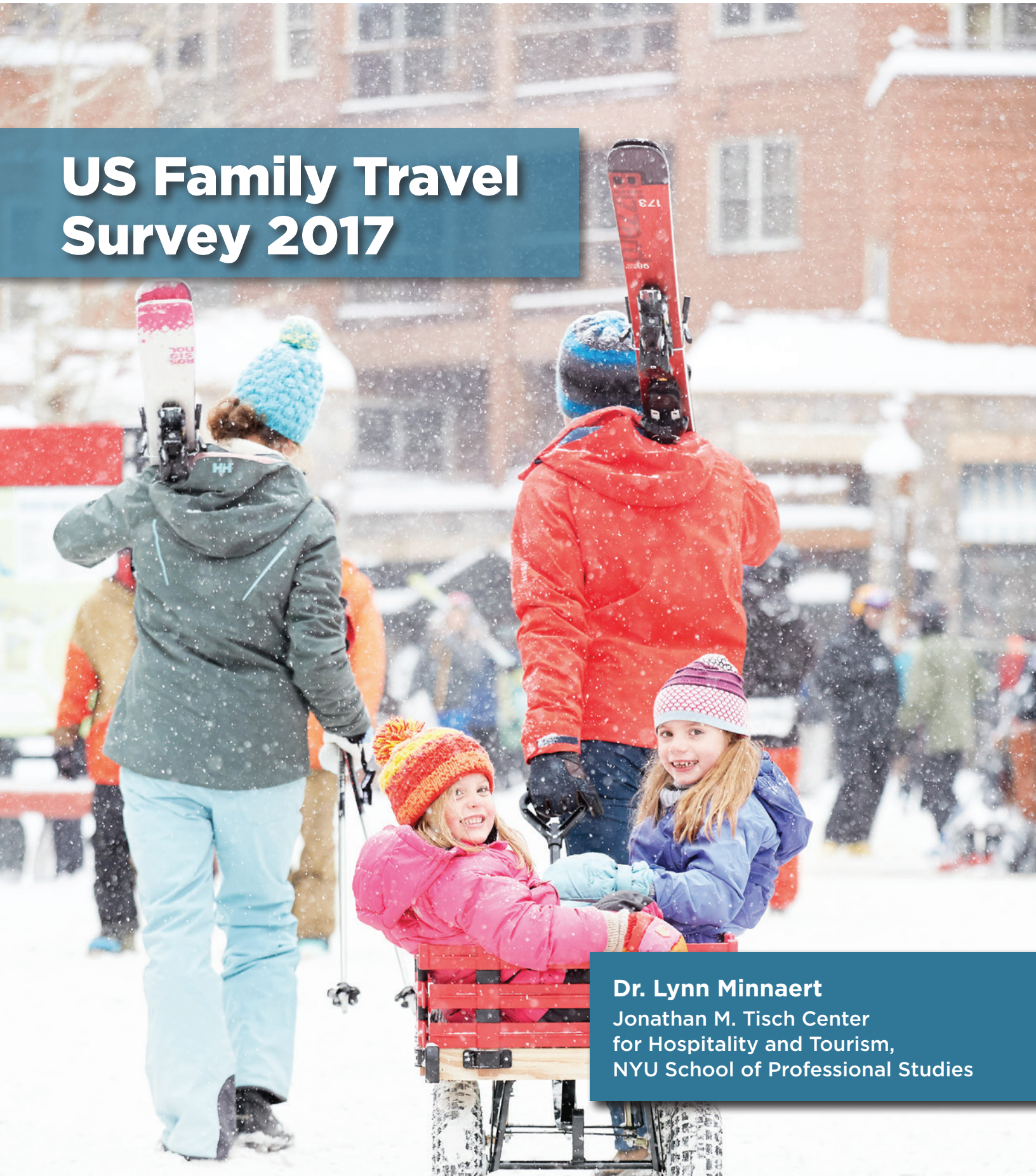
NYU SCHOOL OF PROFESSIONAL STUDIES

FAMILY TRAVEL ASSOCIATION
Changing Lives Through Travel

US Family Travel Survey 2017



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US FAMILY TRAVEL SURVEY 2017:
Learning More About Today's Modern Traveling Family
By Rainer Jenss, President & Founder, Family Travel Association

Three years ago, the Family Travel Association launched with 12 charter members and one primary objective: to bring the travel industry together to inspire families to travel—and to travel more. We believed that even though business in family and multigenerational travel was booming, there was still a lot of room for growth. Why? Because far too many families—despite having the time, income, and interest—still had something holding them back. Our goal was to identify some of those inhibitions and, if possible, try to help consumers overcome them.

What did we learn? We learned a lot in our first two years, mainly about the habits, preferences, and attitudes that American families have when it comes to traveling. More important, the research taught us that, despite all the challenges and complexity that families face when planning and going on a family vacation, there's plenty of enthusiasm and a strong desire to do it. And that's great news for all of us who want to see more families in a vacation destination, resort, airline seat, or rental car.

We also confirmed that, despite the rapid increase in family/multigenerational travel, there is, in fact, plenty more room for growth in this sector! As we studied the data, we noticed three distinct groups of family travelers. The first, which we call the *Hassle-Free Travelers*, places more value on material possessions than traveling. Many in this group prefer to stay at home for vacation and are more likely to think of traveling with children as a hassle. When they do venture out, they prefer cruises, all-inclusives, and organized tours (probably because they are the easiest to book). They also are the least likely to pull their kids out of school to travel.

The second group, or *Cautious Travelers,* wants to visit new places and likes to travel to experience different cultures. In addition, they are more willing to have their kids miss school to travel. They do worry about safety, though, and since they find it hard to identify appropriate activities for their children, they are the most likely to visit theme parks. But because they feel that travel strengthens family bonds and makes children better global citizens, the members of this group seem to be sold on the value of traveling with their kids, even when they are not sure where to go and what to do, or are just too nervous to leave their comfort zones.

Finally, there are the *Intrepid Travelers.* These are the families we love. They tend to opt for new destinations each time they travel, are most likely to take their kids out of school for vacations, value travel over material possessions, and like to travel to different cultures and unusual destinations. While all families want to keep their families safe while traveling, this is not the main focus for this group.

Which is the largest group? The *Cautious Travelers* are the greatest in number, followed by the *Hassle-Free* and then the *Intrepid Travelers*.

What does this mean? I submit it confirms that a large chunk of the population is very willing to travel—and travel more with children—but is not doing so without help. These people are struggling to find meaningful information about where to go and what to do, they need assistance booking their travels, and they seek reassurance that their families will be safe while on the road.

I would even argue that this is great news, as it represents a tremendous opportunity for the industry. If we continue to nurture the *Intrepid Travelers*, help the *Cautious Travelers* with their concerns, and start seriously engaging with the *Hassle-Free Travelers*, we could see an even greater acceleration in the growth of family and multigenerational travel in the years to come.

So that's why I believe that today, right now, is precisely the time to double down on family travel. Besides the not-so-inconsequential detail that the United States looks to be lagging behind the rest of the developed world in producing world-ready workers, I've always maintained that not enough American parents place the same priority on the value of travel as their counterparts overseas. This is a broad generalization, of course, yet there does seem to be a consensus among strong voices in the industry with whom I have talked about this.

What else do we want to learn? A lot.

We are thrilled to have joined forces with the NYU School of Professional Studies (NYUSPS) on our consumer surveys. This report highlights the results of our third year conducting what is arguably the most comprehensive research study of American traveling families.

Does it address every possible aspect of what goes into family travel? Not yet, but we're making great strides. The FTA also has partnered with other organizations, like **Trip.com** and Strottman International, to delve deeper into the qualitative characteristics that our data reveals—all to help us better understand what consumers are thinking and how we can serve them better.

"We were very excited to continue working with the Family Travel Association on this study," said Dr. Lynn Minnaert, clinical associate professor at the NYUSPS Jonathan M. Tisch Center for Hospitality and Tourism. "This is a very under-researched area in the tourism literature at

the moment, and we hope that this study will help the travel industry provide better products and services for families in the future."

What's New in 2017

In 2015, we produced groundbreaking research into how families make travel decisions and what barriers they face in doing so, as well as how parents prioritize traveling with their kids in different ways. In 2016, we had a fresh set of numbers and new data that confirmed what we learned in year one.

This year, we expanded the survey to include questions about destination preferences and aspirations. We also went deeper into recognizing that families come in all different shapes and sizes. Now, single parents, families with stepchildren, LGBT parents, and families with special needs children all can be segmented.

Finally, we asked people to give a grade to various parts of the travel industry to reflect how they are doing in serving people's unique needs. I think you will find the results quite revealing.

Please take a deep dive into the research and let me know what specific data points interest you. As a member of the FTA, you have complete access to all the information, and we are happy to cross-tab and run any numbers you want. After all, helping our members better understand this market is one of our top priorities.

Best regards,

Rainer Jenss
President & Founder
Family Travel Association

STUDY HIGHLIGHTS

By Dr. Lynn Minnaert, Clinical Associate Professor,
NYUSPS Jonathan M. Tisch Center for Hospitality and Tourism

In this third edition of the US Family Travel Survey, the Family Travel Association and the NYUSPS Tisch Center for Hospitality and Tourism examine the under-researched phenomenon of family travel in the United States. The survey represents families of diverse incomes, education levels, ethnicities, and sizes. The study examines the following about American families:

- Travel behavior and preferences
- Travel challenges
- Travel attitudes
- Travel decision-making
- Travel industry evaluation

Key Findings

Here are some key findings from this survey, which provides a snapshot of family travel behaviors and preferences in the US:

- 88% of families are "very likely" or "likely" to travel with their child or children in the coming 12 months.
- **Shorter vacations (up to one week) are most common.** While summer is the most popular time for family travel, respondents show a strong interest in winter vacations for future years. Most families book their travel within three months of departure.
- Theme parks, beach vacations, and family road trips are the most common vacations the respondents have taken. When analyzing which vacation types US families would like to try for the first time in the future, **cruises and all-inclusive resorts** show the greatest appeal.
- The top three states families have visited are Florida, California, and New York. The top three states they would like to visit in the future are Florida, California, and Hawaii.
- Hotels, resorts, and motels were the most commonly used accommodation choices. **Value for money** and **amenities for children** are key factors in their decision-making process on where to stay.
- A family's main priority when taking a family vacation is "**visiting new places and exploring together**" (49%), followed by "**relaxing and unwinding together**" (42%).
- 25% of respondents had booked with a **travel agent** in the past five years.

A new addition to the survey this year is a block of questions that examined families' evaluations of the travel industry. Respondents were asked to grade the travel industry on how well it meets the needs of families, and they gave it **a lackluster score of B–**. The recommendations they had for the industry focused on the following:

- The need for more affordable options
- A request for more packaged domestic options
- The challenges larger families face when traveling
- The lack of reliable and comprehensive information on travel options and prices
- The lack of accessible travel options for families with an adult or a child who has a disability

For more information on the recommendations respondents had for the travel industry, please see page 41.

Since 2015, the US Family Travel Survey has distinguished between three family travel profiles:

- Hassle-Free Travelers
- Cautious Travelers
- Intrepid Travelers

Each profile has its own distinct characteristics, which were confirmed in the findings of this new edition of the survey. New attitude statements have revealed a more nuanced overview of the profiles and show that each has its own **attitude spectrum**: in other words, the boundaries between the profiles are somewhat fluid in some areas, and several characteristics are shared between several groups. For example, while *Cautious Travelers*—the most prominent group for the third year running—often worry about safety and value for money, they still see themselves as fairly adventurous families. *Cautious Travelers* share some additional characteristics with *Intrepid Travelers*: both groups like to plan their vacations thoroughly and enjoy researching destinations and travel options. This shows that even profiles that appear to be opposites at first glance may share characteristics and preferences. As such, travel products may appeal across two different profiles. This more nuanced understanding of the three family travel profiles can assist in the **marketing, distribution, and product development** of family travel products and services.

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SURVEY OVERVIEW AND RESPONDENTS

Survey Design and Administration

The survey presented here consisted of seven survey blocks:

- *Qualifiers:* Only respondents who were over the age of 18 and who had children 17 years of age or younger were eligible to take the survey. Respondents who were "unlikely" or "very unlikely" to travel with their children in the coming 12 months were filtered out after the first question block.
- *Travel Behavior:* Questions in this block focused on the frequency of travel, the travel types in which respondents had participated, the travel types in which respondents were likely to participate in the future, preferred transport and accommodation for family vacations, and preferred destinations.
- *Travel Challenges:* Questions in this block focused on the factors that can make family travel more difficult, and their relative prevalence.
- *Travel Attitudes:* In this block, respondents were asked the extent to which they agreed with a series of attitudinal statements about family travel.
- *Travel Decision-Making:* Respondents were asked in this block to rank information and inspiration sources for travel.
- *Travel Industry Evaluation:* In this block, respondents were asked whether or not they use travel agents, what their dream vacation would look like, how the travel industry has surprised and delighted them, and what score they would give the travel industry and its subsectors.
- *Demographics:* Respondents were asked to identify their gender, income level, state of residence, education level, ethnic background, and the number of paid vacation days to which they have access.

Survey Respondents

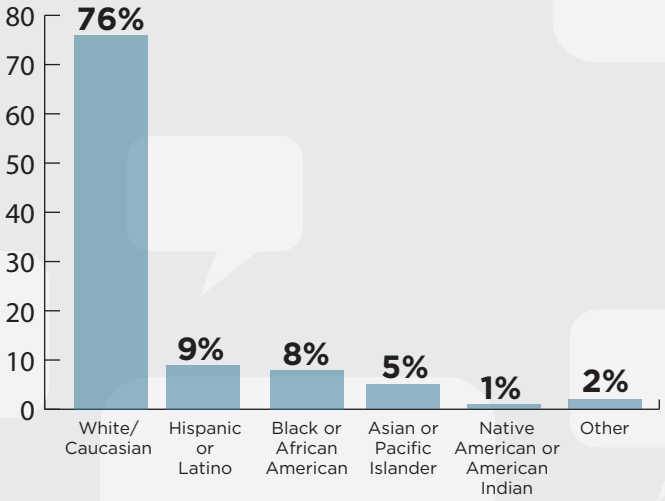
Respondents by gender

Total responses: 1,599

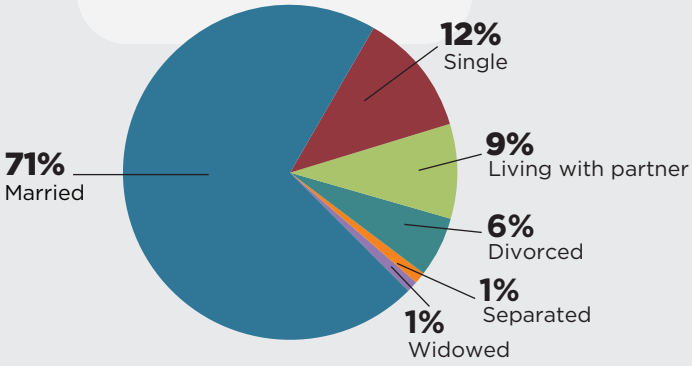
14%
Male

86%
Female

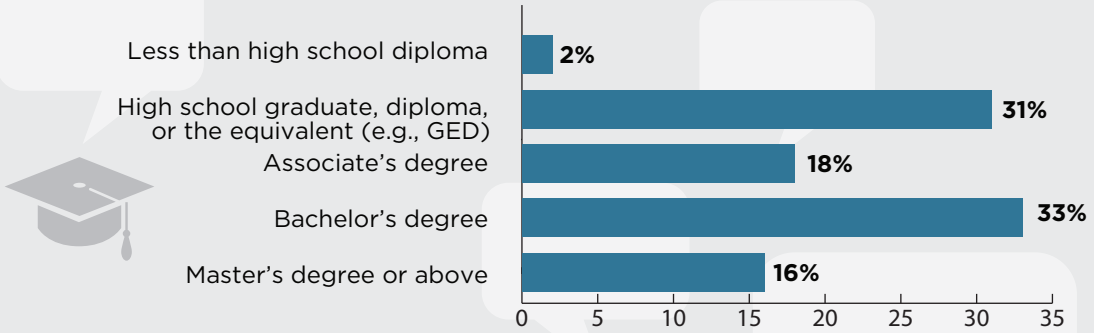
Respondents by ethnicity



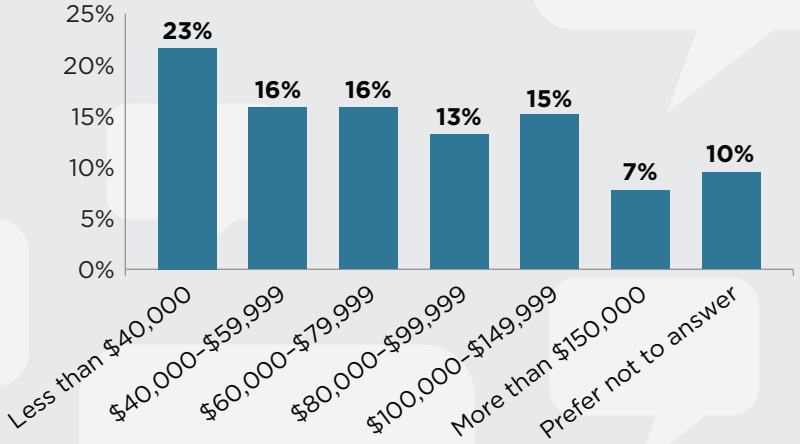
Respondents by marital status



Respondents by level of education



Respondents by household income



The sample reflects a wide range and diversity of families:

26% of respondents have three or more children

19% of respondents are single parents

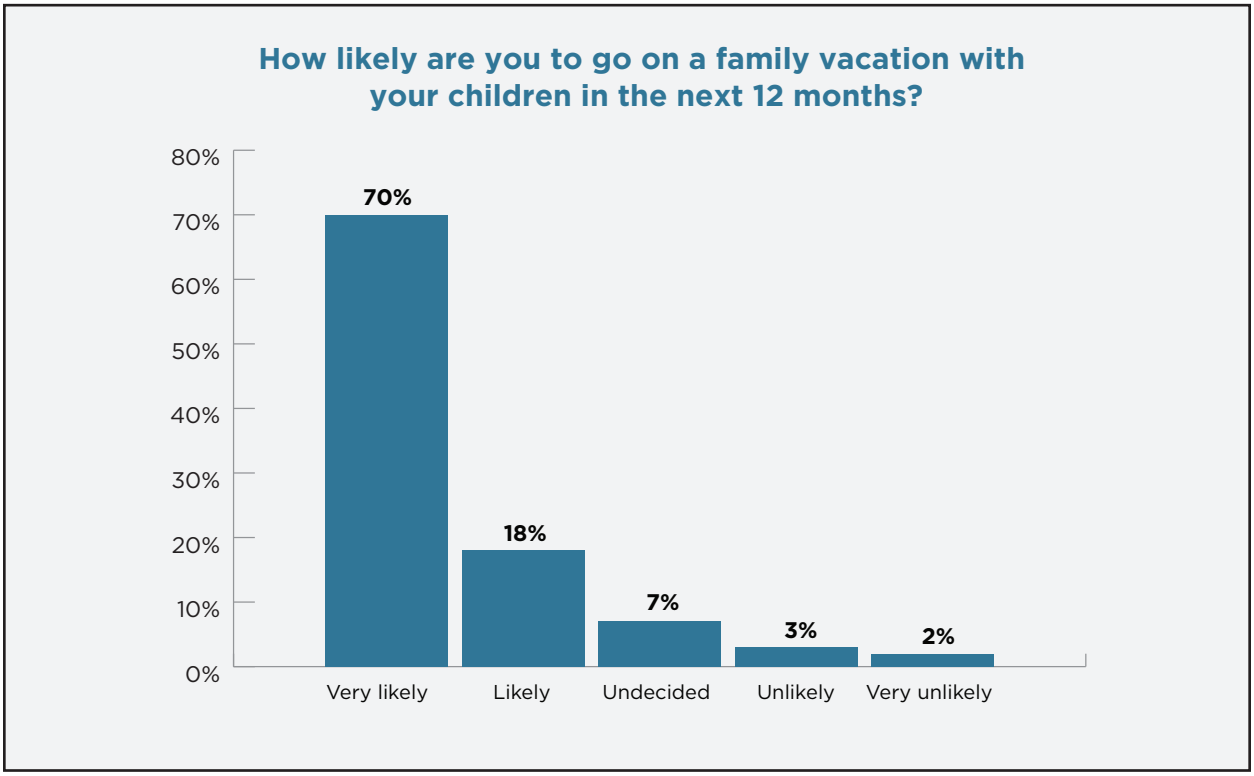
12% of respondents have a child/children with special needs

7% of respondents have stepchildren

2% of respondents are LGBT families

TRAVEL BEHAVIOR

US families love to travel together! 88% of the respondents are either “very likely” or “likely” to travel with their children in the next 12 months. Only 5% are “unlikely” or “very unlikely” to travel with their children.



Respondents who were either “unlikely” or “very unlikely” to travel with their children in the next 12 months were asked what their reasons were for not doing so. In this question, they were asked to select all the options that applied.

Reason for not traveling (select all):

I/We cannot afford it	72%
Our children are too young	11%
I/We don’t have any/enough vacation time	8%
Traveling with my/our family for vacation is not a priority	7%
Health problems or physical limitations make it difficult to travel	7%
Traveling with children is not relaxing for me/us	7%
I/We don’t think a family trip is worth the money	5%
Air travel is too much of a hassle	5%
I/We don’t like traveling	5%
Our children are too busy with other activities	5%
Our children would rather spend vacation time at home	5%
It’s too difficult/time-consuming to plan	4%
Our children won’t like it	4%
Safety concerns	3%

They were then asked for their main reason for not participating in family travel.

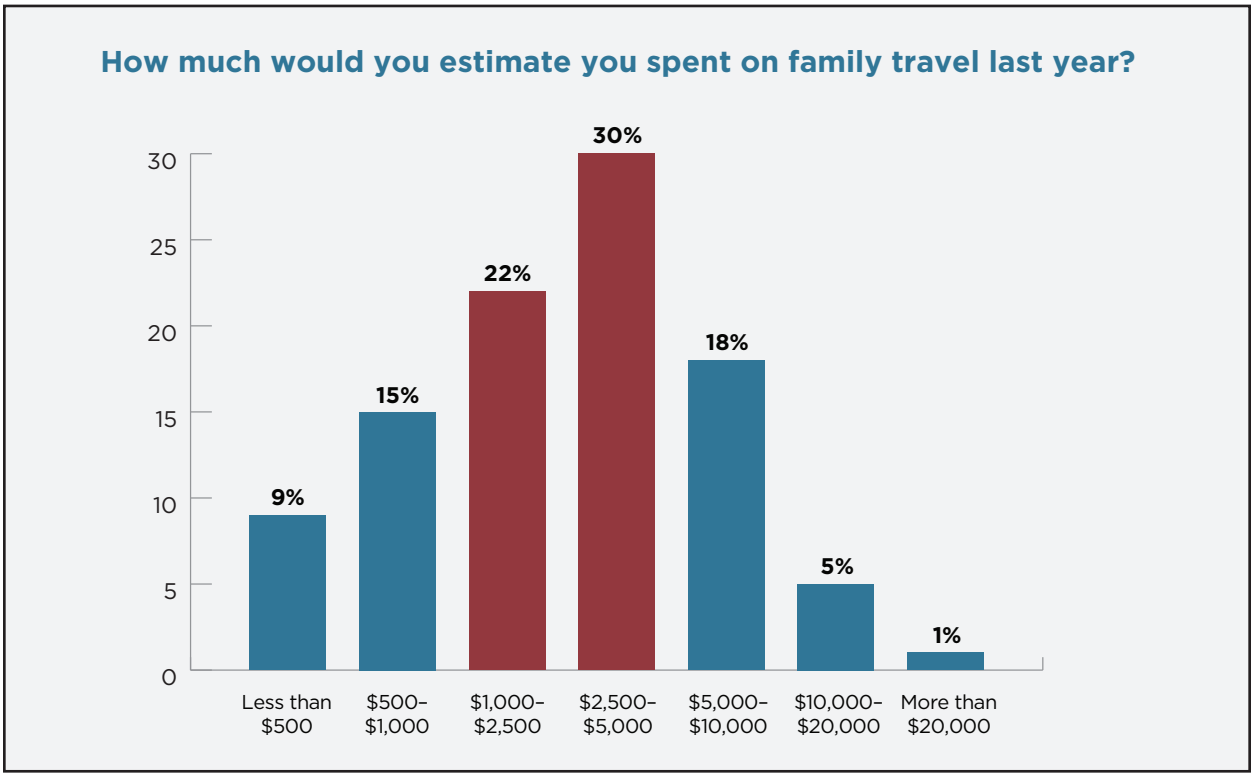
Main reason for not traveling:

I/We cannot afford it	63%
Our children are too young	10%
I/We don’t have any/enough vacation time	6%
Our children would rather spend vacation time at home	6%
Traveling with children is not relaxing for me/us	4%
I/We don’t like traveling	2%
Our children are too busy with other activities	2%
Traveling with my/our family for vacation is not a priority	2%
Health problems or physical limitations make it difficult to travel	2%
Other	3%

Affordability emerged as the main reason for not participating in family travel. The age of the children is a factor for families with very young children: all respondents in this group had children between 0 and 3 years old.

Travel Spending

Over half of the respondents spent between $1,000 and $4,999 on travel in the last year.



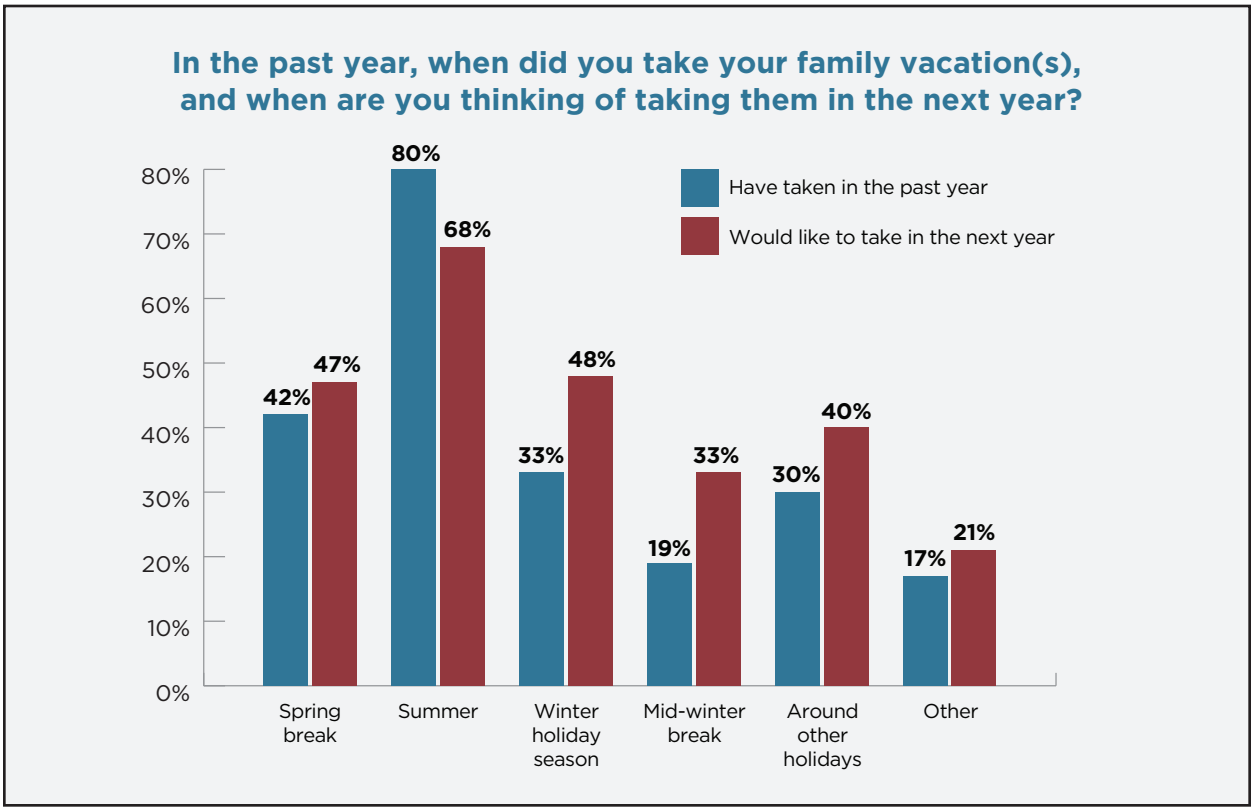
Family Vacation Types

Respondents were asked to indicate the number of vacations they had taken of the following lengths in the past year: 1–3 nights, 4–6 nights, 7–13 nights, and 14 or more nights. **Shorter vacations** were more popular: 65% of respondents had taken more than one vacation of 1–3 nights, and 64% had taken more than one vacation of 4–6 nights. Trips of 14 nights or more were fairly uncommon.

How many of the following types of family vacations have you taken in the past year?

	1–3 nights	4–6 nights	7–13 nights	14 nights or more
1	35%	36%	27%	8%
2	25%	15%	6%	2%
3	16%	4%	4%	1%
4	6%	2%	2%	1%
5	4%	1%	1%	0%
6 or more	5%	1%	1%	1%
Average number of trips In past year	**1.9**	**0.9**	**0.6**	**0.3**

The following question addressed the time of year in which families had traveled in the past year, and when they were planning to travel in the coming year. While **summer** remains the most popular time to travel, the **winter** holiday season and mid-winter break are appealing options for families, even if they have not traveled during the winter season in the past year.



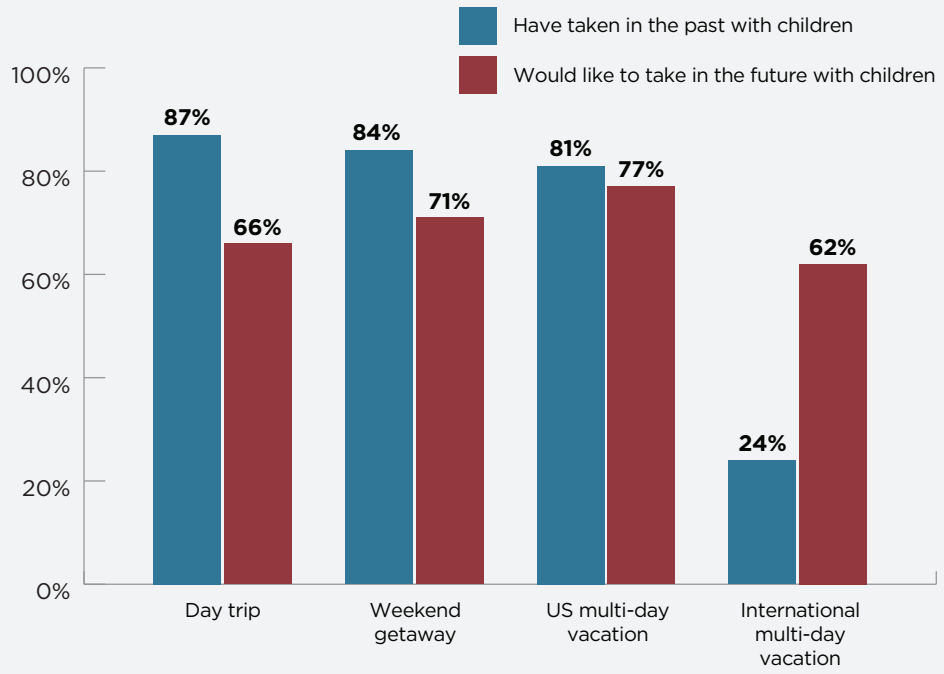
Respondents were then asked when they did the planning for the vacations they had taken in the past year. (The question filtered only the options they had indicated as "taken in the past year" from the previous question.) Results show that many families book their travel **within three months** of their departure date: this option received the highest score for spring break, summer, winter holiday season, and mid-winter break.

When did you do the planning for the vacations you took last year?

	January–March	April–June	July–September	October–December
Spring break	56%	25%	6%	13%
Summer	28%	42%	24%	6%
Winter holiday season	13%	11%	28%	48%
Mid-winter break	26%	12%	26%	36%
Around other holidays	16%	21%	28%	35%
Other	28%	27%	29%	16%

The survey looked into the vacation types and lengths that US families have taken with children, and which ones they would like to take in the future. Day trips, weekend getaways, and multi-day vacations around the US are travel options that American families commonly engage in. Only 24% of the respondents had taken an international multi-day vacation with children, but 62% would like to take one in the future.

What kinds of trips have you taken with your children in the past, and how likely are you to consider these types of trips in the future?



The survey also looked into the types of activities that US families prefer when they vacation. **Theme parks, beach vacations, and family road trips** are the most common vacations the respondents have taken. River cruises, volunteer trips, and visits to dude ranches are the least common.

When analyzing which vacation types US families would like to try for the first time in the future, **cruises and all-inclusive resorts** show the greatest appeal. **Safaris, RV trips, and river cruises** also score highly with respondents who have not experienced this type of vacation before.

What kinds of trips have you taken with your children in the past, and how likely are you to consider these types of trips in the future?

	Have taken in the past with children	Would like to take in the future with children
Theme park	73%	68%
Beach vacation	68%	71%
Family road trip	68%	63%
Museum or cultural attraction	61%	57%
City vacation	49%	53%
Family reunion	46%	43%
Camping trip	45%	52%
National park	43%	65%
All-inclusive resort	21%	62%
Safari or wildlife viewing	19%	48%
Cruise	19%	60%
Ski/Snowboard trip	13%	34%
RV trip	12%	41%
River cruise	9%	36%
Volunteer or mission trip	7%	30%
Dude ranch	5%	28%

Family Vacation Destinations

Respondents were asked which US states, as well as the District of Columbia and Puerto Rico, they had visited with their children, and which they were interested in visiting with their children in the future.

Which states in the United States have you visited during past vacations with children, and how likely you are to consider these states in the future?

	Have visited	Would like to visit		Have visited	Would like to visit
Florida	**55%**	**60%**	Washington	10%	28%
California	**31%**	**53%**	Delaware	9%	17%
New York	**26%**	**44%**	Arkansas	9%	16%
Pennsylvania	24%	26%	West Virginia	9%	17%
Tennessee	21%	27%	Minnesota	9%	18%
North Carolina	21%	28%	Louisiana	8%	22%
Georgia	21%	26%	**Hawaii**	**8%**	**51%**
Illinois	19%	22%	Mississippi	7%	14%
Ohio	19%	20%	Oregon	7%	21%
South Carolina	18%	28%	Maine	7%	26%
Virginia	18%	26%	New Hampshire	7%	18%
New Jersey	17%	21%	Iowa	7%	14%
Texas	17%	30%	Kansas	7%	14%
Arizona	15%	30%	Oklahoma	7%	14%
District of Columbia	15%	32%	Rhode Island	7%	19%
Kentucky	15%	19%	Utah	6%	18%
Michigan	15%	22%	Vermont	6%	21%
Maryland	14%	20%	South Dakota	5%	18%
Colorado	**14%**	**40%**	Wyoming	5%	21%
Indiana	14%	16%	Idaho	5%	16%
Alabama	13%	17%	Montana	5%	22%
Massachusetts	13%	25%	New Mexico	5%	20%
Connecticut	12%	21%	Nebraska	5%	14%
Nevada	12%	24%	Puerto Rico	4%	25%
Wisconsin	11%	18%	North Dakota	4%	15%
Missouri	11%	17%	**Alaska**	**3%**	**37%**

The top three states that families have visited are **Florida, California, and New York**. The top three states they would like to visit in the future are **Florida, California, and Hawaii**. When analyzing which states US families would like to visit for the first time in the future, **Hawaii, Alaska, and Colorado** show the greatest appeal.

Respondents were asked which international destinations they had visited with their children and which they were interested in visiting with their children in the future. The top three countries/regions that US families have visited are **Canada, the Caribbean, and Mexico**. The top three countries/regions that they would most like to visit are **the Caribbean, Canada, and Europe**. The Middle East and the Polar regions held the least appeal.

Which international destinations have you visited during past vacations with children, and how likely you are to consider these destinations in the future?

	Have visited	Would like to visit
Canada	**19%**	**55%**
Caribbean	**17%**	**57%**
Mexico	**13%**	**37%**
Europe	**8%**	**51%**
Asia	4%	24%
Central America	3%	20%
Pacific	3%	23%
South America	3%	22%
Middle East	2%	13%
Africa	2%	21%
Australia/New Zealand	2%	36%
Polar regions	1%	14%

Lodging Preferences

The next section in the survey examined the preferences of US families when it comes to lodging options. **Hotels, resorts, and motels** were the most commonly used accommodation choices. Vacation rentals, campsites, and bed and breakfasts/small inns were less commonly used. Over 70% of the respondents reported that they have never stayed in RVs or trailers, time shares, or home exchanges.

In what type of accommodation do you typically stay on a family vacation?

	Often	Sometimes	Never
Hotel	61%	35%	4%
Resort	22%	46%	32%
Motel	21%	46%	33%
Vacation rental (home or condo, Airbnb, etc.)	16%	39%	45%
Campsite	15%	41%	46%
Bed and breakfast/small inn	9%	34%	57%
RV/Trailer	8%	20%	72%
Time share	7%	20%	73%
Home exchange	4%	10%	86%

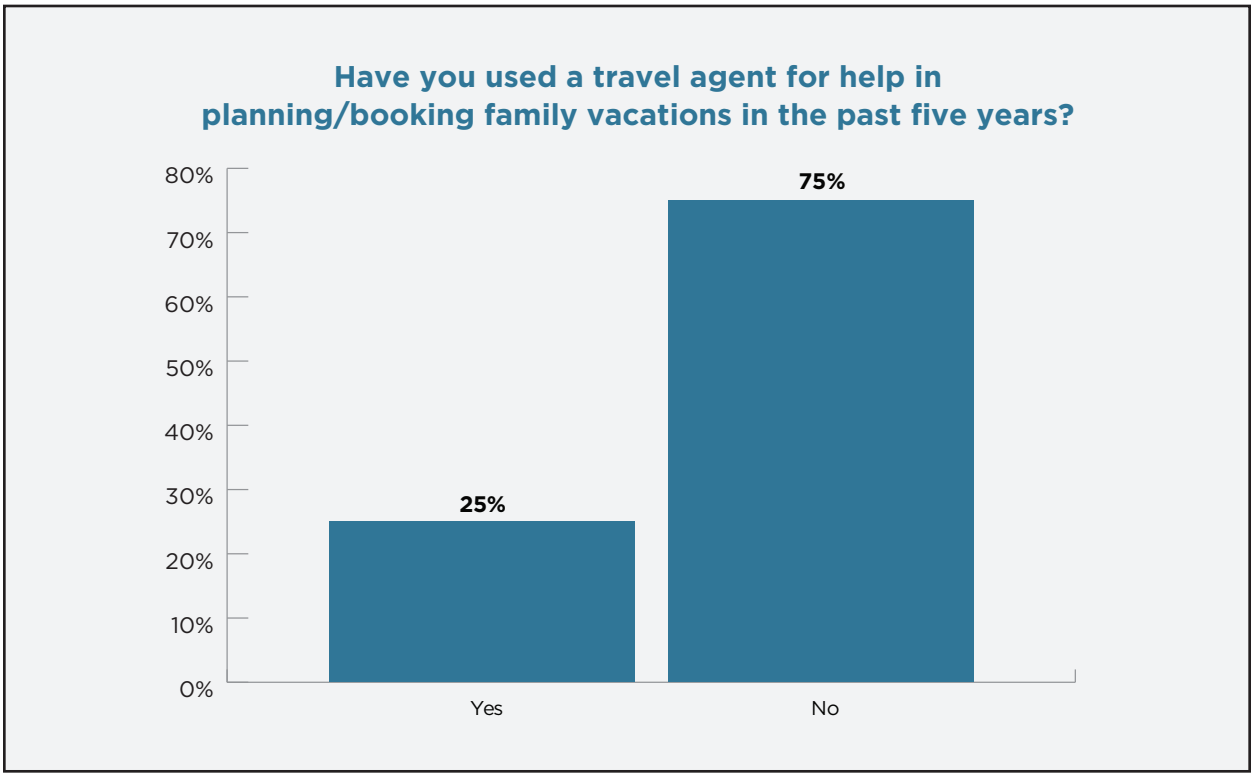
Respondents were then asked to identify which factors were most important to them when they choose their lodging option for a family vacation. **Value for money** was the top factor, followed by amenities, proximity to attractions and activities, a child-friendly environment, and free WiFi. Brand loyalty was the least important factor.

What factors are most important to you when you select where to stay on your family vacation? Select all that apply.

Best value/price for our budget	77%
Amenities for children (pool, beach, game rooms, kids' clubs, etc.)	70%
Close proximity to attractions and activities	69%
Kid-friendly environment	68%
Free WiFi/Internet	66%
Free breakfast included	65%
Free parking	55%
Family-friendly dining options at or near accommodations	54%
Flexible rooms/sleeping arrangements	48%
Whole family can gather in own space	43%
Kitchen area for in room meal preparation and dining	41%
Amenities for adults (spa, pool, beach, golf, sports, etc.)	38%
Ability to use rewards points in exchange for rooms, meals, activities	28%
Our preferred accommodation style	27%
Entertainment options in room	23%
Special treatment by accommodation (toys for the kids, special treats, upgrades, recognition, etc.)	23%
Brand that I am loyal to	18%

Use of Travel Agents

The 2017 survey included a question on the use of travel agents. 25% of the respondents had used a travel agent for their family vacations in the past five years.



In the follow-up questions, respondents were asked why they had, or had not, booked via a travel agent in the past five years.

Reasons for booking with a travel agent:

- *Ease of booking and convenience:* Respondents commented that travel agents offer a seamless, one-stop booking experience that covers all elements of the vacation, which saves a lot of time.
- *Knowledge of the destination:* Respondents often mention that they appreciated the travel agent's recommendations and insights, particularly if they were going to a new destination, traveling in a larger group, or trying out a new vacation type (e.g., cruise).
- *Value for money:* Some respondents mentioned that their agent had access to better discounts and offers, and that the travel agent offered additional "perks" at no extra cost.

Reasons for not booking with a travel agent:

- *Fear it will be expensive:* Respondents expressed that they expected it would be more cost-effective to book by themselves.
- *Enjoyment of researching and booking trip:* Respondents often mentioned that they really enjoyed researching the destination and comparing different options.
- *Simplicity of travel plans:* Some respondents mentioned that they travel by car and stay with family, or that they know the destination and where they want to stay.
- *Fear it will be time-consuming:* Some respondents worried that meeting with the travel agent would take up too much time.

Spending Behavior

A new question for 2017 asked respondents what elements of their vacation they tend to splurge on, and what elements they tend to skimp on. Respondents were most likely to splurge on the **destination** visited. They were most likely to skimp on souvenirs and shopping, as well as on the transportation method they choose.

When you make your family travel decisions, on which of the following do you typically splurge? On which do you typically skimp?

	Splurge	Skimp
Destination visited	83%	17%
Staying close to the destination	68%	32%
Paid attractions	68%	32%
Accommodations	67%	33%
Eating out/food	63%	37%
Length of trip	63%	37%
Paid activities	57%	43%
Souvenirs/shopping	38%	62%
Type of transportation	32%	68%

TRAVEL CHALLENGES

Respondents were asked to rank challenges that can make family travel more difficult on a scale of 1 to 5:

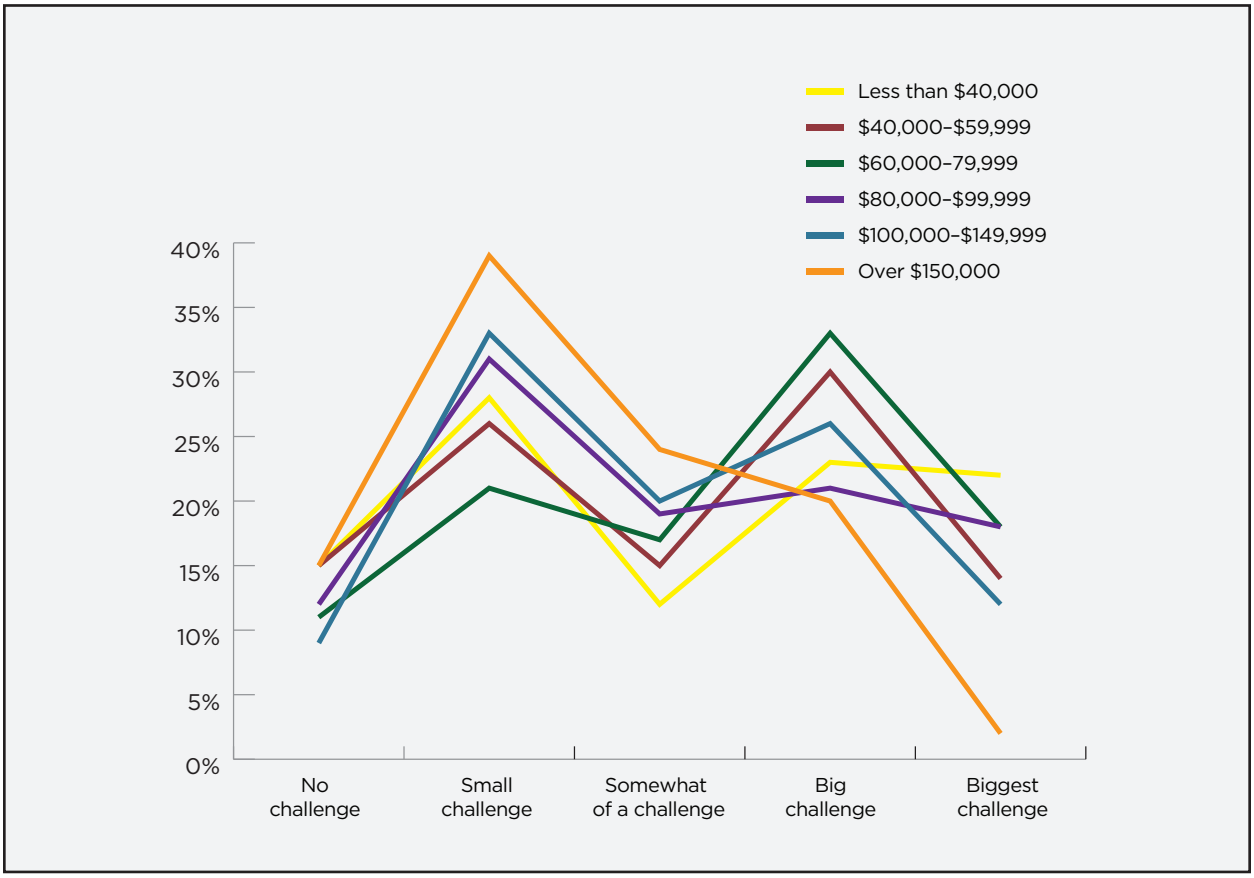
1) no challenge – 2) small challenge – 3) somewhat of a challenge – 4) big challenge – 5) biggest challenge

"Affordability" received the highest score, followed by "finding adult time while traveling with children" and "available vacation time." It is important to note, however, that the overall scores for this question were fairly low, indicating that respondents did not see any of these factors as big challenges when it comes to family travel.

We would now like to ask you about factors that can make family travel more difficult. How challenging are the following to you when considering travel with your children?

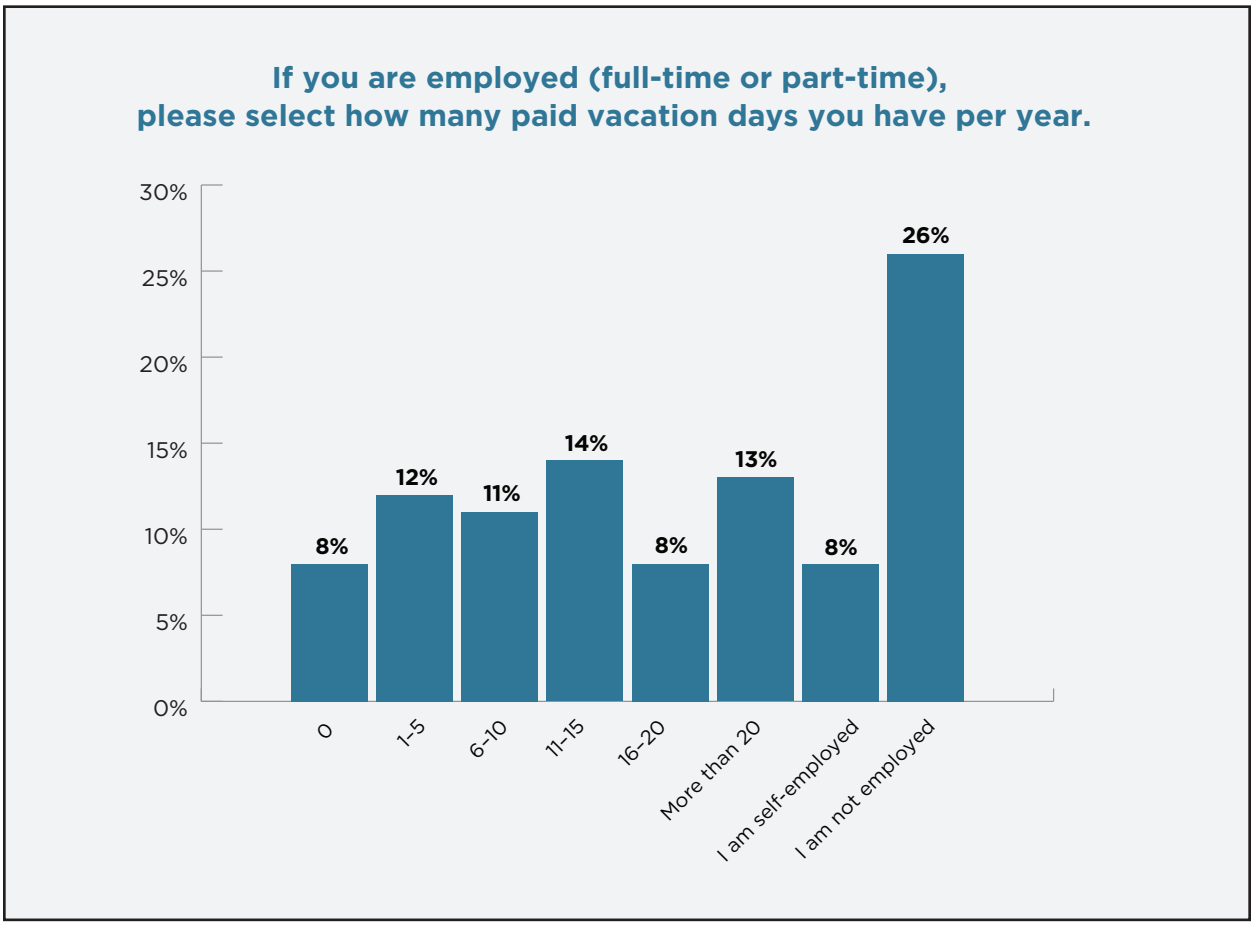
	Median	Average
Affordability	3	3.03
Finding adult time while traveling with children	2	2.67
Available vacation time	2	2.65
Timing of school breaks	2	2.56
Flying with children	2	2.43
Traveling by car with children	2	2.42
Finding a destination or activity everyone will enjoy	2	2.37
Packing for the trip	2	2.37
Planning the trip	2	2.36
Airport security	2	2.32
Passport and visa requirements	2	2.25
Keeping children safe and healthy when traveling	2	2.24
Family members getting along	2	2.21
Finding accurate information about travel options	2	2.21
Age(s) of my child(ren)	2	2.20
Finding family-friendly accommodations	2	2.20
Finding family-friendly dining options	2	2.14
Health and physical limitations	2	1.84

Affordability has emerged, for the third year in a row, as the challenge receiving the highest score. It is important to note here, however, that this challenge affects most income ranges, apart from the highest in this survey (yearly household income of $150,000 or above). The lowest income group in this survey (annual household income of less than $40,000) was most likely to identify affordability as the biggest challenge. However, over 30% of the $60,000–$79,999 income group identified affordability as a big challenge—even if their income is higher, they find affordability more challenging than the $40,000–$59,999 income group. Over a quarter of respondents with an annual household income of $100,000–$149,999 identified affordability as a big challenge. **This indicates that price/cost is not necessarily a challenge for all respondents; however, expected value for money may be.**

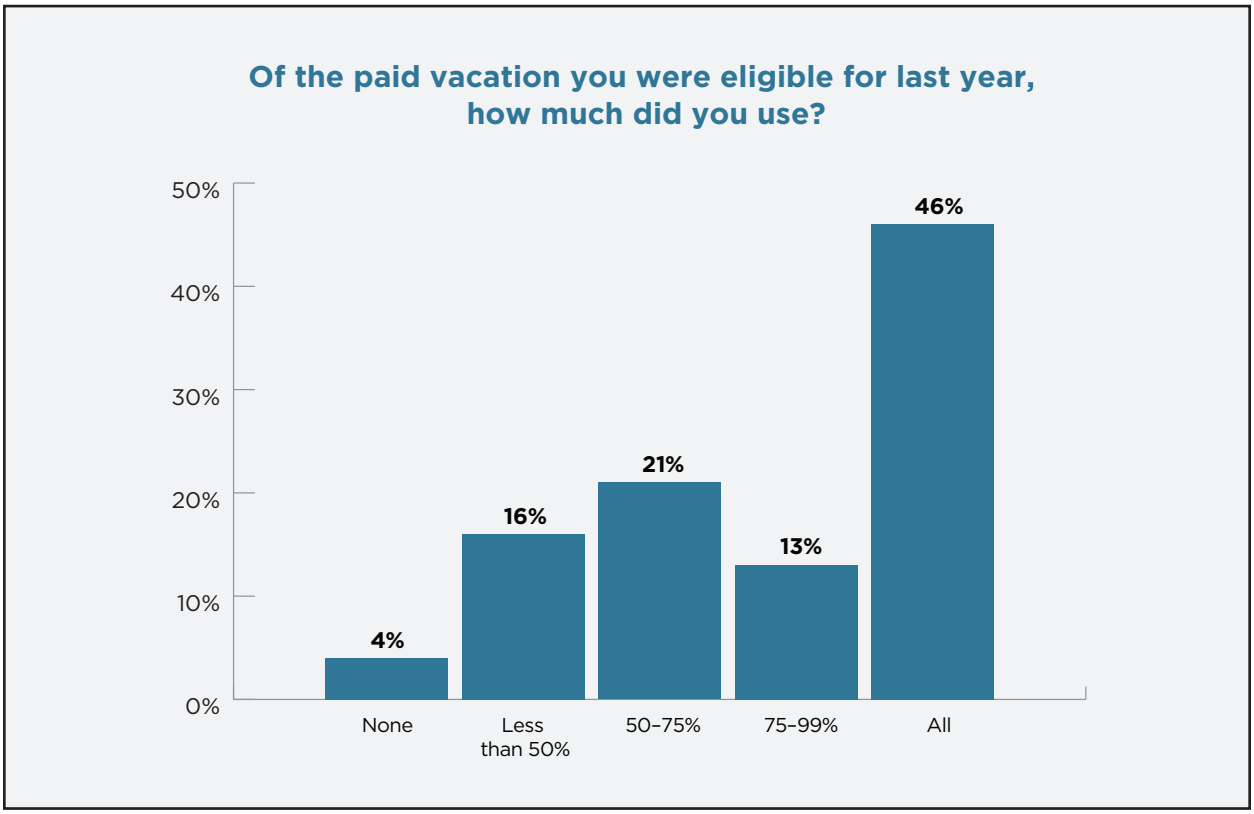


Vacation Time Usage

The survey also asked respondents how much vacation time they had and if they were employed full- or part-time. The relatively high percentage of respondents who are not employed may be associated with the fact that many may be stay-at-home moms.

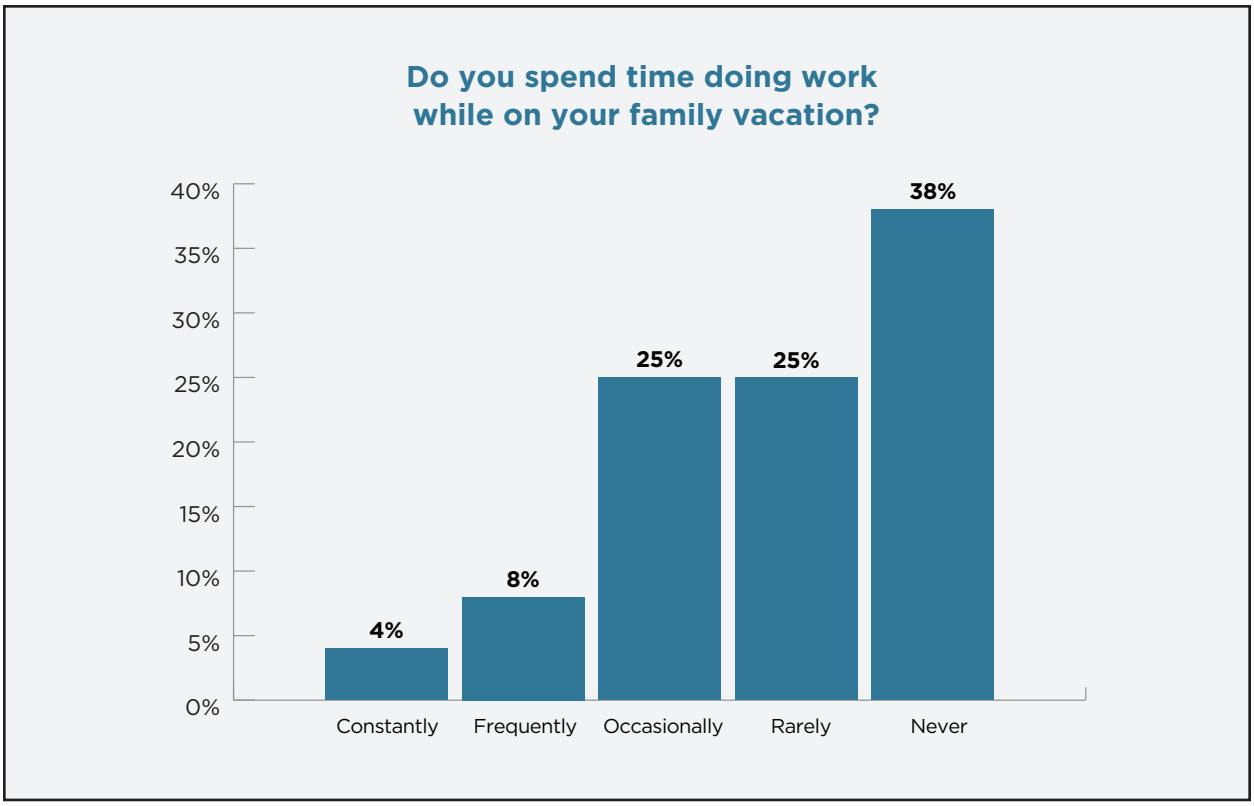


Of the respondents who had paid vacation time, over 50% did not use all of their vacation days last year.



Working While on Vacation

The survey included a new question that focused on whether respondents tended to engage in work-related activities while on vacation. 63% of the respondents reported that they rarely or never spend time doing work on their family vacation. A quarter of the respondents worked occasionally, 8% frequently, and 4% constantly.



TRAVEL DECISION-MAKING: INSPIRATION, PLANNING, AND BOOKING

The next section of the survey explored where US families find inspiration for their vacations and where they research and book travel options.

The first question focused on people who serve as sources of inspiration or information for family vacations. Friends and family members are the most common sources. The children themselves also are influential for more than half of the respondents.

When planning your family trip, who gives you information or inspiration for where you go and what you do? Please select up to three answers.

Friends	63%
Other family members	59%
Your children	52%
Bloggers/Journalists	19%
Travel agents	10%
Other parents at your children's school	8%
Your children's friends	5%
Your children's teachers	3%
None of the above	9%

The second question focused on other sources of inspiration and information. Travel websites influenced 59% of the respondents. Facebook also scored highly, influencing 40% of the respondents.

What other resources give you information or inspiration for where you go and what you do? Please select up to three answers.

Travel websites (TripAdvisor, Expedia, etc.)	59%
Facebook	40%
Magazines	25%
Guidebooks	24%
Advertising/Marketing	24%
TV shows	19%
Pinterest	15%
Blogs	14%
Instagram	10%
Newspapers	6%
Twitter	4%

The third question examined where US families research and book travel options. Search engines were a key resource for 74% of the respondents, and around half of the respondents used travel review websites. Social media sites were used by 30% of the respondents.

Where do you go to research and/or book travel options? Please select up to three answers.

Search engines	74%
Travel review websites	51%
Social media	30%
Travel supplier websites	14%
Guidebooks	13%
Magazines	12%
Travel agents	12%
Travel blogs	8%
Tourist offices	5%
Travel clubs	4%
Newspapers	2%

TRAVEL ATTITUDES

This section of the survey explored the travel attitudes of US families. The first question in this block explored what a family's main priority is when taking a family vacation. **Visiting new places and exploring** was the top response (49%), followed by relaxing and unwinding (42%). In the "Other" category, respondents often referred to visiting friends and family.

What is your main priority when you take a family vacation?

To visit new places and explore together	49%
To relax and unwind together	42%
To be active and outdoors together	6%
Other	3%

In the next question, respondents were presented with a number of attitudinal statements about family travel. The answer scale was as follows:

1) do not agree at all – 2) disagree somewhat – 3) neither agree nor disagree – 4) agree somewhat – 5) fully agree

The first question block focused on attitudes toward different trip types.

	Median	Average
We like to make our own travel arrangements	4	4.20
We prefer to stay at properties with kids' clubs	3	2.85
We prefer to stay at vacation rentals rather than in hotels	3	2.70
We prefer a cruise over land-based vacations	2	2.37
We prefer to go on an organized group tour	2	2.32
We prefer to use a travel agent	2	2.10

The findings above show a strong preference among respondents to make their own travel arrangements, and a fairly reserved attitude toward group tours and travel agents.

The second block focused on adventure, risk, and planning behaviors.

	Median	Average
I want to raise my children so they love to travel	4	4.07
When planning a trip, the safety of my children is the first thing on my mind	4	4.06
We plan our vacations carefully to avoid surprises on site	4	3.73
Vacations are a time to just lay back and relax	4	3.69
We like to visit places that offer entertainment and activities on site	4	3.69
Travel is an essential part of our well-being	4	3.67
The travel industry should offer more options geared toward children and families	4	3.61
Other people think we are an adventurous family	3	3.20
I am more worried now about traveling with my family than I used to be	3	3.19
Luxury is important when we travel	3	2.80
We travel to places many other families haven't been to	3	2.79
It is often very hard to find the travel options I am looking for	3	2.71
I don't like spending lots of time researching travel options	3	2.68
Travel with children is more trouble than it's worth	2	2.04

The findings above show that respondents greatly value travel in their family lives, as exemplified by the high scores for "I want to raise my children so they love to travel" and "Travel is an essential part of our well-being." They also highlight that the safety of the children is of utmost importance to respondents, and that many respondents plan their trips carefully to avoid surprises on site. The statements above were used as indicators for the three family travel profiles, which will be introduced in the next section of this report.

The third block focused on attitudes toward the educational/emotional value placed on travel.

	Median	Average
We often discuss memories of our trips as a family	4	4.29
It is important to me that my children understand different cultures	4	4.15
Travel is an important part of my child(ren)'s education	4	3.99
Travel has changed my relationship with my children for the better	4	3.85
We love to share images and impressions of our trip on social media	4	3.59

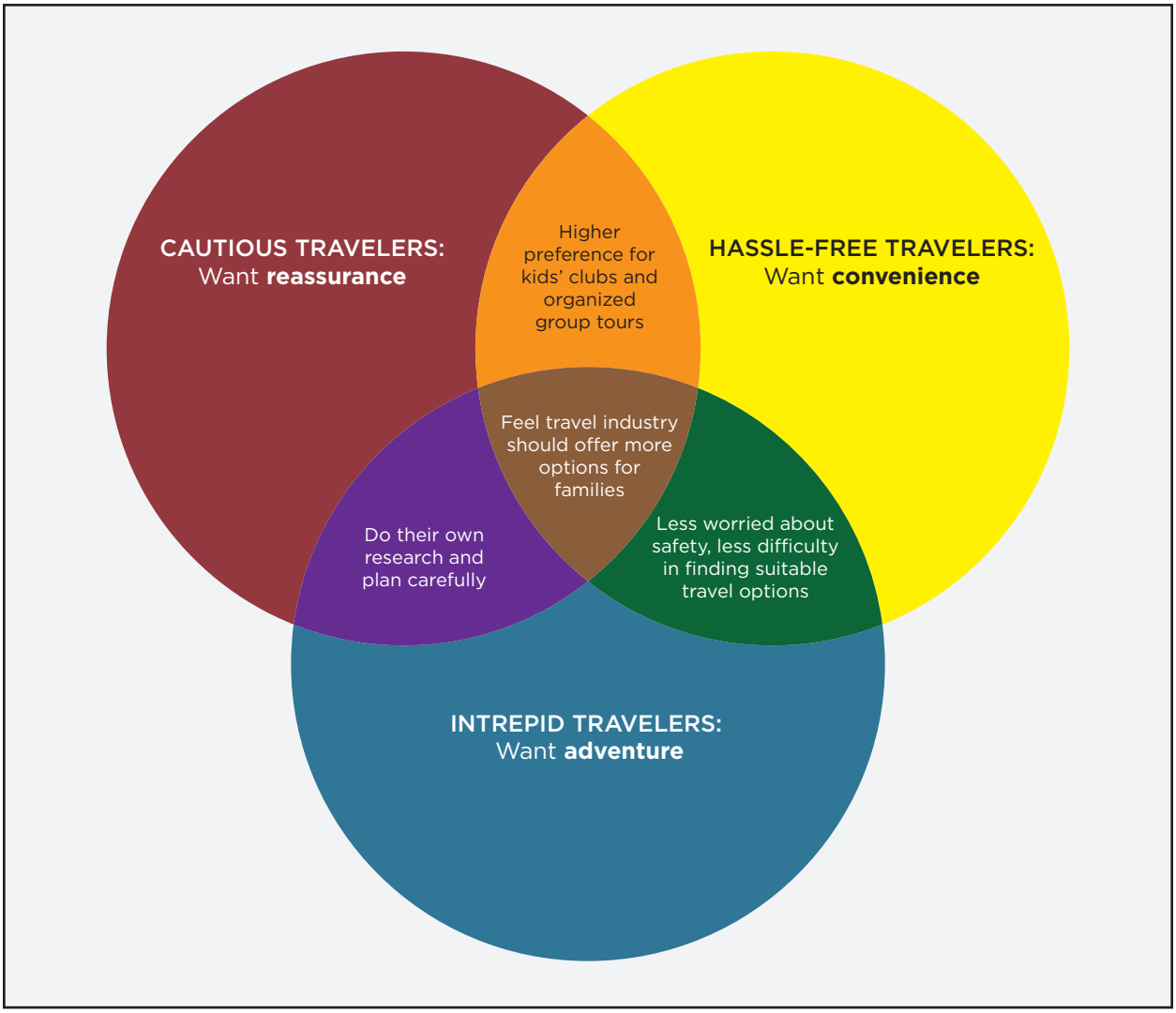
For three years in a row, attitude statements about the educational and relationship-building qualities of family travel have received consistently high scores. This highlights how the Family Travel Association's mission (to inspire families to travel—and to travel more—while advocating for travel as an essential part of every child's education) resonates strongly with the respondents. Parents find it important that their children understand different cultures, and families often discuss memories of their trips together.

Traveler Profiles

Since 2015, the US Family Travel Survey has distinguished three family travel profiles:

- Cautious Travelers
- Hassle-Free Travelers
- Intrepid Travelers

Each profile has its own distinct characteristics, which are outlined below and are confirmed in the findings of this new edition of the survey. New attitude statements, however, have revealed a more nuanced overview of the profiles and show that each has its own **attitude spectrum**: in other words, the boundaries between the profiles are somewhat fluid in some areas, and **several characteristics are shared between several groups**. These findings are summarized in the Venn diagram below.



Cautious Travelers

The *Cautious Travelers* are families who value travel and often put great effort into **researching and planning** family trips. They are attracted by many different travel products and destinations. However, they tend to stick to trips that are traditionally seen as "**family friendly**," such as theme parks and family-friendly hotels and resorts, because these products are regarded as "safe bets." Their travel decisions are greatly influenced by **worry and uncertainty**: they worry about safety, hygiene, whether a destination offers value for the money, whether a child will get sick, and whether activities are appropriate for children. They do not often visit destinations that are off the beaten track, but they **see themselves as fairly adventurous** families and want their children to experience different cultures. On the attitude spectrum, families who are most pronounced *Cautious Travelers* are more worried now about travel than they used to be and are more likely to use **travel agents**.

- More likely to worry about safety
- Want to know exactly what they will be getting in a travel product/destination
- Tend to prefer theme parks, hotels, group tours, and resorts
- More likely to find it hard to identify activities appropriate for children
- Like trying new places, but also return to destinations they like
- Feel that travel strengthens family bonds and makes children better global citizens
- More likely to take children out of school to travel

The *Cautious Travelers* remain the most prominent group in this edition of the survey, which can be linked to the following pronounced themes in the qualitative results:

- Concerns about affordability and value—travel is a considerable expense for families and they want to make sure they make the right choices
- Concerns about which information to trust
- Concerns about cleanliness, safety, healthcare, and security in unfamiliar destinations
- Concerns about the safety of children in crowded places
- Concerns about maintaining healthy diets on vacation, as well as worries about food allergies
- Concerns about providing children with experiences that are iconic (e.g., famous theme parks)
- Concerns about children being bored, as expressed in preferences for destinations that offer a lot of onsite activities (e.g., entertainment, pools)

Hassle-Free Travelers

The *Hassle-Free Travelers* are families who see travel as time for **relaxation** and indulgence. They seek comfort and **do not want to spend much time planning** the trip. Just like the *Cautious Travelers*, they are attracted to theme parks and family-friendly hotels/all-inclusive resorts, but their motivations are different: whereas the *Cautious Travelers* worry about safety and value and tend to research travel options carefully, the *Hassle-Free Travelers* look for options that allow the whole family to relax effortlessly. *Hassle-Free Travelers* are more likely to visit off-the-beaten-path destinations; however, they are likely to stay in **all-inclusive resorts** or take **organized tours**, as opposed to the *Intrepid Travelers*, and they **do not see themselves as particularly adventurous**. They **want to know exactly what to expect** on site and prefer destinations where all the **amenities** are readily available. On the attitude spectrum, families who are most pronounced *Hassle-Free Travelers* find **luxury** more important and are more likely to book **cruises**.

- More likely to prefer cruises, all-inclusive resorts, and organized tours
- Least likely to take children out of school to travel
- More likely to think that travel with children is a hassle
- More likely to return to the same destination
- Still place importance on the educational value of travel
- More likely to place more value on material possessions
- More likely to stay at home during vacations

Intrepid Travelers

The *Intrepid Travelers* are families who greatly value travel and are **confident**, **independent**, and **often experienced travelers**. They emphasize their interest in **exploring new cultures**, are likely to travel to **off-the-beaten-path destinations**, and often express disinterest in all-inclusive and packaged products, such as cruises. They have an interest in many different travel products and accommodation options, although the majority prefer hotel stays. Just like the *Cautious Travelers*, they are more likely to take their children out of school to travel and to **research their vacation carefully**. They are **least likely to use a travel agent**. On the attitude spectrum, families who are most pronounced *Intrepid Travelers* **see themselves as adventurous**, enjoy researching and planning their vacation, and want their children to grow up to love travel.

- Tend to prefer new destinations every time they travel
- Tend to travel to experience different cultures
- Tend to worry less about safety
- More likely to travel to unusual destinations
- More likely to take children out of school to travel
- Tend to value travel over material possessions

The findings of this survey have provided a more nuanced overview of the different traveler profiles and have exposed some interesting ways in which the travel profiles intersect and overlap.

- ***Cautious Travelers*** and ***Hassle-Free Travelers*** are opposites when it comes to planning and researching their vacations: *Cautious Travelers* prepare carefully and enjoy researching different options, whereas *Hassle-Free Travelers* do not want to spend much time planning. *Cautious Travelers* believe more strongly in the educational and social value of travel. However, **both groups enjoy travel options like group tours and properties with kids' clubs**: the *Hassle-Free Traveler* because of the convenience these options offer, the *Cautious Traveler* because of the peace of mind they bring.

- ***Hassle-Free Travelers*** and ***Intrepid Travelers*** are opposites when it comes to the value they place on travel. For *Intrepid Travelers*, travel is a much more central part of family life and their children's education. However, **both groups tend to worry less about safety** and **tend to find it less difficult to find suitable travel options** for their family.

- ***Cautious Travelers*** and ***Intrepid Travelers*** may appear to be total opposites: *Intrepid Travelers* are more likely to travel to unusual destinations and do not share the *Cautious Travelers'* deep concerns with safety, health, and hygiene. However, **both groups like to do their own research** and **tend to plan their vacations carefully**.

- When comparing levels of adventurousness, it is interesting to note that ***Cautious Travelers*** **tend to see themselves as more adventurous** than *Hassle-Free Travelers* do. (*Intrepid Travelers* see themselves as most adventurous.) This is of importance for marketing toward this group, which is the most prominent among family travelers: while *Cautious Travelers* want to be reassured about safety and hygiene, they also look for travel options that show them as open to adventure.

- **All traveler profiles agree that the travel industry should offer more options geared toward children and families**. This finding highlights that there is a demand for family-centered travel products and travel information among all three groups.

TRAVEL INDUSTRY EVALUATION

Travel Industry Scorecard

In this question block, respondents were asked to give the travel industry a grade for how well it serves their families' needs. The overall grade for the travel industry is a **B–**.

Overall, what grade would you give the travel industry (accommodations, airlines, attractions, cruise companies, etc.) when it comes to serving your family's needs?

A	19%
B	55%
C	23%
D	3%
F	0%

In follow-up questions, respondents were asked to grade different subsectors of the travel industry for how well each serves their families' needs. These top line results by subsector include feedback from all consumers, including those who have not had experience with a particular product or service. For some sectors, we also can provide a second grade from those consumers who have experienced that sector's product or service.

Airlines	
A	22%
B	42%
C	30%
D	10%
F	6%
C+	

Travel agents	
A	25%
B	37%
C	24%
D	8%
F	6%
C+	

Cruise companies	
A	32%
B	38%
C	20%
D	6%
F	4%
B–	

Restaurants	
A	37%
B	50%
C	11%
D	2%
F	0%
B	

Accommodation	
A	32%
B	52%
C	13%
D	2%
F	1%
B	

Tour operators	
A	28%
B	44%
C	20%
D	6%
F	2%
B–	

Online travel booking	
A	40%
B	45%
C	11%
D	3%
F	1%
B	

Car rental companies	
A	26%
B	44%
C	22%
D	6%
F	2%
B–	

For cruises and travel agents, we were able to use the data gathered in other questions to ascertain whether respondents who had direct experience with them rated them higher. Indeed, this proved to be the case: respondents who had taken **cruises** in the past rated cruise companies a high B, rather than a B–. **Travel agents** fared even better: respondents who had used them in the past rated them a B+, rather than a C+.

Below are the grades for cruise companies and travel agents from customers who have indicated in previous questions that they had used their services in the past. Unfortunately, these comparisons could not be drawn for the remaining categories, as no questions about their previous use were included in the survey.

Cruise companies	
A	47%
B	36%
C	13%
D	4%
F	0%
	B

Travel agents	
A	53%
B	30%
C	12%
D	2%
F	3%
	B+

The Ideal Vacation

Respondents were asked to describe their ideal vacation: either one they were planning now or one they would love to take in the future. The question yielded a wide range of responses, with the most commonly reported presented below.

Now we'd like you to imagine that you were going on your "ideal" dream vacation. It could be something that you are actively planning or something that's just a dream for right now. Please enter a brief answer in each box.

Destination
Walt Disney World
Europe: France, Italy, Greece, UK
US: Alaska, NYC, Las Vegas, Puerto Rico, Miami, Hawaii
Warm destinations, beach resorts
Asia: Korea, China, Japan
Mexico, Costa Rica, Aruba

Activity
Sightseeing, tours
Relaxing
Theme parks
Hiking
Eating and drinking
Shopping
Water-based activities: snorkeling, fishing, swimming, whale watching, dolphin cruise

Lodging
Resorts and hotels
Cruise ships
Disney cruises and hotels in Disney parks
Beach locations
Cabins

Length of time
Minimum of a week
Two weeks (most popular answer)
Longer (fairly rare)

Recommendations for the Travel Industry

The survey included a question about what the travel industry can do better to meet the needs of families. Below is a summary of the key recommendations that respondents entered in the text box.

Value for money

The majority of the comments focused on the availability of affordable travel options. Many respondents requested better deals or discounts for families.

"It would be really nice if they keep in mind that … there are a lot of single parents out there and we want to take our kids on fun vacations too but it's very difficult on only one salary! I work at a school, which means my vacation time is severely limited, and when I do get it, so does everyone else in the US. It would be nice if there were price breaks for ALL school employees (not just teachers) for some of the peak season times, since we don't really have a choice about when to take our vacation."

The cost of air travel also was a frequent source of frustration. Respondents commented that airfare is too high and that the additional baggage fees add to the cost. Families also want to sit together without paying additional fees.

Packaged travel options

A second recurring theme is a request for more packaged options, including transportation, accommodation, car rental, and activities. Respondents mention that they feel packaged products in the US are mainly available for theme parks, but they want a wider variety of domestic options.

"I REALLY REALLY REALLY want more all-inclusive package options in the United States! If I go to ANY other Caribbean country I can get my room, meals, activities, etc. all for ONE price, it does NOT exist in the US!!!! PLEASE help me out here and make some all-inclusive packages for families!!!!!!!"

"Offer more package deals that don't require a travel agent."

"All inclusive packages for families with children of all ages without the requirement to fly. More places to go with teenagers than amusement parks."

Better options for larger families

A large number of comments refer to the needs of larger families. Many address the limited accommodation options available that are affordable.

"Families are not just 2 parents and 2 kids. Very limited choices for families with 3 kids who sometimes travel with grandma"

"I wish we could find more hotels that would offer adjoining rooms or suites with more than one room, or at least a division between the 'living room' kind of area and the beds. It's hard when the kids go to sleep before the grownups, but we don't have a place to be without being in bed."

"Hotels could offer better room layout choices for families. We like to be able to put the kids to bed but then let the adults stay awake. Having a separate room for the beds and/or even just a partially separated area in the room makes this much easier but is VERY hard to find, even when we look at more expensive hotels. It's also not very easy to figure out how rooms are configured from photos—maybe hotels could offer a room ground plan view, just to help us out!"

"I have a family of 6—I can't split us up between 2 rooms because my kids are too little—even if we have adjoining rooms they would act up and be crazy. So I unfortunately have to lie and say there is only 5 of us and us go up to our room separately, then we are dealing with inadequate sleep space. There needs to be rooms that allow people with 4 or more kids that are small to all stay in one room—even if it is a couple extra dollars for the extra towels and bed linens—they need to understand that small children can not be left alone in a separate room all together even if the door is open between rooms—4 kids, even just 3 of them, all in one room when the parents can't completely see them doesn't allow the parents to easily put them to sleep."

"More hotel options offering multiple bedrooms/suites so kids and adults can have own space and together space without having to book a private home. Plus we can enjoy the amenities of the hotel. Also, include a good breakfast and free wifi."

More comprehensive, reliable information and transparent pricing

Many respondents commented that finding reliable information about the destination and the accommodation can be a challenge. They also complain that pricing information does not reflect hidden costs and extra fees.

"More visuals of the current state of the establishment. Not picture of what the place looked like when first opened."

"On some of the websites, the distance to attractions in the area of the hotel we are staying at are not accurate."

"More transparency about additional fees such as resort fees/taxes, etc. Stop with the hidden fees tacked on at the end and making them unavoidable, just have upfront pricing."

Accessible travel

Parents with children with disabilities and families where a parent has a disability commented on the lack of accessible options when they travel.

"Better accessibility for families with disabled children. I won't fly because getting my daughter and her wheelchair through security is a nightmare"

"Just an emphasis on wheelchair-friendly activities and make things more accessible. It's hard to get around with a seven-year-old in a wheelchair."

"Be more aware of ADA standards and different accessibilities. For instance, in regards to hotels: an accessible room at the far end from the elevator might not be a problem for a wheelchair user, but for our family (my husband walks short distances with canes and I carry all of the luggage and the baby) it is not as accommodating."

Surprise and Delight

As a final question, respondents were asked whether they had ever been really impressed or delighted with a travel experience that made their family vacation extra special. Below is a selection of the comments respondents entered in the text box.

Kind and knowledgeable staff

"Just the generosity of others. I am a large family and going anywhere is a handful. It's the kindness of others that gets us through the process."

"I received very helpful information and assistance from a front desk clerk at a Holiday Inn I once stayed at. She was very kind and friendly and made a bad day/trip much better."

"We've encountered some really great staff at the hotels we've stayed at. They introduce us to local attractions and restaurants that we may not have otherwise known about."

Unexpected freebies

"When you walk into a hotel and they offer you hot, delicious cookies or give you something free. Like free bottled water. It's the small things. One hotel leaved a small bag of locally made chocolates on our pillows each night. When they saw we had kids, the housekeepers started leaving additional treats for them. Nice local soaps in the bathroom are nice, natural organic products even better. Upgrading you to a better room at no cost, if something is available. One hotel went out of their way on our anniversary, sending us a free bottle of champagne, fancy desserts, upgrade to penthouse suite. Truly above and beyond."

"I like to get free stuff, even if it is secretly included in the initial price of the stay/trip. Just getting something free makes my brain waves spike! (Even though it really isn't free … haha)"

Expertise of travel agents

"Yes one trip to Mexico the travel agent pre-arranged VIP for our family to attend local events … Great surprise!!"

"Oh yes! Once we planned our vacation with an agent she was so caring she looked every single place, restaurant where my family and I would get advantage. That was the best experience, we enjoy every single moment because everything was as exactly the agent prepared for us, not delay, no misinformation."

CONCLUSION

US families love to travel and vary widely in their travel behaviors and attitudes. Some generalizations, however, can be made, which have been consistent for the past three editions of this survey:

- Affordability and value for money remain a dominant factor in the family travel decision-making process.
  - It is the main reason for non-participation in family travel.
  - It is the main challenge experienced by families who do travel.
  - It is the main factor that guides which accommodations families choose.
  - It is the main focus of recommendations families have for the travel industry.

  Organizations like the Family Travel Association can play a central role in informing families about travel products and destinations to fit different budgets. Respondents highlight that they seek affordable package deals that are easy to book.
- Large families continue to comment that their needs are not served adequately by the travel industry. They continue to face challenges when trying to book suitable hotel accommodations. Not all families are keen to book a vacation rental, as they wish to make use of the amenities at the hotel.
- US families continue to place a high value on the role of travel in their family relationships and in the education of their children. The great majority want their children to experience different cultures and to become better global citizens.
- Among US family travelers, three profiles can be distinguished: *Cautious Travelers*, *Hassle-Free Travelers*, and *Intrepid Travelers*. While each profile has distinct characteristics, the boundaries between profiles are at times fluid, and two seemingly opposite profiles can share similar attitudes.
- All profiles agree that the travel industry should do more to meet the needs of families.

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Founded in 1995, the NYU School of Professional Studies Jonathan M. Tisch Center for Hospitality and Tourism was established in response to the growing need for hospitality and tourism undergraduate and graduate education. Hospitality and tourism are major global economic sectors, and the Tisch Center serves these growing and evolving industries by offering relevant, cutting-edge curricula that attracts bright, motivated students who seek to become leaders in their fields. Through its undergraduate degree in **hotel and tourism management**; its graduate degrees in **hospitality industry studies** and **tourism management**, a plethora of **career advancement courses** and **diploma programs**, and its **world-renowned conference**, the Tisch Center provides students with the tools to enable them to manage change, to communicate, to thrive in complex work environments, and to advance the businesses of hospitality and tourism.

For more information, visit **sps.nyu.edu/tischcenter**.