

The Weaponization of Travel Survey Results

Meeting & Event Professionals



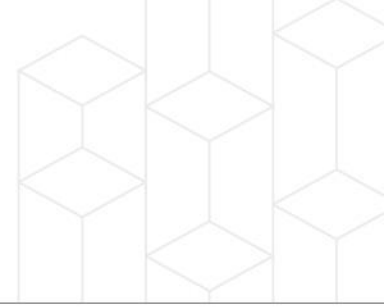
October
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Research background & methodology



As travel continues to be weaponized, the Destinations International Foundation and Meetings Mean Business Coalition are working to support their members, as well as the meeting and events industry more broadly, with issue management strategies and communications best practices.

An important industry stakeholder, meeting and event professionals (MEPs) are recommending, selecting and vetting destinations as part of their common job responsibilities. Today, they are navigating a new landscape where there is an established risk of a travel ban, boycott or advisory being declared against their next destination. Destinations International Foundation and Meetings Mean Business recognize the importance of supporting MEPs in this issue landscape.

To that end, Destinations International Foundation and Meetings Mean Business commissioned APCO Insight to conduct a comprehensive research study among meeting and event professionals. Between August 22 and September 28, 2018, APCO Insight conducted a quantitative survey among 100 meeting and event planners. MEPs were invited to participate through Meeting Professional International (MPI) and the Professional Convention Management Association (PCMA). To qualify, respondents must have influence or decision-making power in selecting meeting destinations.

A preliminary round of qualitative research was conducted in June 2018 and used to inform the quantitative survey questionnaire. The qualitative research included a 90-minute online focus group among 32 MEPs and nine in-depth interviews among MEPs who have dealt with the issue of a travel boycott or ban in the last three years.

Executive summary



- **MEPs are generally optimistic about the growth of their industry, but many are concerned about safety and security at their meetings and events.** Safety and security is the most commonly named unaided issue.
- **Heightened safety concerns surely impact views on travel boycotts and bans,** as is demonstrated when MEPs are asked why they avoid targeted destinations and several cite making attendees feel safe is nonnegotiable.
- **Yet, most don't recognize travel boycotts and bans as a problem.** Only 42 percent say they are concerned about the issue (and only 15 percent are *very* concerned).
- **Limited concern is, in part, due to limited experienced consequences** – very few report policies against hosting events in targeted destinations (just 16%) and only 21 percent say they've been impacted in recent years. Even among those who have been impacted, few report experiencing pressure from attendees or leadership to move, postpone or cancel their event.
- **The biggest risk is in those avoiding targeted destinations in their selection process** – 41 percent say they avoid planning meetings in targeted destinations (41%).
- **This risk is amplified when one sees MEPs tend to lean in favor of personally supporting boycotts.** Though there is clearly uncertainty among MEPs, a plurality (45%) say they may personally support travel boycotts or bans depending on the issue. A plurality also say they believe travel boycotts and bans to be effective (43%).

Executive summary (continued)



- **MEPs feel hesitant to take an active role in fighting for meetings and events in targeted destinations.** Only three percent say they try to plan in targeted destinations today and while MEPs lean towards supporting a meeting were a boycott or ban to be declared, there isn't a majority agreement and intensity is soft, even after exposure to messaging.
- **This may be, in part, due to personal beliefs and in part due to a lack of preparedness - MEPs do not feel prepared to handle a boycott or ban. Indeed, MEPs report all tested support materials would be useful.** Just under half (45%) of MEPs say they feel unprepared to deal with a travel boycott or ban. A large majority find all tested support materials useful, especially tips for attendee communications. A crisis plan detailing best practices and talking points for leadership or clients are also seen as very useful by a majority of MEPs.
- **The best viewed alternatives are those that work with meeting stakeholders to ensure discriminatory policies aren't enforced and that support for inclusivity will be demonstrated.** For some, adding a session on advocacy for interested attendees is something to consider, but more aggressive activities like scheduling lobbying days or using social network channels to speak against the policy are polarizing.
- **Preferred messaging reflects the best performing alternative – discriminatory policies won't be enforced and all parties involved are committed to creating spaces where attendees feel welcome and safe.** MEPs also react positively to statements that emphasize travel boycotts and bans hurt innocent bystanders and counter the industry's mission of hospitality and inclusion. Messaging focused on remaining apolitical and the ineffectiveness of boycotts and bans are polarizing.
- **Validating the qualitative, the CVB/DMO relationship is critical.** MEPs say they are a trusted resource. They also say there is a role for MPI and PCMA. These stakeholders have the best positioning to encourage MEPs to consider targeted destinations and help MEPs be better prepared.

01

Industry Mood & Top Concerns

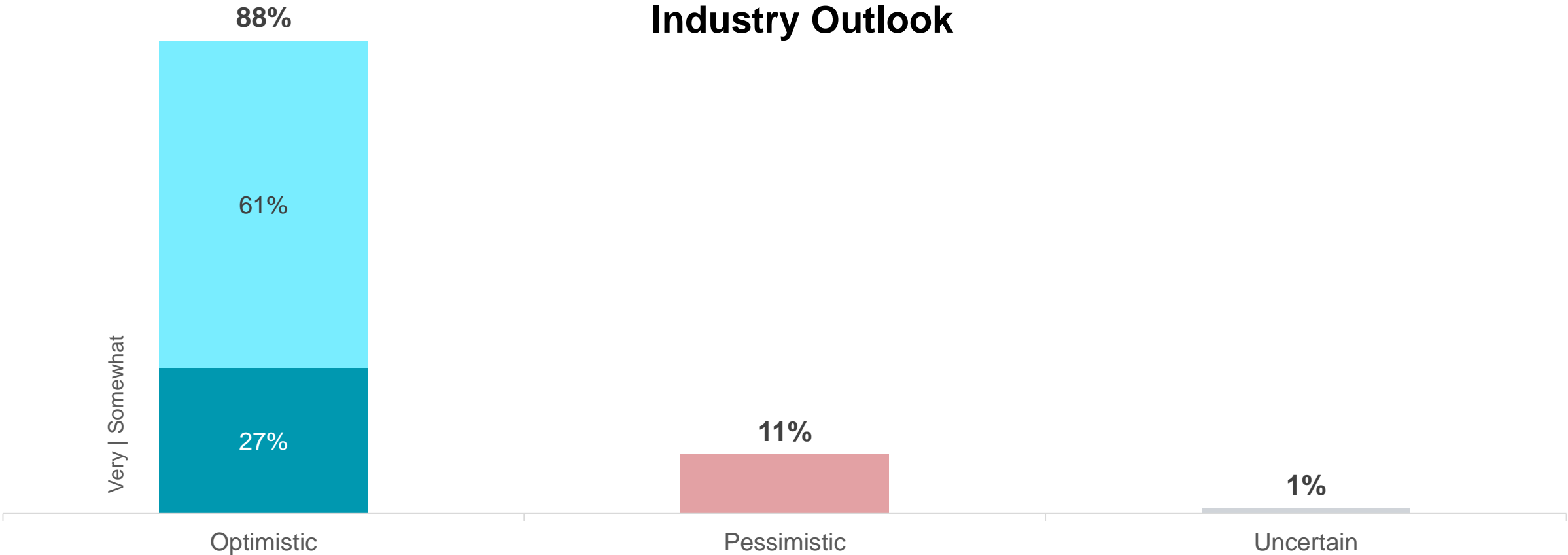


Most MEPs are optimistic about the growth of their industry



The vast majority say they are optimistic, though the positive mood is somewhat soft.

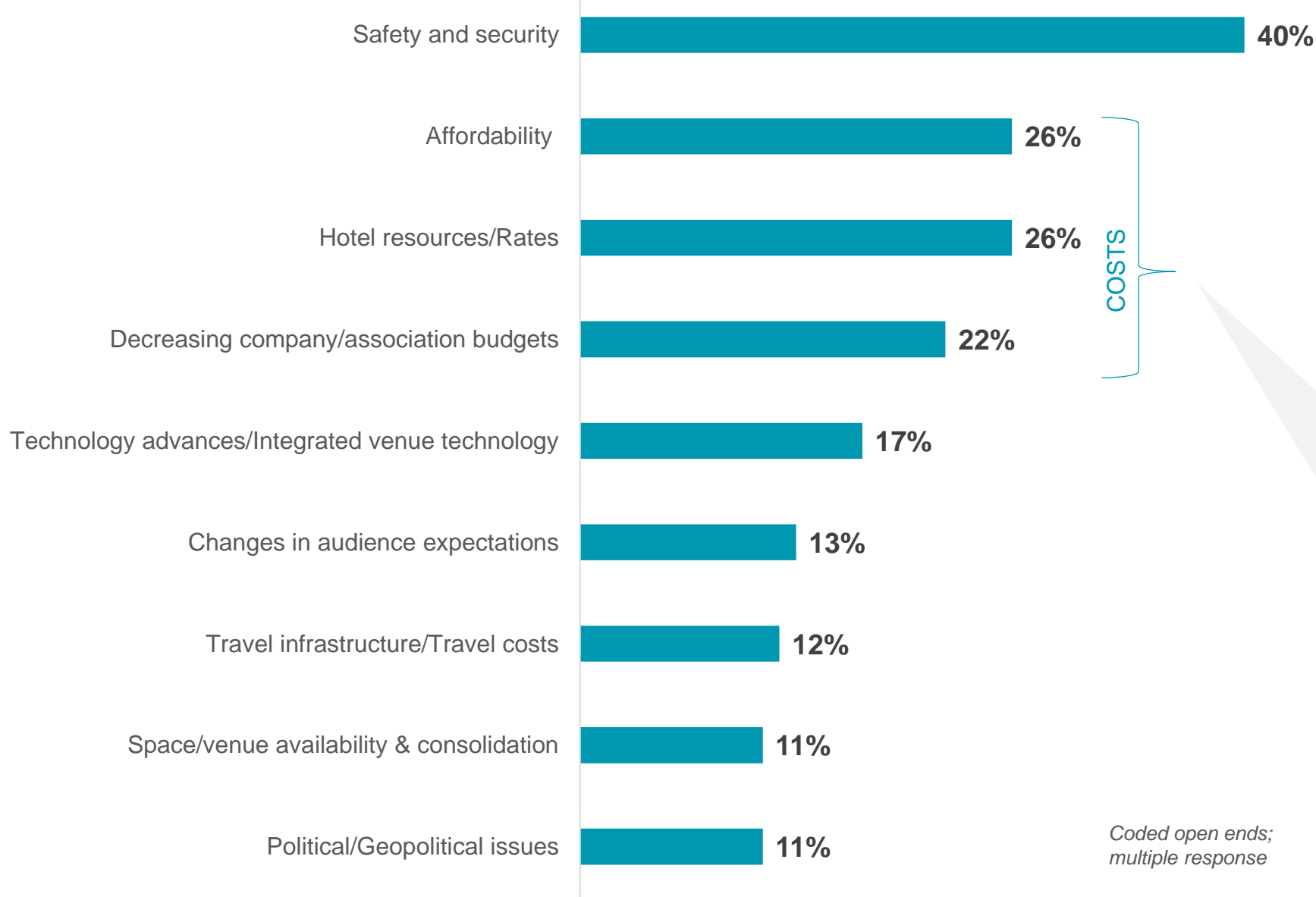
No one reports strong pessimism.



MEPs top concern is safety and security; weaponization of travel is only mentioned in connection with international attendees, U.S. bans



Three Critical Industry Issues



COSTS

Safety and security due to the public nature of many event spaces.

Safety and security planning and protocol.

Safety. Safety is a very challenging and multi-faceted [issue] that it is often difficult to manage.

Having to produce better events with same/shrinking budgets.

The cost of doing business coupled with declining attendance and membership.

Shrinking budgets - being asked to do more with less or get a better deal than the year before.

Accommodation costs and resort fees.

Providing services that meet client expectations while adhering to lower budgets.

Coded open ends; multiple response

02

Issue Familiarity & Experience

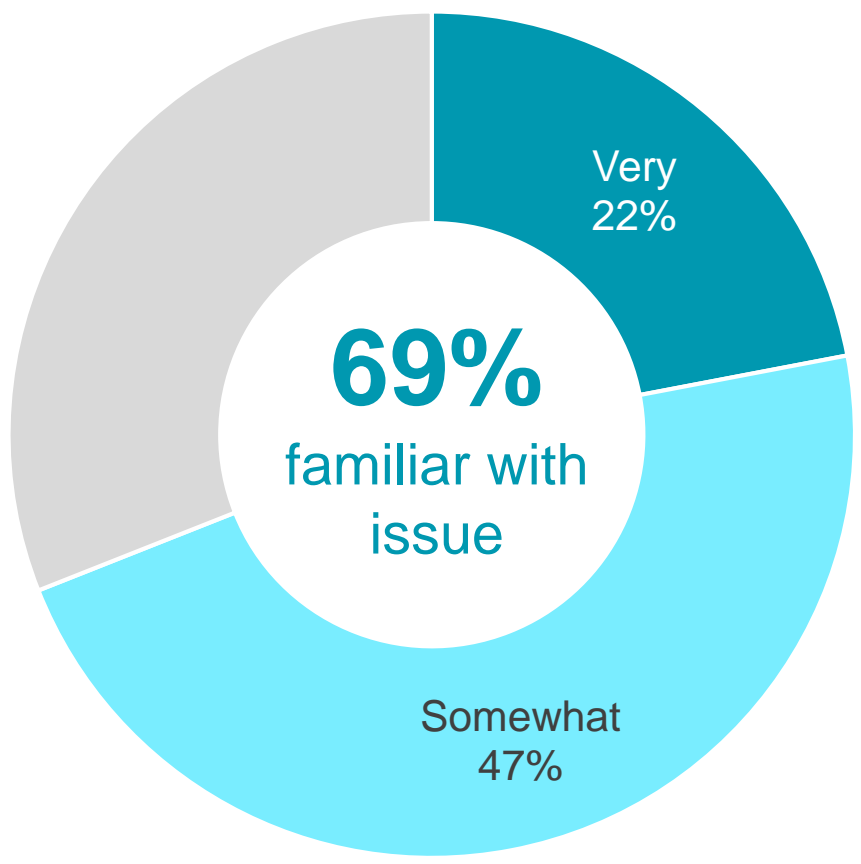




Most MEPs are at least somewhat familiar with travel boycotts and bans (issue presented without description)

Familiarity is soft with just over one in five MEPs saying they know the issue well.

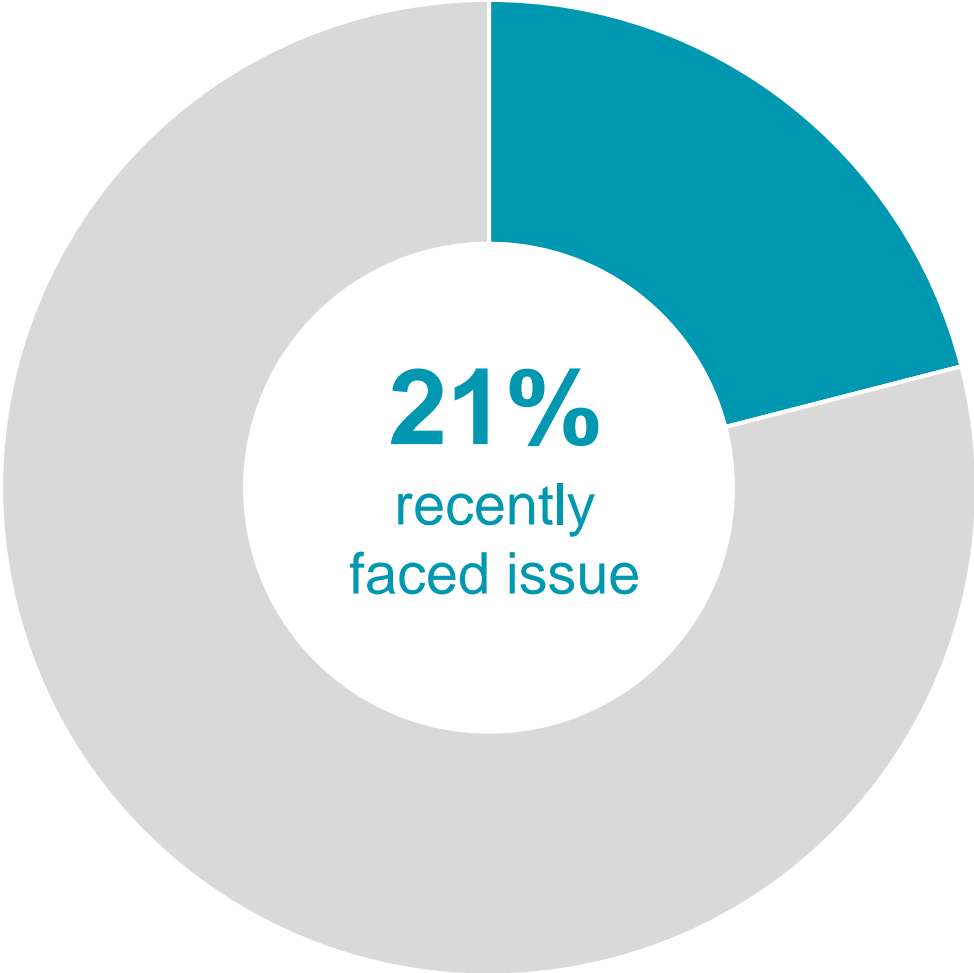
There is no difference in familiarity based on industry experience, region, event size or type of employer.



Few MEPs report having planned an event in the last three years that was impacted by a travel boycott or ban



In the past three years, have you planned a meeting or event in an area that became targeted by a travel boycott or ban?



03

Issue Role in the Decision-Making Process



Travel boycotts and bans are a lower priority consideration when selecting a destination



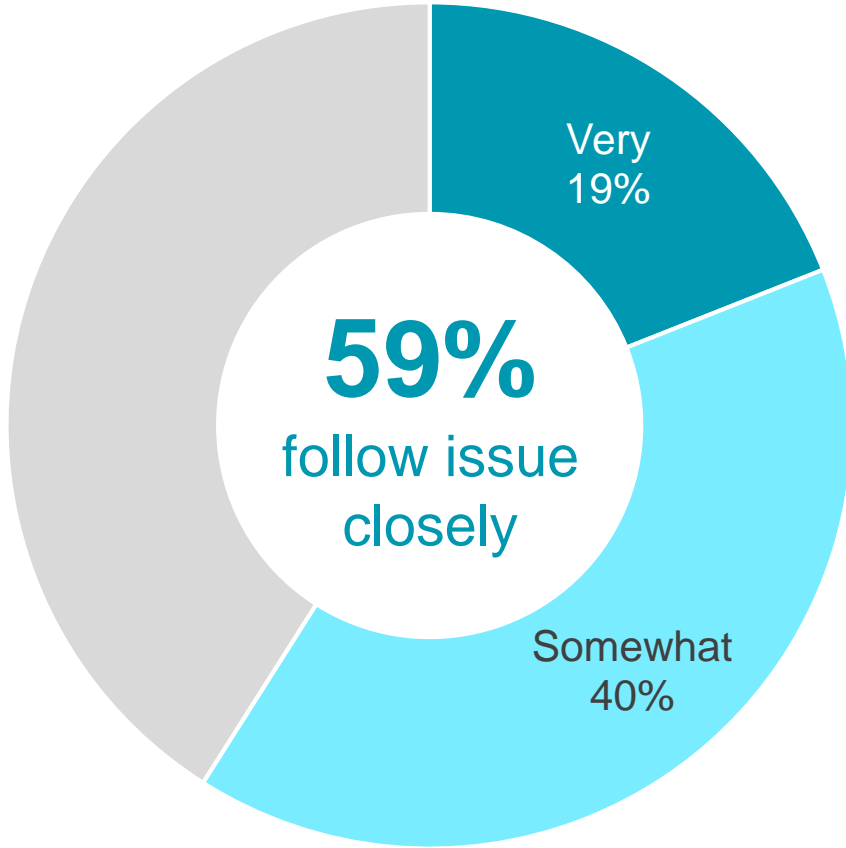
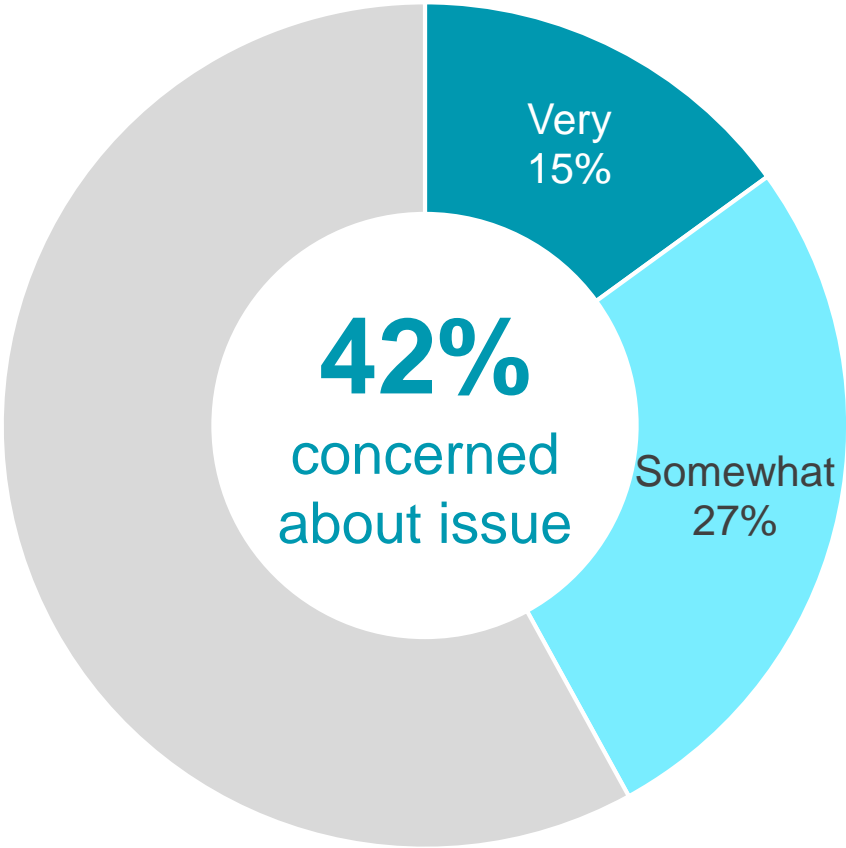
Considerations for Destination Selection

	Mean rank	% ranked in top 3
1 Cost	2.8	78%
2 Size of venue	3.3	64%
3 Safety	4.2	43%
4 Airlift	5.0	40%
5 Accessibility	5.4	26%
6 Weather	6.1	11%
7 Walkability	6.6	7%
8 Area attractions	7.0	11%
9 Dining options	7.2	4%
10 Travel boycott or ban	7.5	16%

Consistent with the qualitative research and unaided issues facing the industry, cost and safety rank as most important when deciding on a destination.

Travel boycotts and bans are not the top issue for MEPs generally – it ranks last overall – but for those who do factor it into their decision-making, it is an important consideration. One out of every six (16%) MEPs reports travel boycotts and bans is a top 3 consideration, which runs similar to weather and area attractions and outpaces walkability and dining options.

In fact, travel boycotts and bans are not universally recognized as a problem among MEPs (despite a majority following the issue)

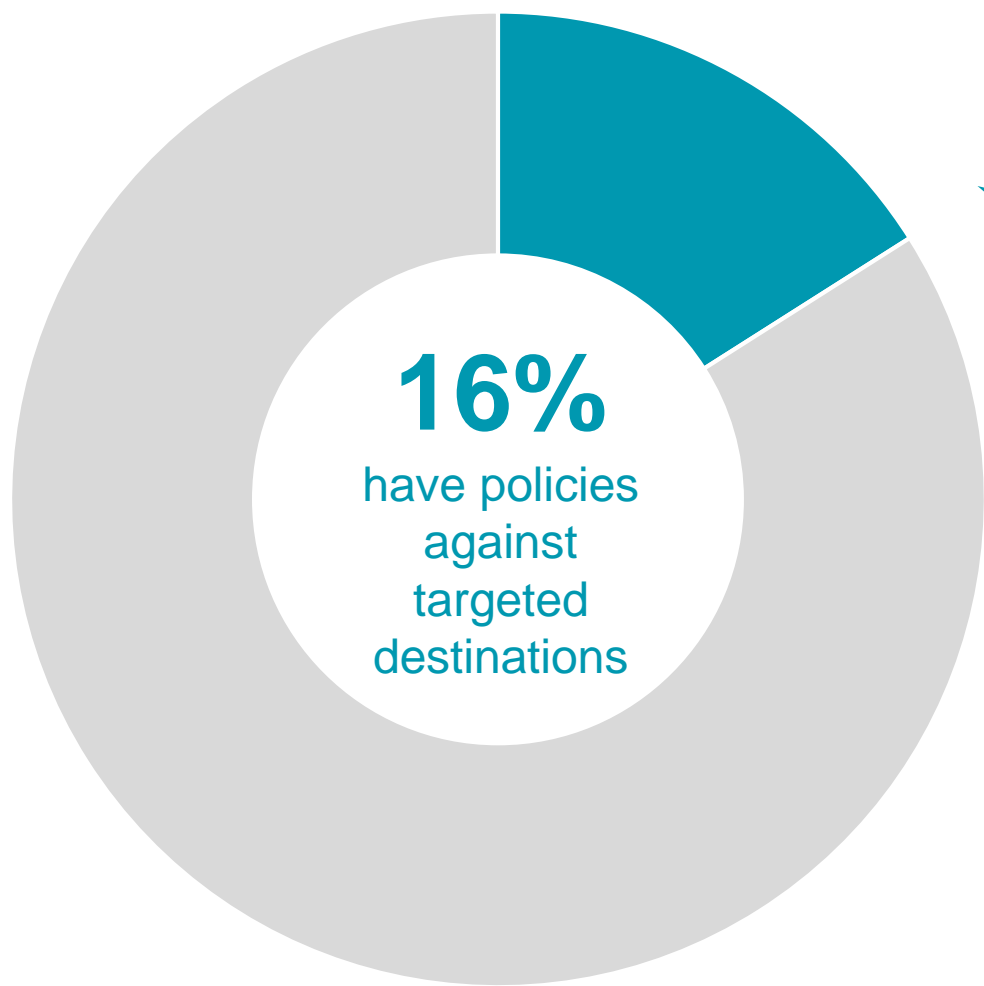




Low concern is, in part, due to limited consequences; very few report policies against hosting events in targeted destinations (and recall few have dealt with the issue in recent years)

Just 16 percent of MEPs report there are destinations where they are not permitted to plan a meeting or event due to a travel boycott or ban.

For those constrained from planning events in certain areas, Mexico is a common restriction, as well as other countries listed by the Department of State as dangerous. Besides safety, laws related to gun gag laws or LGBTQ issues appear to motivate these policies.



We have numerous companies that cannot hold meetings in Mexico and Guatemala due to travel restrictions/bans. We also have an LGBTQ-related client that will not allow us to plan meetings in Mississippi due to HB 1523.

Minnesota, Missouri, Montana for gun gag laws.

Any destination noted by travel.state.gov.

Mexico - due to the safety in some areas.

Iran, Russia, Syria, or anyplace on the Department of State watch list.

Locations in the Middle East, and Mexico in the past for drug cartels.

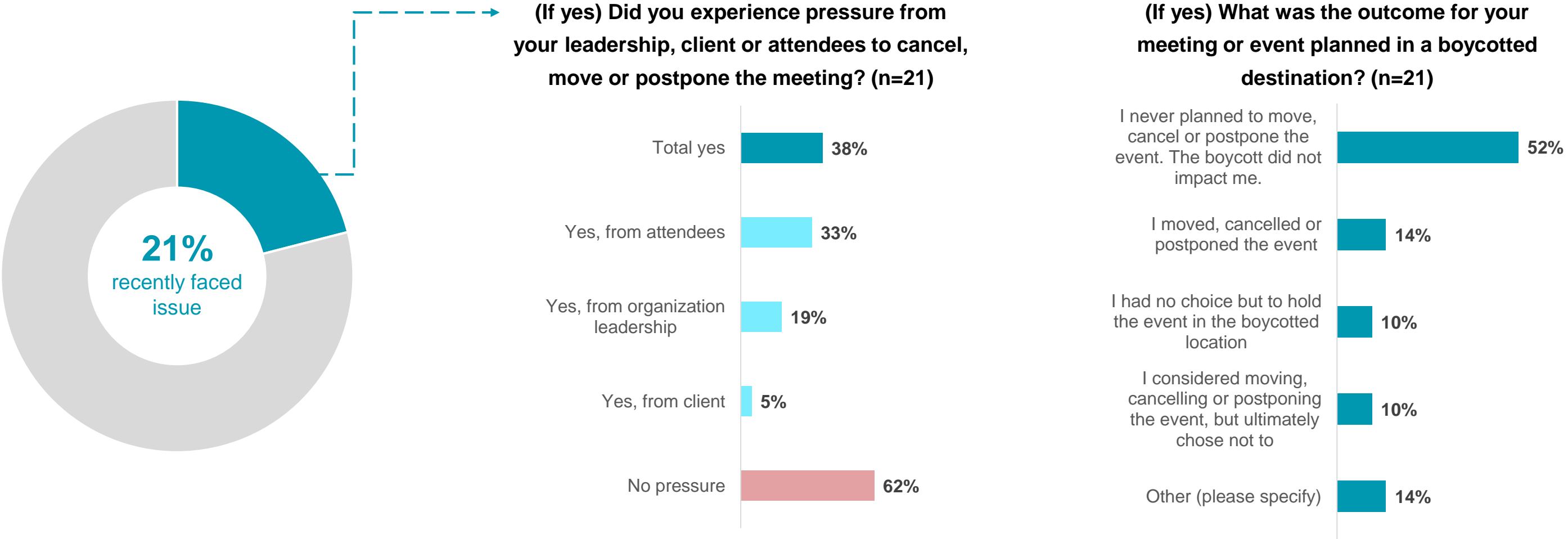
Texas, Tennessee, North Carolina - maybe the entire USA if our membership votes to do so!

Moreover, most who've been through the fire did not receive pressure; very few report moving the event



Of those who planned a meeting or event in recent years in a destination that became targeted, a majority say they did not experience pressure from attendees, leadership and/or their client (if third party planner). Half say they didn't even consider changing their event.

Despite eight MEPs reporting some pressure, only three actually say they moved, cancelled or postponed their event.

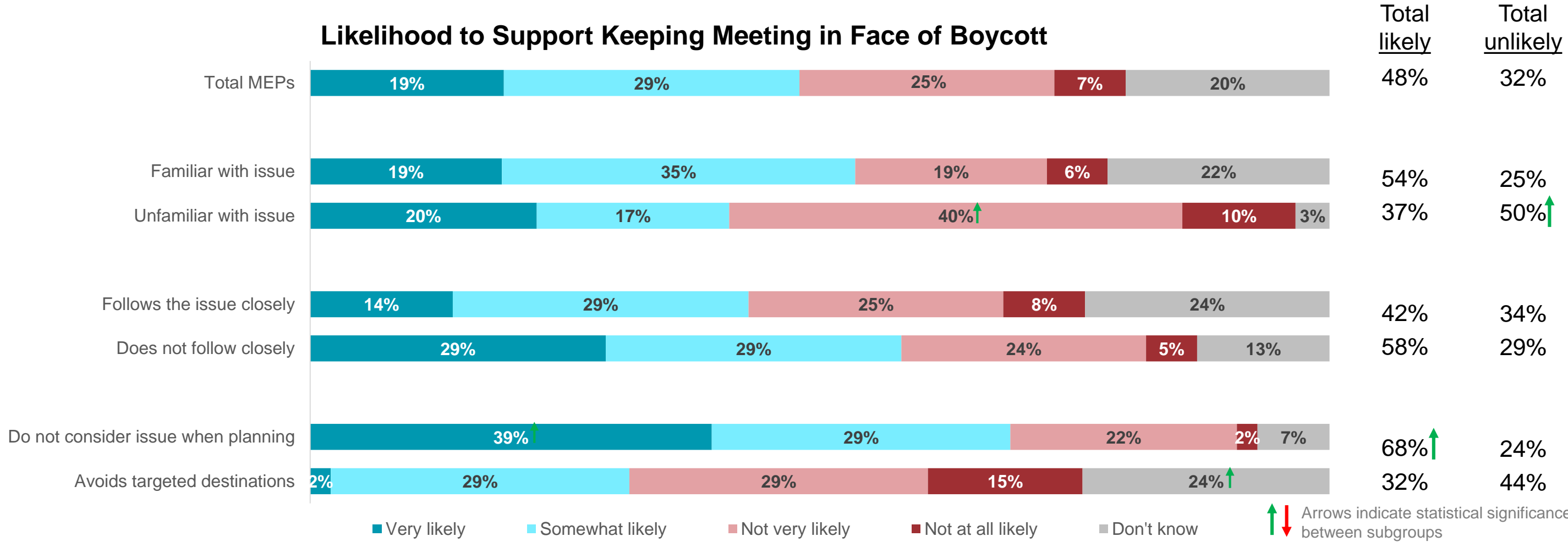


Support for keeping events in a boycotted location is mixed



MEPs with the least amount of knowledge about travel boycotts and bans are the least likely to support keeping events in a boycotted location. This is a group that will benefit from further education and an easy-to-understand set of resources at their disposal. Those who avoid targeted destinations already are not likely to support keeping them there and are often simply unsure, emphasizing further the need for resources to help guide decision-making in how to respond to a boycott.

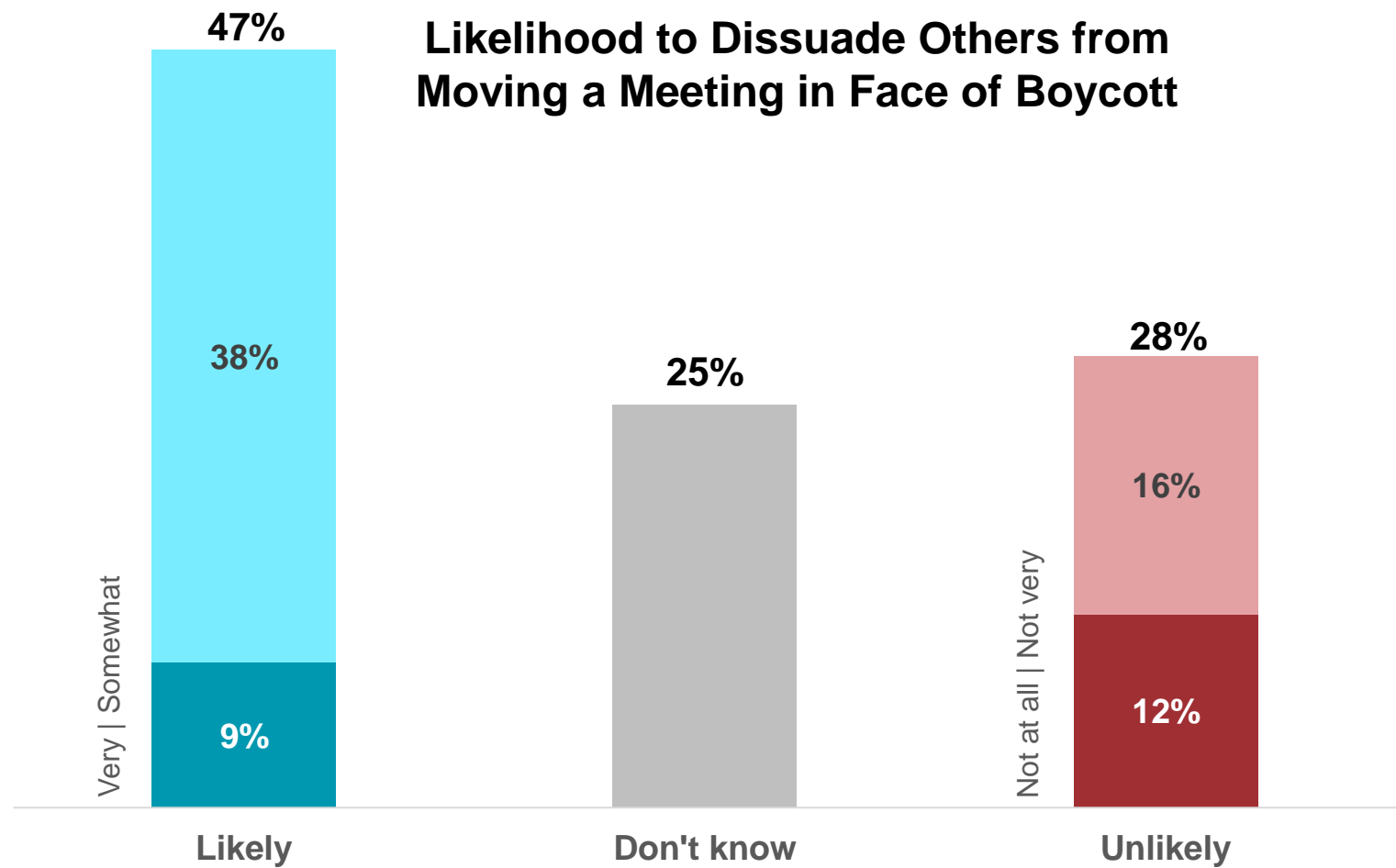
Likelihood to Support Keeping Meeting in Face of Boycott





MEPs are hesitant to take a more active role in dealing with travel boycotts; support for pushing back is soft

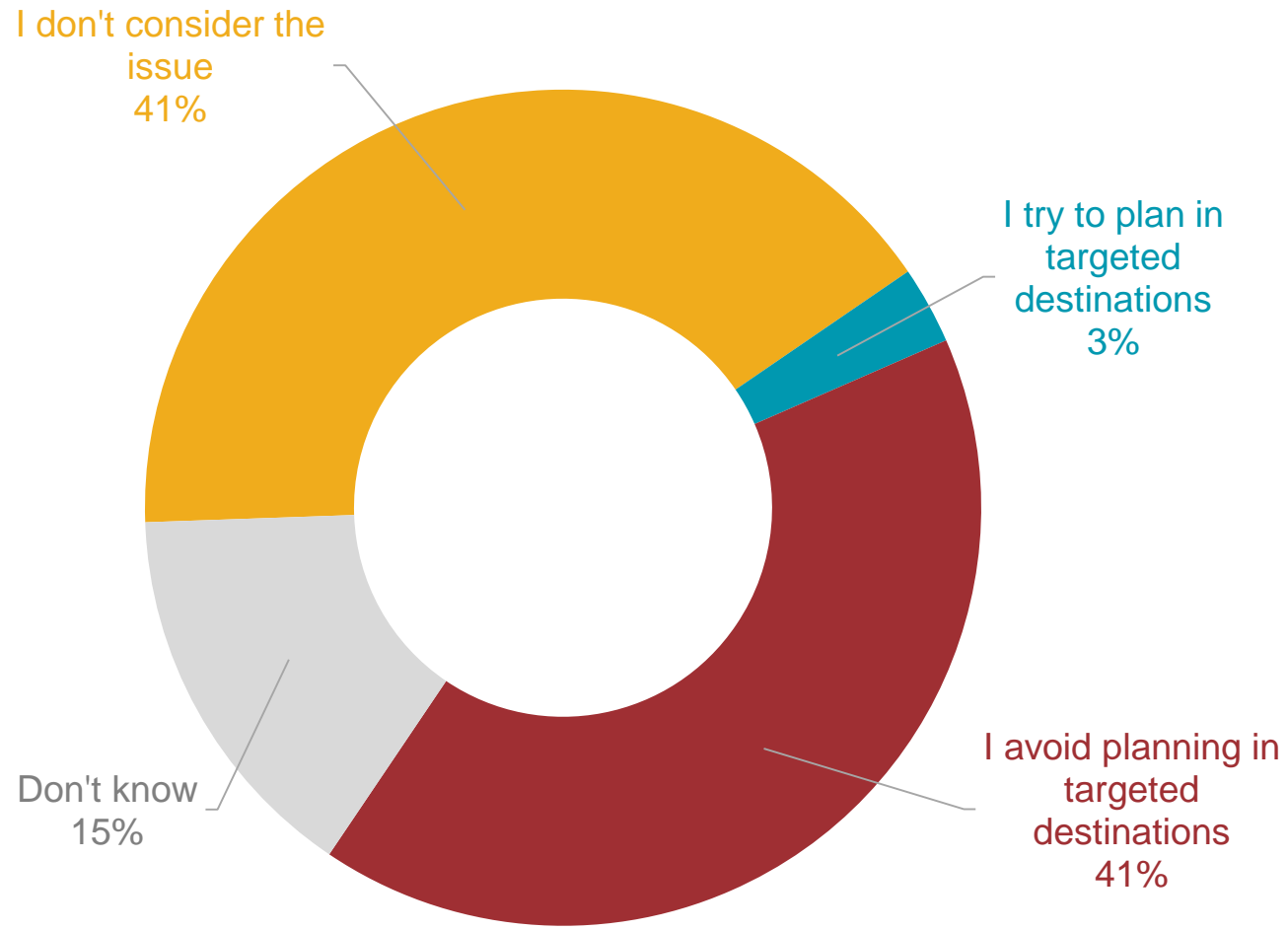
About half of MEPs say they would try to dissuade those who want them to participate in a boycott, but certainty is very soft with only nine MEPs saying they are very likely to push back. Another one in four don't know what they would do.



When selecting a destination, equal numbers say they ignore boycotts or avoid planning in that location



Which of the following best describes how a travel boycott impacts your selection of a destination for a meeting or event?



Four in ten MEPs say they don't consider the issue of travel boycotts when selecting a destination. Another four in ten say they avoid targeted destinations.

Very few say they try to plan meetings in locations that have been targeted by a boycott or a ban.

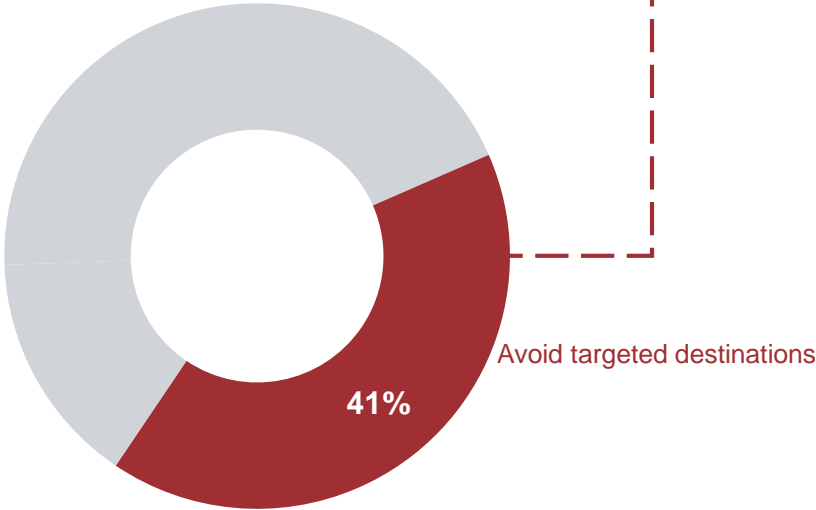
Personal views play a role - Republican MEPs are more likely than Democrats to report they do not consider boycotts when deciding on a destination (63% vs 44%).

For those who avoid targeted destinations, the primary motivations are attendee safety and attendance rates



MEPs also express concern that boycotts may negatively affect the attendance as well as negatively impact the reputation of the organization hosting the meeting.

Which of the following best describes how a travel boycott impacts your selection of a destination for a meeting or event?



For what reasons do you **avoid planning meetings or events in destinations that are the target of travel boycotts or bans?** (n=41)

- For safety and security measures only.*
- Security issues to attendees.*
- I don't want the added pressure of attendees' discourse on either side of the political concern. If the boycott is a safety concern, I would cancel my contract.*
- Depending on the issue and how I feel about it (my brand) and what my client feels may feel be a reflection on their brand, it is a general sense to avoid the complication of trial by social media to go to such places. If it won't be an issue of perception for the company or a security concern for the attendees then it may be a consideration. There are too many factors to consider.*
- Holding a meeting in a location that is the target of a boycott/ban can negatively affect attendance and negatively affect the hosting organization's reputation.*
- The difficulties of moving the event.*
- Because I think [travel boycotts and bans] affect the participation and planning of a meeting or event.*

For most MEPs, personal support for travel boycotts and bans is soft and most often depends on the issue

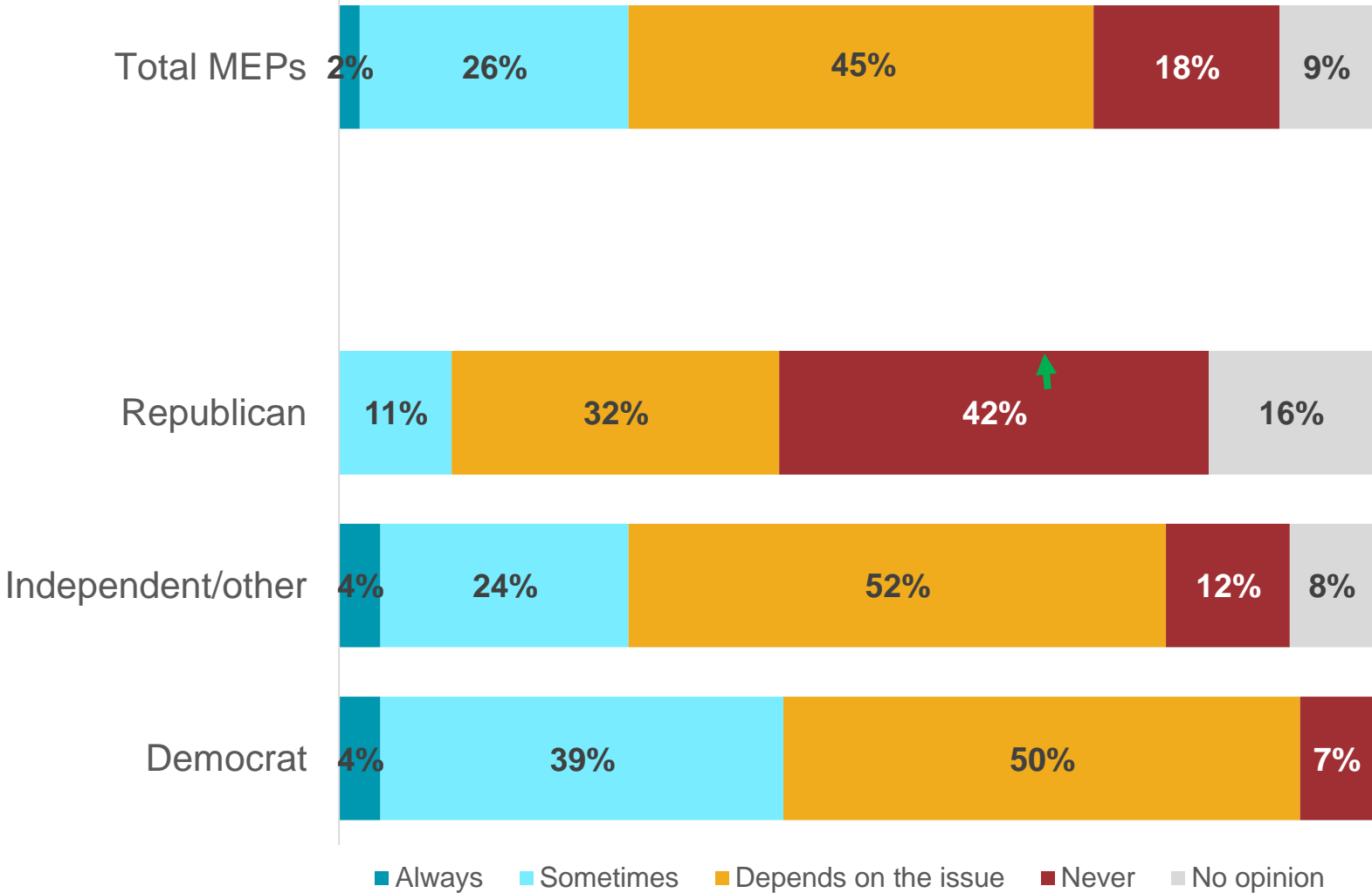


After being shown more information about travel boycotts and bans, a plurality of meeting & event planners say their personal support depends on the issue.

More MEPs say they are inclined to personally support (either sometimes or always) than never engage.

Similar to traveler sentiments measured last year, there are differences across party ideology. Republican MEPs are significantly more likely than Democratic MEPs to say they never support boycotting or banning travel to a destination.

Personal Support for Travel Weaponization



↑↓ Arrows indicate statistical significance between subgroups

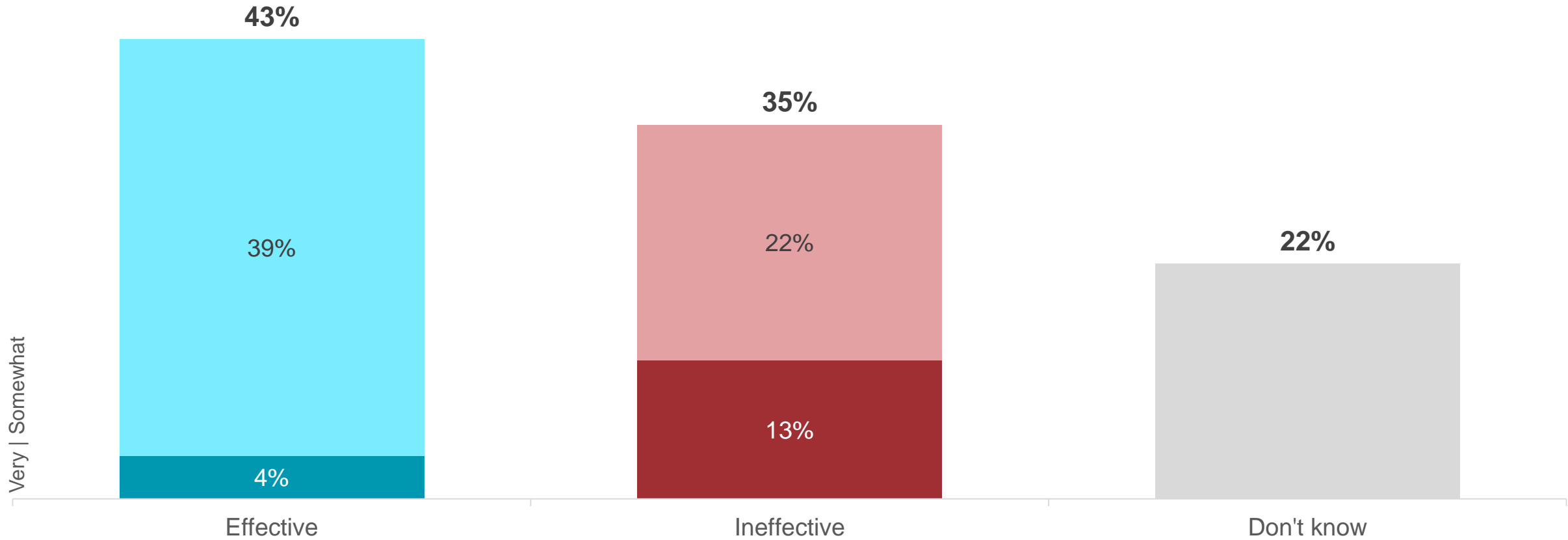
MEPs have mixed opinions on the effectiveness of boycotts and bans



More MEPs say travel boycotts and bans are effective than ineffective. However, intensity is stronger among those who view them as ineffective.

A significant portion (one in five) aren't sure of their effectiveness.

Perceived Effectiveness of Travel Weaponization



04

Supporting MEPs

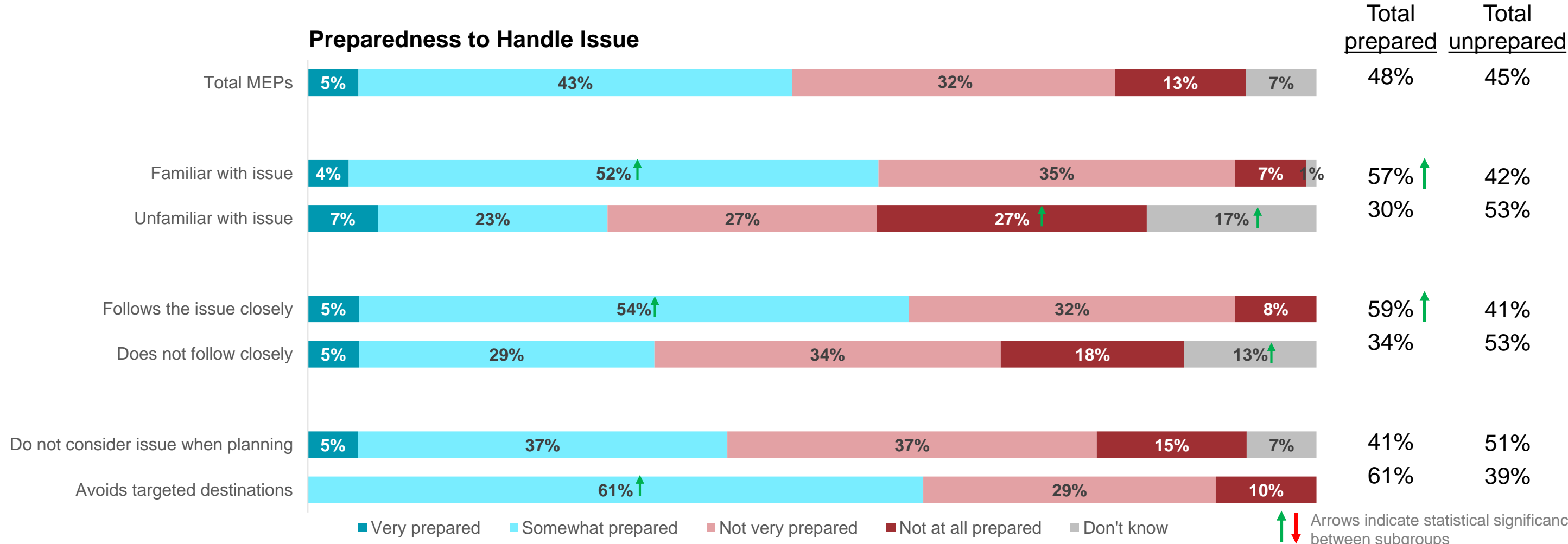


Just under half say they do not feel prepared to handle a travel boycott or ban



In particular, MEPs who are unfamiliar with bans or do not follow the issue closely are significantly more likely to feel unprepared.

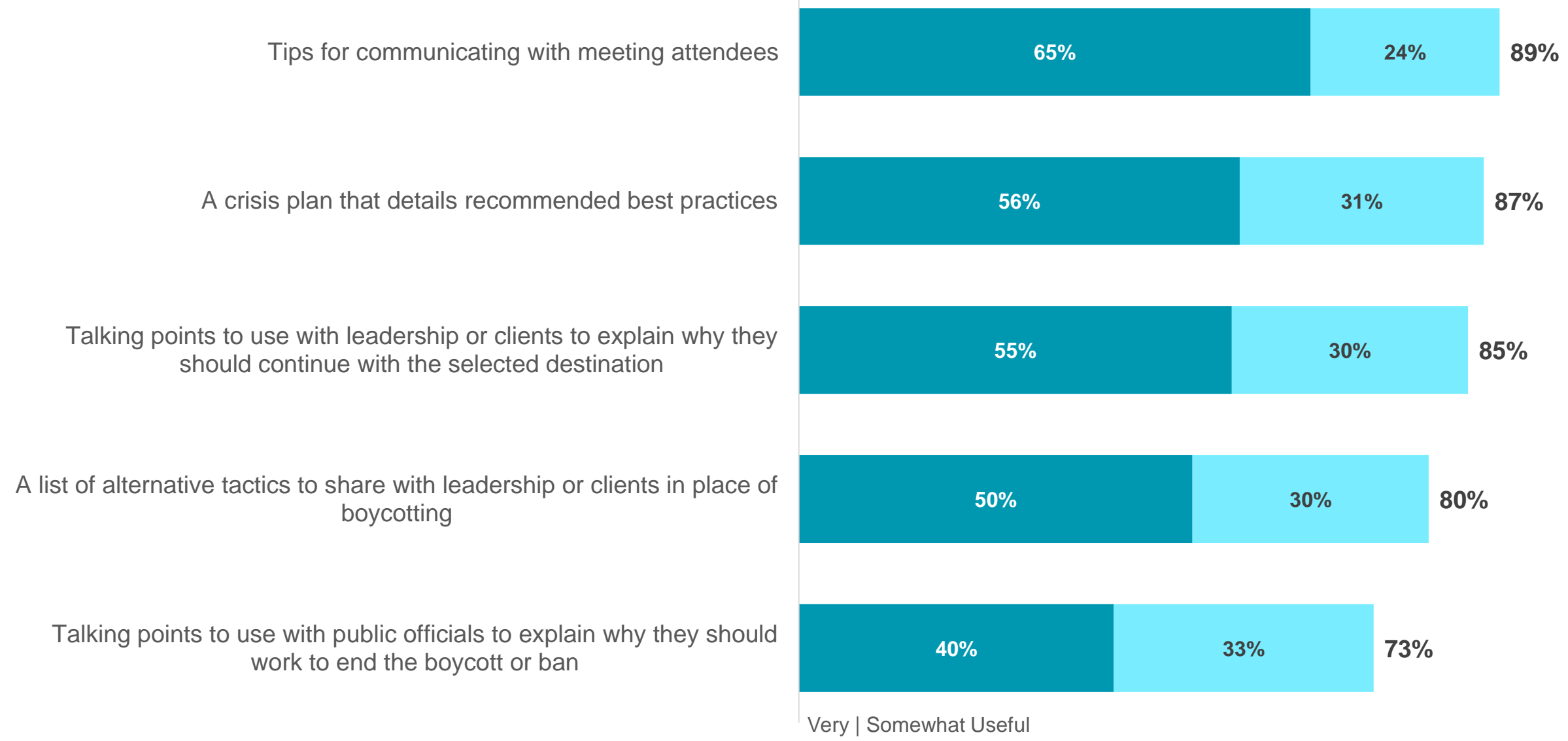
MEPs who avoid planning in targeted destinations report feeling somewhat prepared at high rates, not because they are better equipped to deal with the issue than others, but because they simply avoid the issue altogether. Arming this group with information and a toolkit may help open possible event locations that were previously closed to them.



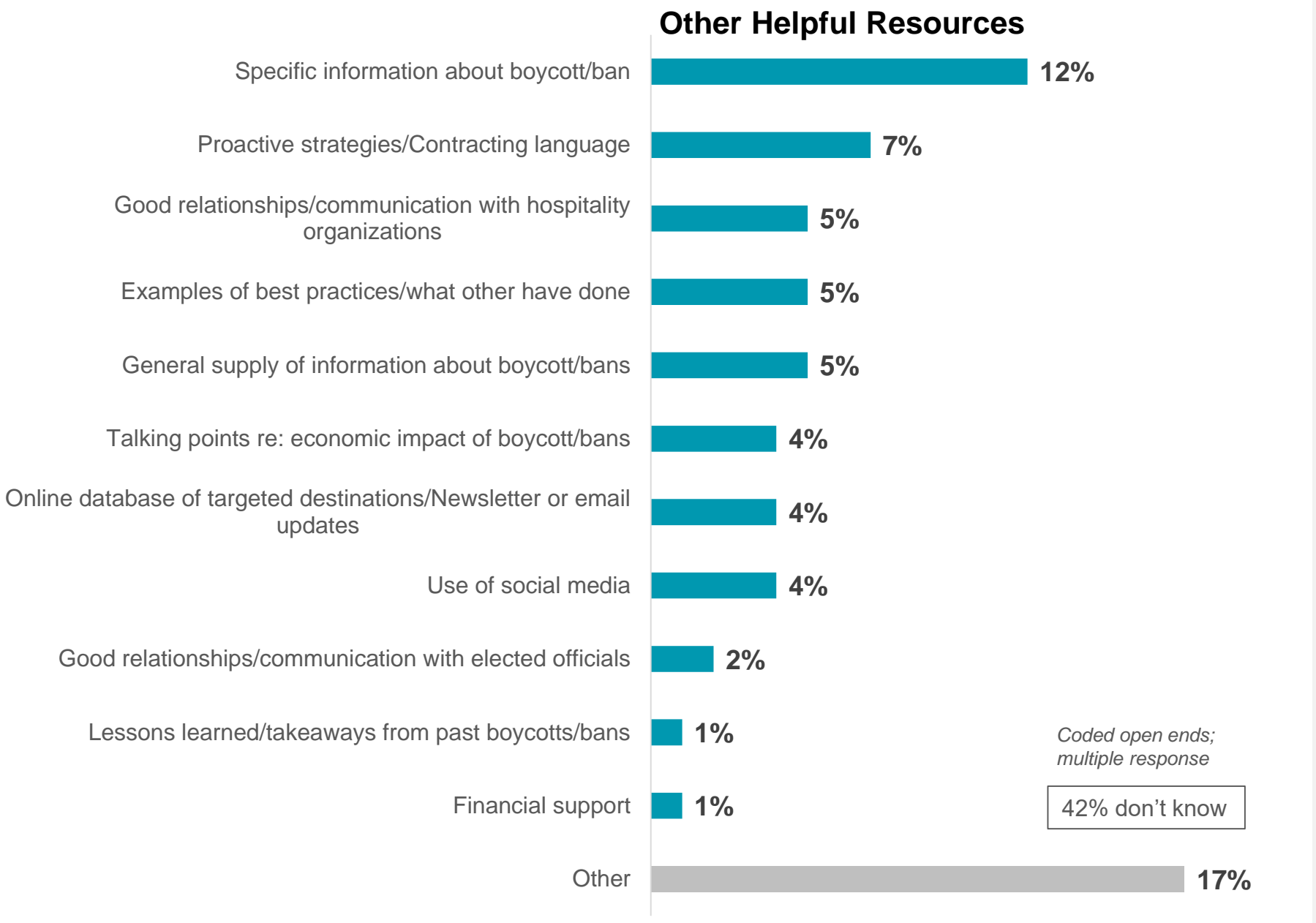
MEPs believe all tested support materials would be useful, especially help with attendee communications



Useful Support



MEPs say supplying them with boycott/ban details and best practices for how to respond would also be helpful



Response from hotels, CVB, and convention centers during a boycott/ban to organization leadership is always useful.

Reasons for and against going. Hearing what others have done.

Have the aforementioned items in a toolkit format that can easily be modified to personalize the messages and other information.

In my experience, the decision to stay the course or move or cancel comes down to financial impact.

What is being done to combat the ban.

Anything related to emergency travel planning.

A list of other companies being affected or targeted by the ban.

Stronger legal language to include in contracts.

It all depends upon what the boycott and/or ban is about and who is sponsoring it.

A security briefing.

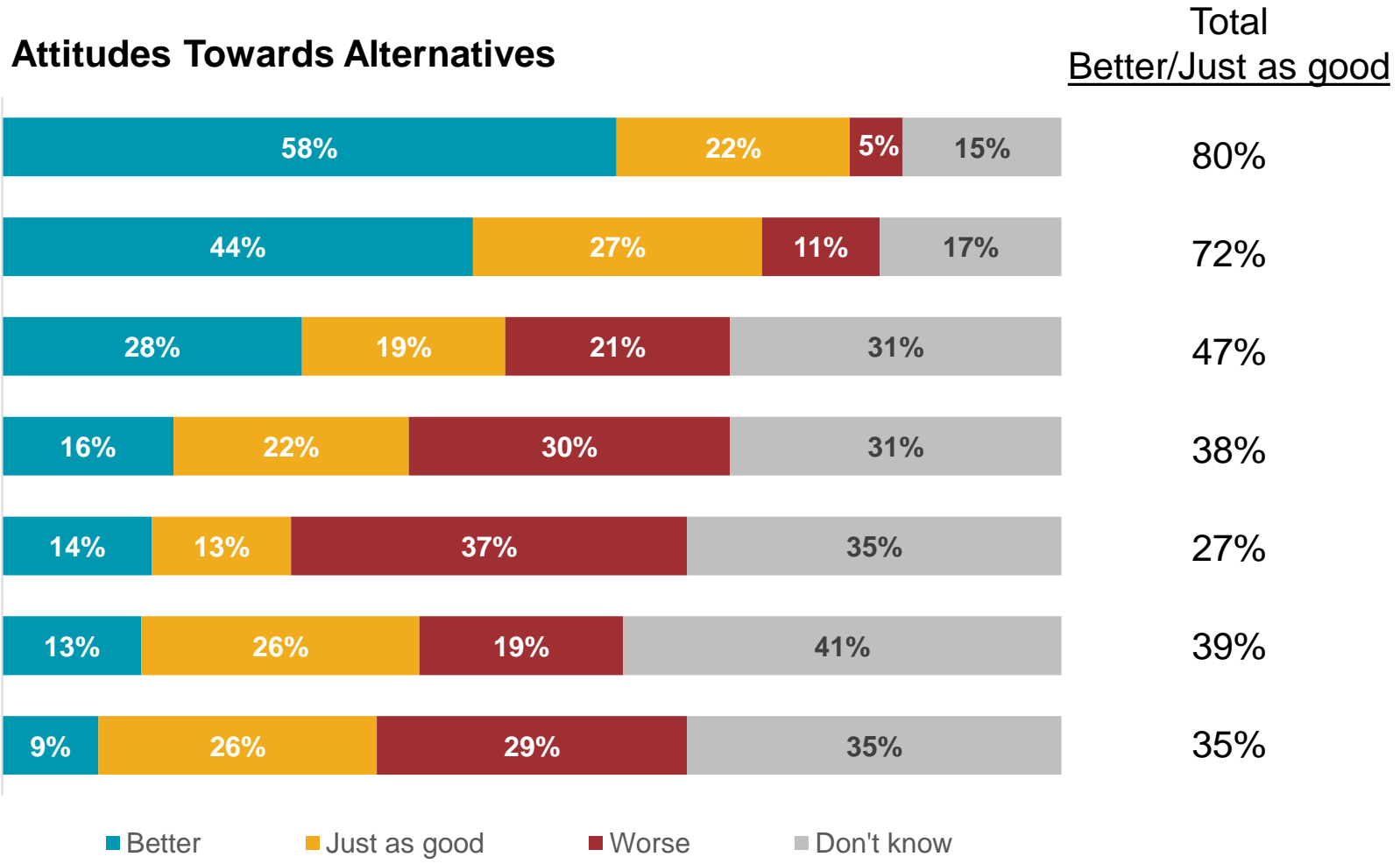
Cost comparison templates – how will costs increase or decrease by staying versus finding a new area/venue?

Talking points to help legislators understand why laws that caused the ban or boycott are financially detrimental to business in the area.

MEPs say the best alternative to changing event plans is to work with others to ensure discriminatory policies will not be enforced



Working with local meeting stakeholders is the only option seen as a better alternative to cancelling, moving or postponing an event by a majority of MEPs. A majority of MEPs believe creating a partnership between everyone involved to show support for inclusivity is at least just as good an option. More than a third (37%) worry that speaking out on social media would be worse, demonstrating MEPs hesitance to take a visible, proactive stance.

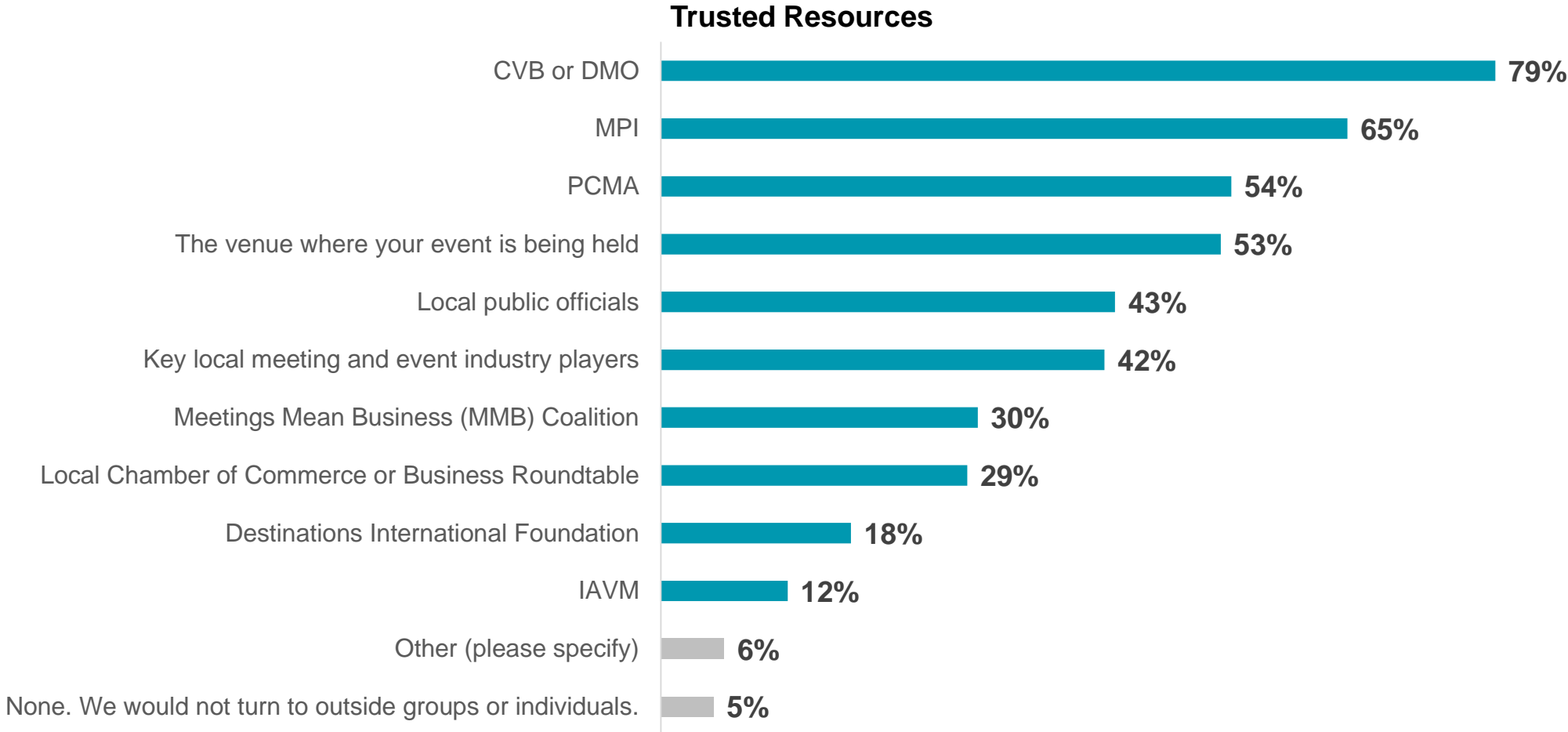




The local CVB or DMO are trusted resources and one of the first places MEPs would go for support during a boycott

Nearly 8 in 10 would turn to the local Conference and Visitor Bureau (CVB) or Destination Marketing Organization (DMO) for support if a boycott or ban were declared in their event area.

As the MEP relationship holders, MPI and PCMA are also trusted.



05

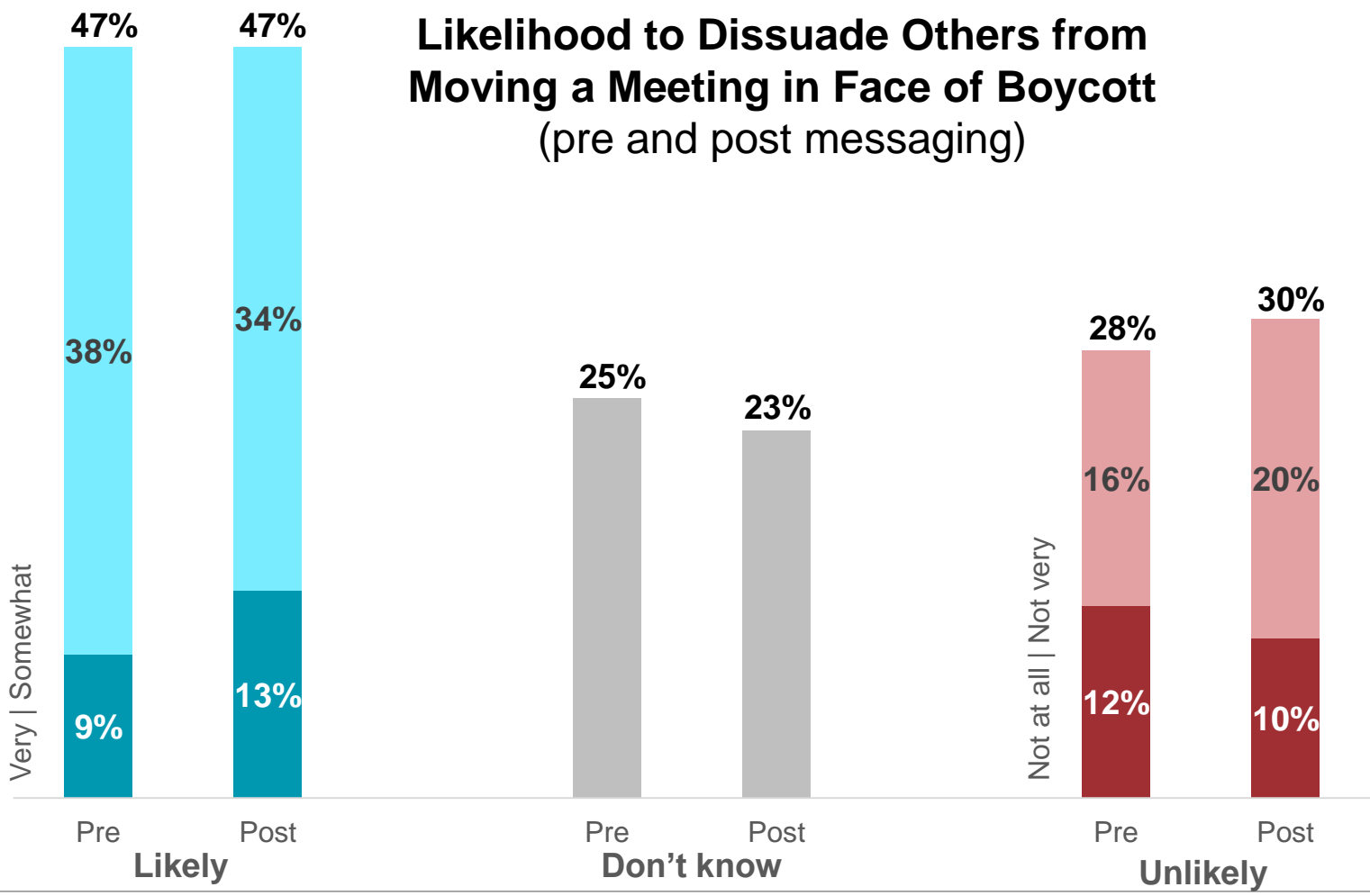
Message Assessment



Even after exposure to messaging, MEPs overall remain cautious about dissuading boycott supporters; intensity increases, but overall likelihood is unchanged



After messaging, MEPs remain largely unchanged in their likelihood to dissuade those who want them to participate in a travel boycott or ban, though intensity increases (+4 very likely).



Six statements tested in opposition to engaging in travel boycotts



[WON'T ENFORCE] We do not support discriminatory policies nor will we support businesses that enforce them. All businesses and staff hosting event(s) have committed to create spaces where attendees feel welcome and safe.

[HARMS INNOCENT] Travel boycotts and bans hurt innocent bystanders – local residents and businesses who rely on the meetings and events industry.

[INDUSTRY ETHOS] Meetings and events are a way to bring people together; our industry is all about hospitality and inclusion.

[ALTERNATIVES] There are better ways to influence policy that are less harmful and just as, if not more, effective, such as donating to advocacy groups or using a meeting or event as an opportunity to organize advocacy activities.

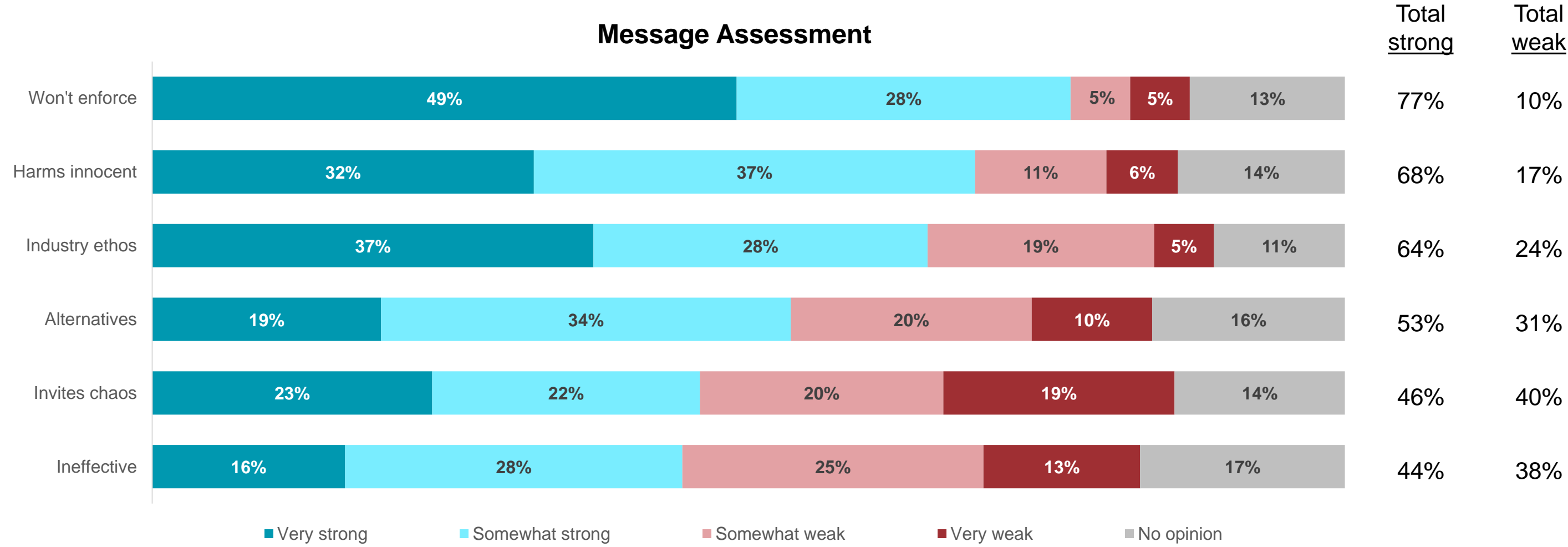
[INVITES CHAOS] Politics today are unpredictable. No one knows where the next travel boycott or ban will hit or how long it will last. Engaging in boycotts or bans is risky and it is best to stay apolitical.

[INEFFECTIVE] While boycotts and bans can help to raise awareness on an issue, results have been mixed in overturning discriminatory policies.

The strongest message among MEPs emphasize those involved in the meeting will not enforce discriminatory policies



The message that travel boycotts and bans hurt local residents and businesses also performs well. Arguments about the effectiveness of boycotts or the political nature of boycotts are considered the weakest. The most persuasive arguments for MEPs who moved from unlikely to likely to dissuade supporters are “Won’t Enforce (83% consider it a strong argument), “Harms Innocent” (83%) and “Invites Chaos” (83%), which does not perform well among MEPs overall.

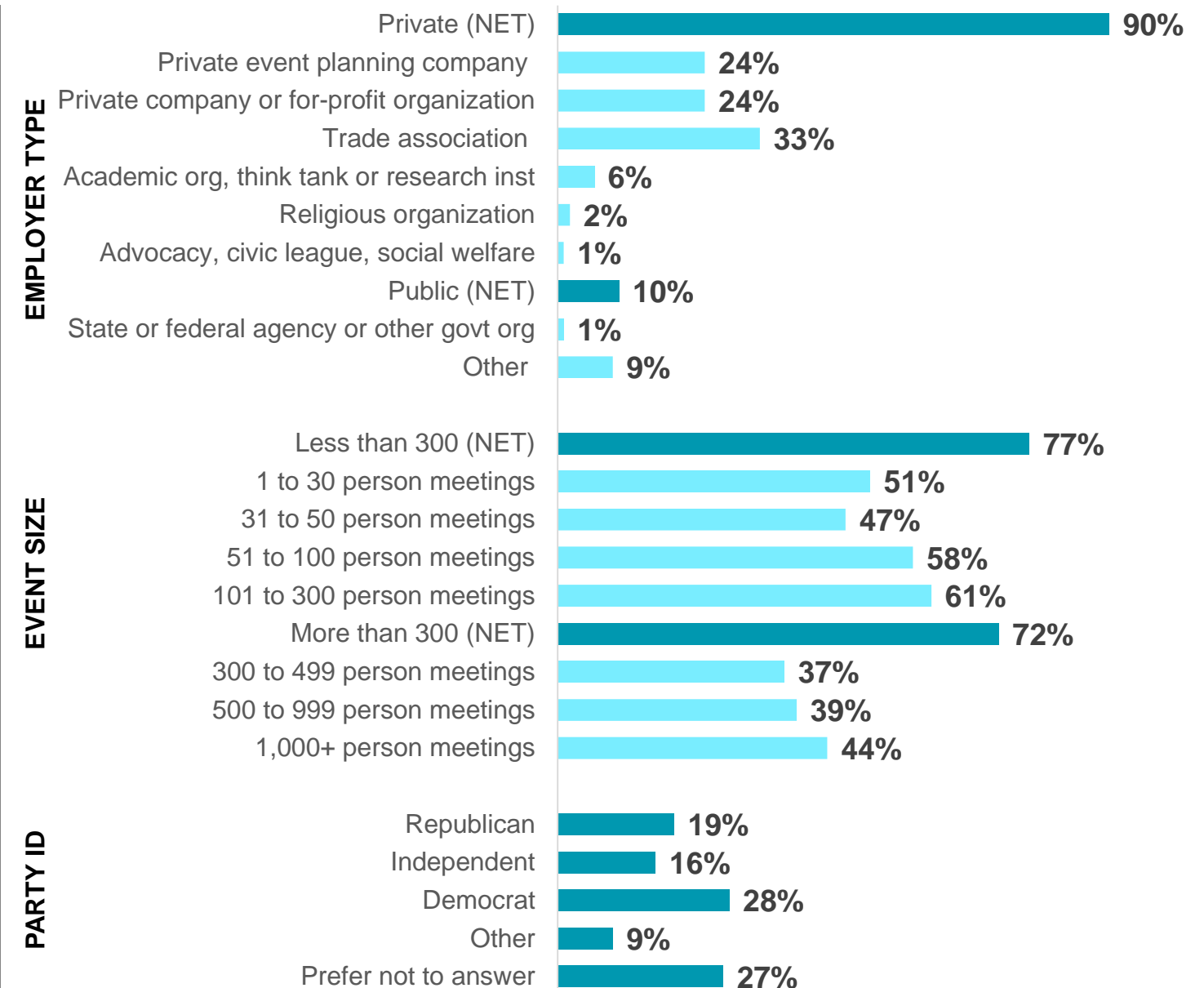
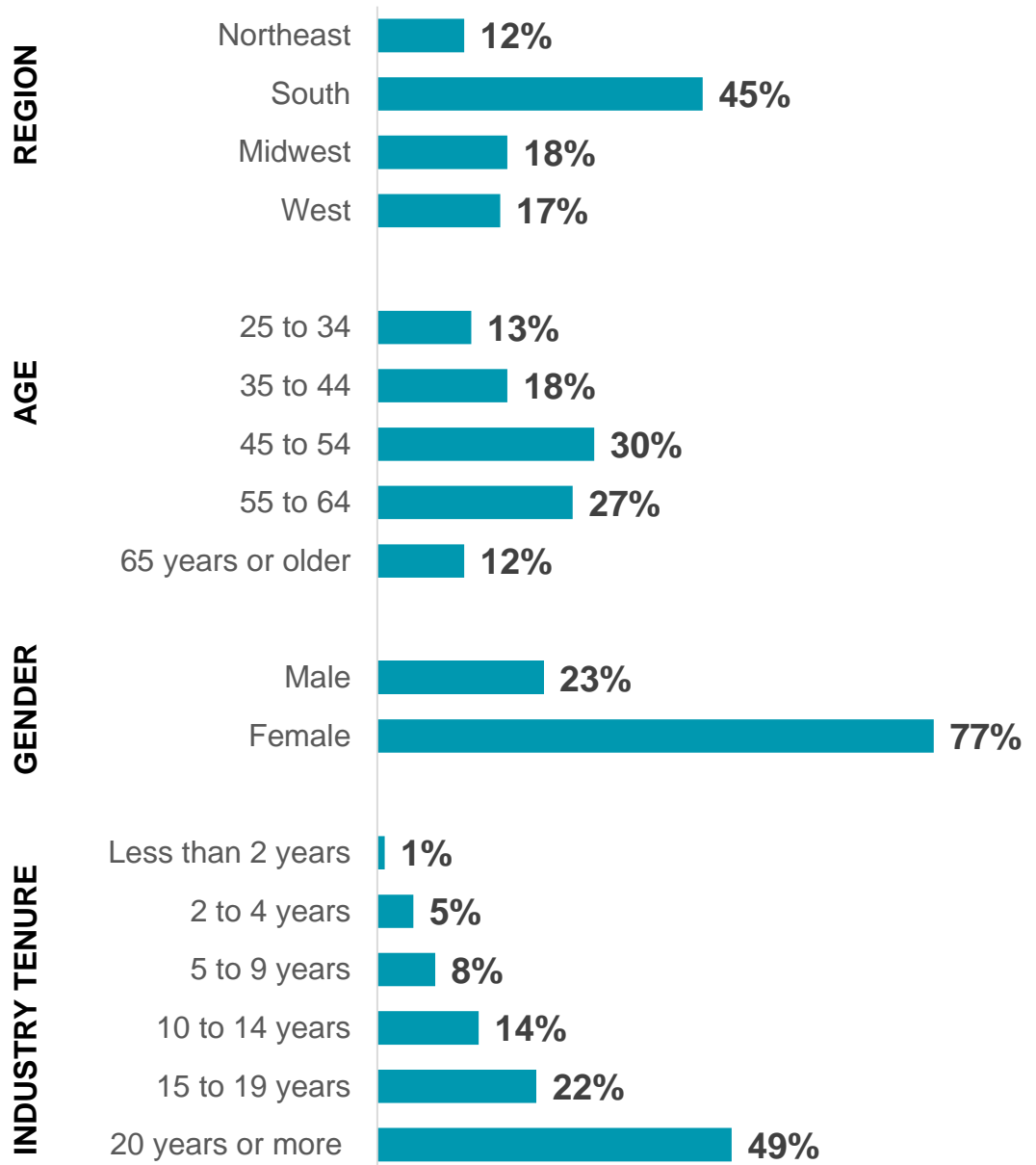


06

Sample Demographics



Meetings and Events Planners profile



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