boeije, 2010). Within purposive sampling there are two options that can be distinguished. First, one way of sampling is to select participants based on existing theories (Boeije, 2010). The other option is to use theoretical sampling, which aims to generate theory based on the data that is obtained (Boeije, 2010). My way of sampling was a combination of both. The population from which I got my sample are the companies in the Netherlands who run a travel-related business. There are a few reasons why I believe this is the best source of information to learn more about the subject of this thesis. First of all, companies are consciously working on their marketing strategies. Thus, they are considering whether to use offline and/or online channels, whether to participate in the Vakantiebeurs and how consumers can be targeted best in promotional campaigns. Second, many companies have been exhibiting for years at the Vakantiebeurs and therefore have been better able to notice changes. Finally, as Law et al. (2015) have argued, there is a general lack of research into the perspectives of companies on issues related to intermediation. The choice for only companies that are located in the Netherlands has been made because of money and time constraints.

My final sample included 19 companies and this section explains their characteristics and why they were selected. From the theory I deduced that people with complex travel plans often still very much appreciate the use of offline channels. Hence, in my sample I wanted at least some companies who offer these and also some companies who offer the opposite; pre-packaged holidays to countries that are very popular among the Dutch, such as France and Germany. By selecting both I aimed to explore whether the complexity of the trip influences the choice for offline or online channels. Table 8 shows the characteristics of my sample in terms of complexity through three different categories: high, medium and low complexity. This categorization is based on the complexity of the destinations and the type of trip (pre-packaged or customized). Furthermore, I intended to select a diverse sample of companies when it comes to their type of business (e.g. tour operator, direct seller, destination management organization) and their size. Unfortunately it was not possible to include direct sellers, such as hotels and airlines in my sample because these organizations normally are based in foreign countries. Finally, I wanted to have both companies that participated in the 2015 edition of the Vakantiebeurs and companies who did not. I believe that this gives a better understanding how the Vakantiebeurs complements other channels because it allowed me to explore why certain companies – maybe because they focus on certain customer segments – do not consider the Vakantiebeurs useful.

Table 8: Sample characteristics

Total sample: 19 companies	
Complexity	High complexity: 7 Medium complexity: 10 Low complexity: 2
Type of business	Tour operator: 16 DMO: 3
Participation Vakantiebeurs 2015	Yes: 17 (of which 2 companies had not participated very often) No: 2

The next step is to clarify how I got access to the desired participants. Companies who have participated in the 2015 edition of the Vakantiebeurs can be identified through the exhibition catalogue. The other companies will be selected from the website of the ANVR, which is the Dutch association for travel companies. After selecting potential participants, I wrote them an e-mail with a request to participate in my research. When they did not respond within a few days, I contacted them by phone. It is also important to elaborate how many participants were interviewed. As Boeije argues: “generally samples are not predetermined, and selection is sequential, interleaved with data collection and analysis”. The amount of respondents that I interviewed depended on many factors, such as: the extensiveness of their answers, their willingness to cooperate, my own time and space constraints, the diversity of their viewpoints and many more. Within these constraints I interviewed participants until I believed my data represented the wide range of perspectives, motives and experiences, and became saturated. Interviews were done in Dutch in order to improve the quality of the responses. After an agreement for an interview was reached with a potential participant they were asked where they would like to be interviewed. Most companies asked me to come to their office while a few wanted to meet at a public space. Each interview was record by means of an audio recording. The concepts and discussions raised in the theoretical framework were used to construct the interview guide, which can be seen in Appendix 1. Existing literature about participation motivations of consumers and exhibitors were derived from the literature and form the first sections. Concepts about the disintermediation debate and the future of online and offline channels were used to construct the last sections of the interview guide.

3.4. Data analysis

The final product of the data generation step is a set of recorded interviews which were transformed and analysed before they would become useful for answering the research questions. The purpose of this subchapter is therefore to elaborate the steps which needed to be taken in preparation for, and during, the data analysis. As Boeije argues, the data needs to "interpreted through the identification and coding of themes and categories leading to findings that can contribute to theoretical knowledge and practical use" (2010, p. 11)

In the process of inviting companies to participate, they were also asked whether they agreed the interview's audio would be recorded. This enabled me to document the conversation without having to worry about taking detailed notes during the interview (Boeije, 2010). Also, it improved the quality of the data and it allowed me to use literal quotes from participants in my report (Boeije, 2010). After every interview, the audio recordings were transformed into transcribed text. The name of the interviewee was replaced by a particular code which guarantees anonymity and retained important respondent characteristics at the same time. Appendix 3 shows the characteristics of each exhibitor and the attributed code, while at every quote it is mentioned which exhibitor mentioned that piece of information. As mentioned before, the interviews were held in Dutch and therefore the transcriptions were also in Dutch. In order to make the research transparent also for non-Dutch speakers, I subsequently translated the transcriptions into English. The resulting transcriptions are the material which was used during the data analysis.

The data analysis started by selecting relevant information from the transcriptions by means of open coding. In Boeije (2010), coding is understood as "categorizing segments of data with a short name that simultaneously summarizes and accounts for each piece of data" (Charmaz, in Boeije, 2010). The purpose is to systematically manage, interpret and categorize the data for further analysis (Boeije, 2010). The transcriptions were analysed and it was determined which fragments are relevant for answering my research questions. These fragments were assigned with a name that is appropriate for the fragment, a so-called code (Boeije, 2010). If fragments were found which have corresponding content then the same code is used. As Boeije (2010) argues, codes can be in vivo or constructed. If a code is derived from a concept that was found while reading the literature, it is called a constructed code (Boeije, 2010). Otherwise, the code directly results from the data provided by the respondents and this is called an in vivo code (Boeije, 2010). The end product of this phase of data analysis is two-fold: it includes a list of codes which were identified in the text and the interview transcriptions with coded fragments.

The next step of the data analysis was to transform the coded fragments from the interviews into clear-cut answers on the research questions. To achieve this, it was needed to see which codes give information about which research question. Thereafter, selected fragments within each research question were inspected for interesting similarities and/or differences. By doing this, an outline of the final answer became clear. The outline eventually served as a guide to write the extended answers to the research questions.

In order to improve the transparency of my research I included both the interview guide and the coding scheme in the Appendix. By showing this and not just presenting the end result I aim to make the research transparent. This justifies the choices that I am going to make and my line of reasoning (Boeije, 2010). This also helps to justify how I interpreted the generated data, as Boeije argues: “Findings of qualitative research always include interpretations of the empirical data. It is a mistake to consider raw data as findings. When you interpret someone’s words or actions, you explain what you think it means and how you think it should be understood” (2010, p. 94)

The choice of qualitative methods also has consequences for the validity of the research, because the person conducting the research is inevitably involved to a high degree the results will be influenced by his/her presence (Boeije, 2010). One possible outcome is called reactivity and involves respondents changing their behaviour or answers because of the presence of the researcher (Boeije, 2010). In my case, respondents could be hesitant to provide me with comprehensive information because they might fear they give information to competing companies. By making respondents anonymous I aim to reduce the effects of my presence as a researcher on the responses given. Additionally, the chosen methods determine what kind of knowledge is produced and therefore what kind of conclusions can be accounted for. Because I employ semi-structured interviews, the data already is an interpreted reality (how people say they experience reality) (Boeije, 2010). After the data analysis this turns into my interpretation of the interpreted reality.

4. Results

This chapter discusses the main findings from the interviews with exhibitors at the Vakantiebeurs. The focus during the interviews was to identify the most important reasons to participate in the event for both consumers and exhibitors. The findings about this topic are categorized according to four main themes, which shape the first four subchapters: *exchange of information*, *product distribution*, *face-to-face interactions* and *leisure experience*. Additionally, exhibitors were asked about the influence of the Internet on the event and the future of the Vakantiebeurs. The findings from these two topics shape the last two subchapters.

4.1. Exchange of information

The Vakantiebeurs is an event where there is communication of information between exhibitors and visitors. According to survey results 70% of all visitors consider ´acquiring information´ an important reason to visit the event (Vakantiebeurs, 2016). They are looking for information about destinations, products and companies. The exchange of information takes place by means of an interaction between an exhibitor and the visitor. The exhibitors use the Vakantiebeurs to communicate a particular brand or destination image to the visitors by means of verbal and non-verbal communication. The event is also used by exhibitors to address potential buyers´ needs through acquiring information about their travel wishes and demands. This subchapter discusses to what extent the participants of this research consider the different aspects of *exchange of information* important reasons for exhibitors and visitors to be at the Vakantiebeurs.

Participants in my research describe the Vakantiebeurs as an event where collecting information is one of the primary reasons for consumers to visit. It was usually seen as the most important, or otherwise among several important, reason(s). Participants were very detailed about their arguments concerning this topic and this allows me to go into depth while discussing it here. I have divided this category into some subcategories, in line with those different arguments. The subcategories are: orientation, goal-orientated questions/advice, comparison, complexity and information overload. The first two refer to the two types of consumers when they are at the Vakantiebeurs for acquiring information. According to several exhibitors consumers are either there for orientation because they have not yet decided about the destination, organization and product, or they are there for goal-orientated questions/advice because they have already made some choices about the destination, organization and/or product. The following quote illustrates this:

> "There are two types of customers. They have either already been orientating themselves and visit the Vakantiebeurs to acquire the last pieces of information and then say like: *well, now I have really spoken to everyone and now I can make my*

> *decision*. Those are the people who are going to travel this year. But there are also customers who start the exhibition like: *well, we want to go somewhere far away. Let's go the Vakantiebeurs in order to be informed*. Then slowly some idea will be formed and from there people will move on. And yes, it could be that the actual trip will take place in the following year." (Exhibitor L)

Comparing, complexity and information overload refer to the specific qualities of the Vakantiebeurs in comparison to other information channels. I will first elaborate about the two types of information search and thereafter I will discuss what exhibitors think about the added value of the Vakantiebeurs as a place where consumers can acquire information about products, destinations and organizations.

<u>Orientation</u>

According to participants in my research the Vakantiebeurs is packed with people who are at the exhibition to orientate themselves, mostly about which country or region could be the destination of their next trip. Consumers can use the Vakantiebeurs to look around and explore which destinations attract their attention. It does not necessarily have to lead to a trip in the current year, it could also be that people are orientating themselves for the next years. Also, participants stressed that orientation could also be about what kind organization or trip they want, instead of only about the destination, as can be seen from the following quote:

> "And I think that there are also people looking around who have a bucket list of ten or twenty destinations in their life where they still want to go. And they are walking around at the Vakantiebeurs like: *well, which destination appeals the most to us?* And they are still doubting between two or three destinations. That is not necessarily two or three destinations at one continent, it could differ from Thailand to Antarctica, South America or South Africa. And they are going to see like: *What are we going to do next year and why should we do it?* Or they have twenty destinations on their list, but they know they have money only for ten destinations in their life and they are going to see which destinations appeal the most. And of course, they do not travel necessarily this year or next year. That can take a few years." (Exhibitor G)

<u>Goal-orientated questions/advice</u>

The other type of consumer looking for information concerns the people who already have some idea about where they want to go on their holiday. Some of them already know the destination, but it could also be that they have a few countries in mind: "A lot of people know exactly where they want to go to and just want more information about that destination" (Exhibitor F).

Participants indicated that the Vakantiebeurs then serves as a location where those consumers can ask some questions in order to acquire specific information which could help them to make a final decision. Thus, this type of consumer is a bit more advanced in the booking process and wants to find more detailed information. This can be seen from the following quote:

> "Certain people have already been orientating and come to the Vakantiebeurs to get the last things straight, and to make comparisons like: *have I been correctly informed? And all of the experts are at the Vakantiebeurs, so I can get all of the information over there.* And those people will afterwards make a decision with which expert or organization they want to book a holiday." (Exhibitor L)

The advantage of going to the Vakantiebeurs is that they can ask direct questions at the counters and they can subsequently acquire personalized advice instead of general information. According to participants, these are the people who come straight to their counters with clear cut questions after orientating themselves before the event: "And yes, at such an exhibition you also have distribution of information in a whole different way. That interactive aspect, with specific answers to your questions. (...) You cannot get that from a brochure" (Exhibitor N). They stress that acquiring information through the Vakantiebeurs has advantages compared to other information channels:

> "For people who are really interested in the product it is really convenient that they.... well you see, if you are checking out a website you are thinking like: *oh, what do they really mean by this?* And now they are at a counter and they can ask you that question directly." (Exhibitor H)

<u>Comparisons</u>

Both orientation and goal-orientated questions/advice are things which could also be done through other information distribution channels than the Vakantiebeurs. In order to understand however why people choose to visit the Vakantiebeurs for these purposes, participants in my research mentioned that consumers value that they can use the exhibition as a place where they can make comparisons very easily. For example, they can compare products, destinations and organizations because all of them are right next to each other. Instead, when consumers would want to visit different organizations to achieve the same thing when the Vakantiebeurs is not taking place, they would have to travel all over the country, At the Vakantiebeurs all of the exhibitors can be seen in one day, so it offers a so-called one-stop shopping opportunity. This is illustrated by the following quote:

> "We notice that customers really visit… well, there are customers who look for a number of organizations before the Vakantiebeurs. They are already preparing like: I want to speak to those organizations and at that day I have them all together. Then I do not have to go to all the different places. I can talk to five organizations in one go, in one day." (Exhibitor L)

<u>Complexity</u>

Another specific quality of the Vakantiebeurs in this matter, according to participants, is related to the characteristics of the trips at offer. The complex character of destinations and products which certain consumers are interested in ensures that they value to acquire more information at a location such as the Vakantiebeurs. Participants in my research agree with the proposed assumption derived from literature that offline channels might be preferred by consumers when they have to deal with complex travel products or destinations (Law et al., 2015; Cheyne, et al., 2006; Frambach, et al., 2007). They believe the Vakantiebeurs gives those consumers an opportunity to deal with the experienced complexity: “The more complex the product, the further away it is, the more expensive it is, the more… yes, I can imagine that there arises more need to discuss the whole thing one-on-one” (Exhibitor G).

Participants in my research often mentioned the importance of complexity during interviews. They referred to different kind of aspects relating to complexity and I will discuss in detail why they think people would want to visit the Vakantiebeurs to deal with these complexity aspects. The aspects which were brought up by participants are: price, destination, type of trip and organization.

Firstly, participants in my research argued that holidays at the Vakantiebeurs are relatively expensive because most companies focus on exotic destinations and extraordinary trips. The Vakantiebeurs, in general, is not a venue where cheap holidays to mass tourism destinations are being promoted and sold. This was argued by several participants and it can be supported by the fact that 7 of the 9 biggest companies for relatively cheap, mass tourism holidays do not exhibit at the event (Travmagazine, 2015). Instead, many companies focus either on exotic destinations or offer more expensive and extraordinary holidays to relatively common destinations, as was argued in subchapter 1.4. Survey data from the Vakantiebeurs shows that visitors spent an average of €3.376 per person in 2015 (Vakantiebeurs, 2016a), while the average Dutch citizen spent only €1.260 per person in 2015 (NBTC-NIPO, 2015). The expensiveness would then induce a higher demand among consumers for more information. Because they are about to spend a lot of money, participants believe consumers will want to make sure that their money is well spent. This can be seen from the following quote:

> “And if you are going to book a trip to Spain or Turkey then I really can’t imagine that you are going to orientate yourself at the Vakantiebeurs. But if you are making a long haul trip with such a budget then I can imagine that you are going to look into it a bit further. When you consider that people who travel with two persons will need to spend seven or eight thousand euros… When you are going to buy a kitchen for the same amount of money then you will also go to all of the kitchen stores on a Saturday. So I think it is very self-evident that people visit the Vakantiebeurs because they want to see where they are going to spend all of their money. I am sometimes amazed that there are people who acquire one quotation and subsequently purchase and spend the money. Then I think: I would have orientated myself a bit more.” (Exhibitor B)

Secondly, it was indicated by participants in my research that consumers are concerned with acquiring a great deal of information because a lot of the destinations are unknown and exotic to those people. It was also suggested by the literature that people are less confident to use online information channels for destinations which they consider exotic (Cheyne et al., 2006). Participants often talk about Europe as being relatively familiar to most people, while destinations in other continents are in general considered to be exotic: "Yes, everything is a lot more thrilling. It is a different country, a different culture, different habits. You have to obtain vaccinations and pills. It is a lot scarier than when you just visit Spain" (Exhibitor B). It could also be that consumers are doubtful about the safety at a certain destination, for example because of recent war or disease, and therefore wish for more information. Participants in my research indicated that they can understand that consumers want to visit the Vakantiebeurs to learn more about those destinations instead of browsing themselves on the Internet. This can be seen from the following two quotes:

> "Especially with destinations which are quite new to people and Israel is always one of those. There are always who walk by and say like: *Ah Israel, that looks good. I really want to go there someday, but*… And then you always hear like: *yeah, but it is safe?* And then you can obviously talk about it. So that is very convenient and important." (Exhibitor F)

> "The interaction is just very important, especially for long haul trips. For Europe, I do not have the confidence to say anything about it. That is obviously a lot closer by and customers are a lot more familiar with those destinations. But for our long haul destinations… there are a lot of destinations which are very remote in the minds of people and they are a bit scared like: *yeah, imagine that something goes wrong, or imagine that I book the wrong hotels or that the car is not arranged… what about all this?* Those type of things, they want to have answers to those questions. And you can settle it through email, but it is a lot easier to speak face-to-face with the people." (Exhibitor L)

Thirdly, participants argued that consumers want more information because some people are about to go on a once in a lifetime trip. Subsequently, they want more information than when they are going on a trip which is the same as, or not very different from, the trip they take every year. Finally, some participants argued that people are looking for more information because they have to deal with organizations which are not familiar to them, as the following quote shows:

> "And of course, from friends and acquaintances you hear where they have booked but when you are searching for a trip to Africa you will come across numerous providers which you have never heard of. So that makes everything a lot more unfamiliar." (Exhibitor B)

<u>Information overload</u>

The final reason why participants in my research believe consumers value the Vakantiebeurs for acquiring information is because they think consumers suffer from information overload. As was argued in the literature, one of the biggest advantages of the Internet is the large amount of available information (Schoenbachler & Gordon, 2002). However, when the ability of a consumer to process all of this information is limited then it could result in a so-called information overload (Del Chiappa et al., 2015; Frias et al., 2008). This danger is relevant with respect to travel-related information, as can be seen from this quote:

> "Customers do check the Internet, but it is very hard to look for anything if you do not know what is possible, because there is so much information. There is so much, they are just not able to get through it. And one page says this, the other says something else." (Exhibitor L)

The abundance of information on the Internet and through other information channels could become too much for certain people and participants believe those people value it when they can go to the Vakantiebeurs and ask to be told about the things they need to know: "And because you are talking to three travel experts. Because of that you have a lot more information than when you would have been googling for one and a half hours" (Exhibitor H).

To conclude this section, participants in my research believe consumers visit the Vakantiebeurs in order to acquire information about destinations, products and companies. However, this exchange of information requires participation of exhibitors. During the interviews it was mentioned that exhibitors also use the event to exchange information through the communication of a particular brand or destination image. Every participant stated that the event allows them to be visible and traceable for consumers. When consumers are looking for a destination or an organization, the exhibitors want them to come across their name: "Yes, visibility. To be present in the orientation process of our travelers" (Exhibitor C). Several participants even argued that improving the brand awareness among potential consumers is the most important reason for them to participate in the Vakantiebeurs:

> "Yes, the main reason obviously is just to reach out to new people. That is really the main purpose. People are coming there [at the Vakantiebeurs] in order to look for a new holiday trip and that is why you are there." (Exhibitor O)

Some of them supported this argument by presenting a clear picture of how many of their customers became familiar with their brand thanks to their presence at the Vakantiebeurs. These numbers result from aftersales surveys and are used by exhibitors to evaluate the effectiveness of their Vakantiebeurs participation: "It is about 40%. I have checked it, because I also evaluate. 40% of our customers is being attracted through consumer travel exhibitions" (Exhibitor K).

However, most of them regard the exhibition as part of their general marketing policy and assume that it leads to a better brand awareness among consumers. Hence, this is often based on the feeling that participation is necessary and not backed by any knowledge and facts. Especially newly founded companies consider the Vakantiebeurs a good opportunity to make themselves known: “We were very small and nobody had ever heard of us, so we felt like: well, if we want to make a good start then we should go to the Vakantiebeurs” (Exhibitor N).

When participants were asked about the distinctive quality of the Vakantiebeurs compared to other offline events, they stressed the enormous size of the exhibition. The Vakantiebeurs is the biggest consumer travel exhibition in the Benelux and therefore allows companies to reach large numbers of potential clients in a relatively short period of time. Also, online marketing campaigns might offer the same opportunity, but the type of interaction with the consumer is of course very different. This will be further explained and illustrated in subchapter 4.3. The following quote stresses the importance of the size of the event:

> “Well, the Vakantiebeurs is of course a location where 100,000 people walk by in five days, from which maybe 5,000 are potential customers for Africa. And to have the opportunity to meet thousands of people a day who are potentially interested in your product, is very unique.” (Exhibitor B)

At the Vakantiebeurs companies are able to present their destination, product or brand to consumers. They can show them who they are and what they have to offer. Exhibitors argue that they can communicate a particular atmosphere by everything they do at the booth during the exhibition. They can create this atmosphere by making their stand location attractive through images, music and even smells. Additionally, the way how they approach potential customers and how they help them with questions will determine how the consumer perceives the destination, product or brand. The Vakantiebeurs allows them to give consumers an impression of how it would be when they book their holiday with that organization. The following quote illustrates this:

> “And we want to bring Greek people into the booth. So that creates a very nice cozy atmosphere, an experience within your booth which makes other people think like: *there is the Greek himself, over there [Greece} it is cozy, over there it is enjoyable.* And that is also the air which we want to exude.” (Exhibitor O)

While discussing the visibility of the organizations and the brand awareness among consumers several participants stressed the lack of this when they would not be at the Vakantiebeurs. They would then argue people would miss them when they would not be exhibiting at the event: “Yeah, I think that many people would miss us. We have noticed this with our other brand and I believe it would be even more with this organization. We would definitely get questions like: *why are you not here?*” (Exhibitor C). One organization even said they are participating because their competitors in the market are also there. For them, being absent while competing companies are presenting themselves to several tens of thousands of potential consumers is not an option:

> “Well look, the Vakantiebeurs is indeed just being present and making sure that people see your company when they walk around at the event. We are of course a

> pretty big player in the long-distance travel market. So we think people would consider us not being present as a deficiency." (Exhibitor C)

Finally, some participants would even argue that participation in the Vakantiebeurs event confirms the existence of their enterprise. If you are not there, then it must be because your company or destination is not doing well. According to the participants, consumers expect them to exhibit at the Vakantiebeurs and become suspicious if they suddenly do not see you anymore at the event. The following two quotes illustrate this from the perspective of a tour operator (first quote) and a DMO (second quote):

> "Yeah, then you sort of exist. You are there among all kinds of travel companies. You are immediately well-known among a big audience. That is it. A colleague (from a different company) of ours decided to drop out at a certain point in time and people would then ask us like: *Do they still exist?* So it is like: if you are not there, then you are not doing well." (Exhibitor N)

> "In August the situation in the country began to heat up again. And then you can tell them like: yeah, we are not coming to the Vakantiebeurs. But what do you show the audience by doing that? People might expect you at the exhibition. So, when it is a bit unstable in the country at the moment… do you show them that you are dropping out of the Vakantiebeurs and thereby telling them that they should not go?" (Exhibitor F)

Hence, all of the participants argued that the communication of their brand of destination image is one of the most important reasons to participate in the Vakantiebeurs. This exchange of information is communicated by the exhibitor and received by the visitor. However, there is another exchange of information happening at the event which goes the other way around: visitors express their travels wishes and demands.

Through the interviews it became clear that this subject has two dimensions. Firstly, it could refer to the Vakantiebeurs as a location where companies can get an impression of what kind of products consumers want. During the exhibition there is a lot of interaction between visitors and exhibitors in which the latter can listen to the wishes of the former and subsequently change their supply for next year accordingly. Thus, participation in the Vakantiebeurs can contribute to a product supply which better addresses the demand of potential buyers. After asking whether the company listens to the wishes of consumers during the Vakantiebeurs they replied: "Yes, certainly. It is very informative. Exhibitions, but also information days which we organize internally, are very important to stay up to date with the wishes of the travelers" (Exhibitor I). And the following quote illustrates how a company had its assumptions about the market challenged by the event:

> "Well, because for me it was also important to get an idea of what the market wants. So basically of what the customers are interested in. The fact is that we expected to sell a lot of group tours, but we noticed that we actually sold a lot custom-made products. By participating in the Vakantiebeurs we wanted to know what the Dutch tourist wants." (Exhibitor H)

Secondly, it could refer to the opportunity for exhibitors to meet in person with consumers and let them customize travel products on the spot. Many companies at the Vakantiebeurs focus mainly, or at least to a considerable extent, on customized travel products. It is therefore required to have some kind of interaction with the customers in order to obtain a clear picture of their wishes. Obviously, this can be done by telephone or e-mail but only one organization stated that the Vakantiebeurs is a good location for this matter.

However, there were only a few participants who stressed the importance of the Vakantiebeurs in order to address potential buyers' needs. This could not be related to any specific characteristics of these participants. Some of these participants indicated that it is an additional advantage of the exhibition when they are able to adjust their products due to input from consumers, but in general exhibitors consider the Vakantiebeurs not an appropriate location to address potential buyers' needs. Two different reasons for this can be distinguished from the interviews. Firstly, they believe they are too busy at the exhibition to have time for it, as can be seen from the following quote:

> "There is just no time for it. The Vakantiebeurs in particular is too big, too hefty and too crowded. We are doing it. We try to sit at the table with customers, but you notice that it is different (opposed to meeting at their office). Also the people are more distracted, because they have that conversation eight times that day. Well yes, then it is very hard for them to memorize what you are telling them. So it is different. Hence, you have to keep it short when you are at the exhibition." (Exhibitor A)

Thus, some participants indicated that they would rather invite the people to their office after the exhibition in order to customize the product. This could not be related to any specific characteristics of these participants. Secondly, it was said that the Vakantiebeurs is not suitable for addressing potential buyers' needs because the exhibitor values after-sales surveys more for this purpose. They would rather use specific input from their travelers after the trip and do not consider it an important reason to participate in the Vakantiebeurs. The following quote illustrates this:

> "Well, I am not quite sure. We do consider what people tell us (at the Vakantiebeurs), but we change our supply more through the complaints we receive and through study trips which are undertaken and where feedback is given. So for us, the Vakantiebeurs is not really the right location for that." (Exhibitor C)

4.2. Product distribution

In subchapter 2.3 it was stated that literature on consumer travel exhibitions argues that travel products are being sold and bought at events like the Vakantiebeurs. Rittichainuwat & Mair (2012) state that making purchases and sales are reasons for visitors and exhibitors to participate in consumer travel exhibitions. They also argue that consumers visit these events in order to get promotions and discounts. This subchapter discusses to what extent the participants of this research consider these three different aspects of *product distribution* an important reason for exhibitors and visitors to be at the Vakantiebeurs.

The subject of making sales at the exhibition was often touched upon by participants. They either clearly agreed with it being an important reason for them to exhibit, or they firmly disagreed by giving elaborated arguments, which will be explained in this section. Overall, most participants do not consider making direct sales a primary goal at the exhibition. Only a few did believe it is one of the reasons for exhibitors to participate in the Vakantiebeurs. One of them concerns a destination management organization which stated that they aim to generate bookings: “I do not want to be there alone as a tourism board, because that is totally useless for us. I want to see products which are being sold, so there have to be tour operators who are interested in that” (Exhibitor F). This also is a good example of organizations which share a stand location.

The majority of the participants explained that they do attach significant importance to bookings resulting from the exhibition. However, this normally concerns sales in the weeks or months after the exhibition and not specifically direct sales at the Vakantiebeurs. Many participants are very conscious about whether they make enough money at the Vakantiebeurs to cover their costs and make profit: “But also the bookings which are derived from the Vakantiebeurs. We obviously keep track of that because we do have to know whether we make more money than we spend” (Exhibitor L). Others stated that they do not have clear numbers, but they get the impression that a lot of their customers know their company through the Vakantiebeurs, as can be seen from the following quote:

> “We are convinced that if people would not book the holiday at the Vakantiebeurs, they would come to us in the weeks after anyway to do the same. So it is not really important to make sure that we achieve sales at the Vakantiebeurs.” (Exhibitor G)

In addition to these comments, participants also mentioned three reasons why the Vakantiebeurs for them is not the appropriate location to do direct sales. First, some of them indicate that their products require some customizing through extensive contact with the consumer before they can be sold. Therefore, they need additional contact with the customer after the Vakantiebeurs during which they can work towards an end-product. The Vakantiebeurs then is just one stage in the process from the first contact with the consumer until the moment of making a sale. This is illustrated by the following quote:

> “It does not happen a lot, but that is because the trips are not suitable for it. Our trips normally require some propositional rounds before the product becomes how the people want it to be. It could happen with group trips, but even with those products we notice that people are being overloaded with information at the Vakantiebeurs and subsequently do not make a choice at that moment.” (Exhibitor A)

Second, some participants stress the fact that they want consumers to really think it through before they make a decision. This was mentioned by small companies (TOs) that require much customization in their products. The products for sale at the Vakantiebeurs are in general relatively expensive and complex. Therefore, exhibitors believe they should not rush into any decision they might regret later on. Participants even indicated that they actively tell people not to buy immediately, but first acquire all the information needed to make a well measured decision. The following two quotes illustrate this argument:

> "I said to the customer: I do not accept bookings today, because I want you to really think through what kind of holiday trip you want. So much happens at the Vakantiebeurs. I want you to sleep on the issue. And if you are still enthusiastic about it in the morning then you are very welcome." (Exhibitor H)

> "Well, I have to say, to be honest, I prefer them to not purchase the product spontaneously. Of course, commercially speaking that is not good, but I prefer that they really think it through, that they know what they are purchasing, instead of spontaneously booking something and regretting it later on." (Exhibitor A)

Third, a couple of participants mentioned that they do not consider making sales a primary target at the Vakantiebeurs because they will not sell enough to cover the costs of participation. This was mentioned by both small and big companies (TOs). This is related to the previously mentioned argument that these companies achieve most of their sales in the weeks or months after the Vakantiebeurs. They are not concerned about covering the costs through direct sales at the Vakantiebeurs, but they do monitor whether the Vakantiebeurs offers them enough customers in the next months to at least break even. This does not mean that they do not see the Vakantiebeurs as an appropriate place for making sales, but it does mean that selling products is not an important reason to participate in the event. The following quote illustrates how an exhibitor thinks about making sales at the event:

> "Yes, you are not going to be there because you want to have bookings. You will need a lot of bookings to cover the costs of the Vakantiebeurs. And those costs will be covered in the end, but it is not our primary target to get bookings there. Because if we are here in our office, I believe we will achieve a higher turnover." (Exhibitor G)

Hence, because of these three reasons, making sales at the Vakantiebeurs is generally not considered to be a primary reason for exhibitors to participate in the Vakantiebeurs. However, product distribution at the event is taking place and therefore it was suggested in the theoretical framework that making purchases might be an important reason for consumers to visit the Vakantiebeurs.

There were only a few participants who believe that consumers go to the Vakantiebeurs to make actual purchases at the Vakantiebeurs. This could not be related to any specific participant characteristics. Those participants mentioned that they think it happens at the exhibition, but not necessarily among their target group: “Those people are certainly coming there (people who purchase at the Vakantiebeurs), but not particularly with us. That is more common at organizations which offer group trips with fixed departure dates” (Exhibitor L). One participants expressed the opinion that some people still prefer to purchase their holiday trip in a face-to-face environment: “People who are in the booking process can come by at the Vakantiebeurs in order to make their booking. Some people prefer to do that face-to-face” (Exhibitor O).

Despite the comments of these participants, the overwhelming majority of participants do not believe that visitors of the Vakantiebeurs come to the exhibition in order to make an actual purchase. They do not argue that no trips are purchased at the exhibition, but they believe it is not a primary reason for consumers to come and visit the Vakantiebeurs. When discussing this matter with participants, the following statement was made:

> “I also think that it is not the primary goal for people who are visiting the Vakantiebeurs. Because you obviously have to buy a ticket, and then to only visit the exhibition to book there… But I do think that you can convince people at an exhibition to book there when you are having a good conversation with visitors: yeah, why would you not just book right now?! Yes, we are here with them anyways and they have made me very enthusiastic… And well, I can also book with a discount of 35 euros. Why not right now? But I do not believe that people would buy a ticket for the Vakantiebeurs because they are intend to book a trip there in the first place.” (Exhibitor C)

The strong tendency for participants to argue that they believe it is not a primary goal for visitors at the Vakantiebeurs to make purchases was also supported by a number of different arguments. Some participants, for example, argued that it is not common anymore because the Internet offers the opportunity to make the purchase online when people are at home. Before the Internet, they say, it was more common that people made purchases at the Vakantiebeurs: “Because the Internet was not there back then. And the Internet is much more trusted now. And it is reliable to book, to spend money on the Internet” (Exhibitor I).

Another argument that was made is that consumers want to really think it through before they make the decision to purchase a certain product. This is related to the previously mentioned argument by exhibitors that they also want consumers to take some time to think about it. Instead of going through all of the steps of the booking process (from looking for inspiration about a destination all the way to making a purchase) at the Vakantiebeurs, consumers rather want to have some time to think it over. This can be seen from the following quote:

> “Applications for customized long haul holidays generally take quite some time. I mean, before we have a booking… from the first moment of contact until the moment that the booking is really done can sometimes take about two months. It is also about significant amounts of money, you know? The travel fares are pretty high. There are people who save money for those trips for years, and then the decision does not happen overnight.” (Exhibitor L)

Related to consumers making purchases at the Vakantiebeurs is the suggestion in the literature that one of the reasons for consumers to visit CTEs is because they are looking to get discounts and special promotions (Rittichainuwat & Mair, 2012). However, when exhibitors were asked about their view on why consumers are coming to the Vakantiebeurs, no one initially began to talk about this specific reason. They were specifically asked if they thought it could be significant for consumers in the consideration to visit the Vakantiebeurs. The overall line of reasoning was that discounts and special promotions definitely are widely present at the Vakantiebeurs and consumers also expect these things to be there, but exhibitors do not think that it is an important reason why consumers are visiting the Vakantiebeurs. One argument is that most products at the Vakantiebeurs are quite expensive, so a few euros less because of a discount or promotion is not something these people are looking for. The following quote illustrates this:

> "These trips are of course purchases which people really consciously think through while extensively discussing it with each other. Some people are one or two years in advance already working on it and they come back after they were at your counter last year. They have thought it through but they still have some more questions, you know. So then it really does not matter whether you can get a discount of a few euros." (Exhibitor K)

Participants believe consumers value it, but getting discounts and special promotions is not their main goal at the exhibition. However, when visitors are looking for information and products at the Vakantiebeurs, a discount could convince them to book their holiday at the exhibition instead of at home somewhere in the next few weeks: "We always do something extra at the exhibition. People get something like a small gift, an incentive. So, that is a reason to purchase at the exhibition" (Exhibitor E). It is interesting to note that many participants argue that making sales is not an important reason for exhibitors to be at the Vakantiebeurs, while at the same time discounts and promotions, which purpose it is to stimulate visitors to buy, are widely present at the event.

Nonetheless, discounts and special promotions do not appear to be one of the primary reasons why people visit the Vakantiebeurs. In comparison, at consumer travel exhibitions in Asia visitors know that they can get significant discounts on their holiday trips because all companies offer them during those few days[5]. Subsequently, a lot of people who want to buy a trip go to those exhibitions because they know they can save a lot of money. This was told to some of the exhibitors and they were asked if they thought the Vakantiebeurs could be in some way similar to this. The response was that this is definitely not the case: "Yes, but that is not the case here. No, then 50% of all people in the Netherlands would be there" (Exhibitor M)

[5] Personal communication with C. E. Ong in January 2015, in combination with information from one of the exhibitors.

4.3. Face-to-face interactions

The proliferation of internet use has had a significant influence on industries such as newspapers and books (Waldfogel & Reimers, 2015). Articles written by Del Chiappa & Zara (2015), Frias et al. (2008) and Jacobsen & Munar (2012) have showed that this is no different with respect to the tourism industry, as the Internet has challenged established distribution and information channels. However, it was argued by Rittichainuwat & Mair (2012) that consumer travel exhibitions continue to be relevant because they are able to offer personalized and direct communication to both consumers and exhibitors. Additionally, Yuksel & Voola (2010) stated that exhibitors value these events because they can improve the relationship with their customers. Visitors are able to observe the faces behind the companies and, finally, exhibitors can use the event to observe their competitors (Rittichainuwat & Mair, 2012). This subchapter discusses to what extent the participants of this research consider these four different aspects of *face-to-face interactions* important reasons for exhibitors and visitors to be at the Vakantiebeurs.

A diverse range of participants argued that the Vakantiebeurs offers exhibitors the opportunity to have non-digital and face-to-face interactions with potential customers throughout the five days of the exhibition. Many companies normally interact through telephone, website and email with consumers, and the Vakantiebeurs is a location where these companies have the opportunity to connect with people in a more personal and direct way. This is especially applicable to the small companies as they do not have a lot of employees and therefore are in close contact with their customers. Larger companies choose some of their employees to work at the exhibition and they have contact with a relatively small amount of the company's customers. During the interviews, most participants acknowledged this aspect of the exhibition as an important reason to exhibit there. When they mentioned it, they were also asked why they valued the type of contact and interaction at the Vakantiebeurs. The answers following from that question were very diverse and therefore I will now try to elaborate briefly about the various reactions.

First, participants indicated that the personal and direct communication at the Vakantiebeurs allows them to show consumers that they possess a great deal of knowledge about their destinations and products. This was mentioned by participants (TOs) who consider themselves travel experts, unrelated of their size. This shows how they aim to differentiate themselves from other (online) companies who sell trips without much interaction with their customers. During the exhibition, people can visit their counters and ask questions. Exhibitors therefore have the opportunity to show potential customers that they have the expertise to deliver a very good travel product: "People have a question which needs to be answered. People should deduce from that answer, feel or however you want to call it, like: wow, these people really know all about it. That is the goal" (Exhibitor G).

Hence, participants clearly believe it is important for exhibitors to show potential customers that they possess knowledge about destinations and products and they value the Vakantiebeurs as a location to achieve that goal. Another reason why they value the personal and direct communication at the Vakantiebeurs is that it allows them to convince people to buy their products or to visit their destination: “We also notice that the conversion rates are higher when the amount of personal contact has also been higher” (Exhibitor L). It also allows exhibitors to sometimes reassure people about, for example, the safety at a destination: “And especially for a country like Egypt, which has troubles concerning safety. The Vakantiebeurs enables you to be there and tell people face-to-face how it is, that is really important” (Exhibitor N). In terms of reassuring, it also helps to establish trust among potential customers about the company, as can be seen from the following quote:

> “And then I tell them something about my background and I hope that they then get comfortable. Because, as you know, there is always an uncertain factor: who are these people? And are they not going to take off with my money? Well, that is one of the reasons why we are participating in the Vakantiebeurs.“ (Exhibitor K)

Thus, exhibitors value the direct and personal communication at the Vakantiebeurs because it allows them to convince and reassure people in a more effective or better way than other channels such as their website, the telephone and email. They believe that face-to-face contact is more practical when trying to develop some kind of trust relationship.

Thirdly, it was indicated by participants that the type of interaction at the Vakantiebeurs is very suitable for presenting what kind of company they really are. By having the personal contact with potential customers, they are able to show them their passion, specialism and the faces behind the company. The next quote illustrates this:

> “Yeah, the advantage of the Vakantiebeurs is that the specialists are present at the exhibition. On a website or affiliate website it is much harder to distinguish yourself. Then you have to write and explain that you are a specialist. At the Vakantiebeurs you can bring your personnel and you let them talk to people and then they will notice it themselves.” (Exhibitor O)

Finally, participants mentioned that the personal and direct communication at the Vakantiebeurs allows them to listen to the wishes of consumers in order to give them a good advice or to adjust their product to those wishes. This is very much related to the previously mentioned subject of addressing potential buyers’ needs (subchapter 4.1), but I want to stress the importance of this again because it relates to the direct and personal communication. The kind of interaction at the Vakantiebeurs can be more suitable for giving advice and adjusting products to customers’ wishes: “Yes, we are a specialist, we want to stimulate face-to-face contact. We want to talk to those people in order to give them good advice” (Exhibitor O).

These four aspects explain why participants argue that the personal and direct communication at the Vakantiebeurs is a reason for exhibitors to be at the event. It was suggested in the literature that exhibitors also use consumer travel exhibitions to improve the relationship with customers, but this was rarely spoken about by participants without me initiating the topic. When they were asked whether they consider it an important reason to participate in the Vakantiebeurs, none of them answered in the negative. Thus, it seems like this category is not the first thing that comes to the mind of exhibitors, but they do consider it a contributing quality of the Vakantiebeurs. This can be supported by the fact that some participants mentioned that improving the relationship with customers is relevant but not a primary goal for them to participate in the Vakantiebeurs. After asking them whether this category was important, one participant responded: “Yes, it is very harsh, but that does not bring home the bacon. So it is a very nice sideshow, but it is not a primary goal” (Exhibitor B).

Many participants agreed to the importance of the Vakantiebeurs for improving the relationship with customers by giving examples of situations or conversations between them and customers. Some of them recorded how their regular customers enjoyed seeing their personnel at the Vakantiebeurs and telling them about their experiences on previous trips with the exhibiting company, as can be seen from the following quote:

> “By being a beautiful brand, you have got ambassadors and those customers are also proud to be ambassadors. And yes, they really enjoy coming up to you and having a chat, to show pictures of their last trip on their cell phone or just to exchange travel experiences. That is also a very important aspect of being at the Vakantiebeurs.” (Exhibitor I)

Others noticed how customers use the Vakantiebeurs as a location to meet again with the tour guide of their last trip, or even with fellow travelers from their tour group. The next quote shows this:

> “It almost feels like a reunion, because we also have old customers who work for us as volunteers at the Vakantiebeurs. So they often also know a lot of people and yes, visitors are also coming for that. And sometimes people are coming to book a trip to Asia at the Vakantiebeurs [respondent only offers trips to Africa], but they know that we are also there and then they just want to come by and have a chat with us.” (Exhibitor A)

Additionally, two participants explained how they make use of these encounters with regular customers in a very interesting way. When customers are at their stand talking about previous travel experiences with enthusiasm, the exhibitor can use that energy to attract and convince other visitors to book a holiday with them. Because, as these two exhibitors believe, the best way to sell your product is through consumer to consumer interactions:

> “Oh yeah, that is quite fascinating, because then they come and tell about how amazing all of it is, but they do not travel again. And then they are telling about their experiences, while you see someone at the same counter who wants to ask some

> specific questions. Well, then you try to turn the story around by continuing the conversation with the first person, while trying to involve the person at the counter. Because that is the best way to sell, through consumer to consumer." (Exhibitor F)

> "Yes, people come back to you. And that is great, because they often come back because they are enthusiastic. Maybe not again as customers, but just to visit you. And then they tell you stories. And some of those people, who really enjoy it, stay at your counter for a while. And when there are customers, they say like: *yeah, you really have to go*. And: *well, we did this and this*. And we think through, that is hard to prove of course, that it has a really positive influence." (Exhibitor K)

This subchapter has explored two possible reasons why exhibitors participate in the Vakantiebeurs with respect to face-to-face interactions. Besides exhibitors, visitors also value the face-to-face character of the event because they can observe the people behind the companies. We live in a digital age and much of the communication between us and other people is taking place through non face-to-face interactions. As argued in chapter 2, consumers often use the Internet to search information about, and to purchase, travel products. The development of the Internet has made it increasingly easy for consumers to purchase travel products without having a face-to-face interaction with the people behind the company. However, not every consumer considers this the desirable way of communicating with these companies. A diverse range of participants argued that visitors of the Vakantiebeurs value the type of interaction between one another. About half of the participants mentioned this themselves when discussing the reasons why consumers would want to visit the Vakantiebeurs. The other half agreed with it being of influence when the topic was brought up. Visitors can see the people who are behind the showcase of every company. They can talk to them, get to know them and through the interaction a bond of trust can be created. The next quote illustrates this:

> "One year ago someone called to us: *I have never heard about you. What kind of organization are you?* So people have questions like: *what kind of organization are you?* And when you are exhibiting at the Vakantiebeurs and they can see you, it creates a bit of trust among consumers." (Exhibitor N)

Several participants mentioned that there are even customers who have already booked, or are about to book, but still value to see the faces behind the company:

> "And there are people who come and visit us really with a goal in mind. Just to see that face, to talk through the itinerary and then they decide at our counter like: *you know what? Great, nice team, nice people, good story. Arrange it for me!*" (Exhibitor G)

According to participants, some consumers are concerned whether the company, with which they are looking to book a holiday, really exists. Everyone can create an Internet page, claiming that they are a genuine company, but by going to the Vakantiebeurs and talking to them consumers can verify whether the company is reliable:

> “Sometimes they have already decided that they want to travel with our organization but they still want to see what kind of organization it is. To check if you are not a fake internet page. Well, maybe that is a bit exaggerated, but just to check whether everything is alright.“ (Exhibitor N)

The most often mentioned reason why participants think consumers want to see the face behind the company is because the travel products generally are quite expensive. This can be supported by the fact that visitors of the Vakantiebeurs tend to spend significantly more money on their holidays than the average Dutch citizen, as was argued before (NBTC-NIPO, 2015; Vakantiebeurs, 2016). According to participants, consumers would want a face-to-face interaction less when it concerns relatively small amounts of money then when they are about to pay a relatively high amount. Meeting the people behind the company at the Vakantiebeurs contributed to the bond of trust between the exhibitors and the consumers according to exhibitors. This can be seen from the following two quotes:

> “Yes, absolutely. Sunweb, where I book my skiing trip [respondent pretends to be one of their consumers]… Well, I could not care less how they are organized or whatever. But when I pay 10.000 euros for my holiday then I will wonder whether it will be well spent.” (Exhibitor I)

> “If you are travelling with a family or with four people and some friends then you will have to spend about fifteen thousand euros. I can imagine that you would like to see who is behind the company, to make sure that is not some kind of scam. I am sometimes amazed that people do not do it.” (Exhibitor B)

Hence, consumers use the Vakantiebeurs to observe companies in order to check whether it is reliable and to develop a bond of trust. Rittichainuwat & Mair (2012) suggested that exhibitors also use the opportunity to observe each other, but there was no participant in this research who initially mentioned it. They only spoke about it after it was specifically asked whether they considered ‘observing competitors’ an important factor to be present at the Vakantiebeurs. Amongst the responses there were several different viewpoints, but overall most exhibitors did not consider this factor to be influential in their consideration to participate in the Vakantiebeurs. The organizations who did stress the importance, mentioned that the Vakantiebeurs is a good location to keep track of changes in the market and to keep in touch with their colleagues from other companies, as can be seen from this quote:

> “Well, yet also to keep track of changes at other companies. To observe how others are doing things. How others present themselves. And yeah, you have also got colleagues with whom you have a very good relationship. So, it is also great fun because you only see them once per year.” (Exhibitor N)

Also, they considered it a good event to observe how others are running their business and to learn from that while starting your own company: “Obviously, you come across other companies from whom we can learn certain things. Especially in the beginning of course, because we were completely new and foreign in this area” (Exhibitor K).

However, there were only few participants who expressed these views. A few others agreed that the Vakantiebeurs is a platform where they observe competitors, but they indicated that this is not an important reason for them to participate in the Vakantiebeurs. They rather consider it an added benefit, not a primary reason to exhibit. About half of the respondents clearly rejected the importance of 'observing competitors' for participating in the Vakantiebeurs. Within this group, two different underlying arguments can be identified. Firstly, some participants argued that they have other channels available in order to observe what other companies are doing. Secondly, other participants stress the fact that they believe in their own company and product. These exhibitors have faith in how they are doing business and do not think they can learn from observing how other companies do it. Consequently, they are not really interested in what other companies are doing at the exhibition, and the rest of year in general: "No, I am not doing anything with competitors. I mean, I really do not give a hoot. I have always believed in my own strength, in setting trends and not following them" (Exhibitor B).

4.4. Leisure experience

Rittichainuwat & Mair (2012) argued that consumer travel exhibitions may just offer an enjoyable experience to visitors. They also stated that consumer travel exhibitions are able to engage all senses of the visitors, which could differentiate this information and distribution channel from others, such as the Internet. This subchapter discusses to what extent the participants of this research consider the *leisure experience* an important reason for visitors to be at the Vakantiebeurs.

Many participants argued that consumers visit the Vakantiebeurs simply because they enjoy being there, as if they are in a theme park or at a concert. This can be seen from the following quote:

> "People also just have a nice day-out, they are not even planning to book a holiday. There are there to eat, to stroll around, while taking big suitcases with brochures from the event which they can throw into the fireplace." (Exhibitor D)

After participants were asked the question why consumers visit the Vakantiebeurs, a lot of them immediately took the occasion to explain in great detail how they believe the exhibition serves as a leisure experience for many visitors. Some argued that visitors combine certain functional purposes, such as observing companies or acquiring information about destinations, with the hedonistic purpose of the Vakantiebeurs serving as a fun day-out. This will be discussed further in this subchapter. However, most participants indicated that they believe there is even a significant amount of people solely at the Vakantiebeurs because they enjoy the event itself, without having any intention to use the event for planning or booking their holiday. The next quote illustrates this:

> "A portion of the people is really there for a day-out. You notice that really clearly. I do not dare to express it in percentages, but it has increased over the last couple of years. People really make it into a day-out and they do not have an idea where they want to go on holidays, or they are not sure whether they are even going to travel. Some people also dare to just say it, like: *well, we are having a holiday of one day at this place.* Then they imagine themselves in all kinds of different worlds and they do not have to look for a trip." (Exhibitor A)

An obvious follow-up question is what visitors exactly find enjoyable at the Vakantiebeurs. This often links back to the multi-sensory experience which was discussed in paragraph 2.3.1, as many participants mentioned the food, the music and so on as being entertaining features. Additionally, they also indicated that visitors enjoy the shows, presentations and lectures. The following quote illustrates how one of the exhibitors described these visitors:

> "And then there is a group of customers who are just having a day-out. They bring their suitcase to the event, the whole family walks around, they stuff their suitcases full with brochures, carry them around and at the end of the day they go home again. There are a lot of those people." (Exhibitor L)

Participants often indicated that they thought the multi-sensory experience contributes to the fact that consumers visit the Vakantiebeurs to have a nice day out, because the music, food and so forth makes it enjoyable: "Yes, there is a lot going on. There is a lot to experience and you can see a lot. And if you are walking around then you can see some images. There is music, there are dances" (Exhibitor B).

A few participants argued that the multi-sensory character of the Vakantiebeurs is something which distinguishes it from other information and distribution channels such as the Internet and telephone. At the Vakantiebeurs, consumers can get a fuller experience, because all of their senses are being stimulated: "Yes, I think so. Yes, absolutely. It is alive, it feels, you can smell it, you can hear it, you can see it. The Internet cannot transfer that combination. No" (Exhibitor G).

And finally, a few participants argued that the multi-sensory experience at the Vakantiebeurs allows consumers to really imagine how it would be like in a particular country and subsequently get in the mood for their holiday. Because other distribution and information channels are less multi-sensory, they are less able to achieve the same thing: "You just notice that people get much more in the mood to go travelling. And on the Internet that is just a lot less" (Exhibitor C). Hence, at the Vakantiebeurs people can get very close to the experience they would get when they are on the actual holiday trip. The organization of the exhibition is aware of this opportunity as can be seen from their slogan: "je zou zweren dat je er al was", which can be translated as: "it feels like you are already there". This can be seen from the following two quotes:

> "Yes, especially the experience, that is also what it is about. Those sounds and the sight, and this is 20 by 20 (points to the computer screen). At the Vakantiebeurs it is all around you and it also includes food. And the enjoyable people, often locals,

> people from the country who are there. It is just the atmosphere around it, and then you also really experience more from a country." (Exhibitor O)

> "We have tried again to create the same vibe, because that also brings people in a certain mood and through that it is easier to take them already kind of on a trip actually. And the most enjoyable part of travelling is actually the fun before. We really see it in that way. And this starts for a lot of people already at the Vakantiebeurs. That vibe, that mood, we also try to dress our stand as attractive as we can. (...) The experience is just very important, because travelling is experiencing. I mean, it is not something which you can grasp. You are selling something, you are selling an experience." (Exhibitor L)

According to some participants, a number of people visit the Vakantiebeurs every year because it is a tradition within their family or group of friends: "A day-out. Yes, I really think so. It has to be something like that. It is also tradition, you know. They have been going to the Vakantiebeurs for years" (Exhibitor E). There were even a few participants who compared the Vakantiebeurs with other leisure events, such as going to the zoo or a theme park.

Apart from all of the activities which are organized at the Vakantiebeurs, participants also think that people enjoy the exhibition as a leisure activity because they can get all sorts of free stuff. Apart from the promotional material, such as brochures, flyers and guidebooks, exhibitors provide visitors at their counter with free things like pens, food and bags. Exhibitors use these articles to tempt visitors to their counter where they can convince them to go on a trip with them, but according to participants some people are not actually looking for a holiday and go from one counter to the other in order to gather all the free stuff. Participants indicated that those people come to the Vakantiebeurs with suitcases on wheels, which they use to stuff all of the things they gather. According to participants, people like to do this and they really have to make sure that those visitors do not take things at their counter which are not meant to be taken, such as their own pens and expensive books describing the itinerary of their trips. This type of behavior from certain people is illustrated in the next two quotes:

> "I have even spoken to people who collect holiday brochures. I know a guy who walks around at the Vakantiebeurs at least one day a year, sometimes even two days. And he walks by with his rolling suitcase and he collects brochures of beautiful trips." (Exhibitor A)

> "Well, during the Vakantiebeurs people are there to snatch things away, that is really serious. And we have certain bags which we had between our counters the first time. And while we were busy talking to people we would see hands grabbing those bags. Then I think: well, we are all adults, are we not? So those people are there for entirely other purposes. And when you do not have pens at your counter, people respond like: do you guys not have pens? While they have their pockets stuffed with them. Well I'm sorry, but we are not working here to give our money away. So yes, I believe there are people at the Vakantiebeurs only to take things away. To collect as much as possible." (Exhibitor D)

Finally, participants argued that visitors come to the Vakantiebeurs for a leisure experience, because there they can fantasize about exotic and distant holiday trips and destinations all over the world: “Well, not everyone is able to go on a trip to Asia, Africa or South America. So yeah, when you can get a free ticket and you can pretend you are in those places for a day” (Exhibitor A). They might not have the financial means or time to actually go there, but in a way they experience it by walking around at the Vakantiebeurs. Because of the multi-sensory experience which the Vakantiebeurs is able to produce, it is much easier for people to get that feeling at the exhibition than when they are at home looking at their two-dimensional computer screen. The next quote shows how an exhibitor describes an encounter with such a visitor:

> “I have asked a guy who was walking around and grabbing travel brochures if he also uses them for anything. And then he told me like: *No, but I love to look through it when I’m home again. He says: then I almost feel like I am there.”* (Exhibitor A)

Although participants argued that the leisure experience of the event is an important reason for consumers to visit the Vakantiebeurs, they argue that most visitors actually combine it with collecting travel-related information. Participants describe the Vakantiebeurs as an event where visitors could have a bit of both as they might combine the necessity of functional activities with the enjoyable features which the Vakantiebeurs offers. In other words: consumers know they have to acquire information about a certain destination or product anyway, but they choose the Vakantiebeurs to do this because they know the event also offers a nice day-out. Instead of just browsing on the Internet or looking through guidebooks, they can enjoy the music, food and so on at the exhibition while acquiring travel related information. Hence, participants stressed the importance of realizing that consumers might combine different reasons for visiting the Vakantiebeurs, in particular the combination of acquiring information and having a leisure experience. This can be seen from the following quote:

> “I believe that visitors consider it a nice day-out, but combined with a goal: I want to acquire information about going on a trip, about travelling, about long haul trips, about camping holidays. I think a nice day-out combined with acquiring travel related information.” (Exhibitor C)

4.5. Changes due to the Internet

The proliferation of Internet use has had a big influence on the tourism industry as it gained popularity among consumers as a medium for planning and booking holidays (Buhalis & Law, 2008; Kim et al., 2015). It offered an alternative to the existing information and distribution channels and thereby challenged the existence of these channels. The purpose of this subchapter is to discuss how participants think the Internet has changed the motivations of consumers and exhibitors to participate in the Vakantiebeurs and, subsequently, how the Internet has changed the format of the event. I will present the main discussions raised by exhibitors by elaborating their arguments in general and by showing some specific quotes.

Firstly, it was argued by participants that consumers nowadays increasingly combine multiple information channels instead of using just one or two in their search for travel related information. According to them, the Vakantiebeurs used to be the primary source of travel related information for many consumers before the Internet offered an alternative. Currently, visitors of the Vakantiebeurs are likely to have acquired a lot of information about a destination or trip before their visit and therefore their motivation to participate in the event has changed. Where they used to utilize the exhibition as their main source of information, they now possibly use it more to verify the information which they found on the Internet. The following quote illustrates this:

> "We notice that consumers, also the older generations, orientate themselves on the Internet. But they still value to verify this information at the Vakantiebeurs. So previously, the exhibition was the primary source of information. Now, that is only true among five or ten percent of the people. The others first orientate themselves on the Internet. So, it is a combination of both." (Exhibitor I)

This also changed what kind of information is provided by exhibitors during the event, because they can assume that consumers already have browsed for information before coming to their counter. Consumers ask more detailed questions about things they already found on the Internet, instead of more explorative questions when they do not have any pre-visit information.

The proliferation of Internet use, however, does not mean that consumers do not visit the Vakantiebeurs anymore to acquire information about destinations, products and organizations. It might not be the only goal of consumers anymore and it might have given room for other purposes to develop and strengthen their presence at the exhibition, but online information channels and offline information provision at the Vakantiebeurs do not have to exclude each other. Participants argued that both coexist because many consumers use both during their quest for travel related information. This can be seen from the following quote:

> "No, both information channels are used next to each other. And if both are provided, face-to-face contact and also online, then it does not have to be exclude each other. Then both can strengthen each other and that is how you should look at it." (Exhibitor L)

However, it does mean that the Vakantiebeurs changed because it is not the main source of information for many consumers anymore. As will be explained further, other purposes and activities have entered the exhibition because the exchange of information between consumers and exhibitors became less important due to the proliferation of internet use.

Second, what applies to the Vakantiebeurs as an information channel does also apply in terms of the exhibition as a distribution channel. Previously, consumers used the Vakantiebeurs as a location to purchase their travel products but with the proliferation of internet use an additional distribution channel arose: "Because the Internet was not there back then. And the Internet is much more trusted now. And it is reliable to book, to spend money on the Internet" (Exhibitor I). Some consumers still make purchases at the exhibition, but the majority uses other distribution channels for that purpose. Subsequently, consumers' motivation to visit the Vakantiebeurs to make a purchase has decreased in importance. The same accounts for exhibitors as they can also sell their products through the Internet. Hence, the act of making a purchase and the exchange of money between consumers and exhibitors has become decreasingly present at the Vakantiebeurs, as is argued by participants: "No, in earlier days it was like that, but not anymore. No. We used to really sell trips at the Vakantiebeurs in earlier times, but not anymore" (Exhibitor I).

Third, the Internet has also reinforced certain existing motivations to visit the Vakantiebeurs. As was argued by participants, the proliferation of internet use has induced people to value personal contact at offline distribution and information channels more. It has also introduced the need for some consumers to check whether the company from the Internet really exists, as was explained before. The reinforcement of the need for personal contact is illustrated by the next two quotes:

> "Maybe it [personal contact] has become stronger. Maybe the personal contact has become more important. The Internet has grown so big that people are like: *Yeah but… I especially value that bit of personal contact.* We also continue to offer it, because it is the best way to sell a product, to sell your trip." (Exhibitor N)
>
> "Maybe especially because the Internet has grown so big and people do not know anymore what they should do and what they should choose. Maybe exhibitions are popular because of that, for people to get a feeling with a certain company before they make a purchase." (Exhibitor C)

The Internet has grown so big and for some people this results in confusion and information overload, as was argued in paragraph 2.4.4. Those people still value the face-to-face interactions which the Vakantiebeurs is able to offer between consumers and exhibitors. Hence, the Internet has offered consumers a different way of acquiring information but through this it has also revalued the specific qualities of the Vakantiebeurs. So even though the Internet offers an alternative for information provision and product distribution, and thereby changed the motivations of many visitors and exhibitors at the Vakantiebeurs, it has also reinforced the same motivations for other visitors and exhibitors.

According to participants, the proliferation of Internet use has also affected both the absolute size of the exhibition, as well as the ratio between small and big companies. They argue that larger companies are more capable of using online channels than smaller companies because they have more financial means and because they are better able to hire internet marketing experts. It is difficult to support this with data because it was not possible to get access to the list of exhibitors from the event from, for example, ten or twenty years ago. However, it is possible to stress that most of the biggest companies who offer holidays in Europe were not present at the Vakantiebeurs in 2016, as was shown in subchapter 1.4. In terms of exhibition size, the Vakantiebeurs nowadays has significantly fewer visitors than ten years ago, according to exhibitors. Additionally, the total amount of exhibitors is decreasing (down from 1.454 in 2014 to around 1.200 in 2016 (Vakantiebeurs, 2014; Vakantiebeurs, 2016b). The following quote illustrates how an exhibitor talks about the decreasing size of the event:

> "Yes, that is because ten years ago someone who wanted to go for ten days to Benidorm also went to the Vakantiebeurs to look for that trip. And those people are not doing that anymore, because they can find information relating to those trips easily on the Internet. In fact, if someone would go to the Vakantiebeurs to find a trip for ten days to Benidorm, that person would return home with his tail between his legs as there are no exhibitors anymore who offer those trips." (Exhibitor B)

And finally, it could be argued that the proliferation of Internet use has increased the importance of the leisure experience as one of the main reasons for consumers to visit the Vakantiebeurs. According to participants, before the Internet was available it was less important for exhibitions to offer this as the main goal of consumers was to acquire information. It was argued by exhibitors that it might be that the increased emphasis on the leisure features at the Vakantiebeurs is because it needs to offer something different than the Internet in order to stay relevant. As I have argued before, the online channels have challenged certain purposes of the Vakantiebeurs and subsequently the event needs to focus its attention on those particular qualities which the Internet cannot, or is less able to, offer.

Participants argued that people nowadays are used to multiple stimuli and therefore want a more complete experience at the exhibition. According to them, only functional features at the exhibition is not good enough anymore. Hence, visitors want food, music, things to do, things to see. They want to be entertained and subsequently the Vakantiebeurs has become an exhibition with more leisure activities then ten or twenty years ago. The following quote illustrates why participants believe visitors want more of the leisure experience nowadays:

> "Because in everyday live there are increasingly stimuli from outside. In earlier days there was only one form of stimulation at one time. People would watch only tv, or people would be in front of the computer. Now, people are watching their phone, tablet and television at the same time. People are receiving much more stimuli in daily life. And at the Vakantiebeurs it is the same, you cannot only provide information. No, you also have to show something on a television and you also have a green screen, or a selfiespot or an Asian snack. It has to be a more complete experience and not only one-way information exchange." (Exhibitor I)

As was explained in this subchapter, the Internet has had a significant impact on the motivations for consumers and exhibitors to participate in the Vakantiebeurs. Some motivations became less important and subsequently decreased the presence of those activities at the event while the rise of demand for a leisure experience caused the emergence of more entertainment, food, music and so on at the event. Related to this, it was argued by many participants that the Vakantiebeurs has been, and still is, negotiating the effects of the proliferation of Internet use. Because online channels are able to offer consumers many things which the Vakantiebeurs used to offer, the exhibition needs to adapt in order to stay relevant. Therefore, I want to discuss briefly how participants believe the Vakantiebeurs has tried, and is still trying, to adapt to the proliferation of internet use and the changing motivations of exhibitors and consumers.

Several participants indicated that the Vakantiebeurs has had dropping visitor numbers in the last 5-10 years. There is no real consensus among participants when this exactly happened but they paint a picture in which the exhibition was much bigger ten years ago in terms of attendance: "The visitor numbers have gone down radically compared to the period before 2006 or 2007" (Exhibitor G).

Participants indicated that the organization of the Vakantiebeurs had to adapt by developing new plans to counteract the decreasing visitor numbers. The relationship between these two factors can be illustrated by the following quote:

> "The Vakantiebeurs also promotes the exhibition as an experience and because of that they attract more visitors. They have to… They have to develop these kind of activities because the fewer visitors attending, the less attractive it becomes for us." (Exhibitor G)

When participants were asked how the Vakantiebeurs has tried to counter this trend, a large majority argued that the organization of the event have increasingly tried to enhance the leisure experience. Participants have seen the development of additional elements at the exhibition which aim to increase the amount of activities and to stimulate the interactive character of the event. According to them, all of this contributes to the experience which visitors have when they visit the Vakantiebeurs. So instead of just a few counters where exhibitors offer information and products, the Vakantiebeurs offers an experience in which all the senses of the visitors are stimulated. Instead of focusing on the functional elements at the exhibition, the organization has dedicated its attention to stimulating entertainment and the aesthetic quality of the Vakantiebeurs, according to participants. This can be seen from the following quote:

> (while talking about what the Vakantiebeurs does to create an experience) "By creating a better atmosphere in the venue. More non-commercial activities related to the ambience such as photo exhibitions, restaurants with tastyful snacks…, by bringing in more elements related to the experience. Dance shows. Just little additions which enhance the atmosphere." (Exhibitor I)

Participants did not have a clear explanation why the leisure experience would attract more visitors and why the Vakantiebeurs has chosen to employ this strategy. Some agreed with my hypothesis that the organization of the Vakantiebeurs tries to offer something at the exhibition which online channels are less able to offer, namely the multi-sensory experience. The Internet is rather static and is only able to offer visual elements combined with some audio. At the Vakantiebeurs, visitors are right in the middle of the experience, all of their senses are being stimulated and they can interact with everything that happens around them. Most participants found it difficult to express why they believed the Vakantiebeurs has chosen to enhance the leisure experience at the exhibition, but they generally agreed it is the right strategy to keep the Vakantiebeurs relevant.

4.6. Future of the Vakantiebeurs

During the interviews participants were asked to think about the future of the Vakantiebeurs. This generally involved three different themes. Firstly, they spoke about whether they believe the event will remain relevant and how it will evolve in the next years. Secondly, if the participant was currently exhibiting at the event, he or she was asked to reflect on their presence at the event in the near future: why or why not would they continue to participate in the event. And finally, participants were asked what kind of alternatives the future might bring to serve the current purposes of exhibiting at the Vakantiebeurs.

Participants have very diverse views on the future of the Vakantiebeurs. Some clearly indicated that they believe consumer travel exhibitions, and the Vakantiebeurs in particular, are something of the past and will either totally disappear or decrease radically in size. Others argued that the Vakantiebeurs offers consumers and exhibitors certain qualities which cannot be offered by other information and distribution channels, both now and in the future. I will now discuss more in the detail the different opinions within the debate about the future of the Vakantiebeurs.

Among participants in this research there was a significant group of people who think that the Vakantiebeurs will continue to exist in the next ten or twenty years. They believe the event will succeed in staying relevant for consumers and exhibitors, but they indicated this will only happen if the organization of the exhibition, and themselves as exhibitors at the stands, continues to focus on the development of the leisure experience at the event. The leisure experience is often emphasized by exhibitors because they believe the Vakantiebeurs should try to offer things which other information and distribution channels cannot offer, as can be seen from the following quote:

> "I think indeed that they should try to distinguish themselves and then there will always be room for these things, I really believe that. It is the same as what is happening to book stores. You obviously have book stores who just sell books and they might be struggling, but there are also book stores who have all kinds of activities. They have a possibility to have a cup of coffee or a sandwich, they invite writers for readings and book signings… all sorts of things. So you have got to offer some kind of added value." (Exhibitor N)

Even though these participants believe the Vakantiebeurs will be able to stay relevant when they focus on the leisure experience, they also believe the event will become smaller. They indicated that it is very difficult to create an experience on a big scale and therefore the event should decrease in size. The Vakantiebeurs has already decreased in size, both in terms of visitors and exhibitor numbers [5-10 years ago], and participants expect this trend to continue in the future: "Maybe not in this form, because the Vakantiebeurs is quite big. And if you are going to focus more on the experience, then you should make it smaller because the experience cannot be established on such a big scale" (Exhibitor I).

Connected to the issue of a decrease in the size of the Vakantiebeurs is that participants think that the event will become more focussed. In the last years they have seen the rise of a few smaller and more focussed consumer travel exhibitions and they believe the Vakantiebeurs will also move more in that direction. The focus would be on destinations and travel products which are relatively complex, such as exotic countries and expensive trips:

> "Yes, I believe that the Vakantiebeurs will still be there in twenty years. It is of course an organic system, so some things will be added and some things will be removed. But it will concern the kind of destinations which are a bit more expensive, a bit further away and bit more complex." (Exhibitor G)

Exoticness of destinations could be determined by factors like the familiarity of the consumer with that destination, the language at the destination and the absolute distance from their home country to the destination. Hence, destinations like Rwanda and North Korea probably are more exotic than France and Spain for Dutch consumers. Participants argued that consumers who go on those trips will continue to value the personal contact which can be provided at consumer travel exhibitions such as the Vakantiebeurs. More focussed could also imply that the event will be not so much intended for consumers who are looking to orientate themselves, but rather for consumers who have already used other information channels for orientation and want to use the Vakantiebeurs for asking specific and goal-directed questions through personal contact with exhibitors, as can be seen from the following quote:

> "I would say that the Vakantiebeurs will go down at a certain moment and that will benefit the smaller and more focussed exhibitions in Amsterdam, The Hague and Groningen. And I think that exhibitions for the sake of orientation in the broadest way will slowly disappear but consumers who want complex trips will continue to value personal contact at an exhibition." (Exhibitor H)

Hence, there is a considerable amount of participants who believe the Vakantiebeurs will continue to exist in the next ten or twenty years. This could not be related to any specific participant characteristics. They believe the event will become smaller and more focussed while the organization should aim to continue the development of the leisure experience at the Vakantiebeurs in order to stay relevant. On the other side there is a similarly big group of participants who strongly doubt the future of the Vakantiebeurs and consumer travel exhibitions in general. The argument behind this viewpoint is two-fold: they believe the current generation of visitors will not be replaced by a new generation because they would prefer the Internet, and they think more and more exhibitors will continue to drop out which will affect the quality of the event. I will now explain both arguments in more detail.

In order to sustain an event in the long term, you need to continue to attract new generations of visitors. If the event is only interesting for one particular generation of visitors, this population will grow old and eventually cease to exist. Hence, it could be argued that it will also be important for the continued existence of the Vakantiebeurs to attract new generations of visitors to the event. Several participants have strong doubts whether the Vakantiebeurs will succeed in doing this, as they argued that the younger generations are more experienced with the Internet and prefer to use online channels for acquiring information, making purchases and so on. This can be seen from the following quote:

> "But it will be a lot less than now. That trend can already be seen, because the Vakantiebeurs has decreased in size. Of course, the organization is trying very hard to get those visitors back but eventually they will have to attract the digital generations. And whether they are able to reach those people...I doubt it." (Exhibitor A)

Additionally, there is a group of exhibitors that does not link the absence of future generations as visitors of the Vakantiebeurs to the fact that they are more experienced with the Internet than older generations who do visit the exhibition at the moment. Instead, they believe visiting exhibitions is just something which is considered enjoyable by a particular generation of people, and therefore it will cease to exist when that generation grows old. They describe this generation as people who were raised with regular visits to exhibitions as a way of entertainment.

The other main argument against the continued existence of the Vakantiebeurs is related to the apparent drop out of many exhibitors. It was argued by participants that more and more exhibitors choose not to take part in the event anymore. The most common reason given for this was that many exhibitors think they can better achieve their goals through online channels than through the Vakantiebeurs. When there are fewer exhibitors every year at the event, it will become more difficult for consumers to find the information and products they are looking for. Thus, according to participants, the drop out of exhibitors threatens the quality of the Vakantiebeurs and therefore also the visitor numbers, as people are not likely to come back next year if their needs are not being met. They argued that the organization of the Vakantiebeurs should make sure that the quality of exhibitors stays sufficient but instead they feel like the event is mostly trying to enhance the leisure experience. The next two quotes illustrate this:

> "They are mostly preoccupied with organizing dance groups, drinks and the twenty-seventh restaurant. But the twenty-fifth was already enough. And they are not paying attention at all to the quality of the exhibitors and their counters. And if the Vakantiebeurs does not make sure that people get the right answers to their questions, then their main competitor is indeed the search engine who will give the right answers." (Exhibitor B)

> "Hence, also exhibitors at a certain moment will be like: *it is your problem, we are going to withdraw.* And if the supply of exhibitors will be less, because that is what is happening… the supply at the Vakantiebeurs is becoming less. Exhibitors consider it to be too expensive and they withdraw. We notice that there are more empty spaces in the venue, which they try to cover with nice decoration because they consider it an experience." (Exhibitor D)

Compared to the discussion about the future of the Vakantiebeurs, participants who also are exhibitors are much more united when it concerns their future presence at the exhibition. Although there is some difference in terms of supporting arguments, almost no exhibitor indicated that his or her company has strong motives to withdraw from the event any time soon. The majority of exhibitors said that they have considered not participating in the Vakantiebeurs anymore, but they have eventually come to the conclusion that they still believe the event suits them very well: "Yes, we are evaluating the necessity of participating in those travel fairs. As of now, we believe that it is still important for us to be in those fairs, the big ones".

There are a few reasons for exhibitors to continue their presence at the Vakantiebeurs. First, some indicated that they are an organization which needs the personal contact between consumer and company. It has been explained in detail in subchapter 4.3 why these exhibitors value those face-to-face interactions with customers. Second, some exhibitors simply state that the financial benefits of participating in the Vakantiebeurs still outweigh the costs. And third, the Vakantiebeurs offers exhibitors the possibility to differentiate themselves from companies only visible through online channels. By presenting their organization to a lot of visitors every year in an offline environment, these exhibitors can present themselves in another way. This can be seen from the following quote:

> "It continues to be an important event, but we have certainly considered whether we should still do it. Because it is a very big investment [differs for every stand location and also depends on various optional packages and therefore it is difficult to give an indication of these costs] which you do every year. And not only the Vakantiebeurs, but also numerous other, smaller exhibitions. But the conclusion every time is: you have to be visible, it fits us because it is personal. And online channels are very important, but we will see in the future that…. you can differentiate yourself by also being present offline. And a lot of organizations are not present at all anymore, so there is some room in the market over there which we would like to use." (Exhibitor I)

Yet, there is also a large amount of exhibitors who specifically stated that they evaluate their participation in the Vakantiebeurs every year very critically. By no means would they argue that their presence at the event should be taken for granted. Instead, it depends very much on the outcomes of the most recent edition whether they are going to participate again next year, as can be seen from the following quote:

> "We have been away for a couple of years. We are back again, but every year we are like: *well, we will see how it goes this year.* If it is not a good year then we should consider next year if we still want to be there. We have had that situation a few years back and then we had the best result ever so then you are participating next year again. And then you might even perform better, so it is every year like: *is it still interesting for us, yes or no?*" (Exhibitor E)

A few exhibitors argued that they expect to continue their participation as long as the Vakantiebeurs will exist. However, this depends on whether the event will or will not experience a radical drop in the amount of visitors. Currently, they argued, the event still attracts a lot of people and therefore it is important for them to be alongside their competitors. If that changes they would reconsider their participation and the same goes for when the quality of visitors decreases.

Finally, some exhibitors are really thinking about alternative ways to achieve the goals which they are currently serving through participation in the Vakantiebeurs. Exhibitors argued that they use other offline events and they argued that virtual reality glasses at home can substitute the immersive features of the Vakantiebeurs, as it is able to involve all senses. The personal contact which can be established through face-to-face interactions at the event is important, but participants argue that this could potentially be substituted by online alternatives such as video chat. The ability of the Vakantiebeurs to answer consumer questions through direct interaction with exhibitors could be replaced by normal chat conversations through the website of the exhibitor. This can be seen from the following quote:

> "I would prefer to give online presentations. People can then log in through an account and are able to follow an online presentation about a particular trip. I believe that this could work for that generation, the new generation. So in the future I prefer to spend money on this rather than on an exhibition. So we are already thinking like: *what are we going to do in the future?* Because through those presentations people can see our faces, they can ask questions interactively. That is also possible through chat and so on." (Exhibitor D)

5. Discussion and conclusion

The purpose of this chapter is to present the main findings of this research by comparing the results from the interviews with the theoretical framework and additional literature. The chapter will start with answering the research sub-questions while also discussing how the main findings of each question relate to academic literature. The combination of the main findings of the research sub-questions constitutes the answer to the main research question. This chapter will conclude by making some suggestions for future research.

5.1. Discussion

The main objective of this research was to explore why offline intermediation through consumer travel exhibitions has continued to be popular in an era of increased usage of the Internet for planning and booking holidays. A case study was used in order to understand how consumer travel exhibitions complement the use of other offline distribution channels and of the Internet the rest of the year. Before discussing the findings for every sub-question, I will recount the research questions as originally set out:

Main research question: How does the Vakantiebeurs complement the use of other offline distribution channels and of the Internet for booking and planning holidays the rest of the year?

Sub-Question 1: Which strengths does the Vakantiebeurs possess that other distribution channels do not offer or offer less?

Sub-Question 2: How did participation motivations of consumers and exhibitors at the Vakantiebeurs change due to the proliferation of online distribution channels?

Sub-Question 3: In what way will the Vakantiebeurs be able to continue to serve as a complementing information and distribution channel, in light of the growing use of the internet and other technologies, in the future as it does today?

Strengths compared to other channels – consumers (SQ 1)

In order to understand the popularity of consumer travel exhibitions such as the Vakantiebeurs it is important to explore how the event complements other distribution and information channels for both exhibitors and visitors. In terms of visitors, participants of this research described the Vakantiebeurs as an event which attracts people because of three main reasons. First, participants argued that visitors use the event in order to acquire information about travel products, destinations and companies. It is worth noting that consumers are likely to combine different information channels while making travel plans (Del Chiappa et al., 2012; Elliott et al., 2012; Ho et al., 2012). The findings from this research reaffirm this theory, as participants often stressed that the Vakantiebeurs should not be seen as a substitute for other information channels. Instead, they argued that the event serves as a complementary information channel as some visitors, for example, use the Internet to orientate themselves and the Vakantiebeurs to ask more specific questions in a later stage. Participants argued that the Vakantiebeurs complements other information channels because it is offers visitors an opportunity to compare products, destinations and organizations in a face-to-face environment. The internet also allows for comparisons, but not through face-to-face interactions which some visitors prefer. Instead, consumers could go the office location of the tour operator or DMO but they would need to travel all over the country in order to make comparisons. Additionally, participants argued that other information channels come with the risk of information overload while the Vakantiebeurs is able to offer specific, tailor-made information through goal-orientated questions. And finally, participants argued that the complexity of travel products and destinations, which visitors of the Vakantiebeurs are looking for, increases the need for more information from multiple channels and for offline information channels. Hence, this supports existing knowledge about the use of the Internet for other complex products such as mortgages (Frambach et al., 2007) and insurances (Mau, Cvjiikj & Wagner, 2015). The issue of complexity will be discussed in more detail later on in this chapter. Hence, the comparing, face-to-face, tailor-made characteristics of the Vakantiebeurs make acquiring information at the event complementary to other information channels according to participants.

Second, participants argued that visitors go to the Vakantiebeurs because it allows them to observe the people behind the companies. They explain how the need for this arises because of the complexity of travel products and destinations, as they are often expensive, exotic and involve unfamiliar companies. The combination of the face-to-face character of the event with the opportunity to make comparisons allows the Vakantiebeurs to complement other channels for this purpose. Early predictions about the impact of the Internet suggested that offline information and distribution channels might be replaced by the ´virtual market space´ (Doherty & Ellis-Chadwick, 2010). Instead, it has become clear in other research that the proliferation of Internet use actually reinforces, mainly because of security concerns, certain preferences for offline channels such as the Vakantiebeurs (Buhalis & Law, 2008; Del Chiappa et al., 2015; Wolfe et al., 2005). The capability of the Internet to establish a bond of trust between them and consumers determines whether it can be an alternative information and distribution channel (Agag & El-Masry, 2016; Vos, Marinagi, Trivellas, Eberhagen, Skourlas & Giannakopoulos, 2014). Several studies have showed that online channels struggle to do this as consumers perceive a higher risk when shopping online (Vos et al., 2014; Kim, Chung, & Lee, 2011). This is particularly relevant with respect to travel products, as it involves intangible and high-risk products (Elliott et al., 2012). Participants of this research argued that visitors of the Vakantiebeurs use the event to observe companies in the face-to-face environment in order to establish trust and in that way it is complementary to other information and distribution channels.

Third, participants described the event as a place where visitors go in order to combine the purpose of acquiring information with the hedonic experience of the Vakantiebeurs as a fun day-out. Rittichainuwat & Mair (2012) mentioned the leisure experience as a potential reason for consumers to visit consumer travel exhibitions. According to the findings of this research, some visitors definitely visit the event for pleasure but participants argued that most visitors are likely to combine this purpose with other reasons. The Vakantiebeurs might not offer specific qualities as an information channel with respect to non-complex travel products, but it can be complementary to other channels because it is able to make the process of acquiring information enjoyable through the leisure experience. Participants argued that visitors enjoy the Vakantiebeurs because there is food, music and dance, which supports the argument by Rittichainuwat & Mair (2012) that people enjoy the multi-sensory character of consumer travel exhibitions. Hence, consumers might be able to acquire information just as easily through other channels but the Vakantiebeurs is complementary because it is able to combine it with a fun day-out. Furthermore, participants argued that some visitors have no intention to travel but they visit the event in order to daydream about distant places and trips, which is in line with research by Vogt & Fesenmaier who argued that people search for new information in order to satisfy aesthetic needs through imagining places (Vogt & Fesenmaier, 1998). Vogt & Fesenmaier (1998) also argued that existing theories might have shortcomings as they only focus on functional motivations of people, such as decreasing perceived risk before purchasing travel products in the case of the Vakantiebeurs. This research adds to that by showing a case study where hedonic purposes seem to be, at least for some visitors, at least equally important as functional purposes. Participants of this research support the argument by Vogt & Fesenmaier (1998) that people can experience pleasure from prepurchase activities as they argued that consumers combine acquiring travel-related information with a fun day-out. This could mean that certain visitors would not visit the Vakantiebeurs in order to acquire travel-related information, as other channels are equally able to provide information for non-complex travel products and destinations. However, because the event is also able to offer a leisure experience they do visit the event. This option was stressed by multiple participants in my research.

The theoretical framework suggested two additional motivations for consumers to visit CTEs: in order to make purchases and to collect discounts and promotions. Participants stated that they believe there certainly are visitors who make purchases at the Vakantiebeurs. However, they also believe this is not an important reason for consumers to visit the event, as there are other distribution channels which are able to offer the same service. In the literature it was argued (e.g. Wolfe et al., 2005) that, ten years ago, people were reluctant to buy travel products through online channels because of security issues, which could mean that the Vakantiebeurs could serve as a complementary distribution channel for that purpose. However, participants argued that consumers are much more confident about purchasing through online channels nowadays, which supports the expectation from Wolfe et al. (2005) that online consumption would increase due to increased security of online channels. Consumption of travel products through online channels has gone up from 46% of all consumers in 2005 to 78% in 2013 (CBS, 2016a). Hence, participants argued that purchases of travel products by consumers do take place at the Vakantiebeurs but this is not an important reason to visit the event as other distribution channels offer the same service. Also, it was suggested by several participants that consumers are confronted by too many choices to make. This overload of choices could mean that consumers need some time after the event to think it through, before making a purchase decision. Finally, participants argued that, due to the complexity of the travel products, customers need interaction with the exhibitor after the Vakantiebeurs in order to customize their trip and therefore it is not possible to make a purchase during the event. The Vakantiebeurs in general is not considered to be a complementary channel by participants for making purchases. Additionally, the same applies for discounts and promotions: participants argued that they are widely available at the exhibition but consumers generally do not visit the event in order to get discounts.

Strengths compared to other channels – exhibitors (SQ 1)

In terms of exhibitors, participants of this research described the Vakantiebeurs as an event which attracts people because of two main reasons, while they were divided about the importance of three other reasons. First, participants argued that exhibitors use the event to communicate a particular brand or destination image. In other words, the Vakantiebeurs serves as a marketing channel through which exhibitors reach out to consumers by means of images, banners, flyers and many more. Some do it because they know how much the event contributes to their total amount of customers or profit while others do not gather data about this and just participate in the event because of competitors, habit or a feeling that it is necessary to be there. The Internet has given companies, especially SMEs, a potentially important alternative channel when it comes to marketing and promotion, at least that is what many scholars initially anticipated it to be (Lee, 2001; Zheng, Caldwell, Harland, Powell, Woerndl & Xu, 2004). However, Karanasios (2008) argues that the anticipated level playing field has not become reality, as SMEs struggle to use the Internet for information and product distribution. The adoption of online channels by SMEs is restricted because of limited financial resources, skill deficiencies and time constraints (Karanasios, 2008; Abou-Shouk & Megicks, 2013). Furthermore, Griffith & Gray (2002) showed how consumer´s familiarity with a particular brand strongly influences to what extent the consumer trusts website content. Participants of this research argue that the Vakantiebeurs is valuable because it offers SMEs the opportunity to reach out to 100,000 potential customers in just five days. Larger companies are much more capable of using online channels for raising brand familiarity and therefore they do not need to be at the Vakantiebeurs (Zoetekouw, 2016). Hence, in terms of raising brand awareness it is complementary, especially for smaller companies, to other channels.

Second, participants argued that the face-to-face character of the Vakantiebeurs allows exhibitors to have personal and direct communication with potential customers. This aspect of the event is especially complementary to online channels and it allows exhibitors to demonstrate their expertise through interactions with visitors. Participants also argue that it is easier to convince and reassure people about products and destinations through face-to-face interactions. This can be linked to the earlier mentioned theory that a bond of trust is easier to establish through face-to-face interactions than through online channels. Additionally, participants argue that the Vakantiebeurs allows exhibitors to show what kind of company they are and what kind of products or destination they have to offer. The interaction with potential customers in a physical environment allows them to create a particular atmosphere in order to make the intangible more tangible. Tourism products are inherently intangible, as they involve experiences which cannot be inspected prior to purchase in the same as physical products can (Huang et al., 2010). The face-to-face character of the Vakantiebeurs is complementary because it is possible at the event to engage all the senses of visitors, in contrast to other channels. As argued by Holloway (2004), tourism marketing “needs to overcome the drawbacks posed by an intangible product, and there are a number of imaginative ways in which this has been achieved in practice” (Holloway, 2004, p. 17). He describes how there has been an improvement in experiential marketing through the development of video material, which allows customers to imagine destinations and products better than images in brochures (Holloway, 2004). The Vakantiebeurs in 2016 showed how tourism marketing has found an additional step in experiential marketing, as virtual reality headsets were introduced among several exhibitors. Virtual reality glasses are potentially powerful because they are immersive through smells, sounds, the feeling of motion and moving images (Freina & Ott, 2015). Freina & Ott (2015) argue that it can make people feel like they are actually in the simulated world, which increases the tangibility of the tourism product and thereby decreases perceived risk and uncertainty. But even without the virtual reality glasses the entire Vakantiebeurs event is in effect one immersive experience because it involves a multi-sensory experience through food, dances, images and many more. In this sense the event is complementary because other channels cannot offer the same amount of immersion.

Besides these two factors which participants argued to be key in the motivation for exhibitors to participate in the Vakantiebeurs, there are three factors on which participants had diverging views. First, some participants argued that the Vakantiebeurs is a suitable channel for addressing potential customers´ needs. During the event exhibitors can listen to wishes and demands of potential customers and use that input to change their products after the event. They can also use the event to customize products on the spot when their products require customization. However, most participants argued that they do not consider the Vakantiebeurs complementary for this purpose because exhibitors have many other, more appropriate channels available to do this. Second, it was suggested in the literature that consumer travel exhibitions can be used to improve the relationship with customers (Yuksel & Voola, 2010). Many participants argued that it definitely is a complementary quality of the Vakantiebeurs, as they do not have other appropriate channels to achieve this. However, it was not considered to be an important reason to participate in the event by many. Some participants argued that exhibitors can use the interactions with former customers to attract new customers. Hence, for them the relationship with former customers can serve the purpose of expanding their customer base. Third, it was suggested by Rittichainuwat & Mair (2012) that consumer travel exhibitions can be used by exhibitors to make sales, but research by Yuksel & Voola (2010) opposed this without giving any explanation. Hence, there appeared to be some disagreement in the literature about the importance of making sales during exhibitions. Participants of this research argued that it could be an important factor, but it depends on what kind of company is exhibiting. Companies which offer complex travel products which require customization often need one or several meetings after the Vakantiebeurs with customers to complete the tourism products and therefore cannot make sales at the event. Exhibitors who offer readymade holiday packages are much more capable of using the Vakantiebeurs for making sales. Some also argue that they want customers to really think it through and collect more information before they make a decision because they want to make sure that people are absolutely sure about their purchase. As these views were stressed by small companies, it could be the case that they want to ensure that they have very satisfied customers, as they also stressed that they depend very much on word-of-mouth for new customers. Larger companies are much more capable of using online channels to market themselves, as was argued before. Hence, the purpose of making sales during the Vakantiebeurs is important for some exhibitors but they can also fulfill this purpose through other channels and therefore it cannot really be considered to be complementary. Finally, it was argued in literature that the Vakantiebeurs can serve as a channel to observe competitors (Rittichainuwat & Mair, 2012). Only a few participants argued that exhibitors use the event for this purpose but they do not believe the Vakantiebeurs is complementary as they have other channels, such as the Internet, to do it.

Complexity (SQ 1)

The issue of complexity seems to be key in explaining why the Vakantiebeurs is complementary according to participants for the purposes of acquiring information, observing companies and not for selling and purchasing travel products. This section aims to explore what factors make a travel product complex and to what extent the Vakantiebeurs can be classified as a channel where complex travel products are offered. Cheyne et al. (2006) mention two different factors that could make a travel product complex: the familiarity of the traveller with the language in the destination and the exoticness of the destination in the eyes of the traveller. Anckar & Walden (2001) add to this by means of a table which gives several characteristics of high- and low-complexity travel products. They describe complex travel products as being focussed on international travel instead of domestic travel. However, in the context of the Netherlands I would argue, even though this is highly subjective, that most European destinations would not be considered complex by travellers. Additionally, Anckar & Walden (2001) characterize complex travel products as non-routine journeys which need customization instead of being readymade package holidays. Finally, Järveläinen (2007) argues that complex travel products are also more expensive than non-complex products.

Participants of this research refer to price, exoticness of the destination, type of trip (non-regular and customized) and organization (extent of familiarity) when they spoke about complex travel products. In terms of price, the Vakantiebeurs can be considered to be an event which offers complex travel products. The average Dutch consumer spends about €1,200 per year per person on travel products, while the average consumer at the Vakantiebeurs spends €3,376 according to survey data in 2016 (NBTC-NIPO, 2015; Vakantiebeurs, 2016a). Hence, because the average visitor spends almost three times as much on travel products than the average Dutch consumer, it can be assumed that the products which are being sold are also relatively expensive.

In terms of the exoticness of destinations it is difficult to make an objective assessment as some people might perceive a trip to Italy as being complex while others would refer to destinations in Africa or Asia. Participants of this research often describe European destinations as being relatively non-complex and destinations in other continents as being relatively complex. For the moment I will use this categorization for assessing complexity at the Vakantiebeurs. In 2014, 88% of all Dutch travellers went to a European destination, so only 12% went to other continents (NBTC-NIPO, 2015). If you look at the map of the Vakantiebeurs in 2016, it becomes instantly clear that the ratio European halls versus Global halls is not in line with these numbers, as 40% of all stand locations are located in the Global halls. Additionally, survey results in 2016 showed that 68% of the visitors were looking for European destinations while almost the same amount of people (61%) were looking for destinations outside of Europe (Vakantiebeurs, 2016a). It is important to note that the data of the Vakantiebeurs shows some overlap as visitors were able to check multiple boxes. Based on these numbers, and the categorization of destinations outside Europe as being complex, it could be argued that the Vakantiebeurs focusses relatively much on complex destinations.

In terms of type of trip and the familiarity of organizations it is difficult to make a quick assessment of the Vakantiebeurs. There is no overview or relatively quick way to analyse what kind of products are being sold by the exhibitors, but participants argued that the event has a relatively high focus on customized travel products instead of packaged trips. In terms of brand familiarity, it can be argued that the most popular organizations for holidays are not present at the exhibition, as was discussed in subchapter 1.4. However, it is not necessarily the case that the popularity of a brand in terms of amount of consumers is linked with brand familiarity. Hence, for both these factors it is difficult to make a valuable assessment.

Influence of the internet (SQ 2)

In order to understand the complementing value of the Vakantiebeurs it is important to understand how the rise of an alternative information and distribution channel, the Internet, has influenced participation motivations of consumers and exhibitors. This section elaborates a number of topics, both with respect to exhibitors and visitors, that illustrate how the rise of the Internet has changed, decreased or reinforced particular motivations. These topics include: the Vakantiebeurs as a complementing channel, a change in the type of information at the event, a decrease in sales, a reinforced need for offline information due to online information overload, a reinforced need for personal contact due to the experienced distance on the Internet, the Internet as an alternative marketing channel, and the leisure experience as way to distinguish the event from other channels.

It was argued by participants that consumers nowadays increasingly combine online and offline information channels. This is line with research by several scholars (Del Chiappa et al., 2015; Ho et al., 2012). Ho et al. (2012) argued that the Internet is the primary source for travel-related information but their research showed that people are likely to continue their quest for information in offline contexts after using online channels. Participants in my research also argued that consumers start by searching for information on the Internet and subsequently use the Vakantiebeurs to ask goal-orientated, more specific questions. Hence, in this way the rise of the Internet as an information channel has influenced the type of information which is exchanged at the Vakantiebeurs. However, according to several participants there still is a large amount of people who use the event for orientation, which shows that consumers differ in their behaviour and cannot be generalized. It would be interesting to know more about these two groups of people in order to understand why and whether the Vakantiebeurs can continue to serve as a channel for orientation. This debate will be further elaborated in the next section, which deals with sub-question 3. Findings from this research support the argument that online channels merely complement the other information channels instead of substituting them and therefore the Vakantiebeurs is still used for the purpose of acquiring travel-related information.

Although several scholars in the past raised doubts whether consumers would be willing to use the Internet for purchasing products (Buhalis & Law, 2008; Lang, 2000), it was argued by participants in this research that many people use online channels to buy travel products. Therefore, the Vakantiebeurs for most consumers is not a complementing channel anymore for making actual purchases. They explain that purchases are made during the event, but they believe it is not an important reason for consumers to attend the Vakantiebeurs because the Internet offers them the same opportunity. Through the introduction of the Internet the complementing value of the Vakantiebeurs as a distribution channel for several kinds of tourism products has decreased. Consumers in the Netherlands increasingly prefer the Internet to buy travel products and sales through offline channels, such as the telephone and shops, continue to decrease (NBTC-NIPO, 2013). Participants argued that the security of the Internet has increased and therefore consumers are more confident about making purchases through online channels, which is in line with expectations from Wolfe et al. (2005).

The Internet has offered consumers an alternative distribution and information channel, but it has also reinforced certain reasons for consumers to value the Vakantiebeurs for these purposes. Participants argued that some consumers experience information overload while browsing for travel-related information online. Because the Internet is not able to serve their needs, they revalue offline channels such as the Vakantiebeurs. Participants also argued that the Internet is less able to generate trust between consumers and exhibitors, and therefore consumers revalue the personal, face-to-face interactions at the Vakantiebeurs. When participants were asked what determines why certain consumers experience these difficulties with the Internet while others do not or do less, they stressed the importance of their experience with the Internet and thereby their age as an important factor. Participants argued that young people are much more comfortable with using the Internet as they started to use it very early in their lives while older people might be less comfortable. Many scholars have done research about the importance of age as a determining factor for using the internet as an information and distribution channel, and they support the arguments made by participants in my research (Del Chiappa & Zara, 2015; Wolfe et al., 2005). Hence, the relatively high average age at the Vakantiebeurs (52 years according to survey data (Vakantiebeurs, 2016a)) could be explained somewhat by their lack of internet experience and therefore their preferences for offline channels. Participants in this research argued that this does not necessarily applies specifically for making online purchases, but in particular for acquiring information and establishing a bond of trust. However, participants also stressed that people around this age generally have more time to travel and more money to spend on travel products (which increases the complexity of the products and therefore the need for face-to-face contact).

Furthermore, participants argued that the Internet is especially a good distribution channel for large companies as they are able to make sure that people find them on the Internet, for example through search engines. Small companies, however, do not have the financial means to do the same thing, so they revalue the big amount of people who they reach during the Vakantiebeurs (Dlodlo & Dhurup, 2010; Heung, 2003; Saif-Ur-Rehman, 2016). The big companies, that often offer cheap holidays to mass tourism destinations, do not need to be at the Vakantiebeurs because they have sufficient access to other distribution channels. Subsequently, if those companies are not at the Vakantiebeurs, consumers who are looking for interaction with those organizations do not attend the Vakantiebeurs anymore for that purpose. Through this, participants argued, the proliferation of internet use has offered exhibitors an alternative distribution channel and this had led to a decrease in the amount of exhibitors at the Vakantiebeurs (and relatively more small companies than large companies).

Finally, it could be argued that the Internet has increased the importance of the leisure experience at the Vakantiebeurs. Participants explained that consumers want a more complete experience at the event, while offering only functional features (such as acquiring information and observing companies) is not enough anymore. Visitors want to be entertained through food, music and so on. The Internet is, as was explained before, able to offer many similar qualities and therefore the Vakantiebeurs needs to distinguish itself again by offering new distinctive elements in order to stay relevant. Participants believe that the Vakantiebeurs has identified the leisure experience as the best way to counteract the decreasing visitor numbers. According to them, the event has developed additional activities to increase entertainment and interactivity at the Vakantiebeurs, and participants generally agree that this is the best strategy to continue to attract visitors. However, there are also numerous (potential) downsides to this strategy. Firstly, although participants think everyone could be persuaded into travelling, it was argued that the Vakantiebeurs should make sure that it will not become purely a leisure event without visitors who have the intention to travel. Secondly, participants argued that the noises from all the activities, dances, music and so on can be disturbing when an exhibitor is trying to have a normal conversation with a potential customer. If there are too many stimuli it can disrupt the functional features of the event for both consumers and exhibitors. Thirdly, exhibitors experience differences in interests, for example when the Vakantiebeurs wants to develop a ´culinary route´ which visitors should follow while certain exhibitors have stand locations which are very far away from this route, or when the Vakantiebeurs wants booths to be dressed up in a particular theme and one exhibitor cannot use its newly bought design. Although exhibitors experience these difficulties, they generally believe the stimulation of the leisure experience by the Vakantiebeurs is in their best interest.

Future of the Vakantiebeurs (SQ 3)

There are two main viewpoints about the future of the Vakantiebeurs. One group of exhibitors believes the Vakantiebeurs will continue to exist, but only when the event continues to focus on the leisure experience in order to offer something different compared to online channels. Additionally, they think that the event will become smaller and more focused. The other group of exhibitors argues that they believe the Vakantiebeurs will cease to exist because they will struggle to attract younger generations in the future, as they prefer to use online channels. Consumers have increasingly used the Internet for buying travel products (NBTC-NIPO, 2013) and therefore it could be argued that this will continue to increase as younger generations are even more used to the Internet than older generations. However, this research has also shown that offline channels might be preferred when dealing with complex travel products, which has been argued before by other scholars (Frambach et al., 2007; Law et al., 2015). The key question is whether consumers in the future will be confident and comfortable enough to only use the Internet for purchasing complex products.

Furthermore, they argued that more and more exhibitors choose to use online channels for communication with potential customers and therefore the amount of exhibitors at the Vakantiebeurs continues to decrease. According to them, this will, in combination with the preoccupation of the event’s organization to focus on developing the leisure experience, threaten the quality of the exhibitors and subsequently visitor numbers for following years.

Exhibitors generally agreed that, although they critically evaluate their participation, they currently have no clear reasons to withdraw from participating in the Vakantiebeurs. Participants believe that 1) they need the face-to-face interaction, 2) financial benefits still outweigh costs, and 3) they can differentiate from non-participating companies. The reluctance of exhibitors to state that they would strongly consider withdrawing from the event can be partially explained by their uncertainty about the consequences. It was indicated by one exhibitor that it is very hard to know what will happen to their organization when they would not participate in the Vakantiebeurs for one year and therefore it requires a lot of courage to take such a risk. In terms of alternatives in the future for consumer travel exhibitions, participants mention video chat, regular chat, virtual reality glasses and other offline events.

5.2. Theoretical and managerial implications

The theoretical framework described in this report has shown how limited the available knowledge about consumer travel exhibitions is. Some academic sources describe possible visitor and exhibitor motivations to participate in these events, but they only mention these factors briefly without elaborating how and why participants of CTEs use the event, let alone how

CTEs complement other distribution and information channels. This report contributes to existing theories about CTEs by expanding knowledge about visitor and exhibitor motivations. Existing knowledge about visitor and exhibitor motivations in combination with theories about information and distribution channels and (dis)intermediation has been used to guide the interviews. The report also contributes to the wider debate in terms of online and offline channels by exploring why people still value a particular offline channel and subsequently it helps to understand the limitations of online channels. In terms of managerial implications, exhibiting and non-exhibiting organizations can use this report to reflect on their own consideration to participate in CTEs. The report could also be helpful to the organization of the Vakantiebeurs, as it can add to their understanding about their target groups, both in terms of exhibitors and visitors.

5.3. Recommendations for future research

This research is limited in the sense that it only used existing survey data and input from travel-related organizations to gather data. It would be valuable to do an extensive qualitative research among visitors and non-visitors of the Vakantiebeurs in order to improve the understanding how and why the event is complementary to other information and distribution channels. Additionally, it must be noted that findings in this report might not be applicable in the context of other consumer travel exhibitions in other countries. Factors such as disposable income, technological education and cultural factors might influence the extent to which consumers have access to alternative channels, such as the Internet, and subsequently how and if CTEs complement other channels. A comparable research project in another location would therefore help to understand the complementing value of CTEs with respect to the factors. Finally, it would also be helpful to perform a more general study in terms of the use of online and offline channels by exhibitors and consumers: what kind of channels are used, when and how? By learning more about the complementing value of other channels it will become clearer how CTEs complement them.

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7. Appendices

Appendix 1 – Interview guide

Introductie

Ik studeer toerisme aan de Universiteit van Wageningen en op dit moment ben ik bezig met mijn afstudeeronderzoek. Het onderwerp hiervan is de toegevoegde waarde van reisbeurzen, zoals de vakantiebeurs, voor zowel consumenten als exposanten. Gedurende ongeveer twee maanden neem ik interviews af bij bedrijven en daarna ga ik de resultaten analyseren om vervolgens conclusies te kunnen trekken.

Het interview zal ongeveer 30 tot 60 minuten gaan duren en ik wil graag uw toestemming vragen om het gesprek op te nemen. Zoals ik eerder heb toegelicht, helpt dit mij om de resultaten te verwerken. De geluidsopname gebruik ik om het interview uit te typen en eventuele resultaten kunnen niet worden herleid naar uw persoon of bedrijf. Dus bij deze wil ik graag toestemming om de geluidsopname te starten.

- Start geluidsopname

Korte vragen over het bedrijf

Licht toe wat ik heb begrepen over het bedrijf (verschilt per bedrijf) en stel wat relevante vragen over het bedrijf. Eindig met vragen over deelname aan de Vakantiebeurs: heeft het bedrijf ooit deelgenomen?

Onderwerp 1: Redenen van (geen) deelname voor bedrijf

Speel in op wat de persoon heeft gemeld over de deelname van het bedrijf aan de Vakantiebeurs en vraag naar de redenen waarom de beurs wel of niet relevant is voor het bedrijf. Probeer hierbij aan te haken op de onderstaande concepten, welke gehaald zijn uit de literatuur, maar noem ze niet meteen. Vraag ook of de persoon denkt dat deze redenen uniek zijn voor de Vakantiebeurs of dat andere kanalen hetzelfde doel kunnen bereiken. Pas als de persoon aangeeft alle relevante redenen genoemd te hebben overschakelen naar het melden van enkele suggesties. Pols hierbij waarom de persoon wel/niet denkt dat dit een belangrijke reden is voor hun bedrijf om deel te nemen aan de beurs.

Exhibitors:

- Establish brand/destination image
- Address potential buyers’ needs
- Observe competitors
- Make direct sales
- Collecting information for marketing activities
- Improve relationship with customers
- Personalized and direct communication
- Enhancing the morale of company’s personnel

Onderwerp 2: Reden van deelname voor consumenten

Leg uit dat ik ook geïnteresseerd ben in de motivatie van consumenten om de beurs te bezoeken, omdat dit nauw samenhangt met de motivatie van bedrijven. Vraag aan de persoon wat hij/zij denkt dat de belangrijkste redenen zijn dat consumenten de beurs bezoeken. Vraag naar concrete ervaringen, contactmomenten met consumenten: waar gingen de gesprekken over? Waar zijn de consumenten naar op zoek? Probeer hierbij weer in te haken op onderstaande thema's, maar noem ze in eerste instantie niet zelf. Vraag ook of de persoon denkt dat er verschillen bestaan per reden tussen verschillende types consumenten (bijv. op leeftijd, complexiteit reis, etc.). Als de antwoorden van de persoon verzadigd raken, vraag expliciet naar hun mening over de overige redenen die hieronder genoemd staan.

Consumers:

- To get discounts and special promotions
- Making an actual purchase at the exhibition
- Acquire information about product, service and destination (reduce dissonance of complex products) (no information overload)
- Observe companies that are selling
- Personal, face-to-face contact + possibility to ask questions and get answers
- Multi-sensory experience which makes information provision enjoyable
- A visit as a leisure experience

Onderwerp 3: De invloed van het Internet

Leg uit dat het Internet de laatste 20 jaar steeds groter is geworden en steeds meer een alternatief biedt voor het zoeken naar informatie en het kopen van reisproducten. Vraag of de persoon denkt dat de opkomst van het Internet invloed heeft gehad op de redenen waarom bedrijven en consumenten gebruik maken van offline kanalen (en deelnemen aan de beurs). Waarom wel, waarom niet. Is het bedrijf meer actief geworden op het Internet, en welk effect heeft dat gehad op hun offline aanwezigheid, zoals op de beurs?

Onderwerp 4: De toekomst van de beurs

Leg uit dat verwacht wordt dat het Internet nog verder uitbreidt en dat dit invloed kan hebben op redenen om offline contact te hebben met consumenten. Vat de genoemde unieke kwaliteiten voor consumenten en bedrijven samen die genoemd zijn, en vraag of de persoon denkt dat het Internet deze (deels) over kan nemen, en hoe. Als de antwoorden verzadigd raken, noem dan de onderstaande suggesties als ze nog niet behandeld zijn. Vraag uiteindelijk of de persoon denkt dat de beurs relevant zal blijven voor consumenten en bedrijven in de toekomst en vraag naar de belangrijkste redenen voor deze mening.

- UGC to replace personal touch of offline channels?
- UGC to offer less biased information than offline channels?
- Consumers will continue to value offline payment or will security improve?
- Consumes will become more experienced (old people without internet experience mature) with the Internet and this will result in more online users? (less information overload)

- Eindig geluidsopname

Afsluiting

Bedank de person voor medewerking aan het interview. Leg nogmaals uit hoe de geluidsopname gebruikt wordt en hoe de resultaten vertaald worden naar antwoorden op de deelvragen. Bied de persoon aan om de eindversie van de thesis op te sturen (mailadres!) en leg uit wanneer verwacht wordt dat deze af is.

Appendix 2 – Coding scheme

Main research question: How does the Vakantiebeurs complement the use of other offline distribution channels and of the Internet for booking and planning holidays the rest of the year?

Sub-Question 1: Which strengths does the Vakantiebeurs possess that other distribution channels do not offer or offer less?

Establish brand/destination image	E1
Present because of visitor numbers	E1a
Address potential buyers' needs	E2
Observe competitors	E3
Make direct sales	E4
Collecting information for marketing activities	E5
Improve relationship with customers	E6
Personalized and direct communication	E7
Enhancing the morale of company's personnel	E8
To get discounts and special promotions	C1
Making an actual purchase at the exhibition	C2
Acquire information about product, service and destination	C3
Orientation / comparing products	C3a
Goal-orientated questions/advice	C3b
Because of complexity	C3d
Information overload	C3e
Observe companies that are selling	C4
Because of expensiveness	C4a
Personal, face-to-face contact	C5
Multi-sensory experience	C6
A visit as a leisure experience	C7
Free stuff	C7a
Combination of C3+C7	C10

Sub-Question 2: How did participation motivations of consumers and exhibitors at the Vakantiebeurs change due to the proliferation of online distribution channels?

Changes because of the proliferation of the Internet	P1
Effort of Vakantiebeurs to stay relevant	P2

Sub-Question 3: Will the Vakantiebeurs be able to continue to serve as a popular information and distribution channel in the future as it does today?

The future of CTEs	F1
Their presence at CTEs in the future	F2
Alternatives to CTEs	F3
Relevant information about other exhibitions	O1
Opinion about leisure experience	L1
Reviews	R1
Age of attendants	A1
Security at internet	S1

Appendix 3 – Participants

Exhibitor label	Type of business	Type of products (mostly pre-packaged, mostly customized, both)	Destination (mostly European, mostly global)	Size (small, medium, large)
A	TO	Customized	Global	Small
B	TO	Both	Global	Medium
C	TO	Pre-packaged	Global	Medium
D	TO	Customized	European	Small
E	TO	Pre-packaged	Global	Large
G	TO	Customized	Global	Small
H	TO	Customized	Global	Small
I	TO	Pre-packaged	Global	Medium
J	TO	Both	European	Small
K	TO	Customized	Global	Small
L	TO	Pre-packaged	Global	Medium
M	TO	Pre-packaged	Global	Small
N	TO	Customized	Global	Small
O	TO	Customized	European	Medium
P	TO	Pre-packaged	European	Medium
S	TO	Customized	European	Small
Q	DMO	-	Global	-
R	DMO	-	European	-
F	DMO	-	Global	-