Haystack Consulting

Report created for NBTC | US market

From familiar name to serious option

How American corporate event planners choose destinations and how they see the Netherlands

Report created for

NBTC
Nederlands Bureau voor Toerisme & Congressen

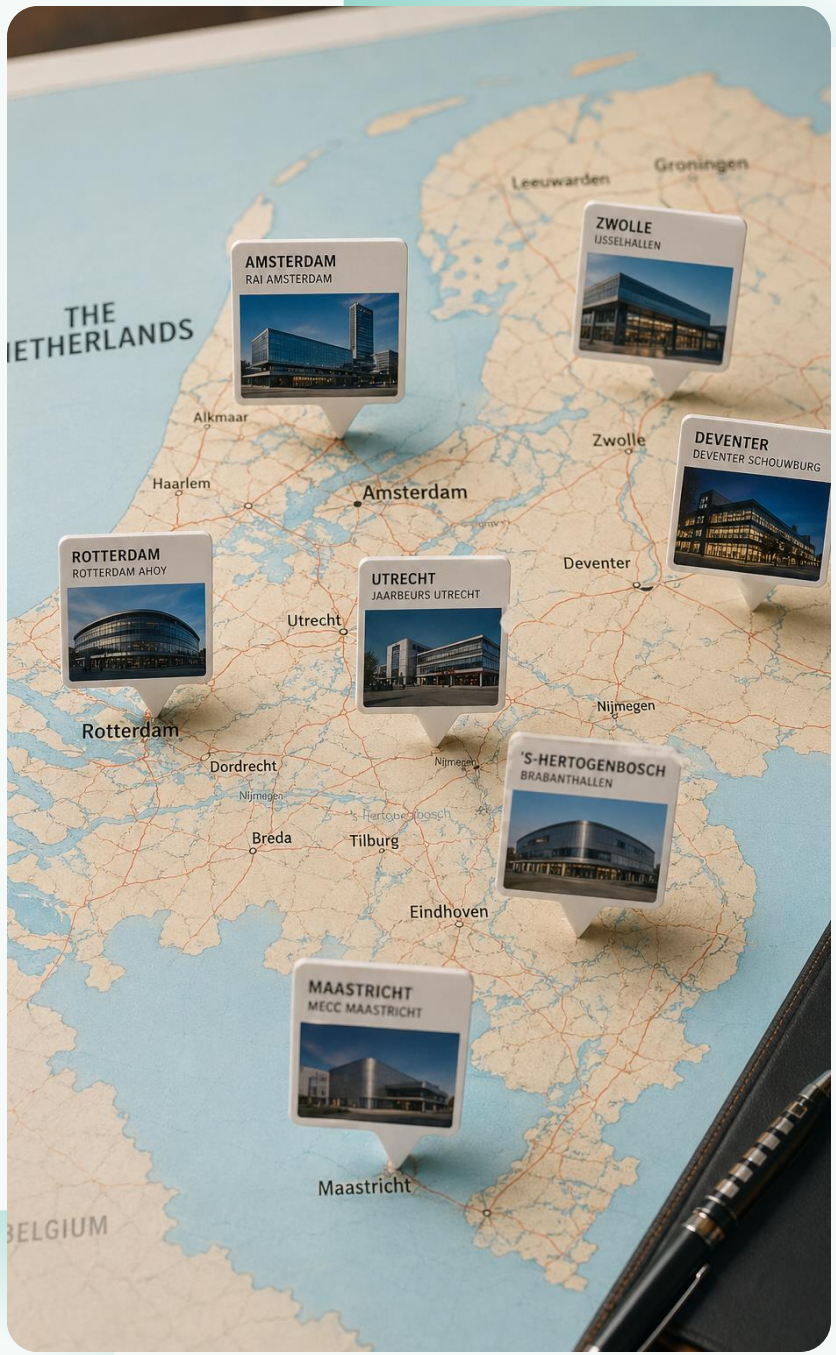
By our experts



Stefan Peeters
Stefan.Peeters@haystack-consulting.com



Valerie Lieffrig
Valerie.Lieffrig@haystack-consulting.com



Background and objectives

Your question to us

NBTC wants to **better understand corporate event planners**, because they play a crucial role in selecting destinations for international meetings, incentives, conferences and events (MICE).

This audience typically **prioritises factors** such as accessibility, infrastructure, venue quality, sustainability credentials and the overall visitor experience. Budget efficiency, logistical simplicity and the availability of high-quality service providers also matter. The destination's image and uniqueness can also strongly influence the decision, especially for incentive travel.

Corporate planners often **balance practical requirements with the need to offer participants memorable and engaging experiences.** Understanding how they see different countries helps NBTC identify competitive strengths and differences. It is important to assess **awareness of the Netherlands** and the **associations** planners have with it, such as innovation, accessibility and sustainability. It is also relevant to explore whether the Netherlands is seen as **distinctive enough** compared with other European destinations. Insight into how planners shortlist and evaluate destinations can inform targeted positioning and decisions. Ultimately, these learnings help NBTC **tailor its offer**, and especially **its communication**, more closely to the needs and expectations of this influential group of decision-makers.

We interviewed senior American event planners, balanced by age and experience with the Netherlands

The approach

01 Virtual audience creation

02 Dynamic interviews
Same script for all, plus follow-up probes

03 Qualitative analysis
Themes ranked by how often and how strongly they recur

The sample

Criteria	Description
Base	US, organising for American participants
Age	30-60 years old
Seniority	Head of Events, Event Director, Senior Event Manager
Experience	5+ years in event planning
Role	Agency and in-house planners
Decision power	Decides or co-decides on the destination
Event type	Multi-day corporate events abroad
Event size	Small (up to 300), medium (301-750), large (750+)
Sectors	Pharma, finance, tech, media, manufacturing, consumer goods
Netherlands	3 booked, 3 considered, 4 never considered
Excluded	Association congresses, incentive-only planners



The Netherlands is rarely rejected, but often not seriously considered

1. **Europe is chosen before the planner starts**
   A sponsor or client picks Europe for a business reason and often names the city. The Netherlands is known by name, rarely put forward.

2. **A city comes in through people, not promotion**
   Peers at conferences, a new flight route or a venue lead add a city. Generic outreach gets deleted; a bad peer story drops one.

3. **Planners check the trip first**
   Flights from US hubs, Schiphol and the last transfer decide early. A hard first day undermines the whole programme.

4. **Then the venue against the brief**
   Large groups put room blocks first, tech briefs want energy, pharma a business look. The Dutch fit is best at 300 to 700 guests.

5. **Dutch options drop out without fast proof**
   Slow answers, unproven venue fit and Lisbon's prices end the comparison before any site visit. Other Dutch cities are names only.

The opening for NBTC
A credible first case



- Peer proof where planners meet
- A feasibility check per brief, in days
- Comparison sheets for the client deck
- Proof that fits the event type
- The Dutch city that fits the brief

Get on the list before the brief, then prove the case once it arrives.

Senior planners who decide what is feasible, not where the search starts

1 | Profile of the target group

Planners control feasibility, not the starting list: most guard execution, some build experience

Profile	Role	Organisation	Events	The Netherlands
	Senior decision-makers	In-house and agency	Multi-day, in Europe	3 booked, 3 considered, 4 never

Mindset	Execution guardians (most)	Experience builders (some)	Shared by all
	Delivery comes first: **they need capacity, easy US arrivals, predictable cost and reliable or compliant suppliers.**	The trip must feel worth it: **they accept some flight friction for a city with energy, but still test venue and production.**	Verification before recommendation: **they check every claim with peers, venues or local partners.**

Other factors at play	Who decides Europe	Group size	Past experience
	A sponsor or client usually decides on Europe first. **Planners shape the shortlist and test feasibility.**	Large groups need **room blocks and space first**; above 700 to 800 guests, planners find Amsterdam tight.	**Known suppliers feel safer**: the risk of an unknown city weighs heavier than the upside of something new.

For NBTC Fit the sponsor's own reason for Europe, and reach planners with proof: peer examples, US arrival plans and all-in costs.

The trip must be worth it; the event type decides what that means

2 | Goals and needs around events

Every planner protects the same three basics

1



A first day that works

Arrivals from several US cities, jet lag and the last leg from Schiphol decide whether the group starts with energy or exhausted.

2



A meeting that works in practice

Stated capacity is not enough. Planners check breakouts, production specs and one concentrated hotel block against the real programme.

3



A cost they can defend

Sponsors, finance and compliance judge the all-in cost. A strong venue and an easy journey must still survive the final spreadsheet.

Underneath all three sits the planner's own credibility: a recommendation that goes wrong on site goes wrong for them.



For NBTC Frame every Dutch proposal around these three risks and show how each one is covered.

Beyond the basics, the event type decides what makes the trip worth it

Large, logistics-led events

- Room blocks and flights decide
- Attendees stay together, not scattered
- Character rarely beats a clean plan

Even the sponsor's favourite city loses if the logistics are riskier

Experience-led tech and brand events

- The city adds energy and purpose
- Innovation scene, site visits, speakers
- Some flight friction is acceptable

Even a city with energy must have a venue big enough for the stage set-up

Regulated pharma meetings

- Compliance holds the veto
- Business-first, no leisure look
- Itemised pricing and meal caps

A business district such as Zuidas passes compliance where the canal ring does not

In every brief: workable flights and a venue that fits come first; character can tip a close call but never rescue an event that doesn't run.

For NBTC Match the proof to the event type: capacity for large events, purpose for experience briefs, documentation for regulated meetings.

Europe is decided upstream, and people, not promotion, bring cities in

3 | Decision process for country selection

The case for Europe is made before the planner starts

Who decides on Europe

- A sponsor, VP or client, almost always
- Decided before cities are sourced
- Planners recommend, others sign off

One planner makes the case herself

Why Europe

- Where colleagues and clients are
- A launch or regional commitment
- A signature event that feels different

Pharma follows the specialists

How a city gets in

- It often arrives with the brief
- Direct flights from US hubs
- A peer, hotel contact or venue lead

Rarely a destination campaign

What it means: a Dutch pitch cannot create the reason to travel. It has to fit the sponsor's business reason, or reach the planner through people they trust.

For NBTC Show which European teams, clients or specialists the event can reach in the Netherlands, and introduce the planner to a US peer who ran a comparable event here.

Planners trust people over promotion, and Dutch options drop out before anyone flies over

Information journey: from first spark to site visit

1

Spark and orientation

A sponsor, client, peer or hotel contact names the city. ChatGPT and venue databases give early ideas, never facts.

2

Peer check

The most trusted source, because nobody on the call is selling. One peer's experience can add a city or drop it.

3

Bureau, then local agency

The convention bureau orients and introduces; the local agency (DMC) takes over once a city is serious. Fast, real numbers win.

4

Venues, hotels, site visit

RFPs and confirmed room blocks decide what survives. A site visit comes last, for the one or two cities left.

Unfamiliar Dutch cities are lost here: no business reason, peer or venue lead to start from

Dutch options drop out here: remote answers too slow or vague to justify a site visit

For NBTC Be present before the search through peers and hotel sales teams, then act as a fixer: real numbers within days, introductions and follow-up until open questions are closed.

Every criterion is tested against one brief, starting at the US departure city

4 | Key selection criteria for destinations

Flights, venue fit and all-in cost decide the choice; character only tips close calls

Seven selection criteria, ranked by how often and how decisively they shaped planners' choices

Make-or-break basics
Judged first; if one fails, the option drops out

Baseline checks
Expected as standard; they can rule out, never decide

Tie-breakers
Tip a close call, never rescue a failing plan

1	**Accessibility & connectivity**	Judged from US departure city to venue door; direct flights to Schiphol are a Dutch strength for all.
2	**Venue, hotel & local partner**	Room blocks, breakouts and production must fit the brief; unproven venue fit is the top barrier, for most.
3	**Price & value for money**	Judged as an all-in total; Lisbon beat Amsterdam twice on cost, and finance spots high rates at once.
4	**Sustainability & ESG**	An RFP box to tick for most; it decided for one planner whose CEO pushed carbon goals.
5	**Safety & stability**	A threshold for all; it can rule a place out before proposals are compared, but never ranks cities.
6	**Distinctiveness**	Energy and an innovation scene justify the trip for experience briefs, but the space must hold the production.
7	**Cultural & business appeal**	English everywhere and an efficient business tone help; Amsterdam's leisure image worries pharma.

For NBTC Lead every Dutch proposal with the three basics (US arrival plan, venue and hotel fit, all-in cost). Add character as the tie-breaker and list certified venues for RFPs.

Schiphol gets the Netherlands on the list; planners judge the trip to the venue door

Criterion 1: accessibility & connectivity

US departure cities → Direct or one-stop flight → Jet lag and Schiphol → **The last transfer** → Venue door

Four findings

Flights come first.
Almost all screen routes from US departure cities first; two connections or a two-hour transfer can rule a city out.

The last leg decides.
Moving hundreds from scattered flights to the hotel is a transport operation. Planners want a costed plan and a named owner.

Access is not absolute.
A large group accepts connections before losing its room block; an experience brief accepts friction for a city with energy.

Schiphol wins comparisons.
Easier flights beat Lisbon's appeal for one sales meeting; weaker connections cost Lisbon a media event.

The group must arrive ready to participate, without the planner rescuing the first day.

For NBTC Replace "easy to reach" with arrival plans per US departure city: direct and one-stop routes, Schiphol transfer times, the last leg and who owns it when flights change.

Room blocks, breakouts and production decide venue fit; the largest groups are the limit

Criterion 2: venue, hotel & local partner

> *I can't invent 200 hotel rooms or another ballroom.*

> *Show me how the trip and the meeting would work, and I'll consider it.*

Room flow

Plenary, breakouts and dinner must work for the real programme; a stated capacity can hide unusable rooms.

Production

Screens, audio, rehearsals and load-in must fit; tech and media briefs want flexible space with character.

Local partner

Specific answers on capacity and cost within days, and one owner for transfers and open questions.

Room blocks

One concentrated block on the actual dates; attendees scattered across hotels is a deal-breaker.

Very large formats are the limit: an 850-person tech summit was lost on venue footprint, and planners find Amsterdam tight above 700 to 800.

For NBTC Show programme-specific layouts, production specs and dated room blocks, name a partner who answers within days, and say so when a group is too large.

Planners pick the total cost they can defend, and Lisbon often wins that comparison

Criterion 3: price & value for money

Venue quote + Bedrooms + Meals & hospitality + Ground transfers + Taxes & audiovisual + Transatlantic travel

Total cost
what clients and finance judge

Finance sees every line

Client finance teams flag high hotel and venue costs at once. Published rates don't help; planners need the current prices groups actually pay.

Cost and access trade both ways

A few planners chose Lisbon over Amsterdam on cost; another chose Amsterdam over Lisbon for easier flights. Planners split on which constraint can bend.

Extra spend needs a reason

Higher cost is defensible if it buys easier arrivals or an event worth the trip. Amsterdam's name alone does not.

For NBTC Provide all-in costings planners can drop into a client deck: current rates, inclusions, open items and assumptions.

Sustainability and safety are thresholds, not reasons to choose

Criteria 4 & 5: sustainability & ESG, safety & stability

Sustainability & ESG

- Raised by clients more than before
- An RFP box to tick for most
- Decisive for one, after a CEO push on carbon
- Certified venues counted for Amsterdam there

Safety & stability

- A threshold for all planners
- It can rule a place out before proposals are compared
- Not a differentiator between European cities

> *“It’s rarely the deciding factor, it’s more a box to check on an RFP.*

Neither factor wins a booking: sustainability is checked, and safety can only rule a place out.

For NBTC Don’t lead with sustainability, but list certified venues for RFPs and say plainly which aren’t.

Character gets an option noticed; only proof gets it approved

Criteria 6 & 7: distinctiveness & cultural and business appeal

Gets noticed

- An innovation or tech scene to plug into
- Energy that justifies crossing the Atlantic
- Efficient, English-speaking ease

Gets approved

- A comparable US event that worked
- Space that holds the production
- Room blocks and all-in costs
- A named local partner who answers

> *I can solve for flight friction, but I cannot manufacture authentic buzz for a dull city."*
>
> Planner, tech summit

For NBTC Pair every distinctive venue or city with proof: a comparable event, production specs and a named partner.

Planners call access and budget essential, then trade them differently

Nuances in what planners protect and what they would trade

Execution guardians (most)

- **Weighs most:** capacity, US arrivals, predictable cost, compliance
- **Success:** nothing fails on site or in an audit
- **Proof:** room blocks, layouts, all-in cost, documents

Experience builders (some)

- **Weighs most:** a city with energy and a clear purpose
- **Success:** the trip felt worth crossing the Atlantic
- **Proof:** comparable events, production-ready space

A few would pay more for easier flights, accept weaker access to hold the budget, large groups protect the room block and pharma the compliant layout.

For NBTC Ask each planner early what worries them most, then lead with the proof that answers it.

Planners rarely reject the Netherlands; it drops out when nobody confirms it will work

Dutch options stall on unproven fit, cost and slow answers, rarely because of the country

Barriers and thresholds

Unproven venue fit

Capacity on paper, but no proof of breakouts, production or one room block.

Slow or generic answers

Brochures instead of numbers, and nobody who follows up before a site visit.

High or uncertain costs

Amsterdam's hotel and venue rates, and totals that only appear late.

Thin knowledge beyond Amsterdam

Other Dutch cities are names only: no venue, no peer, no arrival plan.

Difficult US arrivals

Connections from secondary US cities and an unclear last leg from Schiphol.

For pharma, Amsterdam's leisure image adds a compliance barrier before any venue is assessed.

> *I need data, not inspiration.*
>
> Planner of a 900-person product launch

For NBTC Lower the threshold by taking on the verification work planners now do alone, remotely and within days.

The Netherlands means Amsterdam, with all its strengths and limits

6 | Positioning of the Netherlands

The Netherlands wins mid-sized groups on access and ease; it loses on scale and cost

Positioning of the Netherlands versus competing destinations

What already works

- **Access:** Schiphol and US flight connections, named by all
- **Efficiency:** reliable business infrastructure and English everywhere
- **Image:** recognisable and innovative, a fit for tech briefs
- **Sweet spot:** mid-sized groups of roughly 300 to 700

Where it is challenged

- **Scale:** above 700 to 800 guests, venue footprint and room blocks run short
- **Cost:** Lisbon wins on price; London wins at scale
- **Rivals:** Lisbon, Barcelona, London, Dublin, Germany and, for pharma, Switzerland
- **Pharma:** Amsterdam needs a business-first venue to pass compliance

Schiphol puts the Netherlands on the table; proof of space and cost keeps it there.

For NBTC Position by event type: lead with access and ease for mid-sized groups, show proof for experience and regulated briefs, and be upfront about scale.

Beyond Amsterdam, planners know Dutch cities by name only; Rotterdam draws the most curiosity

Positioning: the Dutch cities in planners' minds

Amsterdam

What planners have heard

Schiphol, a name sponsors accept and reliable infrastructure; a Zuidas business hotel passed pharma compliance.

Rotterdam

What planners have heard

For most, it is the first Dutch city they would look at after Amsterdam. One knows of modern architecture and a port feel; one saw a peer's tech event photos.

The Hague

What planners have heard

One pharma planner could picture a business-first meeting there; one finance planner links it with government.

Eindhoven & others

What planners have heard

Eindhoven: one tech planner vaguely recalls its tech and design scene. Utrecht: planners know the name but nothing about it as an event city. The rest: names only.

What they would need to see

Costs that hold up against Lisbon, room for groups above 700 to 800, and a business setting for pharma.

For any city beyond Amsterdam, planners would need to see

- A comparable event at their scale, with the venue layout and hotel block spelled out
- An easy transfer from Schiphol and costs that hold up
- For regulated meetings: a business-first venue, a fixed contract and documents the legal team can sign off

For NBTC Put a city beyond Amsterdam forward only with real data for the brief: venue capacity, hotel block, Schiphol transfer and costs.

Known by name, rarely on the first list

7 | Awareness and consideration of the Netherlands

The Netherlands is known by name, but often never makes the first list

Awareness and consideration: where the Netherlands comes in and drops out

Aware	Considered	Shortlisted	Recommended
Known by name through Amsterdam and Schiphol, but rarely top of mind for events; other Dutch cities are names only.	Enters or stalls depending on whether a sponsor, peer, flight route or venue lead brings it in or not.	Only if venue, hotels and transfers can be confirmed before anyone flies over. Unfamiliar cities stop here.	When arrivals, venue fit, all-in cost and local answers survive the client's comparison.
Comes in	Comes in / First drop-out	Second drop-out	Reached when proof holds

Where it comes in

Upstream, through a sponsor's business reason, a peer or a flight route; promotion rarely starts it.

Where it drops out

Twice: before the first list when nobody brings it in, and at shortlisting when remote answers fall short.

For NBTC Earn a first look before the search starts, through peers and comparable events, and make remote verification easy once it does.

Knowing the name doesn't put the Netherlands on the list

Awareness: the familiarity paradox

Known by name

Amsterdam's name is accepted by sponsors once it is proposed, but cost and leisure optics make it hard to justify for every brief.

Less familiar

Rotterdam draws curiosity, The Hague and Eindhoven barely come up; planners want space, hotel stock and an arrival plan first.

Success doesn't transfer

Even planners who booked Amsterdam won't assume another Dutch city works: each needs its own venue, hotel and transfer plan.

The obstacle is often not a negative image but an absence of evidence strong enough to displace experience.

> *"The risk of an unknown feels heavier than the upside of something new.*

For NBTC Connect a good Amsterdam experience to a new, evidenced option: named venues, hotel blocks, an arrival plan and a local partner.

Get on the list before the brief, then prove the case

8 | Opportunities to strengthen the proposition

Lead with the Dutch strength that fits the event type, and say plainly where it doesn't

Large, logistics-led events

- Lead with direct US flights and short transfers from Schiphol
- Strongest for groups of about 300 to 700
- Say upfront where venues and room blocks run out above 700 to 800

A tech summit was lost on venue size; London won an 800-person meeting on room block

Experience-led tech and brand events

- Lead with innovation scenes and creative spaces
- Rotterdam or Amsterdam North for character
- Show a programme with a clear purpose

One planner asked for creative industrial spaces with locked pricing

Regulated pharma meetings

- Lead with a business setting such as Zuidas
- Leave out Amsterdam's leisure image
- Itemised pricing and documents for legal

One pharma planner could picture The Hague, but has seen no proof yet

Way in for every type: reach the sponsor through the reason they already have for Europe, and the planner through people they trust: a peer who ran a comparable event, their local agency or a US hotel sales team. Outreach works when it matches the event size.

For NBTC Test these positions on real shortlists: they are our reading of the interviews, not something planners asked for.

A comparable US event, told by a peer, earns a Dutch city its first look

Opportunity: peer proof before a brief exists

1. Where and how a city gets noticed

- **Where:** industry conferences and association chapters such as MPI, where peers swap stories
- **When:** a new direct flight route or trade-press news gives planners a reason to look again
- **Through:** hotel and venue contacts with one concrete venue recommendation
- **How:** outreach with a comparable case and real numbers; generic emails get deleted
- **Over time:** “a long game, not a one-email thing”

2. What a credible example shows

- Group size and layout
- Hotel block and costs
- A contact who delivered it

Inspiration gets a city on the list, if it comes from a peer and not a brochure; data decides once the brief is open.

Examples must show people and production in the space, and what had to be solved.

For NBTC Build a small set of comparable US corporate events in Dutch cities, each with a contact willing to take a call, and bring them to the conferences and chapters where planners meet.

Answer each brief with two or three Dutch options, not a destination brochure

Opportunity: a brief-led planning response

From the planner's brief

- Group size
- Dates
- US departure cities
- Programme and production
- Budget
- Event type

...to two or three plausible city-and-venue options, each showing:

US arrival plan

Direct and one-stop routes from the planner's US cities, Schiphol transfer times and the last leg.

Venue and hotel fit

Dated layouts, breakouts, production specs and one concentrated room block.

Defensible all-in cost

Current rates, what's included, what's unconfirmed and the assumptions, ready for a client deck.

Proof it has worked

A comparable US corporate event and a contact who delivered it.

Sent within days, it replaces the verification work planners now do alone: the work that decides whether a Dutch option survives.

One named contact owns each brief until the open questions are answered

Opportunity: a clear hand-off from bureau to local agency

1. The bureau orients, the agency delivers

- The bureau assesses cities, shortlists venues and introduces local agencies
- The local agency (DMC) takes over transfers, suppliers and problem-solving
- An introduction is not the end of the job while questions remain open
- Planners need this before a site visit is even approved

2. Every answer states its status

Verified

Open question

Who answers

A prompt partial answer ***that separates verified facts from open questions*** can build more trust than a polished but vague proposal. Planners also want to hear when a city is a poor fit for their group.

For NBTC Pilot one named contact per brief who reports what is verified, what is open and who answers each point, and says so when a city is a poor fit.

Help planners build a case they can defend, before a brief exists and once it arrives

The Netherlands doesn't need more awareness; it needs a way onto the first list, and proof planners can defend

Conclusions: what we learned

1	**Europe is decided upstream**	Sponsors choose Europe for a business reason; peers and flight routes bring the cities. Planners then test feasibility.
2	**The basics decide; character tips close calls**	US arrivals, venue and hotel fit and all-in cost come first. Character only counts once these hold.
3	**Dutch options are lost on proof, cost and slow answers**	Unproven space, Lisbon's prices or slow replies end the comparison, often before a site visit.
4	**Amsterdam opens the door; the event type decides**	Mid-sized groups fit well; very large and pharma events need different proof. Other cities lack evidence, not appeal.

NBTC wins by building a credible first case, before the brief and once it arrives

Recommendations: five shifts for NBTC

Shift	In practice
From waiting for briefs → **to peer proof up front**	Build comparable US event examples with a contact who delivered them, and show sponsors how the Netherlands fits the reason they already have for Europe.
From brochures → **to a feasibility check per brief**	A named contact returns two or three options within days: what is verified, what is open and who answers each point.
From claims → **to shareable comparison sheets**	US arrival plans, dated layouts and room blocks, and all-in costs planners can set beside a familiar city in a client deck.
From one story → **to proof paths by event type**	Capacity for large events, purpose and production for experience briefs, business-first venues and itemised pricing for regulated meetings.
From Amsterdam first → **to the city that fits the brief**	Introduce Rotterdam, The Hague and Eindhoven through briefs they suit, and say plainly when scale or budget make a city a poor fit.

Next step Test with real briefs: put a Dutch option beside a familiar European city, for proactive outreach and live enquiries separately, and see what planners verify, pass on and where they stop.

Haystack Consulting

Sensational in Innovation & Branding



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