

# The Weaponization of Travel

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DETAILED REPORT – JULY 2017



## THE WEAPONIZATION OF TRAVEL

### Project Overview

Travel boycotts have risen in popularity in recent years and are regularly making headlines today. Places such as North Carolina, Indiana and Arizona have all felt the pressure of travel boycotts this decade. The impact of travel boycotts on changing policy has been mixed and the details of what makes for a successful or failed boycott tend to be hazy. Economic casualties have been reported, but aggregate losses from boycotts remain to be seen. Most notably, there is a clear gap in understanding how boycotts are impacting brand equity. While there has been public polling on the policies and voter support, there is not publicly available research on how boycotts are impacting perceptions, both in the short and long term, among outside residents and tourists.

To fill these gaps in understanding and inform potential advocacy platforms on the issue of boycotts for the travel industry, Destinations International engaged APCO Insight (APCO) to develop a comprehensive research study. Broadly, the key research objectives were to better understand the successes and failures of travel boycotts, explore the impact of boycotts on the travel & tourism industry and identify favorable alternatives.

To meet these objectives, APCO conducted a detailed audit of the weaponization of travel across five key states—**North Carolina, Arizona, Indiana, Tennessee** and **Mississippi**—and surveyed American travelers from across the nation.

For the audit, Destinations International selected these states to capture a spectrum of policies, timing and geo-political make-up, as well as the voices of a diverse set of its member states. Guiding this analysis were the following questions:

- *What does the trajectory of travel boycotts look like?*
- *What are the tipping points that mean success or failure in changing public policy?*
- *Who are the key players involved and what are meaningful distinctions across audiences?*
- *What are the economic losses endured from a travel boycott?*
- *What alternatives have and haven't worked in the past?*
- *What can have impact without harming the industry?*

The survey was of American travelers:

- Sample size: N=1001
- Adults 21 years of age and older
- Have traveled out of state in the past year and plan to do so in the upcoming year
- Fielded May 23 – 30, 2017

The report that follows outlines the results of the combined work stream in order to provide Destinations International with the capacity to: identify the context that help incubate travel boycotts; identify key stakeholders; and harness learnings to tailor messaging and reputation management strategies.

## Executive Summary:

### Case Study Audit

Whether for business or pleasure, travel was once a question of where to go, when to go and how much to spend. Now, disputes over immigration, marriage equality and gender identity have made travel much more of a political act. Where an individual or organization decides to travel or host a conference can be a sign of direct support (or critique) of state-based policies.

From Arizona's Support Our Law Enforcement and Safe Neighborhoods Act (2010) to Mississippi's Religious Liberty Accommodations Act (2016), controversial legislation led critics and activists to target states' purse strings as a lever to change policy. A common tactic has been issuing travel boycotts, bans and advisories which directly target the state business apparatus as a way to indirectly pressure elected officials.

For the purposes of this report, a *travel ban* is defined as formal action on the part of a business, state or local municipality or other entity to stop travel within its organization to a specific state. *Travel boycotts* are efforts to encourage travelers to avoid target states. *Travel advisories* are efforts to raise awareness on an issue, but don't go as far as to outright encourage people to avoid travel to a state.

Our research found distinct stages of the travel boycott lifecycle:

- *The Origin:* Across all five states, travel boycotts emerged in response to a piece of legislation that was introduced by a unified government—a single party controlled both the Executive and Legislative branches. Additionally, the legislation that ultimately led to calls for travel boycotts, with the exception of Indiana, was introduced during an election year (2010, 2016). In the case studies included in this analysis, travel boycotts were utilized only when legislation was aimed at curbing the rights of minority groups within the state. Said differently, travel boycotts were a tactic to combat controversial social policy.
- *The Trigger Points:* There are several elements that appear to accelerate the travel boycott lifecycle.

Firstly, when national political figures take a stance, such as President Barack Obama in the case of Arizona or Ted Cruz in the case of Indiana, the policy went from local controversy to national conversation. Elected city and state officials will also get involved, namely by banning official travel to these states, though the localized nature of these acts means these tactics are less likely to have major reputational impact or accelerate boycotts.

Another major turning point comes when large companies vocalize their opposition. While smaller businesses and out-of-state municipalities may have already engaged, it is not until heavy hitters become involved that true pressure is placed on state officials. This ranged from international entertainment companies like Viacom in the case of Tennessee, to more localized organizations like Red Hat in North Carolina.

Interestingly, the response from the business community is even more nuanced when one examines the political and business makeup of the state. In states where a single party has historically maintained control (e.g. Mississippi), business opposition to controversial bills

tended to only go as far as publicly opposing the legislation. In states that are more politically contested (e.g. North Carolina), businesses tended to be more vocal in their opposition, made more direct threats and moved to stymie or end operations in the state. Indeed, North Carolina is often labeled a “battleground state” due to the flip-flopping nature of its political leadership which can provide a breeding ground for political warfare. Moreover, the prevalence of national and multinational businesses in a state may subtly influence how an issue escalates. For example, Mississippi lacks Fortune 500 headquarters. In contrast, North Carolina has several headquartered in its state, including Bank of America, Lowe’s, Duke Energy, BB&T, Family Dollar, R. J. Reynolds and Hanes Brands.

The sports industry has been very influential as well, particularly the NCAA. This organization, which schedules hundreds of tournaments each year that bring millions of dollars to communities across the nation, has not only voiced their disapproval of anti-discriminatory legislation, but has also established sweeping travel bans and even made public threats with clear deadlines as was the case of the NCAA threatening in early March of this year that it would soon make decisions on conferences through 2022 and would not include North Carolina as a viable option should HB2 remain on the books. Shortly after, an amendment was made to HB2 and the NCAA agreed to return conferences to the state. In addition to collegiate sports, professional leagues like the NBA and NFL have also moved tournaments and publicly spoken out against legislation.

Activist groups have also been vocal across states included in this analysis. For Mississippi, North Carolina, Indiana and Tennessee, LGBT-specific activist groups fanned the flames of the opposition, with the Human Rights Campaign (HRC) often acting as a central organizing force. In fact, HRC often coordinated activist-business coalition responses. For example, they coordinated a joint letter in Tennessee that was signed by companies such as Dow Chemical Company, Hewlett Packard, Enterprise, Choice Hotels International Inc., and Alcoa, Inc. Other major activist groups involved in most, if not all, state fights are the American Civil Liberties Union (ACLU) and the Southern Poverty Law Center.

As for celebrities and entertainment groups, vocal figures have included the likes of Ringo Star, Bruce Springsteen, Viacom/Country Music Television and Wilco. These individuals have canceled events in states that have passed controversial legislation. Others have opted for alternatives to boycotts. For example, Beyoncé held her concert in North Carolina, but used the event as an avenue to share her support for the LGBT community and urged her fans to donate to LGBT groups in the state.

Associations and professional societies have also been involved, particularly when it comes to relocating their annual conferences. Taken individually, these vary in size, but aggregated, they have amounted to significant losses in cities that rely heavily on conference revenue. This looks to be somewhat of the “new normal.” The Center for Association Leadership has [encouraged](#) its members to look at the sort of legislation included in this analysis, and has provided guidance for language to include in contracts to make cancellations or relocations an option.

- *The Impact:* Travel boycotts, bans and advisories have resulted in millions in lost state revenue, stagnation in room rates, and have made localized political conversations into national debates.

Many of the formal bans and boycotts remain on the books today. Consequently, the lost revenue that would otherwise come from related travel and lodging increases with each passing day.

In all states considered, travel boycotts, bans and advisories have been a relatively successful tactic for bringing attention to policy. The considerable media coverage and public conversation brought to states from travel boycotts, including business leaders, public figures and political leaders, has resulted in substantial political and economic impact on target states.

From an economic perspective, travel boycotts, bans and advisories have considerable potential impact. Still, where states have an ongoing record of growth in business, travel and tourism, the impact is rather nuanced. For example, North Carolina lost a considerable amount of potential economic output when the NCAA decided to move its championship games. However, the economy continues to grow and other companies have continued to expand operations within the state.

The impact on policy is less consistent. In Mississippi and Arizona, federal courts ultimately weighed in on the controversial legislation. For the former, the bill was blocked from going into effect, a decision that was only just overturned at the time this report was published. In the latter, the court upheld the bill and it remains in effect today. In both instances, boycotts, bans and advisories were not successful in pressuring legislature to repeal the bill, though one could argue that the legal decisions were expedited as a result of the bans, boycotts and advisories brought.

In places like North Carolina and Indiana, backlash, particularly those involving large businesses and organizations important to the state's revenue have resulted in formal policy change.

In Tennessee, there have been mixed results. Opposition succeeded in keeping the state's "bathroom bill" from going through the state legislature. However, another bill that allows counselors and therapists to deny services to LGBT people did pass and remains in place with no real talks of repeal or amending.

## **Survey of American Travelers**

### **○ Awareness of Travel Boycotts**

There is general awareness of travel boycotts, with fifty-seven percent say they are familiar with the issue. However, with the exception of North Carolina, there is much ambiguity as to which states have been targeted.

Unaided, North Carolina is top-of-mind (18%) as are relevant groups/issues (e.g. NCAA, bathroom bill). Aided, 31 percent recognize NC as a targeted state. In comparison, Texas is the next most commonly recognized state (aided) with only 10 percent of travelers saying it has been targeted.

From an issue perspective, travelers associate boycotts with LGBT issues (6%). Immigration and racial discrimination are also mentioned, though secondarily (4 and 3 percent, respectively).

- **Attitudes towards Travel Boycotts**

Travelers are split on whether they support or oppose boycotts, though the opposition appears to have a slight advantage. Thirty-nine percent support, 40 percent oppose and 22 percent have no opinion. Fifteen percent strongly support, compared to 22 percent who strongly oppose.

The mixed opinion is, in part, a function of perceived efficacy. Nearly an equal number say boycotts are an effective tactic in compelling state action (42%) as those who do not (44%). On this measure, neither side appears to feel strongly nor have the advantage (intensity on both sides is just 15 percent).

Attitudes are clearly divided on party lines. Democrats support boycotts (58%) and say they are effective (60%), while Republicans oppose boycotts (57%) and believe them to be ineffective (58%).

There is broad consensus that travel boycotts hurt businesses, especially the hospitality industry (74 and 72 percent, respectively, say boycotts harm business overall and the hospitality industry in particular). Travelers say both big and small hospitality lose.

Indeed, in comparison, travelers don't believe politicians bear the brunt of boycott consequences (only 40 percent believe they are harmed).

Travelers believe there are many viable alternatives to boycotts. Almost all tested alternatives are seen as just as good if not better than boycotts. Particularly favorable alternatives are participating in discussions, contacting state politicians and donating to causes that advocate in the state. Millennials (25-34 yrs) especially believe in the power of the tested alternatives.

- **Potential Impact on Travel Intent**

There is potential for negative impact on travel intent to a targeted state. When asked directly, a plurality of travelers say a boycott would not impact their travel to a state (45%).

However, there are a substantial number of travelers who say they are less likely to go to a targeted state (33%). This is somewhat countered by the 10 percent of travelers who say they are more likely to go. In total, there is a net negative impact of 23 percent (33 percent less likely - 10 percent more likely).

The negative impact is driven by Democrats (Net -45%); Republicans/Independents aren't able to offset this as most say boycotts don't impact their travel decisions, rather than making them more likely to visit a state.

Potential damage of a boycott varies by state. Among those aware of a specific state boycott, net negative impact is largest in Mississippi (-36%) and lowest in Arizona (-15%). In North Carolina, the most recognized targeted state, there is a net negative impact of 1 in 4 travelers aware of the issue.

- **Actual Impact**

The lack of understanding for which states have been targeted as well as the weak, mixed stance on boycott effectiveness has resulted in limited damage to overall reputation.

Most targeted states are viewed either more or just as favorable travel destinations than their neighbors who have not been subjected to boycotts.

There are differences across party lines, but it is mostly Republicans having more favorable impressions of Southern states, regardless of whether the state has been targeted or not.

If we calculate the net negative impact of those who recognized a specific state out of all 1,001 travelers surveyed, the reported damage is just 11 percent (17 percent less interested in traveling to the state – 6 percent more interested).

- **Trusted Sources & Influential Messengers**

Tourism boards are a trusted source for both parties. One in four Democrats say they would turn to tourism boards for information. They are a tertiary source behind progressive activist organizations (1 in 2) and DOJ (1 in 3).

Tourism boards are a top source for Republicans (1 in 3). Republicans more focused on business-focused organizations. Tourism boards are on par with state chambers of commerce.

Tourism boards are also one of the most trusted sources for those who have yet to take a position on boycotts (potential persuadables).

HRC is clearly an influential organization with strong support among Democrats and millennials. 48 percent of Democrats and 42 percent of millennials say HRC would make them consider boycotting travel to a state. Even among millennial Republicans, HRC is the most influential organization tested (33%).

- **Implications**

To date, reputational damage of travel boycotts has been limited. However, there is potential for substantial negative impact, especially if recognition and understanding increases.

Travelers side on party ideologies and it is problematic since momentum appears on the side of Democrats. Democrats more likely to act, while Republicans more likely to ignore.

Democrats are more heavily influenced by stakeholder groups, especially by progressive organizations. Again, Republicans are more likely to ignore outside influence.

There is opportunity to message on boycott ineffectiveness, especially how boycotts hurt local business/employees much more so than politicians.

Neither side is convinced on whether boycotts work or not. Moreover, there is strong consensus that boycotts hurt the hospitality industry, particularly local hotel and restaurant owners and employees, while damage to politicians is limited.

There is also opportunity to advance several alternatives, such as participating in discussions, contacting politicians and donating to causes that advocate in the state, which travelers (especially millennials) say are better than or just as good as boycotts.

There is a role for state tourism boards to engage as travelers trust them as an info source.

## Detailed Findings: State Level Case Studies

### ○ Arizona

#### *The Origin*

A historically red state, in the midst of the 2010 election, Arizona had a Republican governor and the legislature was Republican controlled. Arizona Governor **Jan Brewer** signed into law the **Support Our Law Enforcement and Safe Neighborhoods, SB 1070**. This bill provides law enforcement with the ability to question any detainee about their immigration status (or lack thereof) if they have “reasonable suspicion” that they are dealing with an illegal immigrant.

At the time of the bill’s passage, a [Rasmussen](#) poll found that 65 percent of Arizona voters supported the bill, with just 27 percent opposed to it. A similar pattern emerged in a national poll conducted by [Gallup](#) in April 2010 which found that 51 percent of Americans who had heard of the bill were in favor of it, with 39 percent opposed to it. Opposition was strongest amongst Democrats (34 percent favored the bill, 56 percent oppose it; 75 percent Republicans favored it, 17 percent oppose it).

#### *The Trigger Points*

Following the passage of **SB 1070**, many political leaders immediately issued statements criticizing the law. The most notable critics of the bill were President [Barack Obama](#), who cited worries that the bill would be utilized to target specific communities and Mexican President [Felipe Calderon](#) who felt the bill was the “criminalization of immigration.”

Though this bill was aimed at expanding the powers of law enforcement, law enforcement interest groups remained split on the bill. Statewide rank-and-file police groups, such as the Phoenix Police Department’s union, have consistently supported the bill’s passage, while the Arizona Association of Chiefs of Police has come out in [opposition](#) to it.

Outside of law enforcement, a wide array of groups have publicly criticized SB 1070. This includes unions, academic groups, non-profits and activist coalitions. Specifically, The United Food and Commercial Workers International Union, Service Employees International Union (SEIU), Asian American Justice Center, Center for Community Change, Leadership Conference on Civil and Human Rights, Sociologists Without Borders, Leadership Conference on Civil and Human Rights, National Council of La Raza, National Puerto Rican Coalition, Denver Public Schools, Los Angeles Gay and Lesbian Center, Santa Monica College.

From a business perspective, the Greater Phoenix Economic Development Council expressed concerns for the reputational impact of the bill and organized a group, titled the Real Arizona Coalition, which includes businesses, faith-based groups and various multicultural organizations and describes itself as an organization “rejecting the demagogic rhetoric of division.” As examples, coalition members included, Goodmans Interior Structures, the Cesar Chavez Institute, the Arizona chapter of the American Academy of Pediatrics and the Tucson Metropolitan Chamber of Commerce.

While businesses like those above have participated in speaking out against SB1070, companies generally have not taken it further – there is little evidence of a large business setting a travel ban to the state. The one example found was of the World Boxing Council who said they would not set fights with Mexican boxers in the state, but this is a very specific policy (note they were not banning ALL fights, just



those with Mexican fighters). They have since forgone this policy, without a formal, public announcement.

Rather, Arizona travel bans have been primarily set by out-of-state municipalities. This includes: Austin, Texas; Berkeley, California; Bloomington, Indiana; Boston, Massachusetts; Boulder, Colorado; Cook County, Illinois; Columbus, Ohio; El Paso, Texas; Gallup, New Mexico; Hartford, Connecticut; Los Angeles, California; Oakland, California; Richmond, California; San Francisco, California; San Pablo, California; Santa Monica, California; Seattle, Washington; St. Paul, Minnesota; and West Hollywood, California.

### *The Impact*

A [report](#) released by the Center for American Progress in November 2010 estimated related travel boycotts and bans had cost the state \$141 million in lost meeting and convention-related revenue. This included the loss of a \$3 million contract between Phoenix based Cavco Industries and Santa Monica, California. The Santa Monica city council [refused](#) to award Cavco the contract due to the fact the company is based within Arizona and Santa Monica had passed sanctions against the state.

There are conflicting estimates of the impact the bill has had on travel to Arizona. The Center for American Progress put [hotel industry losses](#) during the first four months after the signing of the law at about \$45 million. Moreover, the estimated opportunity cost of what these lost visitors would have spent in the state was \$96 million. In contrast, a [report](#) from Smith Travel Research found travel to the Grand Canyon went up by nearly 3 percent in June, July and August, compared with the same period in 2009. Further, Arizona hotel occupancy rose in the summer following the bill's passage (8.3 percent in June, 2.6 percent in July and 3.4 percent in August). Thus, travel and tourism appears to have grown, but perhaps not as much as it could have.

To date, SB 1070 remains intact. This is despite municipal travel bans (which remain in place) and even judicial review. Indeed, in June 2012, the U.S. Supreme Court, upheld the provision requiring detainees to show proof of their immigration status, one of the more controversial elements of the bill, *in Arizona v. United States*.

In this example, travel boycotts and bans failed to incite legislative change. It is possible this is due to a lack of heavy business hitters enacting policies that economically damage Arizona. Moreover, public sentiment at the time was in support of the bill, both within the state and on a national level. It is also likely that the failure is a product of other national narratives, such as the rise of the tea party or changes in congressional leadership, distracting large political and advocacy organizations from further engaging in this fight, particularly after the loss in the Supreme Court.

### ○ **Indiana**

#### *The Origin*

In March 2015, then Republican Governor **Mike Pence** signed the ***Religious Freedom Restoration Act (RFRA)***, **SB 101** into law. The law provided that a state or local government may not substantially burden a person's right to the exercise of religion and may assert this burden as defense in court proceedings.

Signed against the backdrop of a Republican-controlled state legislature and a state that is generally considered a Republican stronghold, the bill included extremely strong language which progressive

organizations and people said allowed for blatant discrimination of LGBT people on the grounds of religious beliefs.

The sentiment of Indiana voters at the time is not clear, but nationally, public sentiment stood in sharp contrast to the legislature's actions. A national Reuters/Ipsos [poll](#) conducted in April 2015 found that 54 percent of Americans believed it was wrong for businesses to refuse service on the grounds of religious freedom. The same poll also found 52 percent of Americans supported same-sex marriage, compared to 32 percent who opposed it.

### *The Trigger Points*

Early in the Presidential primaries, Republican candidates **Jeb Bush, Marco Rubio, Bobby Jindal, Rick Santorum, Ted Cruz** and **Ben Carson** publicly announced their support for the bill. Meanwhile, some elected Indiana officials came out against the bill. For example, Greg Ballard, the Republican mayor of Indianapolis, called on the legislature to either repeal the law or add explicit protections for sexual orientation and gender identity. Much of the academic [community](#) in Indiana also came out against the bill, including Mitch Daniels, former Governor of Indiana and president of Purdue University, James Danko, the president of Butler University and Michael McRobbie, president of Indiana University.

In addition, religious groups like the Islamic Society of North America, the Sikh Coalition, Central Conference of American Rabbis, Religious Action Center of Reform Judaism, and Disciples of Christ announced their opposition to the bill.

Businesses were vocal about their opposition. GAP and Levi Strauss released a joint [statement](#) decrying the law's effort to foster a "culture of intolerance." Subaru, which was in the process of building a plant in Indiana, came out [against the law](#) but did not threaten operations. Other companies including Apple, Anthem Inc., Eli Lilly and Company, Cummins, Emmis Communications, Roche Diagnostics, Indiana University Health, Dow AgroSciences, Eskenazi Health also came out in opposition to the bill but did not appear to make changes to their travel or operations policies.

Still, some major businesses took action. In March 2015, the same month as the bill's passage, Marc Benioff, CEO of Salesforce, [announced](#) that the company would cancel all programs that require customers or employees to travel to Indiana. Angie's List also [announced](#) they would cancel a \$40 million expansion of their Indianapolis based headquarters that would have moved 1000 jobs into the state.

Conferences, conventions, tournaments and concerts were also relocated. The CEO of Gen Con, Adrian Swartout, wrote a [letter](#) to Gov. Pence urging for the repeal of SB 101 and threatened to move one of Indianapolis' largest conventions if it wasn't repealed. The [NCAA](#), which moved its headquarters to Indianapolis in 1999, threatened to move events in the state, like the Final Four, along with its headquarters if the bill was not repealed. The American Federation of State, County, and Municipal Employees (AFSCME) called their annual women's conference, originally scheduled to happen in Indianapolis (the conference was rescheduled after the bill was amended). Comedic couple Nick Offerman and Megan Mullally cancelled their 'Summer of 69' tour event and the band Wilco cancelled a concert in Indianapolis.

### *The Impact*

According to Visit Indy, as of January 2016, Indianapolis had lost over \$60 million in revenue from future conventions as a result of the backlash from RFRA.

Following much public upheaval, media attention and opposition from large businesses, Governor Pence called for the state legislature to move quickly to “fix” the SB 101. The law was amended just one week later, in early April, with SB 50 by enumerating nondiscrimination protections on the basis of race, color, religion, ancestry, age, national origin, disability, sex, sexual orientation, gender identity or military service.

It is possible that the success in this state can be attributed to an unexpected heightened backlash. It was one of the first times that businesses took such an active stance with real economic implications for the state. Indeed, Governor Pence was quoted on March 31, 2015 as saying, “Was I expecting this kind of backlash? Heavens no.”

- **Mississippi**

*The Origin*

In April 2016, when Republicans controlled the state legislature, Republican Governor **Phil Bryant** signed the **Religious Liberty Accommodations Act**, HB 1523 into law. The bill provided Mississippi businesses and government employees with the ability to cite religious beliefs as a means to deny services to same-sex couples.

The bill was widely supported within. Prior to the bill’s passing, Mason-Dixon Polling & Research found 63 percent of Mississippi voters supported HB 1523, while 24 percent opposed it. A majority of both Democrat and Republican voters expressed support (57 percent and 72 percent, respectively; opposition was 28 percent and 19 percent).

Notably, the bill was passed the same month arguments over the constitutionality of gay marriage were being argued in the U.S. Supreme Court. A decision allowing for the legal right to marry, regardless of sexual orientation, was made in June of that year.

*The Trigger Points*

Following the passage of HB 1523, several large companies present within the state spoke out against the bill, although none of these companies threatened to withdraw business operations. Companies in opposition include: Nissan, MGM Resorts, Huntington Ingalls Industries, Toyota, Tyson Foods, AT&T, Levi Strauss, Sanderson Farms Inc., GE, Dow Chemical Company, PepsiCo, Hewlett Packard Enterprises, Hyatt Hotels Corporation, Choice Hotels International Inc. and Whole Foods Market.

Sanderson Farms, the third largest poultry producer in the U.S. with headquarters in Mississippi, along with former Ambassador John Palmer and several prominent Mississippian businesses, filed a brief with the Fifth Circuit Court of Appeals regarding HB 1523. In the brief, the group stated that HB 1523 “...does nothing but hurt Mississippi. The law has no legitimate secular purpose, and whatever purpose the state might think up now is a sham for the Legislature’s religiously motivated decision to confer favored status on one set of Christian beliefs about marriage and gender roles. No avowed purpose can save HB 1523 from scrutiny under the Establishment Clause (of the Constitution).”

As the travel ban tactic has increased in popularity, several places have issued broad travel bans to states who pass religiously motivated, discriminatory legislation, with Mississippi becoming another

example. Current states with travel bans to Mississippi and other states with legislation deemed “anti-discriminatory” are: Connecticut, Minnesota, New York, Vermont, and Washington DC, California. Current counties: Dane, Wisconsin; Franklin, Ohio; Montgomery, Maryland; and Multnomah; Oregon. Current cities are: Berkeley, Cincinnati, Dayton, Honolulu, Long Beach, Los Angeles, Miami Beach, New York City, Oakland, Philadelphia, Portland (ME), Portland (OR), Providence, Salt Lake City, San Francisco, San Jose, Santa Fe, Seattle, Tampa, West Palm Beach, Wilton Manors, and Baltimore.

Foreign governments have issued advisories to the state. In April, the British Foreign and Commonwealth Office issued a warning to LGBT travelers to Mississippi. In May, the European Union released a statement condemning the Religious Liberty Accommodations Act.

Many human rights advocates have expressed opposition to HB 1523. The Human Rights Campaign has been extremely critical as have other advocacy groups like Conference on Civil and Human Rights, Mississippi NAACP, Mississippi ACLU, Southern Poverty Law Center, Planned Parenthood Southeast and Gulf Coast Equality.

Though not a direct economic impact to the state, an interesting player that had potential for reputational damage was The New York Mississippi Society which canceled their annual picnic for Mississippi natives living in New York in protest over the passage of HB 1523.

#### *The Impact*

Even though HB 1523 was passed, Federal Judge Carlton Reeves [blocked](#) the bill hours before it was set to go into effect on July 1, 2016. Judge Reeves stated that HB 1523 does not “honor the tradition of religious freedom nor does it respect the equal dignity of all Mississippi citizens.” Governor Bryant appealed to the 5<sup>th</sup> Circuit for a stay of Judge Reeves ruling but was denied. The block was [lifted](#) in late June 2017 with the bill becoming state law.

Direct monetary damages to the state are unclear and have not been widely reported. In December 2016, Governor Brant [announced](#) the state’s unemployment rate reached 5.6 percent, the lowest since 2004.

While travel bans may have helped with coverage, they were not successful in inciting legislative change. It is possible that the political context of the state as a major Republican stronghold as well as the lack of Fortune 500 companies headquartered there meant businesses were less likely to engage in this fight. Ultimately, HB 1523 has not faced the same scale of backlash as many other states, though it will be interesting to see if this changes now that the block has been lifted and the bill has become law.

#### ○ **North Carolina**

##### *The Origin*

In 2016, Republicans controlled the North Carolina General Assembly with supermajorities in both houses and held the Governor’s Office ahead of the elections. In February of that year, the Charlotte City Council added LGBT protections to the city’s nondiscrimination ordinance, granting protection in places of “public accommodation,” despite warnings from the Governor not to pass the ordinance. In March, the North Carolina General Assembly held a special late-night legislative session to debate the **Public Facilities Privacy & Security Act, HB 2**. The bill eliminated anti-discrimination protections for lesbian, gay, bisexual and transgender North Carolinians. It also mandated that, in government

buildings, individuals may only use restrooms that correspond to the sex on their birth certificate. In less than twelve hours, it passed both houses and was signed into law by Governor Pat McCrory.

### *The Trigger Points*

Since the bill's passage, much attention has been paid to the critical stances taken by various athletic organizations, a principal legacy from the state. The [NBA](#) moved the 2017 All-Star Game from Charlotte to New Orleans, and the National Collegiate Athletic Association ([NCAA](#)) pulled its championship events from North Carolina.

Companies with large operations, if not headquarters, in the state made public statements regarding their concern and approval for the bill. This includes companies like Biogen, Red Hat, IBM and American Airlines. In addition, the Human Rights Campaign and the American Civil Liberties Union (ACLU) led the formation of a [coalition](#) of various executives to call for the bill to be repealed, named the North Carolina Values Coalition. This coalition included executives from Bank of America, Time Warner Cable, American Express Company, Visa and Ernst & Young. In late March, the ACLU also filed a [lawsuit](#) against the state claiming HB2 violates the Equal Protection Clause.

A series of local legislators have remained vocal supporters of HB2. In contrast, voters find the bill to be unpopular. A January 2017 [survey](#) from Public Policy Polling found that only 32 percent of voters supported the bill, while 50 percent opposed it. Further, only 24 percent believe HB2 is helping the state, while 58 percent believe it is harming North Carolina.

Government travel bans and advisories to North Carolina have been rather sweeping, coming from the local, state and even international level. States with bans in place include Vermont, Washington, and California; cities include San Francisco, Los Angeles, New York and Seattle; the United Kingdom has also issued a travel advisory.

Celebrities also engaged with the issue. Ringo Star and Bruce Springsteen were scheduled to perform in North Carolina in 2016, but [cancelled](#) their shows in protest. Beyoncé, on the other hand, performed but used her concert as a venue to [speak out](#) against HB2 and encourage attendees and her fans more broadly to donate to LGBT-groups in the state.

### *The Impact*

Aside from the NCAA's cancellation of championship games in 2017, a decision reversed in April of this year after amendments to the law, North Carolina has lost opportunities for expanded business operations in the state. For example, [PayPal](#) withdrew a \$3.6 million complex that would have created more than 400 jobs in Charlotte. PayPal, Deutsch Bank and the CoStar Group pulled out of [expansion](#) projects in the state. The PayPal and Deutsch Bank cancellations cost the state 400 and 250 jobs, respectively. These positions would have amounted to \$42 million in average [salaries](#).

There has been damage to hotels in cities where conferences, tournaments and concerts are most commonly held. Starwood's Westin Charlotte has seen more than 55 percent [decrease](#) in business over the last year.

In Raleigh, the loss of 24 conventions and sporting events scheduled by VisitRaleigh cost the region \$8.5 million in 2016. Charlotte was supposed to host the NBA All-Star Game, which would have drawn tens of thousands of visitors and celebrities and created a \$100 million economic impact.

However, not all business development has stalled as consequence to the bill. For example, Moen, Corning and Alevo have plans to expand in-state with an estimated 650 additional jobs over the next several years.

In total, an Associated Press report estimates that HB2 would result in a loss of more than [\\$3.76 billion](#) in lost revenues over the next decade or so. This report, in combination with the attention brought by the NCAA, reignited the conversation surrounding a repeal of HB2.

While Gov. McCrory had moved earlier in 2016 to appease opponents of HB2 by [signing](#) an executive order that added sexual orientation and gender identity to the list of protected classes among state employees. It was not enough to assuage critiques. In late March of this year, the NCAA gave North Carolina an April 18<sup>th</sup> [deadline](#) to repeal HB2 or lose championship events until 2022. Several days later, the North Carolina Senate and House of Representatives voted to [amend](#) HB2.

However, the same organizations and individuals that called for the repeal were critical of the new legislation. With the repeal came the passage of [House Bill 142](#), which provides the state with the sole power to mandate bathroom policies and prevents local authorities from passing non-discrimination ordinances. As a result, the [NCAA](#) “reluctantly voted to allow consideration of championship bids” and ultimately awarded a number of championships to the state.

Interestingly, the change occurred only after the culmination of the most recent election cycle, when a Democratic governor was elected into power. This suggests that shifts in the political environment, specifically the absence of office holder’s worries of losing their seats, coupled with public outcry and tangible economic impact, may help to create an environment where change can occur.

Even with the replacement of HB2, the ACC elected to pull eight championship events from the state—though their Council of Presidents voted to [allow](#) N.C. to host future championship games. In response to this muddled behavior, several lawmakers proposed a bill that would [require](#) UNC Chapel Hill and NC State to leave the ACC if another boycott were to occur.

- **Tennessee**

*The Origin*

In 2016, Republicans had control of the legislature and the Executive Mansion. In March 2016, Governor **Bill Haslam** attempted to sign [SB 2387](#) into law. This bill would require students in public schools and public institutions of higher education to use restrooms and locker rooms that are consistent with the sex on the student’s birth certificate.

This bill brought much media attention to the Tennessee General Assembly, as well as Governor Haslam. It ultimately failed to be signed into law. However, a month following this, Governor Haslam then signed [SB 1556](#) into law in April, a bill which allows therapists and counselors with “sincerely held principles” to reject gay, lesbian and transgender clients. With its passing came a reanimation of political cannon fodder amongst medical groups, state and local governments, as well as LGBT advocacy groups nationwide.

*The Trigger Points*

The day Bill 2387 was being voted on, The Human Rights Campaign, Dow Chemical Company, Hewlett Packard, Enterprise, Choice Hotels International Inc., and Alcoa, Inc. collectively signed a letter

condemning the law. Viacom, which employs almost 400 employees in Tennessee via Country Music Television, released a [statement](#) declaring the bill in contradiction with their values.

Similarly, performers such as Emmylou Harris, Miley Cyrus, Billy Ray Cyrus, Ty Herndon, Chely Wright, Gretchen Peters and Desmond Child, and artist groups like Country Music Association, the Recording Industry Association of America and the Music Business Association all went on to publicly oppose the bill.

Professional associations concerned with educators and other employees of public school systems have come out in sharp opposition to Bill 2387. This group includes: The American School Counselor Association, The Child Welfare League of America, The National Association of School Psychologists, The National Association of Social Workers, and The National Education Association.

In contrast, given the medical subject matter of Bill 1556 the opposition has been more narrowly focused. Specifically, professional medical associations came out in opposition to the bill, including the American Academy of Pediatrics and the American Counseling Association. Indeed, the American Counseling Association (ACA) canceled their 2017 convention in the state.

The same states and municipalities with travel bans against anti-discriminatory locations also acted against Tennessee, including the City of Philadelphia which introduced a travel ban as direct consequence to Bill 1556.

LGBT-focused equality groups such as the Tennessee Equality Project and the Nashville LGBT Chamber of Commerce have come out against both bills 2387 and 1556.

Survey data regarding Tennessee voter's support/opposition to these bills is not presently available.

### *The Impact*

While economic losses aren't widely reported, the estimated loss of the American Counseling Association convention [cost](#) Nashville more than 3,000 visitors, \$4 million in combined local and state tax revenue and a local economic impact of up to \$10 million. Nashville Mayor Megan Barry [says](#) the bill will cost Nashville \$58 million in direct visitor spending from canceled conventions.

Though Bill 2387 failed to pass, Bill 1556 remains in place with no real talks of repeal or amending. In response to Tennessee-specific travel boycotts, Tennessee lawmakers like State Senator Mike Bell are calling for a [counter boycott](#) of California.

## Shielding from Impact: Reputation Management Recommendations

In 2015, U.S. travel and tourism [generated](#) nearly \$1.6 trillion in economic output. Further, the industry employs nearly 1 in 18 Americans. America's financial wellbeing, consequently, rests on a robust, healthy travel industry.

Beyond the states included in this analysis, it is important to prepare for and combat travel boycotts. The large activist organizations like HRC, ACLU and SPLC have honed their strategy playbook, with business boycotts being a central tenet. Thus, Destinations International needs to also build and prepare its strategy. Destinations International should be able to recognize the environments that breed and incubate boycotts as well as identify the key influential stakeholders for engagement on this issue.

### Environments that Breed Boycotts

- Recent proposal or talks of social policy aimed at curbing or limiting the rights of minority groups, particularly around issues of gender identity which is a newer focus of national discourse
- An upcoming election
- A government by a unified, single party
- State has been deemed politically contested or "battle ground" state
- Presence of Fortune 500 Companies

### Key Influential Stakeholders

- National political figures (i.e. President, Presidential candidates)
- Fortune 500 CEO's with major business interests in the state
- LGBT advocacy groups (i.e. HRC)
- Other large activist groups (i.e. ACLU)
- Sports/entertainment organizations (i.e. NCAA)



Detailed Findings: Survey of American Travelers

State Snapshots

○ Key States

To better understand the reputation of boycott-targeted states, respondents were asked to rate 15 states in total. This includes known popular and less popular destinations, as well as neighboring states that have not been subjected to a boycott.

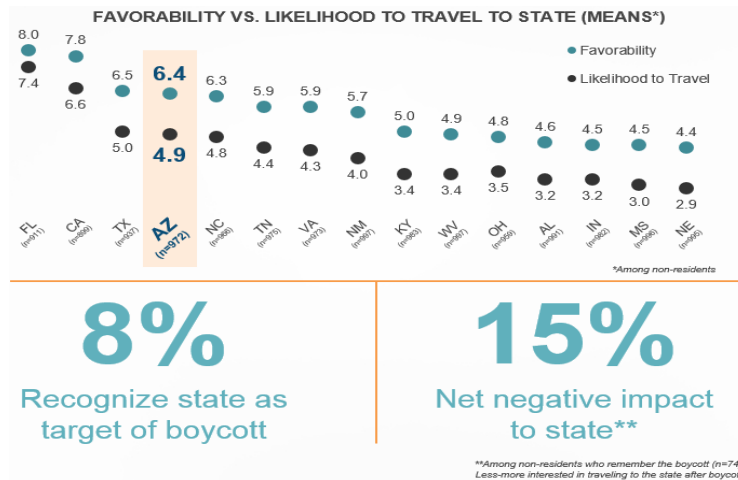
BENCHMARK (POPULAR DESTINATIONS)	
California	
Florida	
BOYCOTT-TARGETED STATES	PROXY FOR COMPARISON
Arizona	New Mexico
Indiana	Ohio
Mississippi	Alabama
North Carolina	Virginia
Tennessee	Kentucky
BENCHMARK (LESS POPULAR DESTINATIONS)	
Nebraska	
West Virginia	

○ Arizona

Reputationally, Arizona is viewed somewhat favorably. It bests its proxy (New Mexico) and is on par with Texas. It ranks fourth on the list of 15 tested states.

Recognition of Arizona as a targeted state is low overall (North Carolina is most recognized at 31%), though the eight percent recognition is still interesting given it is the oldest originated boycott (2010).

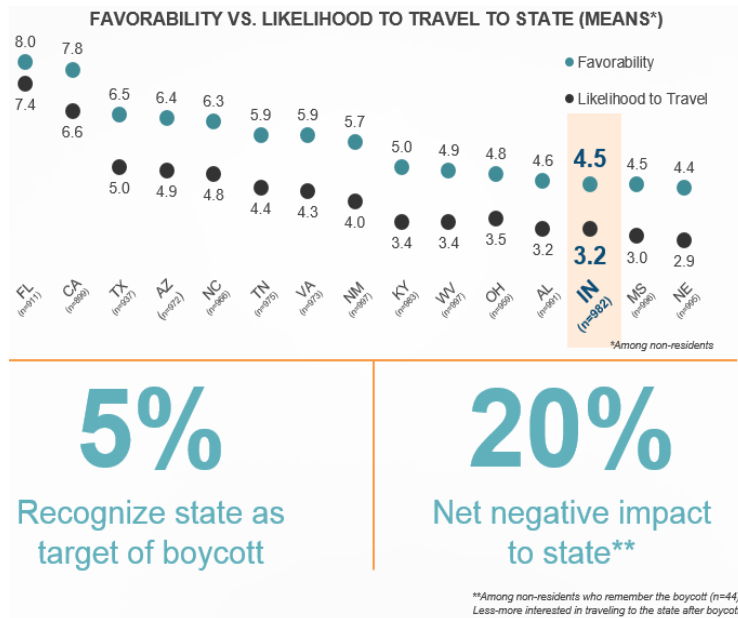
Perhaps partly because of this distance in time, Arizona sees the least negative impact on interest in traveling to the state.



○ **Indiana**

Impressions of Indiana as a travel destination fall below the 5.0 mid-point and Indiana ranks low among the tested 15 states. It also performs slightly below its proxy, Ohio.

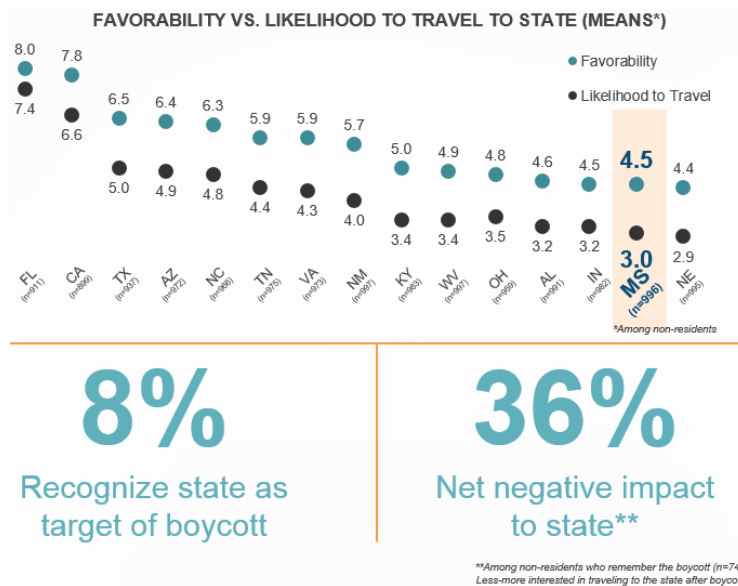
Recognition of the state as being a target of a boycott is low. The net negative impact among those aware is 1 in 5.



○ **Mississippi**

Mississippi's reputational scores scrape neck-in-neck with Nebraska, the benchmark low, and Alabama, its proxy state.

The somewhat negative impression of the state appears to inflate the impact of the boycott. Among the eight percent aware that the state has been targeted, Mississippi sees the greatest net negative impact on interest in travel to the state (more than 1 in 3).

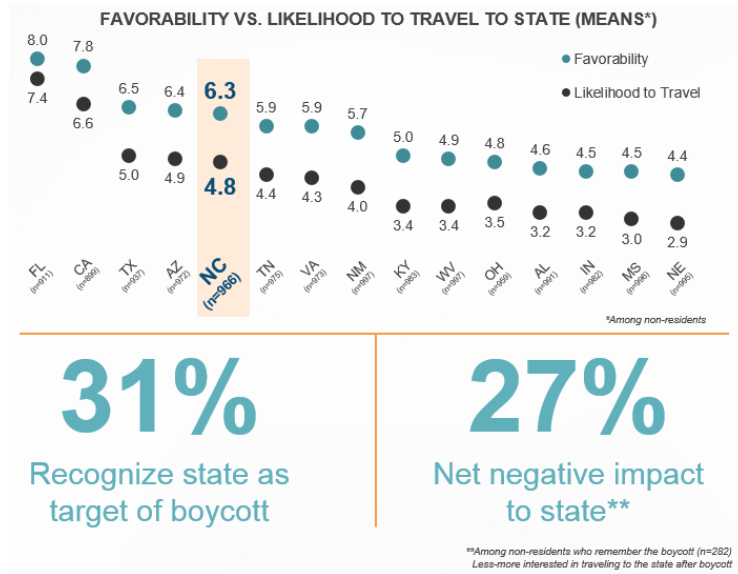


○ **North Carolina**

Like Arizona and Texas, North Carolina is viewed somewhat favorably. It rates slightly higher than its proxy (Virginia) on favorability and likelihood to travel.

This is despite North Carolina being the most clearly recognized target of boycotts (31%).

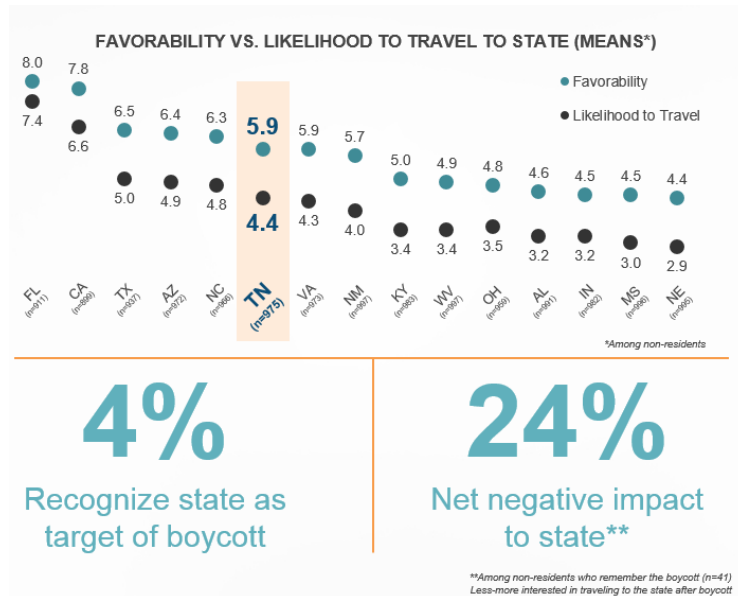
However, there is still potential for negative impact. There is more than a one in four net negative impact among those aware of the boycott.



○ **Tennessee**

Reputationally, Tennessee falls into a secondary tier among targeted states. Its favorability rating falls slightly above the mid-point of 5.0. Still, it bests its proxy, Kentucky, significantly.

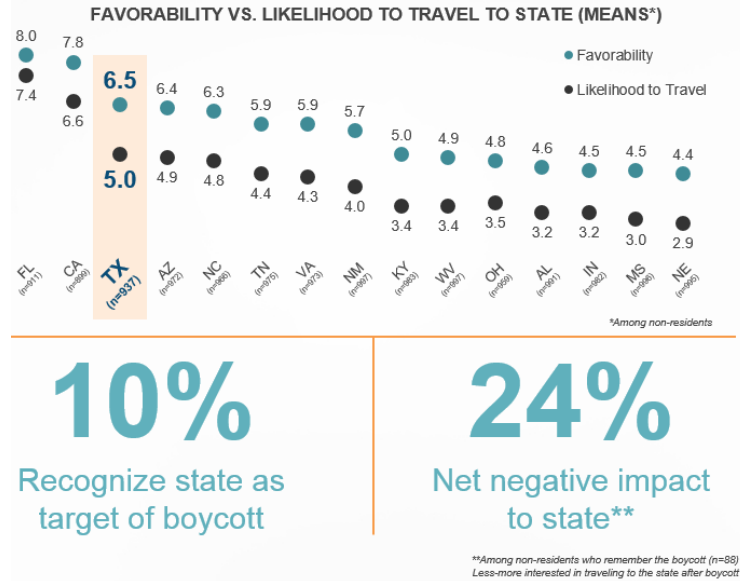
There is very low awareness of Tennessee being a target of boycotts. Among the few that are aware, the net negative impact is one in four.



○ **Texas**

Texas ranks highest in favorability and likelihood to travel of all the targeted states and their proxies.

One in ten travelers recognize the state has been targeted. It is the second most commonly recognized behind NC (31%). Among those who know of the boycott, there is a net negative impact of one in four travelers.

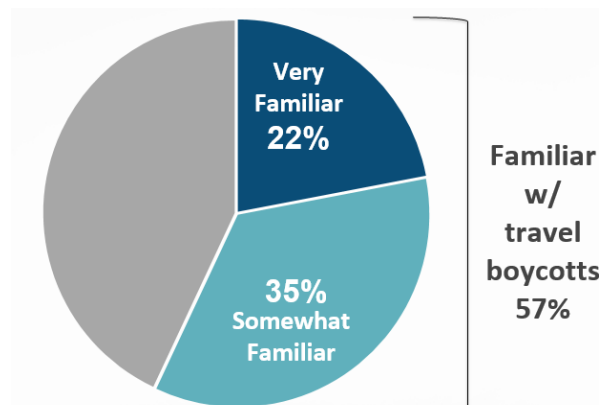


**Awareness & Understanding of Travel Boycotts**

○ **Awareness**

More than half of respondents report a familiarity with boycotts. Still, a sizeable contingent (43%) is otherwise unfamiliar with the issue. Familiarity is most pronounced amongst males (66%) and Democrats (66%).

Interestingly, those living in a state that has been targeted by a boycott have similar awareness levels to those who live in other states.



Q: Over the last decade, various organizations and people, including activist groups, municipalities, businesses and even celebrities have announced they are boycotting travel to a state. These travel boycotts have been carried out in response to actions taken by a state's government, typically a new state law which boycotters argue limits the rights of minority groups within the state. Travel boycotts have led to the cancellation, postponement and relocation of events such as meetings, conferences, concerts, tournaments and vacations. How familiar are you with the concept of travel boycotts?

○ **Unaided Association**

Among those familiar with travel boycotts, North Carolina is the place most closely associated. Indeed, it dwarfs unaided association of all targeted states—nearly tenfold. As such, it is not surprising to see the NCAA and references to a bathroom bill make strong appearances.

From an issue perspective, boycotts are predominately associated with LGBT issues. Immigration and racial issues are also top-of-mind.

Some also note the economic impact of these boycotts.



Note: Among those familiar (n=570) | | Coded open ends, multiple response.

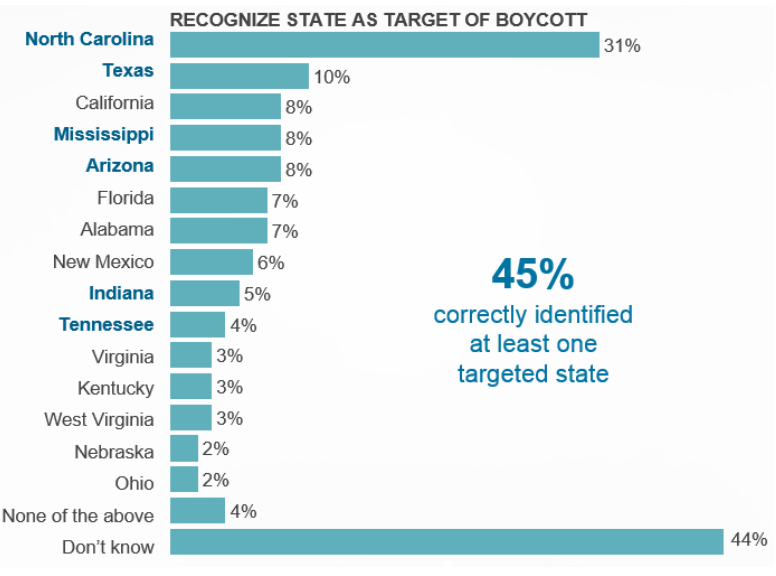
Q: What do you know about travel boycotts? Please be specific in naming any examples such as places that have been the target of travel boycotts, specific organizations or people that have called for travel boycotts and what government action led to the travel boycotts.

○ **Aided Association**

Nearly 1 in 3 respondents correctly identify North Carolina as a target of travel boycotts. That’s more than three times the next most commonly recognized state of Texas.

Given the distance in time, it is interesting to note that Arizona still resonates in the minds of some respondents.

Awareness of boycotts to Tennessee and Indiana fall below non-boycott states such as Florida, Alabama and New Mexico.



Q: To the best of your knowledge, which, if any, of the following have been the target of a travel boycott?

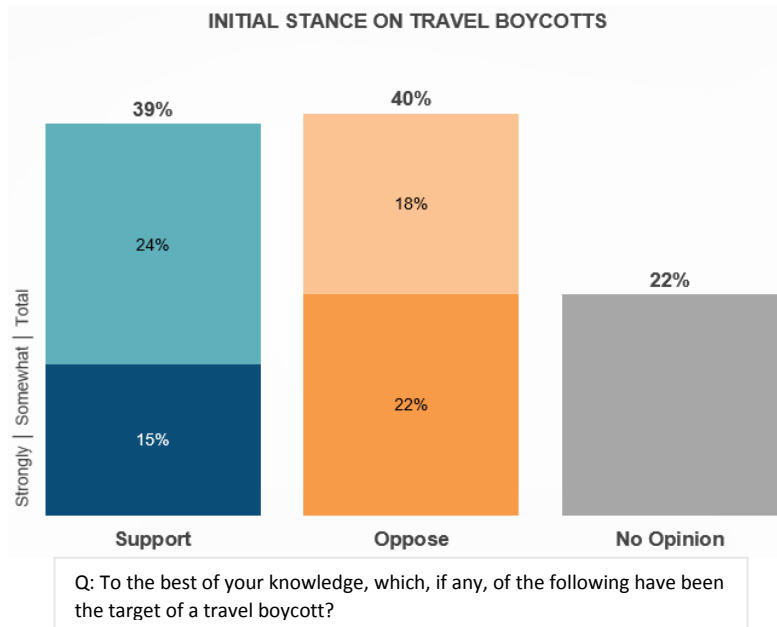
## Attitudes Towards Boycotts

### ○ Travelers are split on support of boycotts

Almost an equal number in total say they support or oppose boycotts, but a closer look at intensity shows opposition is stronger indicating a slight advantage.

Democrats (58%) have the largest support. College educated travelers (49%) are also more likely to support as are younger travelers (<45 yrs), particularly younger men (48%). Republicans are the strongest opposition (57%), particularly Republicans 55 years or older (70%).

A substantial number of travelers have no opinion.



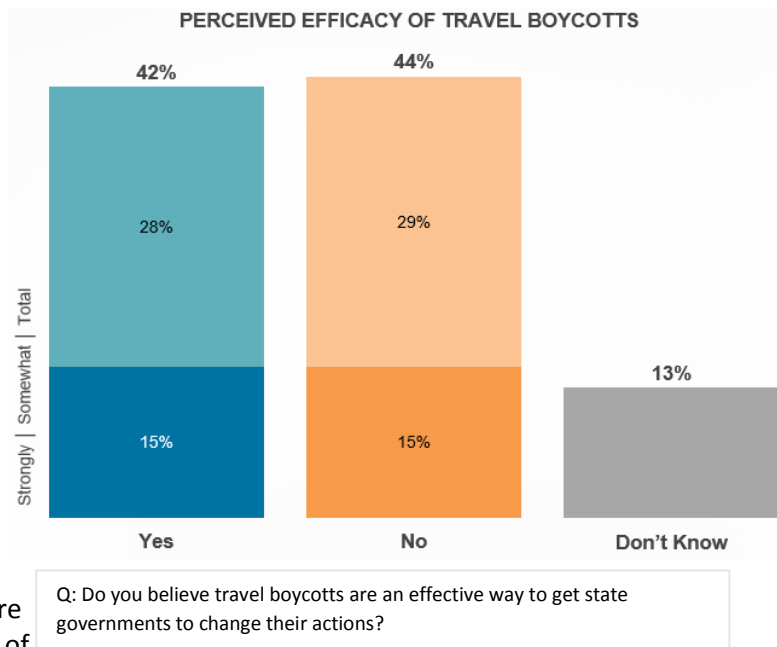
### ○ A lack of consensus on efficacy

Nearly equal numbers of respondents say boycotts are efficacious tactics to compel state action as those who do not. And unlike travelers' positions on the issue, intensity is equal on both sides. Neither side appears to have an edge.

Democrats and millennials (21-34 yrs) are most likely to say boycotts are effective (60 and 52 percent, respectively).

Combining these demographics compounds agreement – 66 percent of millennial Democrats believe they are effective (compared to just 33 percent of millennial Republicans and 43 percent of millennial Independents).

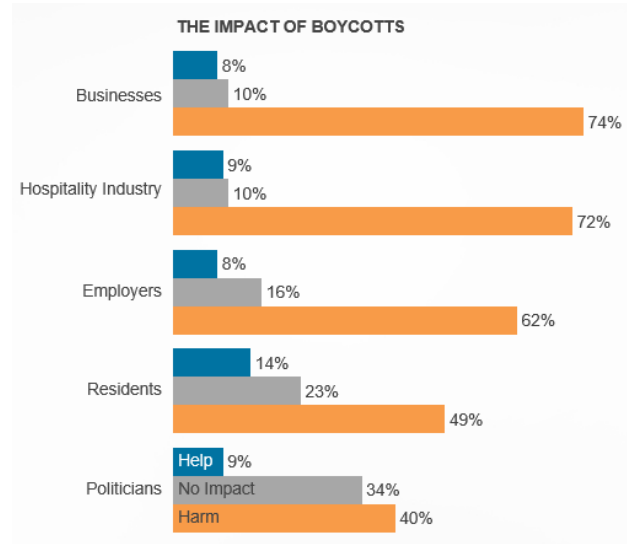
Republicans and seniors (65+ yrs) are more likely to say they aren't effective (58 and 54, respectively). Again, combining these demos compounds disagreement – 72 percent of Republican seniors say they aren't effective.



○ **Travelers believe boycotts hurt the travel industry**

A large majority (three in four) agree that boycotts hurt business, especially the hospitality industry. Even more telling is comparing this number to those who believe it harms politicians – just two in five.

And it’s not just business that is hurt- travelers also say residents are more than three times as likely to lose than gain from the boycotts.

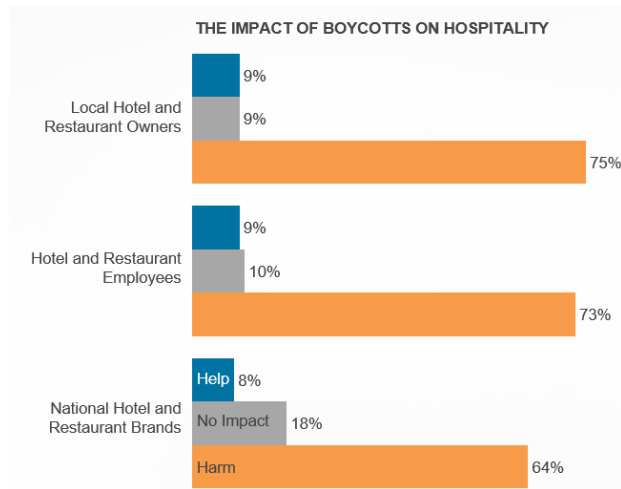


Q: Do you believe travel boycotts help or harm each of the following in the boycotted states?

○ **Travelers say both big and small hospitality lose**

A majority say boycotts harm local owners, employees and national brands.

Though travelers see both national and local hotels and restaurants as feeling the brunt of the impact, more sympathy is directed towards local owners and employees than national brands.



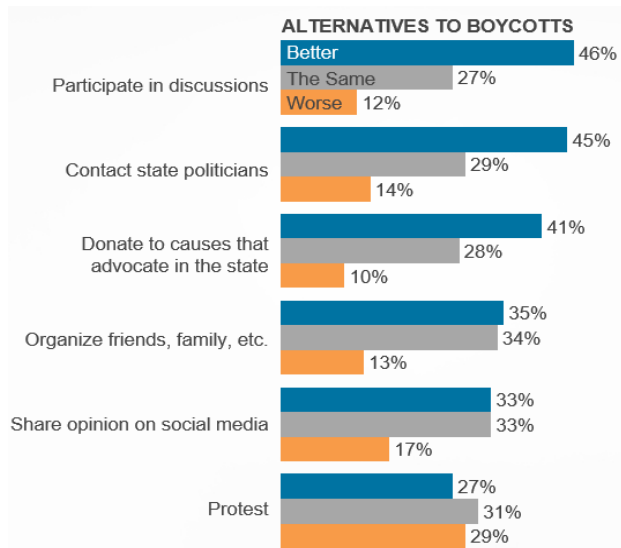
Q: If thinking specifically about the hospitality industry, do you believe travel boycotts help or harm each of the following in the boycotted states?

○ **Dialog, donation are most supported alternatives**

Travelers say there are many viable alternatives to travel boycotts. A plurality believe participating in discussions, contacting state politicians and donating to causes that advocate in the state are all better ways to get state government to change.

Organizing friends/family and sharing opinions on social media are seen as better or just as good. Only protests have meaningful contention as an effective alternative – a similar number say they are better, worse or about the same.

Interestingly, acceptance of these alternatives is high regardless of whether travelers support or oppose boycotts.

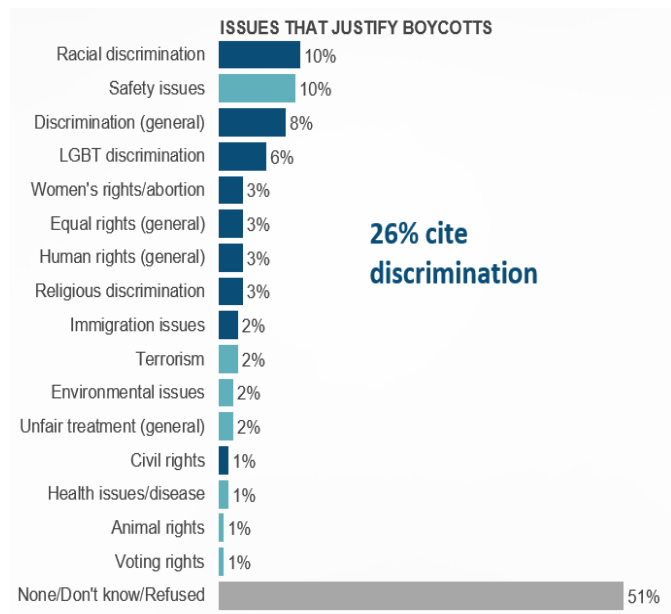


Q: Here are some potential alternatives to travel boycotts. For each, do you believe it is a better or worse way to get state government to change their actions?

○ **Social issues, equal treatment propel boycott support**

Travelers view issues pertaining to equal treatment and/or discrimination aimed at minority groups (racial minorities, LGBT groups) as the most compelling justifications for boycotts.

A lack of safety is also a reason one in ten travelers say they would boycott a state.



Q: What issues, if any, do you believe are important enough to justify boycotting travel to a state?

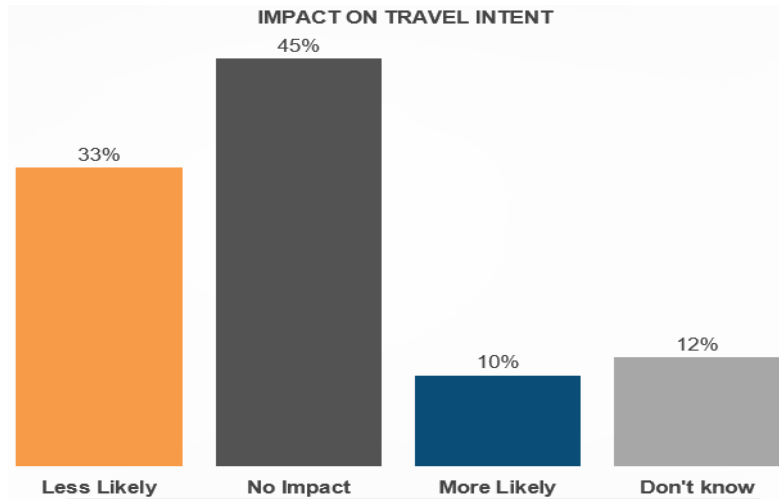


## Impact on State Reputation & Travel Intent

### ○ Potential for negative impact

A plurality say travel boycotts would not have an impact on their likelihood to travel to a state. Still, there is a net negative impact of 23 percent - 1 in 3 say they are less likely to travel, which is offset in part by the 1 in 10 who say they are more likely.

Most likely to boycott a state are Democrats (53% less likely to travel).



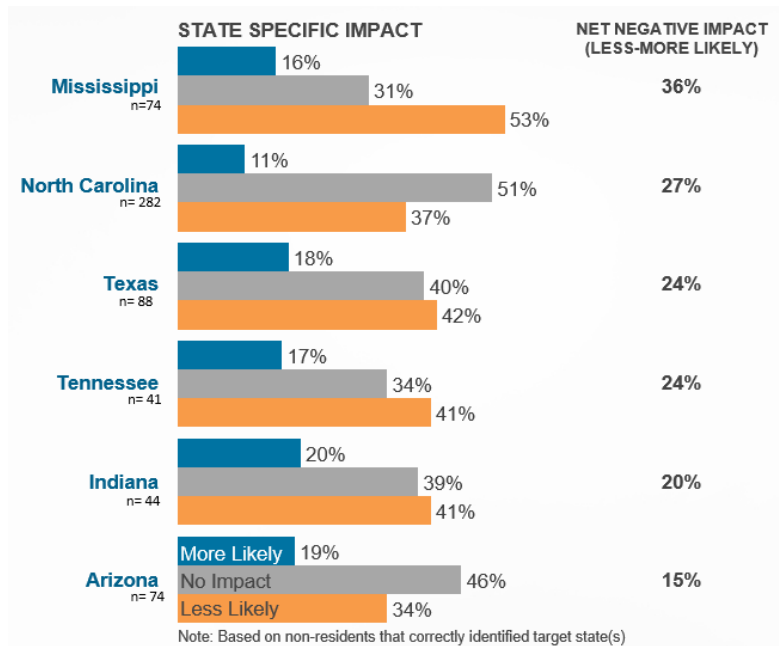
Q: If you knew some organizations or people were boycotting a state, would that impact your likelihood to travel there?

### ○ Level of harm varies by state

In North Carolina, the state most commonly recognized as a target of boycotts, a majority say the boycott did not impact their interest in traveling there. However, there still appears to be a net negative impact of 1 in 4 travelers.

Mississippi sees the largest net negative impact, potentially due to its lower reputational standing overall as a travel destination.

Arizona, where the most time has passed since the boycott, sees the least net negative impact.



Q: You recognized that \_\_\_\_\_ had been the target of a travel boycott. Did the issue in \_\_\_\_\_ and the call for a travel boycott impact your interest in traveling to the state?

○ Ideologies take hold

In total, 6 percent say they are more interested in travel to one of these states vs. 17 percent who say they are less interested. Supporters lose interest in travel as a result of concerns for safety, fair treatment. Opponents seem to be activated by the idea of supporting the state in question or to oppose “boycotters”.

Again, NC holds top-of-mind association with boycotts and consequential travel behavior.

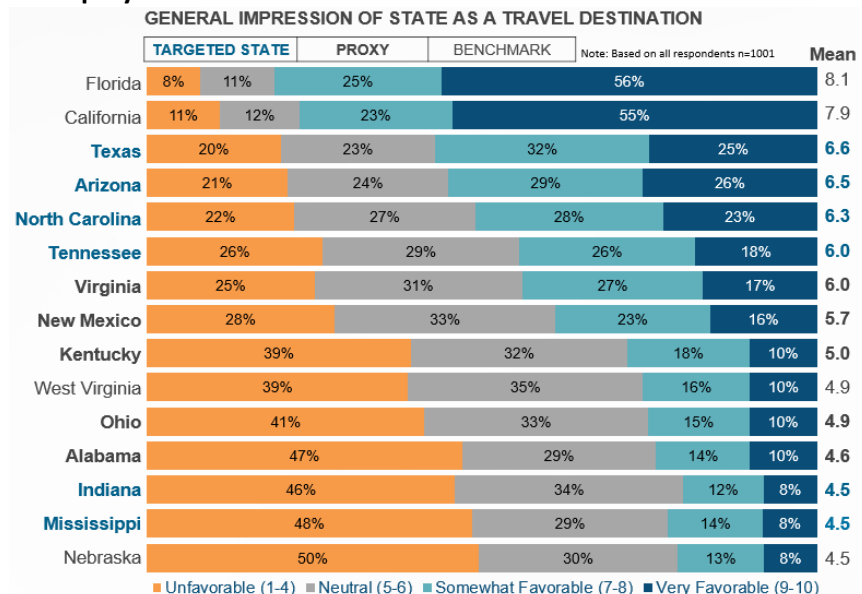
UNAIDED REASONING FOR IMPACT ON TRAVEL	
MORE INTERESTED n=65 (6%)	LESS INTERESTED n=169 (17%)
<p>“From what I remember, Arizona was cracking down big time on illegal immigration and I support that.” -Washington, Republican</p>	<p>“When NC passed that gender discriminating law I was so grossed out. Whatever interest I ever had in traveling there evaporated. Same with Indiana’s attempt to protect business owners hiding behind their religious beliefs.” -Tennessee, Independent</p>
<p>“I admire that they stand up for their principles.” -Arizona, Republican</p>	<p>“State politics in NC are out of control...rurally and Republican in nature...and just not fair.” -Arizona, Democrat</p>
<p>“I support the state of North Carolina in their decision and admire their courage for doing the right thing.” -Ohio, Independent</p>	<p>“They were wrong to force their religious beliefs and exclude certain people because of those beliefs.” -Alaska, Democrat</p>
<p>“It is more interesting to travel to places surrounded in controversy.” -Florida, Republican</p>	<p>“I am not going to travel to a state where they might arrest me because of who I am.” -Illinois, Independent</p>
<p>“Just to be a contrarian to left-wing whacko agendas.” -Florida, Republican</p>	<p>“I wouldn’t feel safe in a state that promotes discriminatory legislation.” -Virginia, Democrat</p>
<p>“To support a state that wants to make laws as they see fit. The moral majority and liberal media have shamed them when its their right to make laws as they see fit.” -California, Independent</p>	<p>“I have considered traveling to boycotted states. Because of the boycotts I ruled out traveling to North Carolina and Texas. However, I’d travel to Indiana because family lives there.” -Kentucky, Independent</p>

Q: You said that a travel boycott in at least one state made you MORE/LESS interested in traveling there. For what reasons?

○ Most target states have positive equity

Respondents were asked to rate their impressions of a number of states as travel destinations, including boycott-targeted states, potential proxies (e.g. NC & VA), and popular destinations (benchmarks like FL & CA).

1 in 4 travelers are solid travel champions for Texas, Arizona and North Carolina. They see these states as very favorable destinations. Tennessee also rates positively as a travel destination. Indiana and Mississippi rank less favorably with pronounced critics.

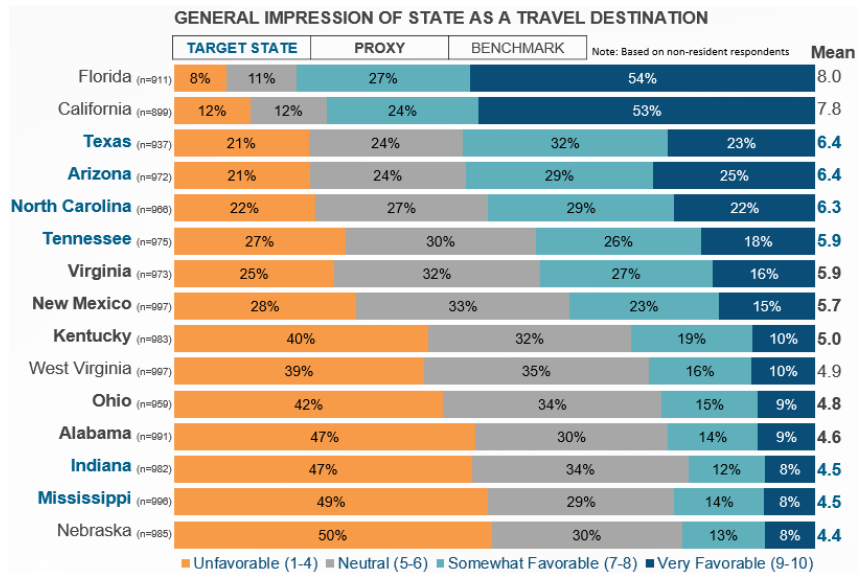


Q: Please rate your general impression of the state as a travel destination regardless of cost or distance. Use a 10-point scale where 10 is you have a very favorable impression of the state and 1 is you have a very unfavorable impression of the state. Even if you don’t know all the specifics about a state, please answer based on your general perception.

○ Residents provide little reputational lift

When state residents are removed from analysis scores fall slightly in some states, but there is not a meaningful difference between mean ratings.

While residents rate their home states much more favorably (typically above an 8 on the 10 point scale), they are such a small proportion of the total sample that their perceptions do not have meaningful influence on the nation’s views as a whole.

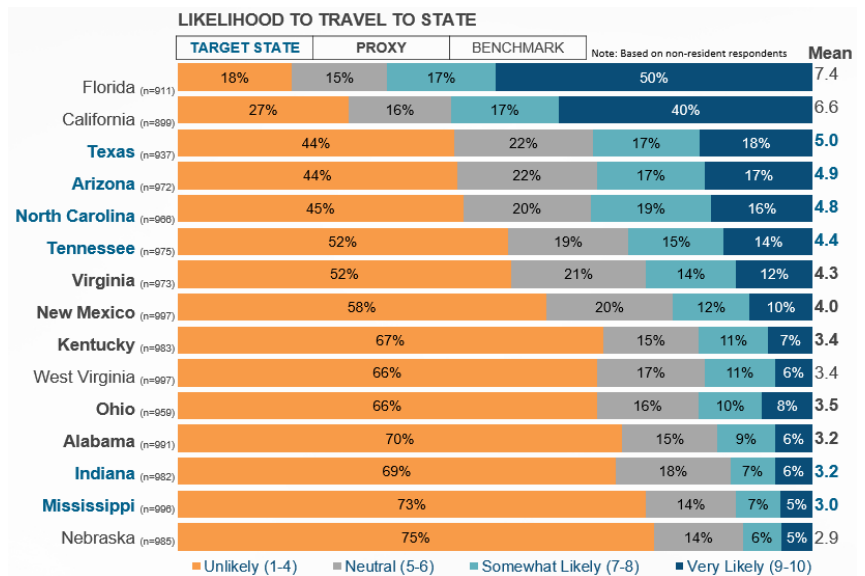


Q: Please rate your general impression of the state as a travel destination regardless of cost or distance. Use a 10-point scale where 10 is you have a very favorable impression of the state and 1 is you have a very unfavorable impression of the state. Even if you don't know all the specifics about a state, please answer based on your general perception.

○ Likelihood to travel is a higher threshold

Because intent to travel is a higher threshold than general impressions of the state, ratings are naturally lower overall.

Likelihood to travel to each state in the next two years follows a similar ranking order to impressions as a travel destination. Texas, Arizona, North Carolina and Tennessee are a contingent of moderate travel consideration. Indiana and Mississippi are again less likely to be destinations for travel.



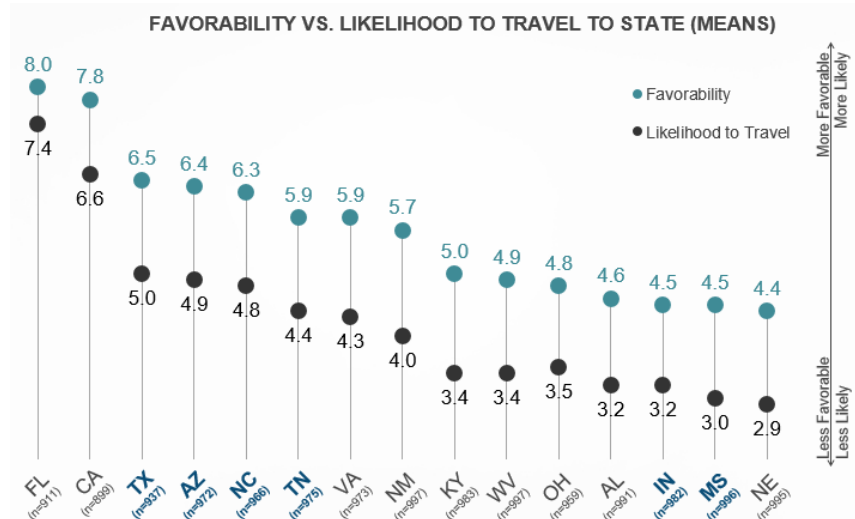
Q: In the next two years, how likely are you to travel to each state for pleasure?

○ Favorability & travel intent work in parallel

Texas, Arizona and North Carolina have the greatest travel consideration scores of the targeted states.

Indiana and Mississippi break from the pack, holding below average favorability and travel intent marks.

Indiana and Mississippi are also the only two states that do not best their neighboring proxy states that have not been targeted by boycotts.



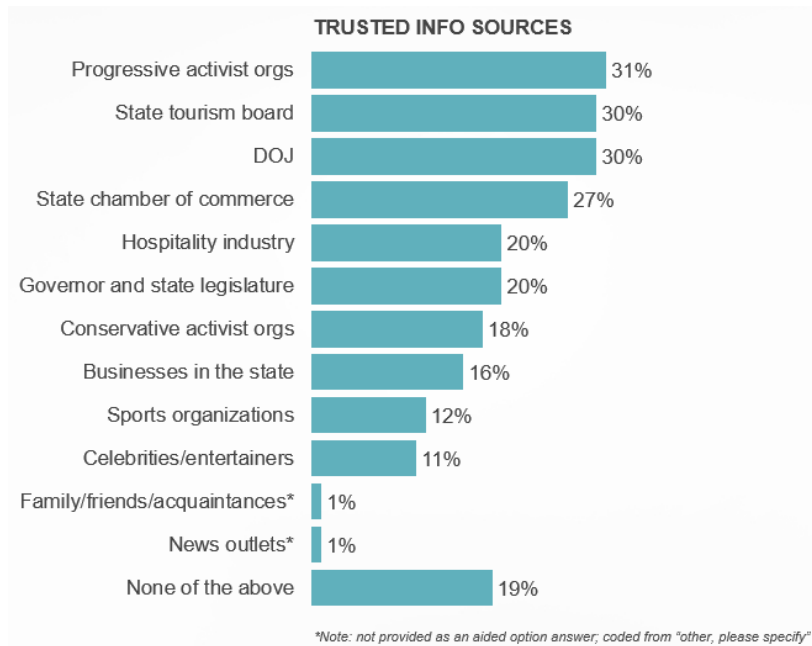
Q: Please rate your **general impression** of the state as a travel destination regardless of cost or distance.

Trusted Sources & Influential Messengers

○ Travelers trust progressive advocacy groups, tourism boards and the DOJ most

Unsurprisingly, the trust in progressive activist organizations is driven by Democrats (49%). Only 12 percent of Republicans and 28 percent of Independents say they would trust this info source.

Interestingly though, the reverse is not true - Republicans aren't more likely to trust conservative advocacy groups (20%) than Democrats (17%). Instead, they favor business-focused organizations, namely tourism boards (34%) and chambers of commerce (33%). Trust in the hospitality industry remains consistent across party lines.



Q: If you were looking to learn more about a travel boycott, its motivation and its impact, which of the following would you trust for information?

For those who have yet to take a side on boycotts, the DOJ and tourism boards are most trusted.

**Favorability & travel intent work in parallel**

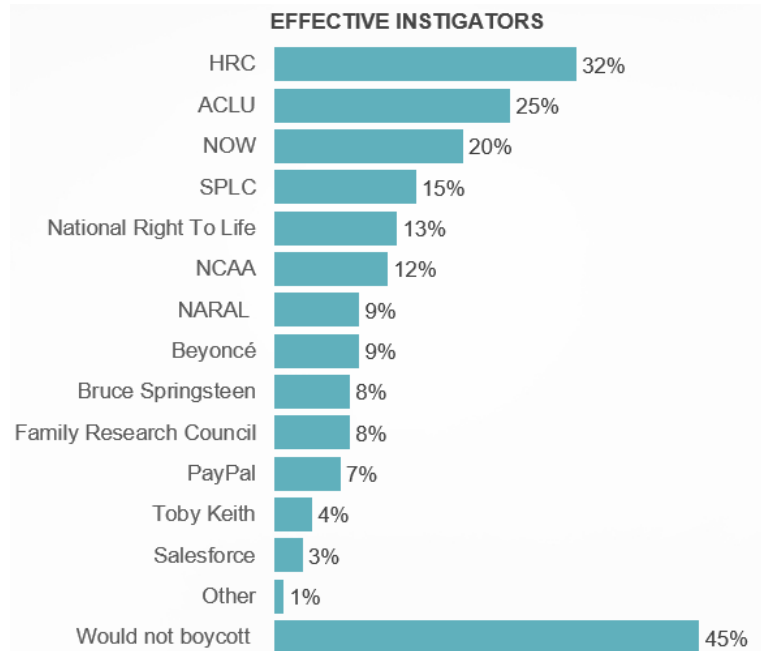
- **A plurality say they would not boycott a state based on an organization’s involvement**

Just under half say none of the organizations would make them consider boycotting travel to a state. This is driven by Republicans (62%) and Independents (53%).

A large majority of those who do not have an opinion on travel boycotts also say these groups aren’t influential (71%).

Democrats are driving perceived impact of progressive advocacy organizations as well as progressive celebrities and even the NCAA. HRC is clearly influential, especially among Democrats and millennials.

48 percent of Democrats and 42 percent of millennials say HRC would make them consider boycotting travel to a state. Even among millennial Republicans, HRC is the most influential organization tested (33%).



Q: If you were looking to learn more about a travel boycott, its motivation and its impact, which of the following would you trust for information?

## Appendix: Survey Sample Demographics

Gender	%	Age	%	Region	%	Education	%
Male	49%	21-34	27%	Northeast	18%	High school or less	42%
Female	51%	35-44	20%	South	37%	Some college	22%
Male <45	21%	45-54	19%	West	22%	College degree+	37%
Male 45+	27%	55-64	18%	Midwest	22%	Some high school	7%
Female <45	25%	65-74	11%			High school graduate	34%
Female 45	26%	75+	6%			Some college	22%
						College graduate	27%
						Post-graduate degree	9%

Political Orientation	%	Income	%
Democrat	40%	<\$25K	11%
Republican	32%	\$25K-\$50K	25%
Independent/Other	29%	\$50K-\$75K	21%
		\$75K-\$125K	26%
		\$125K+	14%

Children	%	Marital Status	%	Sexual Orientation	%	Ethnic Background	%	Planning role in Travel	%
Yes	35%	Married	63%	Heterosexual	93%	White	59%	Primary Decision Maker	64%
No	65%	Single	37%	LGBT	6%	Black	13%	Share Decisions	36%
		Divorced	9%	Other	1%	Hispanic	17%		
		Widowed	4%	Don't Know	--	Asian American	5%		
		Single	24%			Native American	1%		
						Other	4%		

Age of Children	%
Under 5	35%
5-9	39%
10-13	33%
14-17	31%
18 or Older	11%
No Children	1%