The Weaponization of Travel Survey Results

Venue Managers

October 2018

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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, venue managers (VMs) are running venues in locations that have been targeted or may become the target of a travel boycott or ban. Today, they are navigating a new landscape where there is an established risk of a travel ban, boycott or advisory being declared against them at anytime. Destinations International Foundation and Meetings Mean Business recognize the importance of supporting VMs in this issue landscape.

To that end, Destinations International Foundation and Meetings Mean Business commissioned APCO Insight to conduct a comprehensive research study among venue managers. Between August 22 and September 28, 2018, APCO Insight conducted a quantitative survey among 129 venue managers. VMs were invited to participate through the International Association of Venue Managers.

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Executive summary

- **Venue managers' optimism for growth is high but soft.** Most feel reasonably confident revenue for their venues and for the industry overall will grow, but are cautious in their optimism.
- **Safety and security is a major concern for the industry.** Venue Managers are concerned about preventing threats proactively, responding to incidents effectively and having the resources to deal with security threats, especially as other costs rise and attendance decreases.
- **Though most are familiar with the issue, fewer are worried about the impact of travel boycotts and bans on their venues and the industry overall, revealing a disconnect between the rising occurrence of travel boycotts and venue managers' awareness of them.** Only 65 percent are concerned about the impact on the industry, including just 14 percent who are very concerned, and just 29 percent are concerned about the impact of travel boycotts on the venue they manage, including 5 percent who are very concerned.
- **Limited concern stems in part from limited experience with travel boycotts.** Only 16 percent have managed a venue that was in a targeted destination.
- **In general, managers at publicly-owned venues are closer to the issue of travel boycotts and bans than managers at privately-owned venues.** VMs of public venues are more familiar with the issue, are more concerned about the impact of boycotts on the industry and the venues they manage and feel more prepared to handle a boycott.

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Executive summary (continued)

- **VMs request support communicating with both public official and event planners.** Unlike Meeting and Event Planners (MEPs), VMs cannot avoid targeted destinations. If an area where they manage a venue is targeted by a boycott, VMs have no choice but to deal with the issue, likely driving their request for talking points to use with public officials on ending the boycott. Additionally, VMs will need talking points to use in persuading MEPs that are current or potential customers to continue working with the venue despite the boycott or ban.
- **To further support VMs, provide examples of how others in similar situations have responded to a travel boycott.** A list of best practices will help guide Venue Managers who may be dealing with a boycott and alleviate concerns among those who worry about a boycott being imposed on their area.
- **VMs are divided on the best alternatives to travel boycotts and bans.** The top choices provide an opportunity for attendees of the event to engage with the issue (either through an advocacy session or a lobbying day), but are activities that are more likely the responsibility of those planning the event (MEPs). A similar amount of VMs say engaging with the media to speak out against the policy is a strong alternative, followed by speaking out against the policy on social media.
- **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*.** VMs also react positively to statements that emphasize travel boycotts and bans counter the industry's mission of hospitality and inclusion and hurt innocent bystanders. Messaging focused on remaining apolitical is not seen as compelling.
- **The International Association of Venue Managers is an important resource for Venue Managers.** The local Conference and Visitor Bureau or Destination Marketing Organization, as well as local public officials, have a role to play as well.

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01

Industry Mood & Top Concerns

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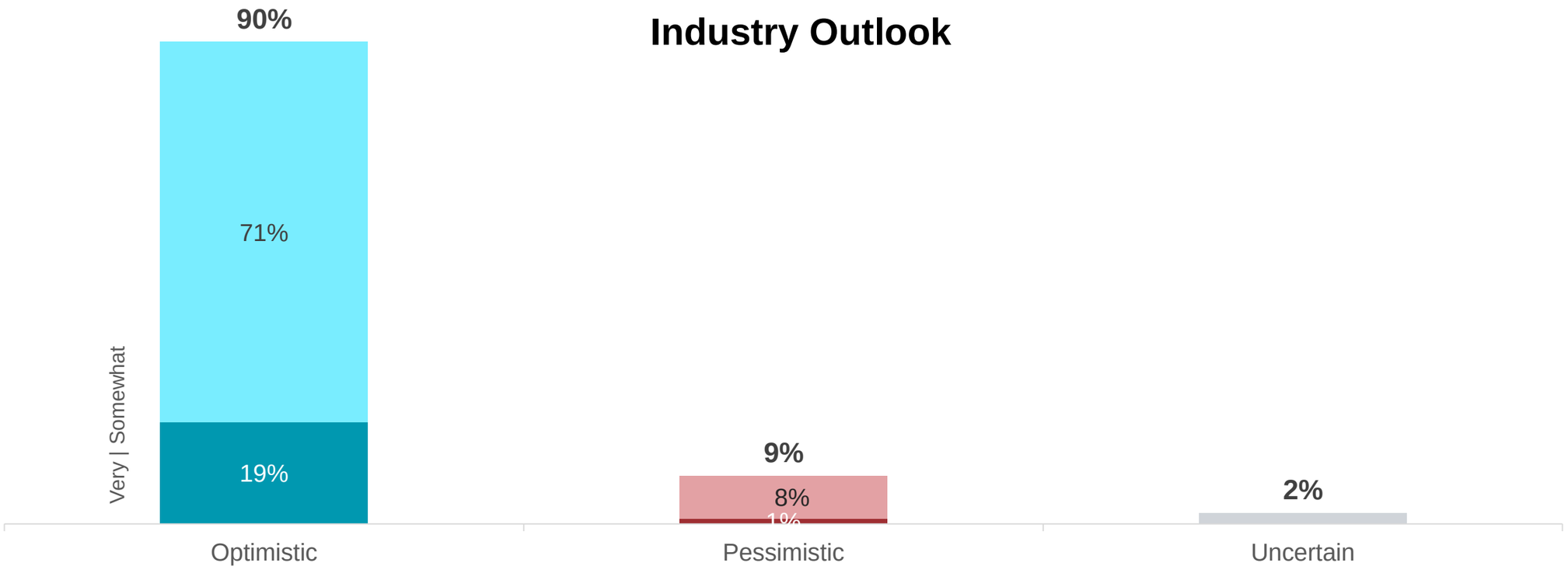
Most VMs are optimistic about the growth of their industry

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

Managers of public venues are significantly more optimistic than their managers at private venues (94% versus 79% optimistic).



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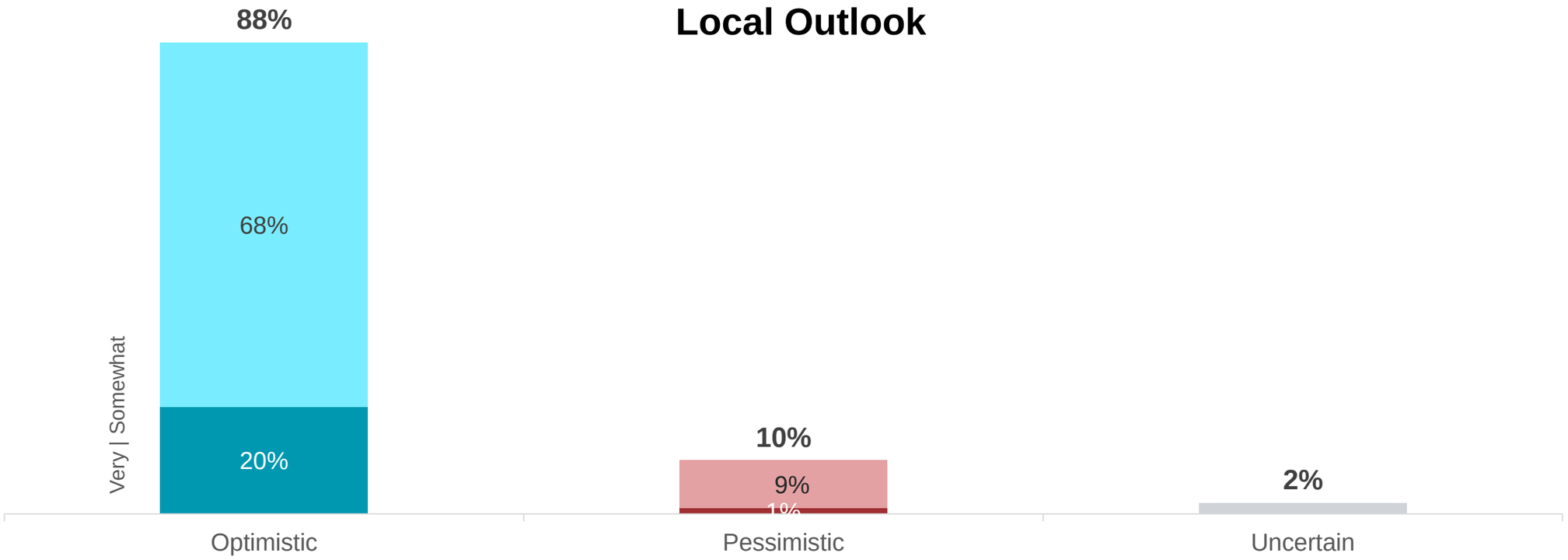
Q1. Generally speaking, would you say you feel optimistic or pessimistic about the growth of the venue industry over the next two years?

Optimism for own venues aligns to general industry outlook

Managers at public venues are less optimistic about their particular venues than about the industry overall (89% your venue vs. 94% industry), while managers at private venues are more optimistic about their venue than about the industry overall (84% your venue vs. 79% industry).



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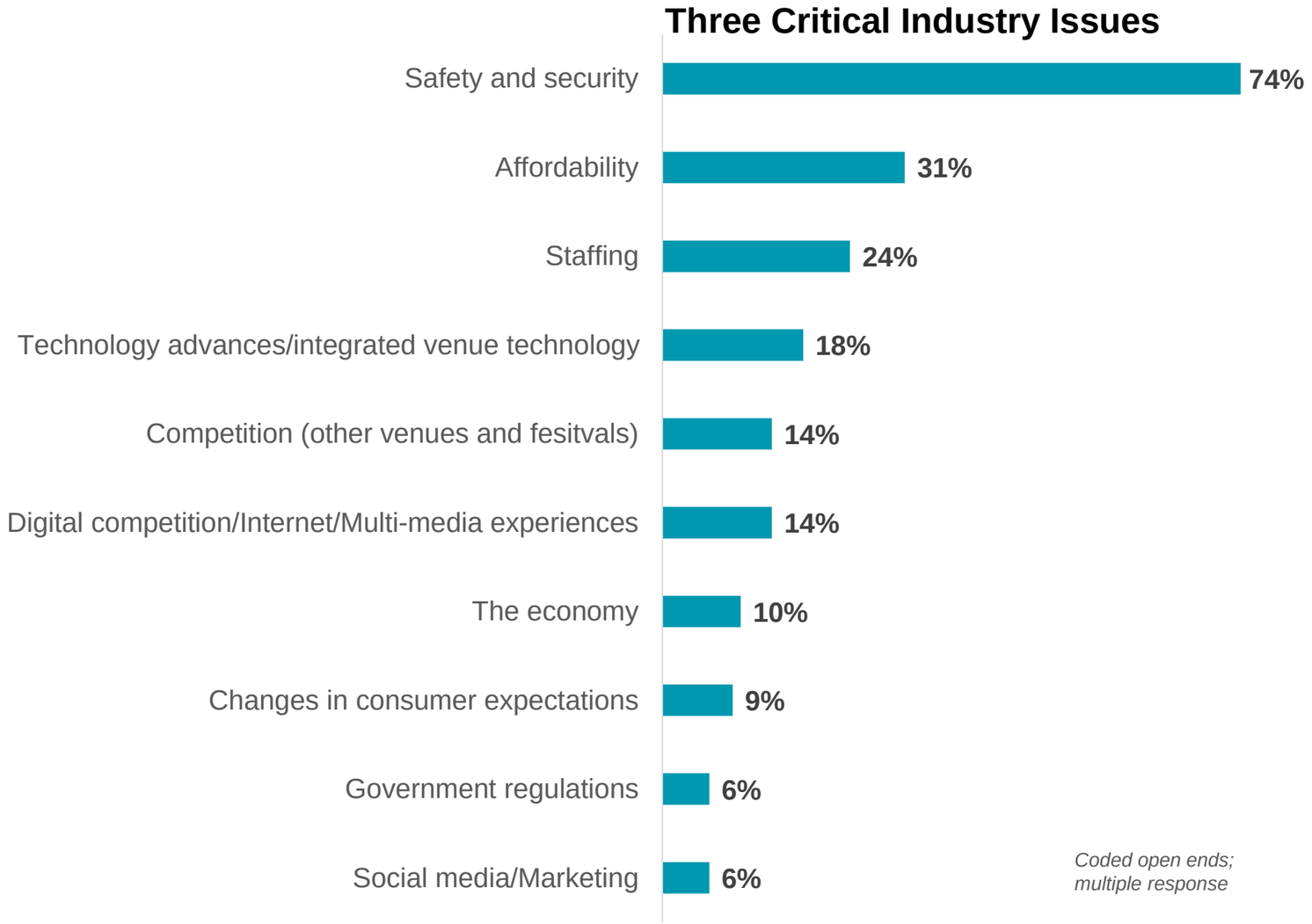
Q3. Let's focus on the venue(s) you manage specifically. Would you say you feel optimistic or pessimistic about the growth of your venue's revenue over the next two years?

Safety and security is the number one issue facing the venue industry today



The safety of our guests.

Safety and security - places of assembly are all targets because of uncontrolled access to weapons.

Terrorism threats causing the event experience to be full of friction.

Preventative security and response to incident.

Enhancing security at affordable costs.

Affordable hotel and air fare rates.

Rising costs of security, staffing, and technology.

Business model fragility - no one wants to pay for anything.

Competing for our guests' time as well as dollars. The internet has changed the focus from live entertainment.

Keeping up with new technologies to enhance customer experience.

Creating amenities for the millennial generation and marketing to them.

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Q2. In your opinion, what are three critical issues facing the venue industry today?

02

Issue Familiarity & Experience

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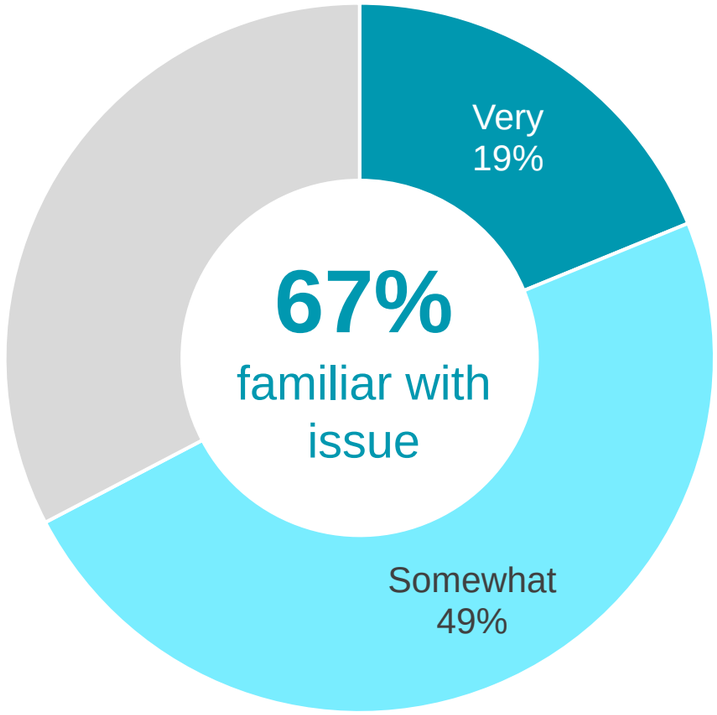
Most VMs are at least somewhat familiar with travel boycotts and bans (issue presented without description)

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

While managers of publicly- and privately-owned venues are about equally familiar with the issue overall, VMs at public venues are significantly more likely to say they are *very familiar*.



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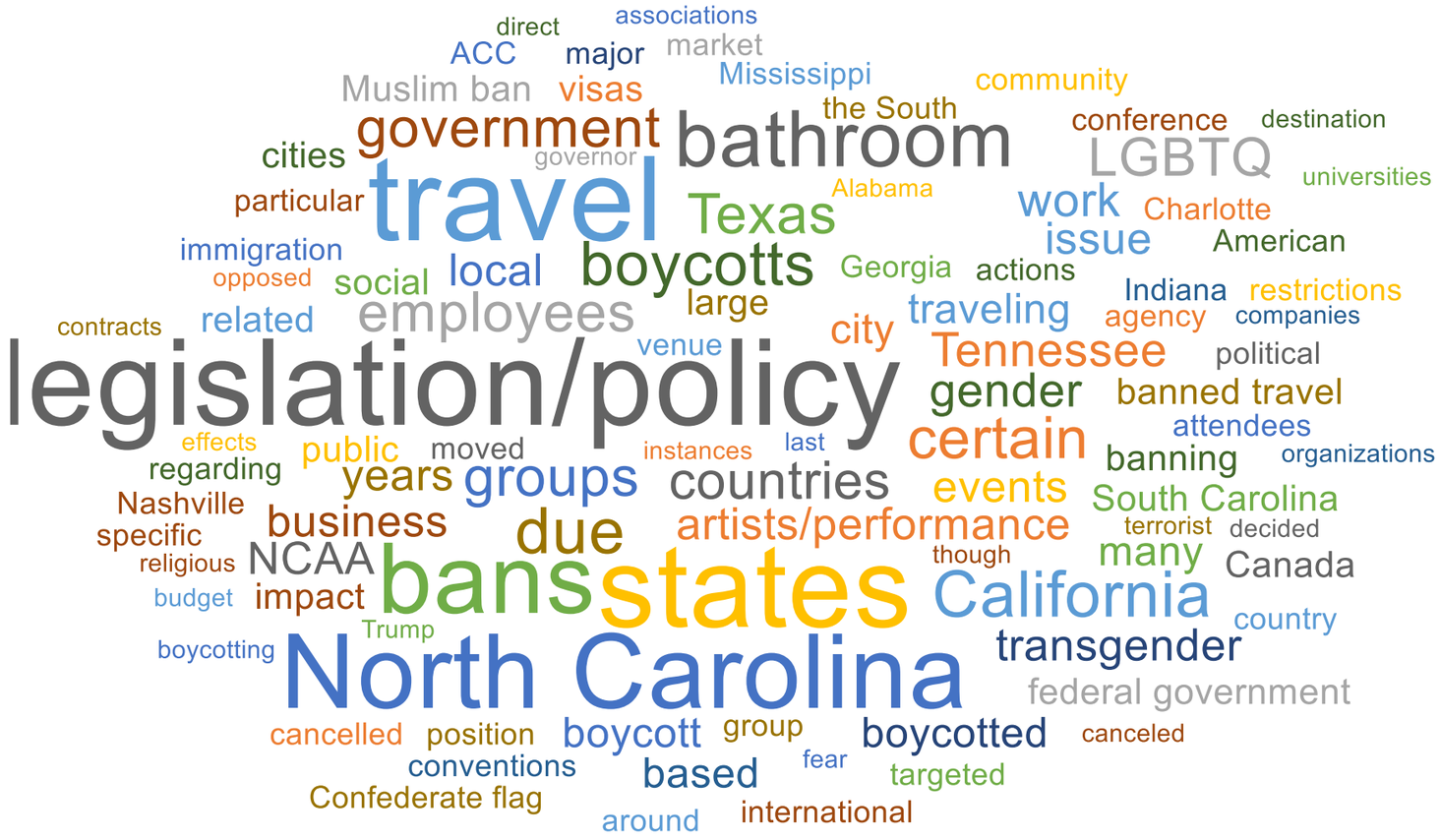
Q4. How familiar are you with travel boycotts and travel bans related to state and local government laws, rules and regulations?

Familiarity with boycotts and bans is largely focused on specific states, namely North Carolina

Top-of-Mind Issue Associations



My employer banned travel to North Carolina when they had their discriminatory legislation against the transgender community.

Some states now prohibit their employees from taking nonessential work trips to states with laws that, in their view, discriminate against lesbian, gay, bisexual and transgender people.

North Carolina had major issues with getting people to come to the state after the gender law was passed. They have righted the ship somewhat but are still recovering.

I work at a state school in New York and we are not allowed to travel to two states for business.

I am aware that several companies and entities instituted bans from traveling and/or doing business in North Carolina after the "bathroom bill" was passed. I am also aware of companies that have canceled business with MGM Resorts after their lawsuit against shooting victims from last year's country festival.

There are two types of travel bans. For example, groups will decide not to host an event in a particular city or location because of a local law. Best example was the bathroom law in North Carolina and how that caused the NBA to boycott Charlotte for the All Star Game. Secondly, the actions by the United States Government issuing a travel ban from selected countries with large Muslim populations has impacted overall travel.

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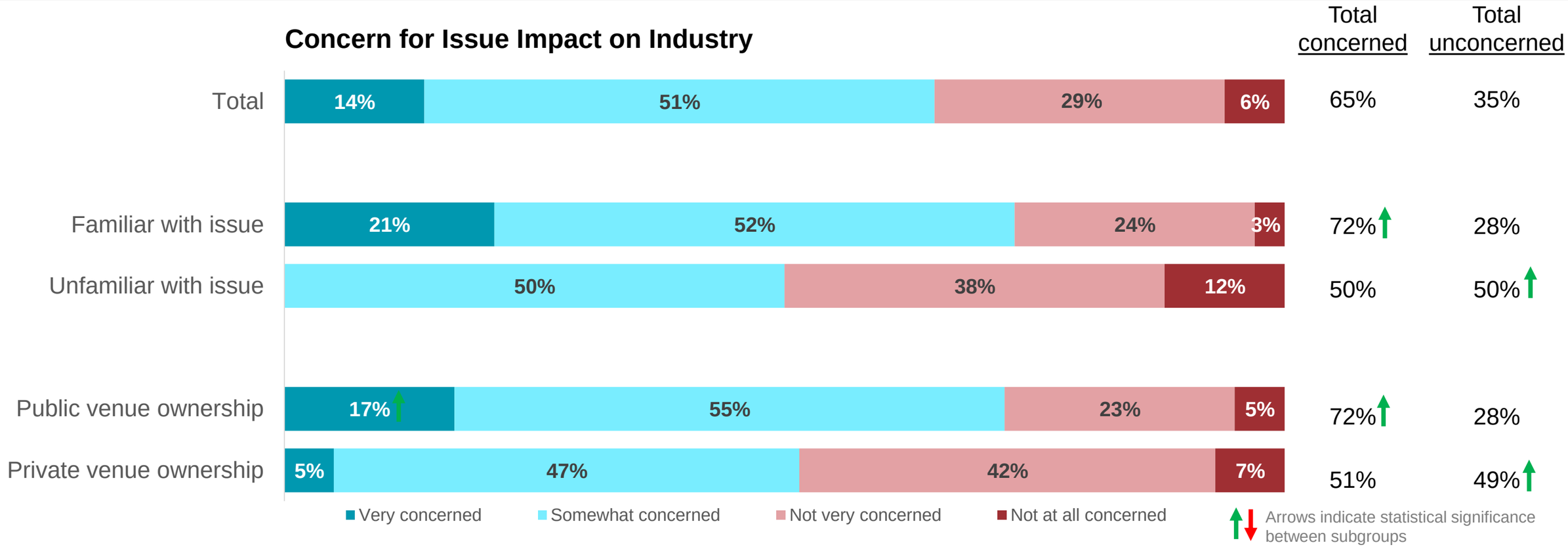
Q5. (If very or somewhat familiar with travel boycotts or bans, n=81) What do you know about travel boycotts and bans? Please be specific in naming any examples such as places that have been the target of travel boycotts and bans, specific organizations or people that have called for travel boycotts and bans and what actions or issues have led to travel boycotts or bans.

Venue managers are somewhat concerned about the impact of travel bans on the industry overall

After being shown more information about travel boycotts and bans, 2 in 3 express some concern about the impact of boycotts on the industry.

Those already familiar with the issue or managing public venues are most concerned (72% concerned for both).



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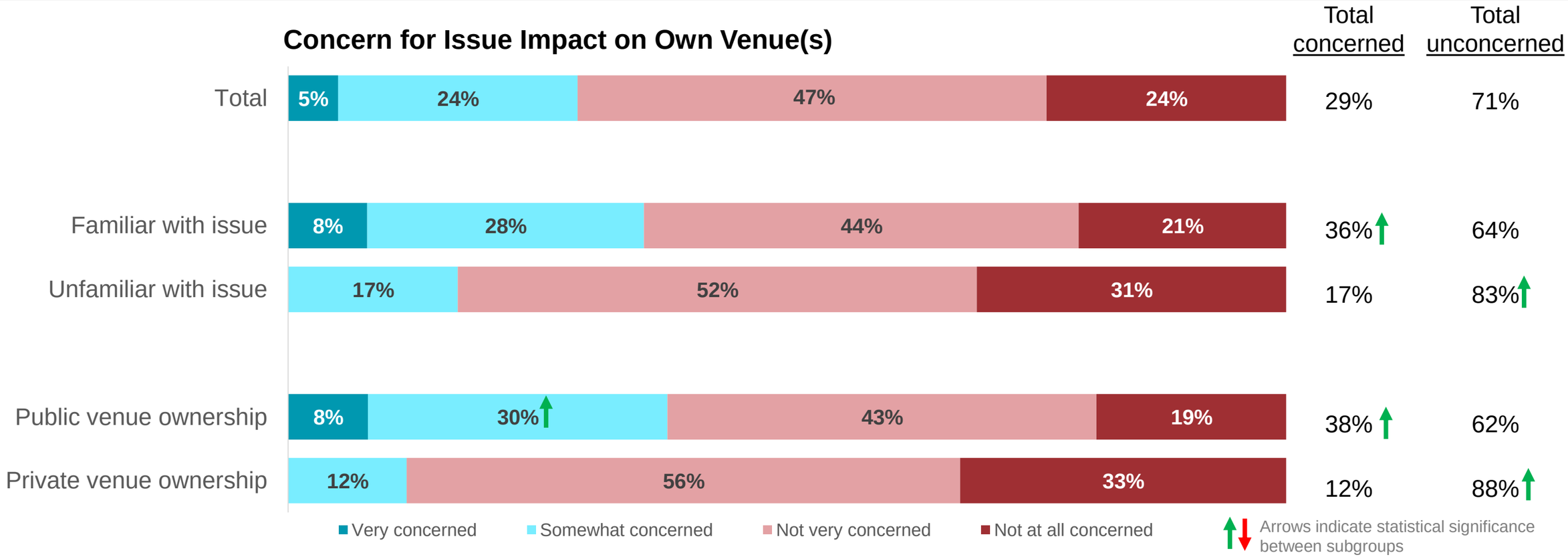
Q7. Based on what you know, how concerned, if at all, are you about the impact of travel boycotts and bans on the venue industry?

The impact of travel boycotts is not yet personal for most

Fewer venue managers are concerned about the impact of travel boycotts and bans on the venues they manage compared to the venue industry overall (29% concerned for their venue versus 65% concerned for the industry).

Concern about their own venues is higher among those already familiar with the issue (36% concerned) and public venue managers (38%).



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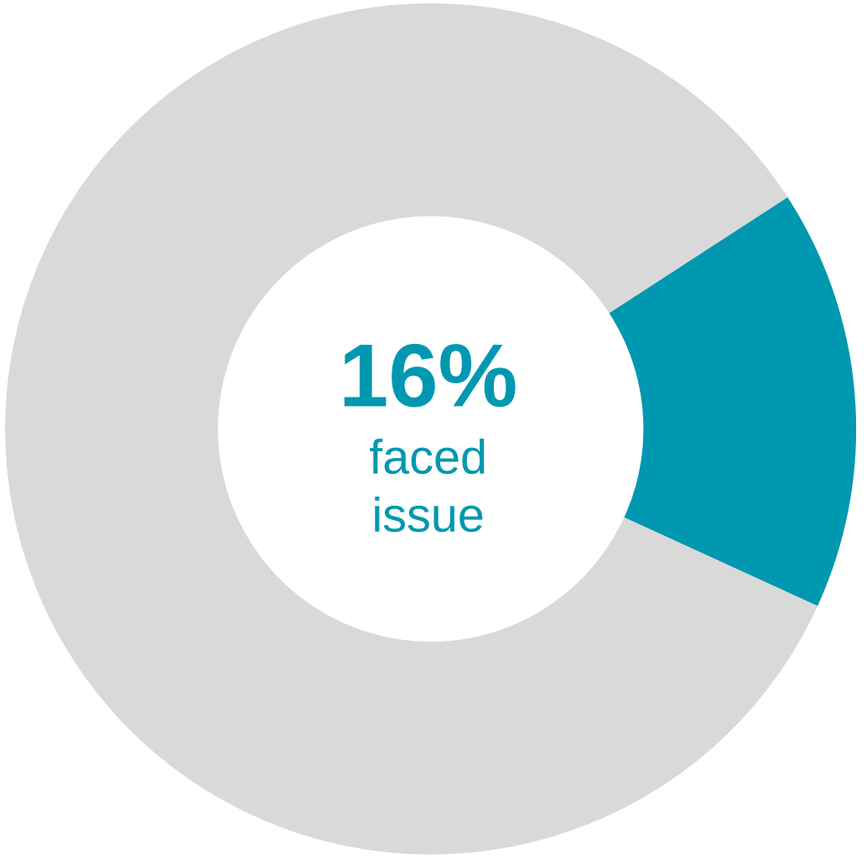
Q8. How concerned, if at all, are you about the impact of travel boycotts and bans on the venue(s) you manage?

Direct experience with travel boycotts and bans is limited; less than 1 in 5 have managed a venue in a targeted location



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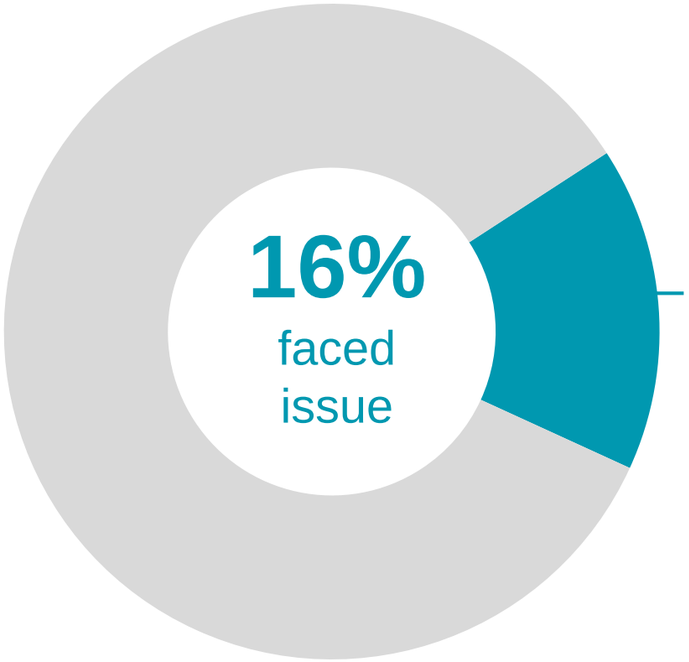
Q9. Have you ever managed a venue that was in a destination targeted by a travel boycott or ban?

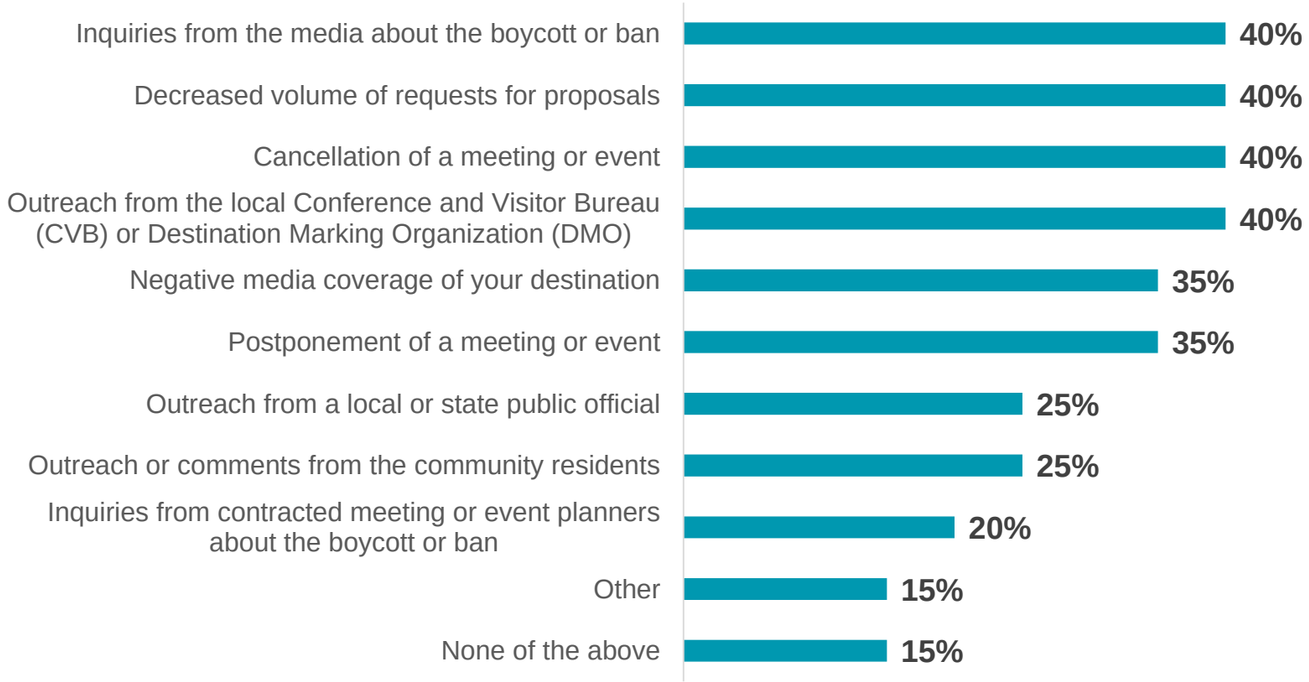
Those who have managed a venue in a targeted location may experience a range of outcomes related to the boycott

Venue managers that have personally faced a boycott or ban have experienced media inquiries, cancellation fees, decreased volume for requests for proposals, cancellations or postponements and outreach from the local CVB or DMO.

Have you ever managed a venue that was in a destination targeted by a travel boycott or ban?



(If yes) If so, did your venue(s) experience any of the following? Select all that apply (n=20)



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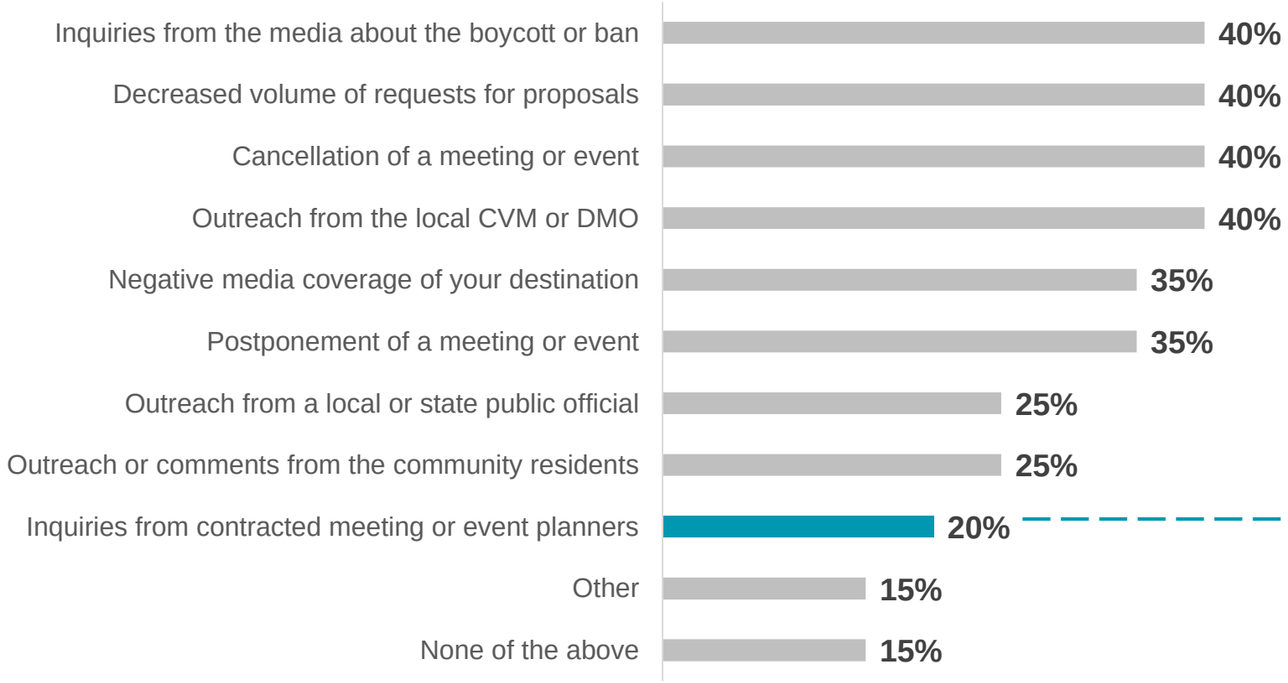
Q9. Have you ever managed a venue that was in a destination targeted by a travel boycott or ban?
Q10. If so, did your venue(s) experience any of the following? Select all that apply (n=20)

VMs receiving inquiries from MEPs about the boycott primarily being asked about cancellation or delay fees

Very few VMs report receiving inquiries from event planners about the boycott, but those who have say MEPs are inquiring mainly about fees to change the event or suggestions for alternative methods of advocating against the policy without cancelling the event. Those who have received inquiries say fewer than 15% of MEPs reached out.

(If yes) If so, did your venue(s) experience any of the following? Select all that apply (n=20)



(If inquiries from MEPs) During the travel boycott or ban, what percentage of your contracted meetings or events contacted the venue? What types of information were MEPs looking for? (n=4)

VMs receiving inquiries from MEPs being asked about:

4 cancellation or postponement fees

3 Suggestion for alternative ways for event sponsors to advocate against the policy without cancelling the event

2 Support in messaging on the issue to event attendees

2 The venue's stance on the policy motivating the boycott or ban

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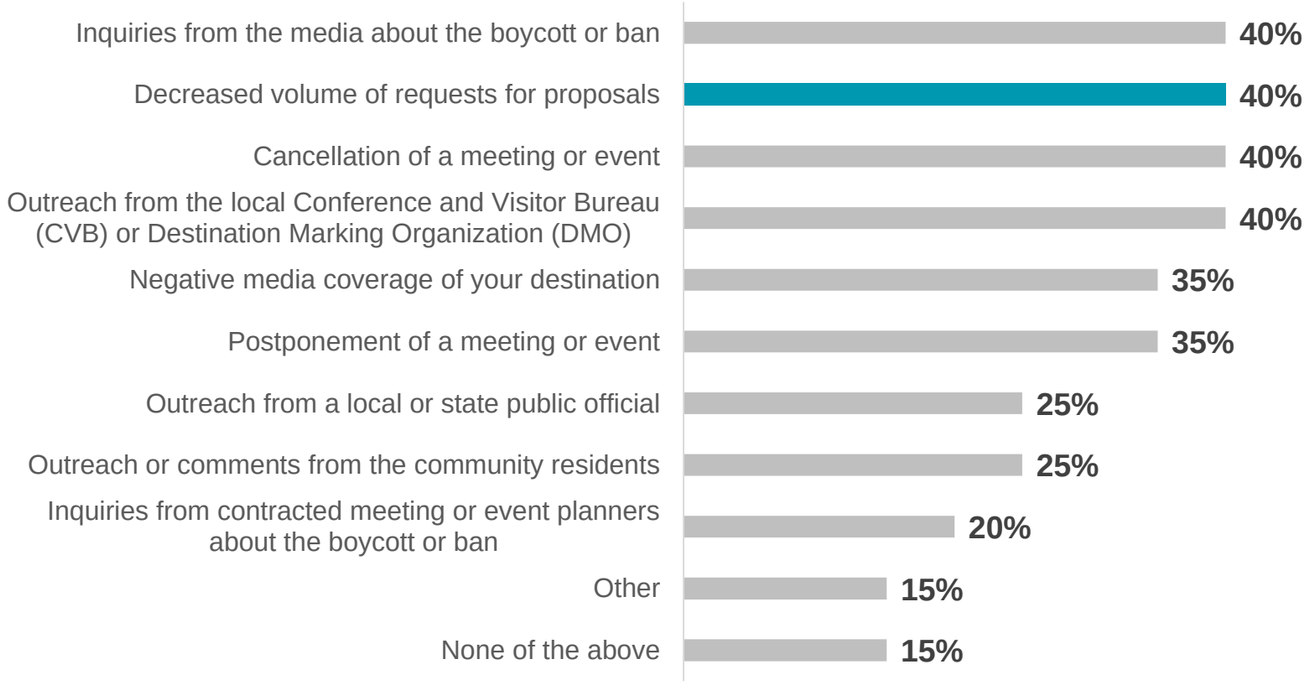
Q11/12. (INQUIRIES FROM CONTRACTED MEETINGS, n=4) What percentage of your contracted meetings or events contacted the venue to inquire about the issue and their options? / What types of information were they looking for?

A travel boycott may impact the RFPs that VMs recieve

Very few VMs report receiving inquiries from event planners about the boycott, but those that do say MEPs are inquiring mainly about postponement or cancellation fees.

(If yes) If so, did your venue(s) experience any of the following? Select all that apply (n=20)



(If decreased RFPs) By about what percentage did you see a decrease in requests for proposals during the boycott or ban? (n=8)

Percentage of RFP decrease (n=8)

4 are unsure about the percentage of decreased RFPs

1 12% decrease in RFPs

1 15% decrease in RFPs

1 20% decrease in RFPs

1 40% decrease in RFPs

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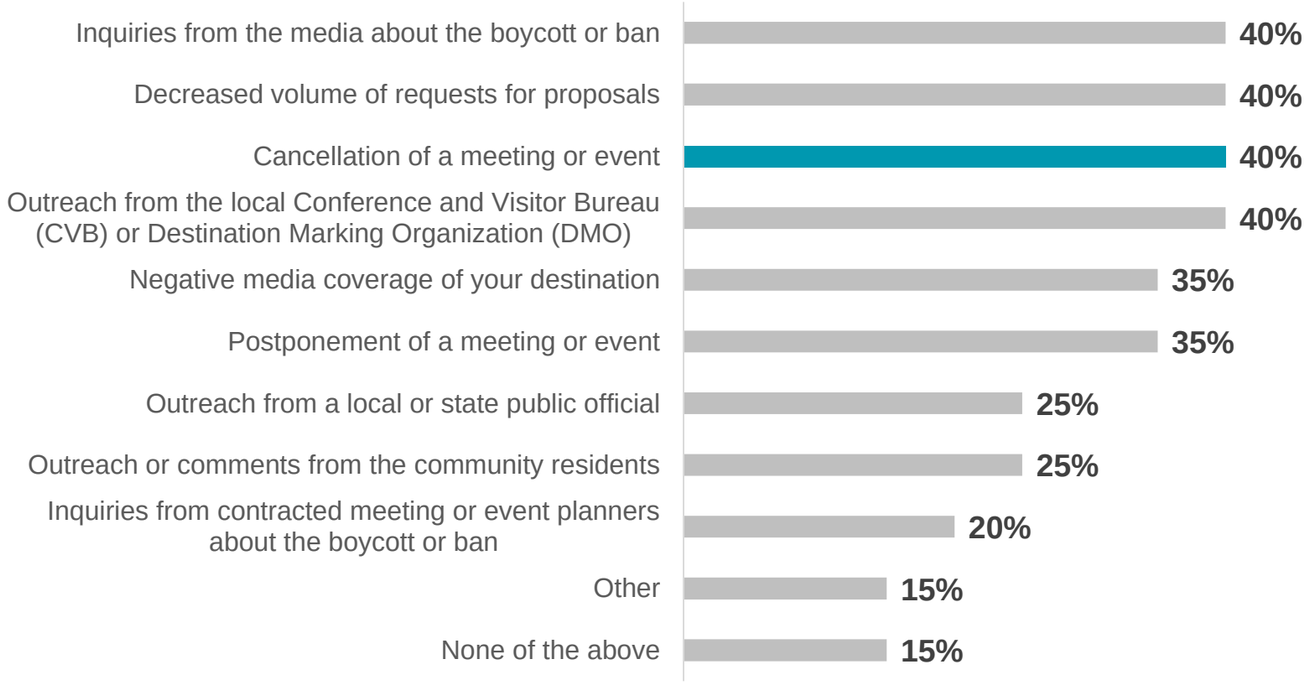
Q13. (If decreases RFPs, n=8) By about what percentage did you see a decrease in requests for proposals during the travel boycott or ban?

Revenue loss from cancelled events due to travel boycotts can be significant

Of the eight VMs who report a cancelled event, most are unsure of the revenue lost. Others estimate anywhere between $30,000 and $500,000 was lost.

(If yes) If so, did your venue(s) experience any of the following? Select all that apply (n=20)



(If cancelled event) How much revenue would you estimate was lost in cancelled events during the travel boycott or ban? (n=8)

Percentage of revenue lost due to cancellations (n=8)

5 are unsure

1 $30,000

1 $250,000

1 $500,000

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Q14. (if cancelled event, n=8) In total, how much venue revenue would you estimate was lost in cancelled events during the travel boycott or ban?

03

Supporting VMs

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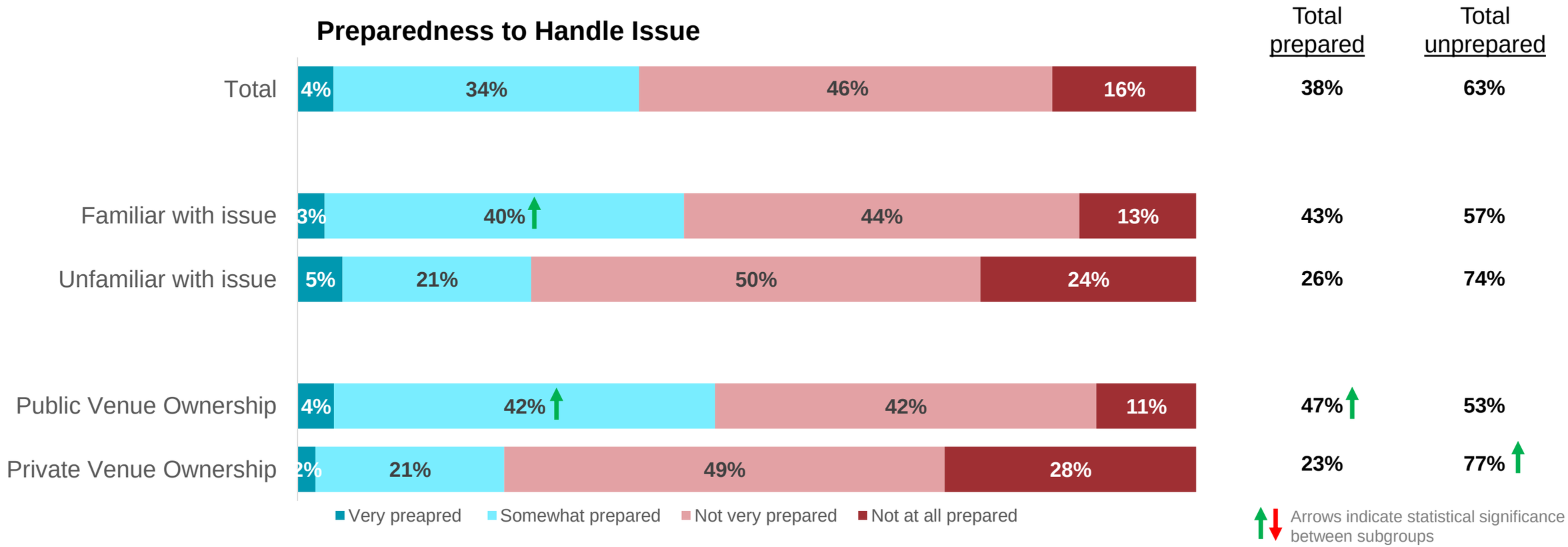
Most venue managers do not feel prepared to handle a travel boycott

Public venue managers feel more prepared to handle a boycott or ban than private managers (47% prepared vs. 23%). More than 3 in 4 VMs running privately-owned venues say they feel unprepared, including more than 1 in 4 who feel strongly they are not prepared.

Familiarity with the issue gives VMs more confidence in their abilities to handle a boycott as well – 43% feel prepared, compared to just 26% of VMs unfamiliar with the issue.



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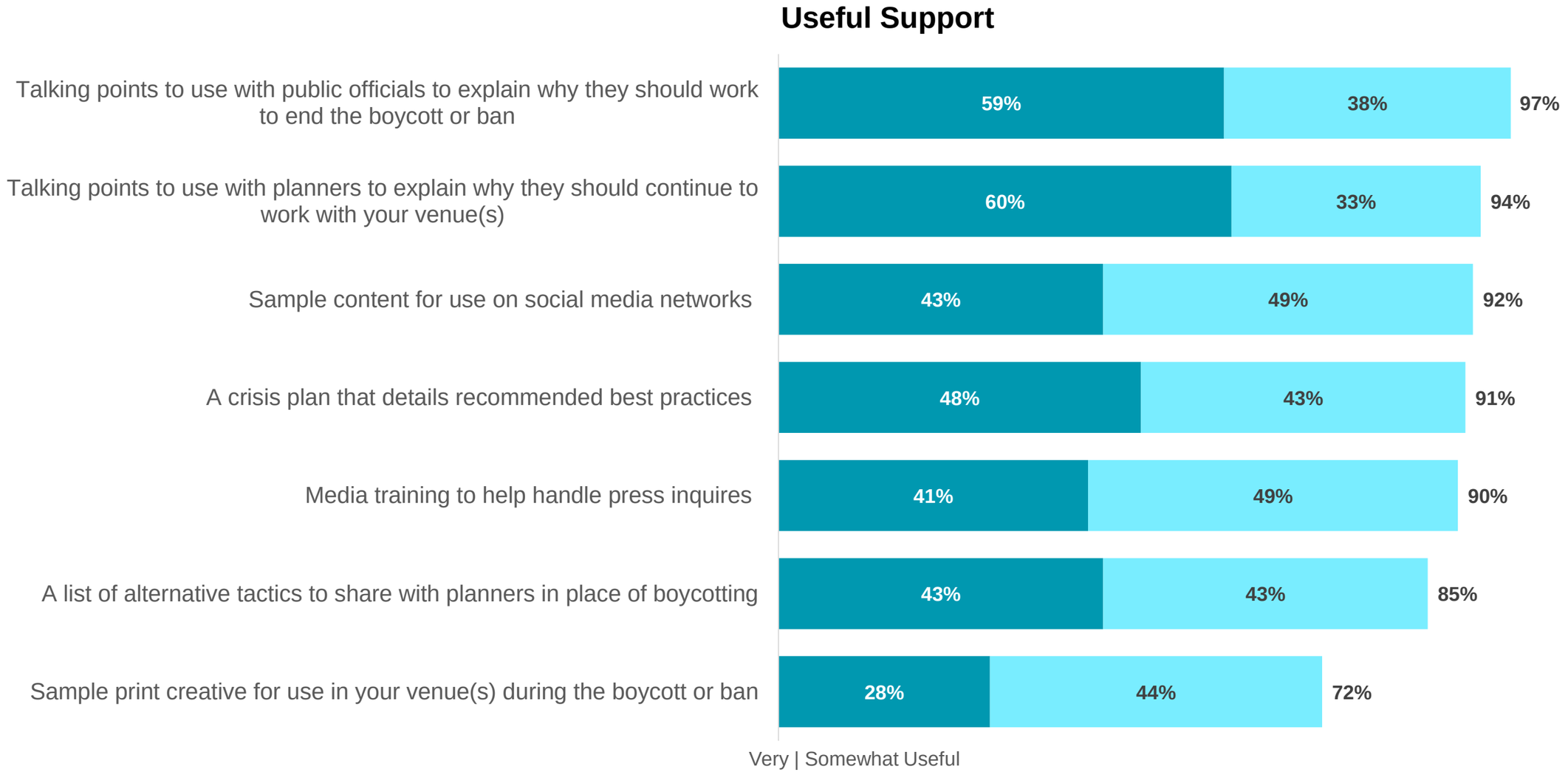
Q15. As a venue manager, how prepared do you feel to handle a travel boycott or ban?

VMs believe all tested support materials would be useful, especially support with public officials and event planners



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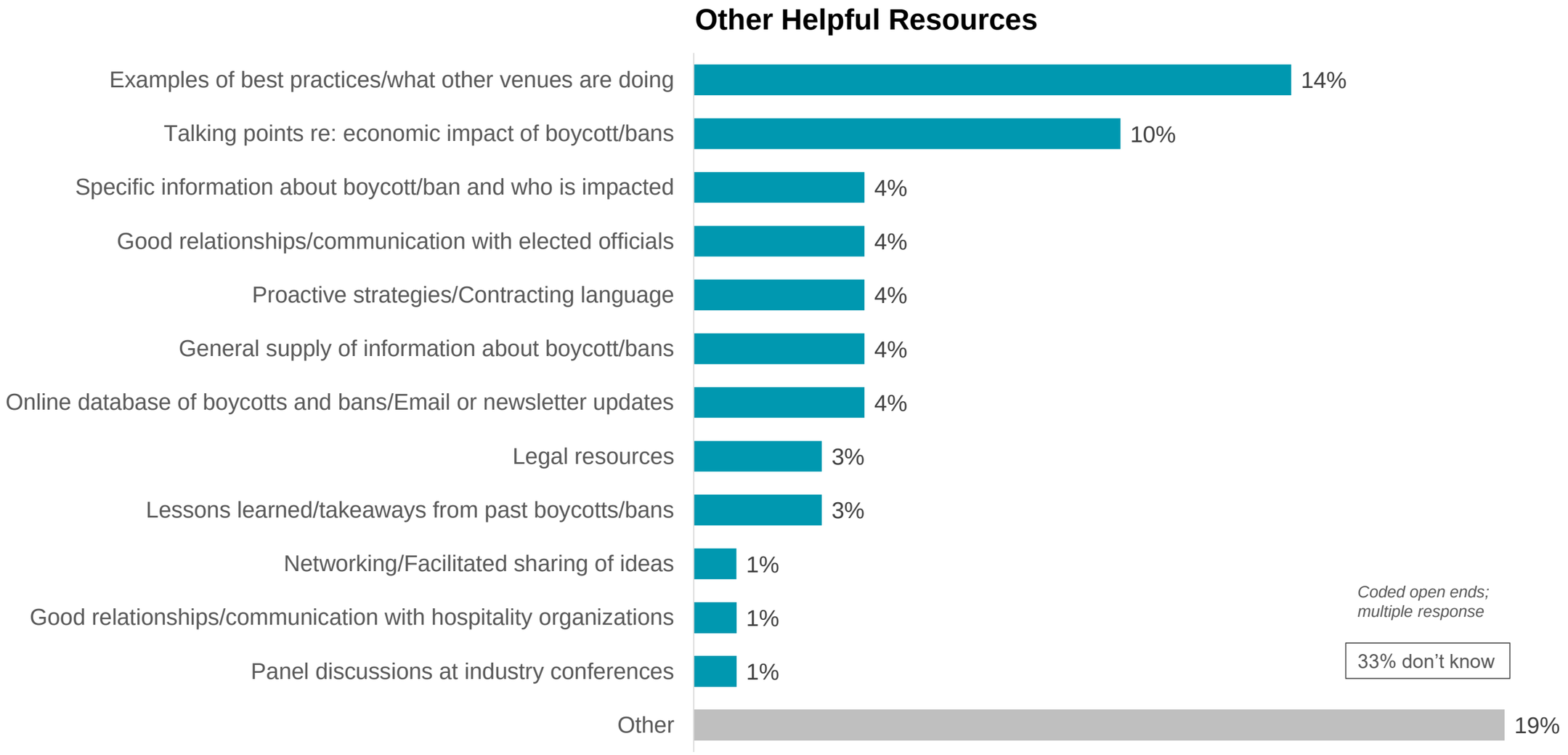
Q17. How useful do you believe each of the following would be for your venue if a boycott or ban were declared in your city/area?

VMs are looking for examples of what other venues have done to deal with boycotts and talking points



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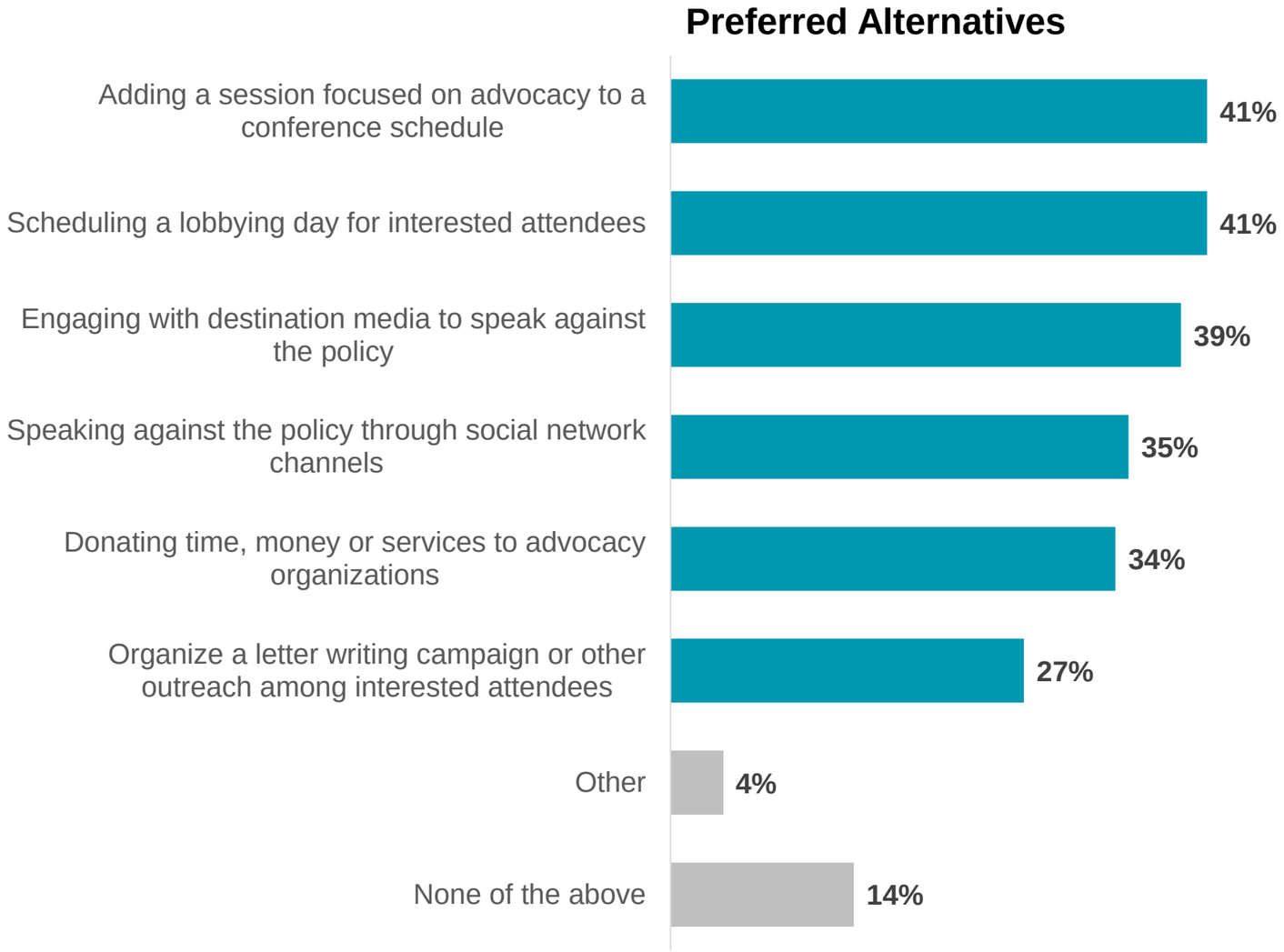
Q18. What other resources, materials or support would be helpful in preparation for a travel boycott and bans?

VMs are divided as to the best alternative to a boycott or ban



About 2 in 5 VMs support either adding an advocacy session to the event schedule, scheduling a lobbying day for interested attendees or speaking out against the policy in the media.

Managers at large venues are significantly less likely than those at smaller venues to consider an advocacy session (29% of large venues vs. 48% of small/medium venues) or speaking out against the policy in the media (26% of large venues vs. 45% of small/medium venues) a good alternative to boycotts.

VMs who are concerned about the impact of boycotts on their venue are more likely to think that scheduling a lobbying day for attendees (58% vs. 33%) or speaking out against the policy in the media (55% vs. 32%) are good alternatives to boycotts.

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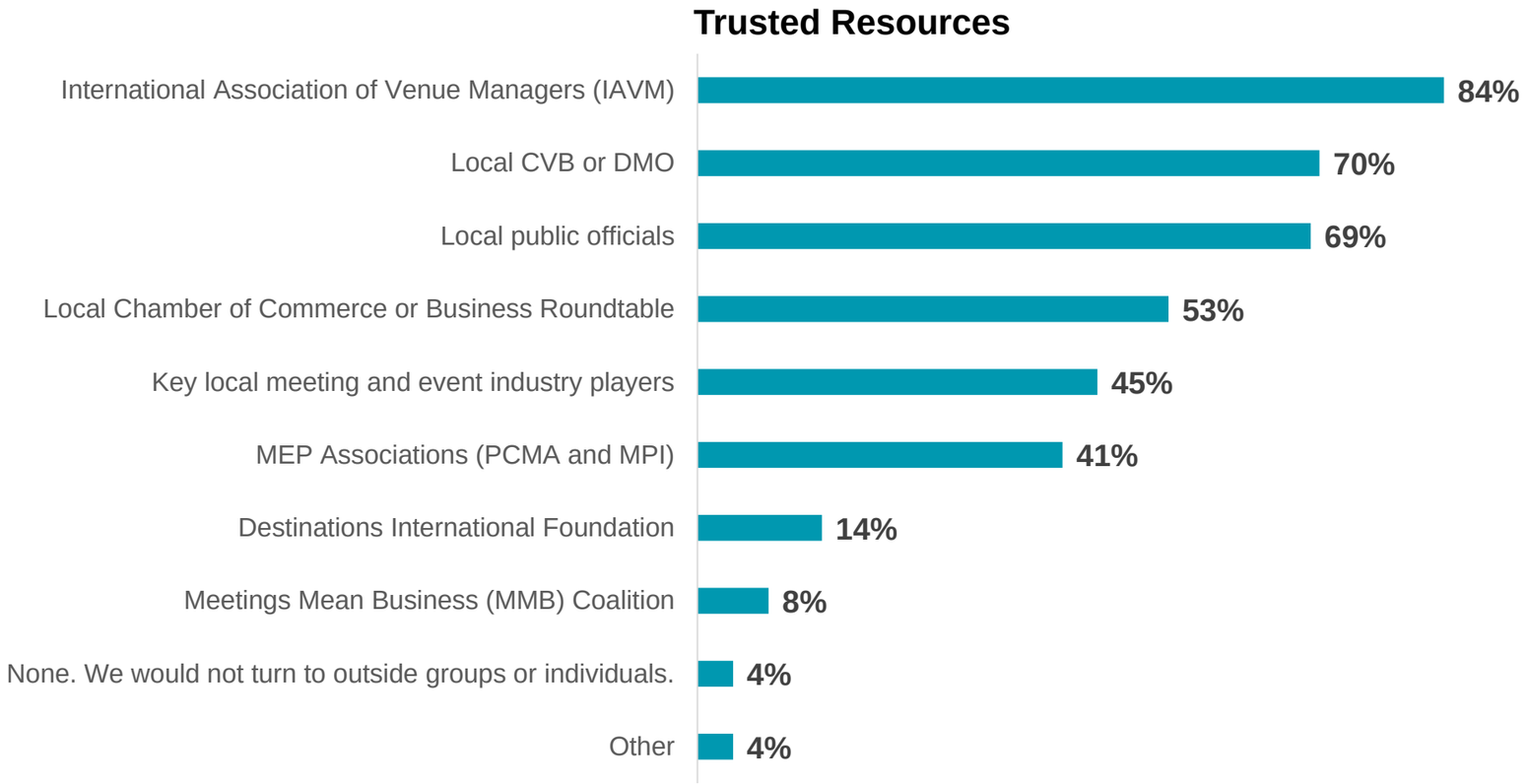
Q19. For those who wish to take action, here are some examples of alternatives to boycotting or banning a destination. In your opinion, which are as good, if not better, than boycotts or bans? *Select all that apply.*

Most would turn to the International Association of Venue Managers (IAVM), the survey distributor, if impacted by a travel ban or boycott

The local Conference and Visitor Bureau (CVB) or Destination Marketing Organization (DMO) are popular resources as well.



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Q16. Listed are some organizations that have been involved in supporting those impacted by travel boycotts and bans. In your opinion, which are trusted resources that you might turn to if a boycott or ban were to be declared? *Select all that apply.*

04

Message Assessment

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Six statements tested in opposition to engaging in travel boycotts

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

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

[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.

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

[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.

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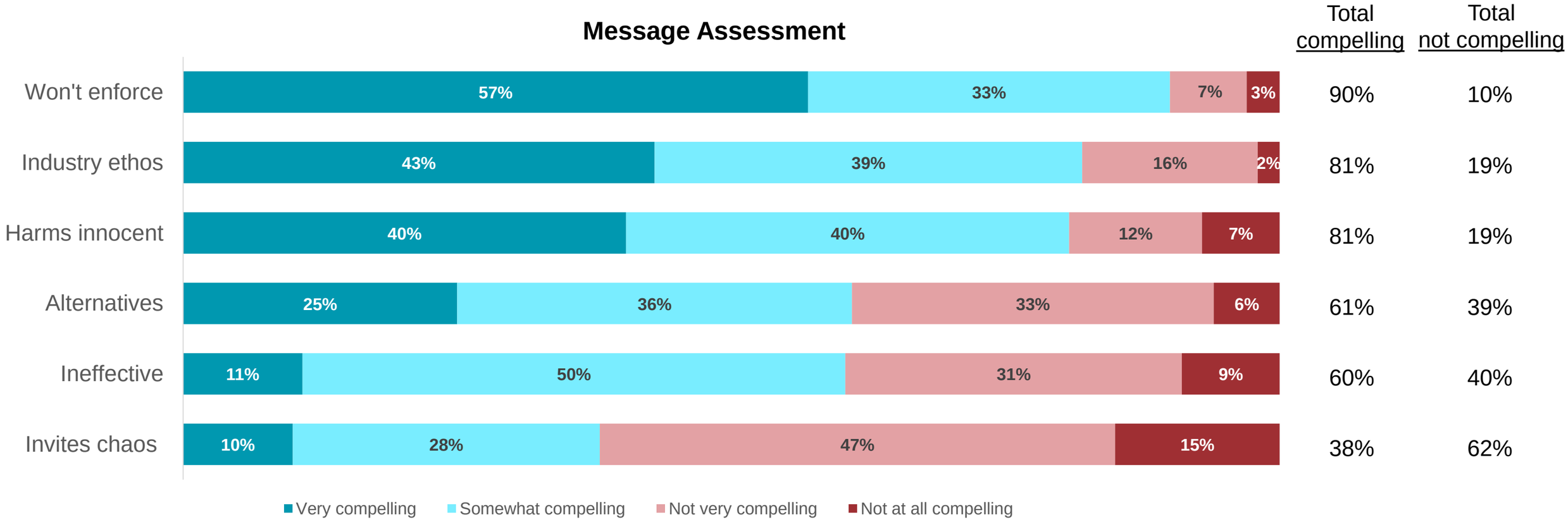
Q20. Here are some statements shared by meeting professionals who oppose engaging in travel boycotts. How compelling is each statement in opposition to travel boycotts and bans? Please select one for each row.

The strongest message emphasizes VMs will not enforce discriminatory policies

Industry Ethos and Harms Innocent also perform well. Invites Chaos is not compelling to VMs.



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Q20. Here are some statements shared by meeting professionals who oppose engaging in travel boycotts. How compelling is each statement in opposition to travel boycotts and bans? Please select one for each row.

05

Sample Demographics

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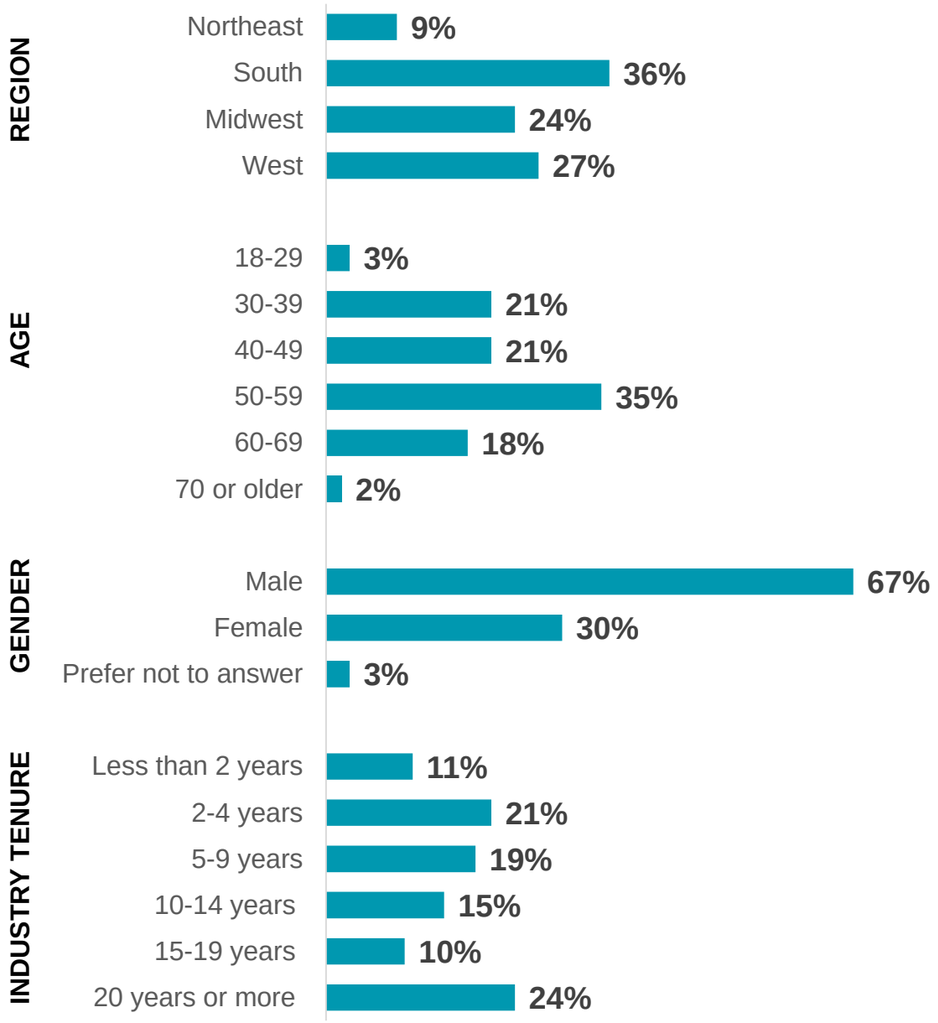
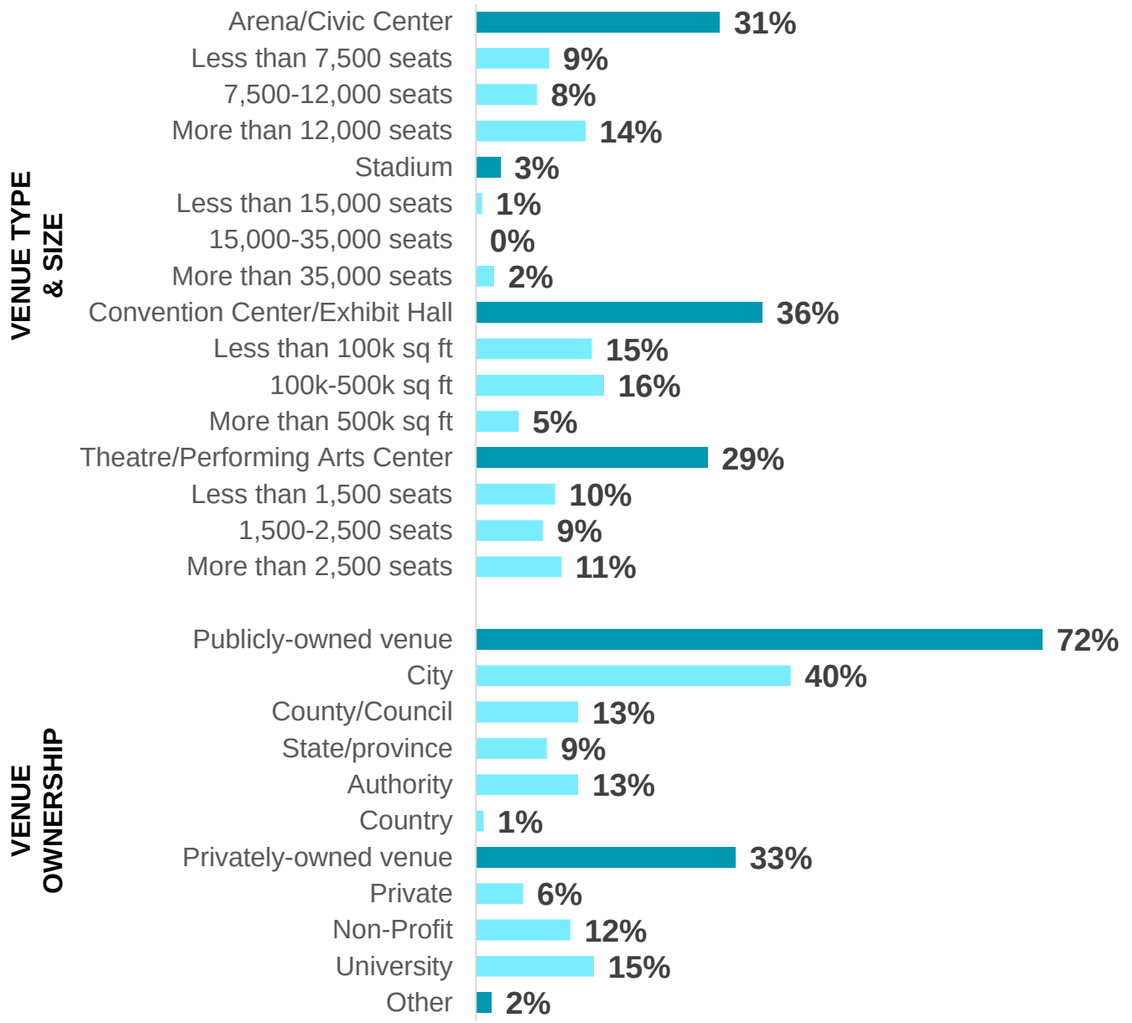
Venue managers profile





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