NYU SCHOOL OF PROFESSIONAL STUDIES

FAMILY TRAVEL ASSOCIATION
Changing Lives Through Travel

FTA Family Travel Survey 2016

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INTRODUCTION BY RAINER JENSS
President & Founder, Family Travel Association

Why Family Travel Will Continue to Grow

In October 2014, the Family Travel Association was officially launched with one primary objective: to bring the travel industry together to inspire families to travel—and to travel more. The belief was that, despite the rapid growth in family and multigenerational travel, 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.

For the third year in a row, Virtuoso has proclaimed family and multigenerational travel to be one of the hottest trends in the travel industry. So why would this segment, which accounts for over one-third of all leisure trips, need an association to help grow demand?

There are several reasons why I believe that today, right now, is precisely the time to double down on family travel. Besides the not-so-inconsequential detail that America looks to be lagging behind the rest of the developed world in producing world-ready workers, I've always maintained that not enough parents in the US 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.

But has there been any research to back up this assertion? Not really.

So to learn more about what's really going on in this country when it comes to families and their travel habits and attitudes, we joined forces with New York University to take a snapshot of the market today. This report highlights the results of our second year of conducting what is arguably the most comprehensive research study of American traveling families.

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

"We were very excited to continue working with the Family Travel Association on this study," said Dr. Lynn Minnaert, clinical associate professor at the NYU School of Professional Studies. "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 did we learn? For starters, we appear to be correct in our premise that, despite the steady increase in family/multigenerational travel, there's plenty more room for growth!

As we started sifting through 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 prefer to stay at home for vacation and are more likely to think traveling with children is 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.

However, the second group, or *Cautious Travelers,* wants to visit new places and likes to travel to experience different cultures. In addition, most are more willing for their kids to miss school to travel. They do worry about safety, though, and finding 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 they want to keep their families safe when traveling, this is not their main focus.

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 to 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, need assistance booking their travels, and 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.

What's New in 2016

There were two main shifts in our 2016 survey, compared to the 2015 edition. The first has to do with the sample for this research: while the sample still covers a broad range of families, the respondent group in this round skewed toward higher educational levels, and fewer respondents had a family income below $40,000 per year. This could help explain why the likelihood to travel, as well as the average number of trips per year, is higher this year than in 2015.

A second shift has to do with the topics the research covers. This year, we expanded the survey to include questions about multigenerational travel—asking parents how and why they vacation together with their own parents and children. What did we learn? That Virtuoso is right. This is a robust and growing segment that is strongly represented in the family travel market space: 60 percent of the respondents have taken a multigenerational trip. Of the 40 percent who have not, 26 percent are considering this option for future vacations. This highlights the great potential of multigenerational travel, and the need for the travel industry to respond to the needs of this growing market segment.

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, Jonathan M. Tisch Center for Hospitality and Tourism

In this second edition of our exploratory study, the Family Travel Association and the Johnathan M. Tisch Center for Hospitality and Tourism (NYU School of Professional Studies) examine the under-researched phenomenon of family travel in the US. The study examines the following about families:

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

Key Findings

- 95 percent of the respondents are either "very likely" or "likely" to travel with their children in the next two years.
- Respondents took an average of 4.20 domestic trips and 1.26 international trips with their children in the past year.
- Families most prefer to travel with their children when the children are between the ages of 6 and 12.
- Affordability is the most prominent challenge for family travel. While this mainly affects lower income families, even higher income families raise this as a concern.
- Of the respondents who had paid vacation days, more than 50 percent did not use all of them last year.
- The respondents' household income is the most prominent demographic factor to influence travel behaviors and challenges. Travel attitudes and preferences are, however, linked to psychographic factors.
- Search engines are the most important information source for many families but do not always provide information that is seen to be reliable and trustworthy.
- 60 percent of the respondents have taken a multigenerational trip. Of the 40 percent who have not, 26 percent are considering this option for future vacations. In 61 percent of cases, the cost of the trip is split between parents and grandparents.

Opportunities for the Travel Industry

Several subsectors within family travel show great potential for growth with new customer groups. The following travel experiences were highly desirable for respondents, even if they have not taken this type of trip before:

- Visits to national parks
- Cruises
- Safari and wildlife viewing

Multigenerational travel also holds great potential: only 14 percent of the respondents have not taken a multigenerational trip before and are not planning one in the future. While it is often presumed that grandparents are the driving force behind multigenerational travel, this study has found that in 45 percent of cases, the parents plan the multigenerational trip. In 36 percent of cases, the parents and grandparents plan the trip together.

Cautious Travelers are the most common traveler profile. Respondents also indicate that they somewhat agree that "figuring out if an activity or attraction is appropriate for the child(ren)'s age(s) is hard." The information that is available about travel options and providers can be overwhelming. A tailored resource, specifically directed at families and differentiating between travel options that suits different budgets and preferences, is perhaps sorely lacking.

Dr. Lynn Minnaert
Jonathan M. Tisch Center for Hospitality and Tourism
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New York University

SURVEY OVERVIEW AND RESPONDENTS

Survey Design and Administration

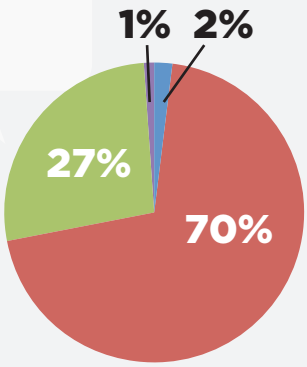
The survey presented here consisted of six survey blocks:

- *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.
- *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 age for traveling with children.
- *Travel Challenges:* Questions in this block focused on the factors that can make family travel more difficult, and their relative prevalence. All respondents were asked to assess a core list of challenges, after which the respondents were randomly assigned three challenges to assess in further detail.
- *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:* In this block, respondents were asked to rank information sources for travel and assess the level of influence the children had in the decision-making process.
- *Demographics:* Respondents were asked to identify their gender, income level, state, education level, ethnic background, and the number of paid vacation days to which they have access.

The survey was designed in Qualtrics and distributed via our partner, Scholastic. The survey was in the field from April until August 2016.

Survey Respondents

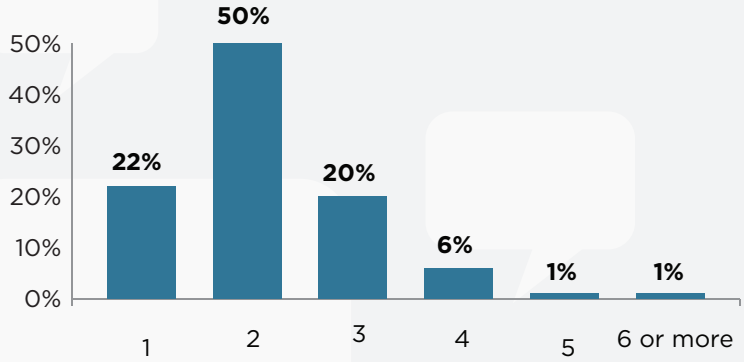
Respondents by age



716 respondents

- 19–29
- 30–44
- 45–59
- 60–75

Respondents by number of children

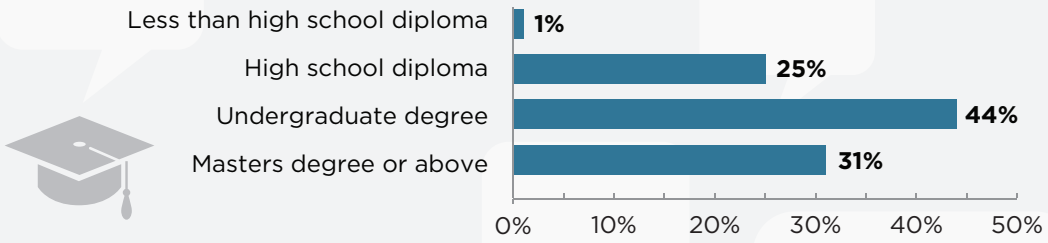


Respondents by gender

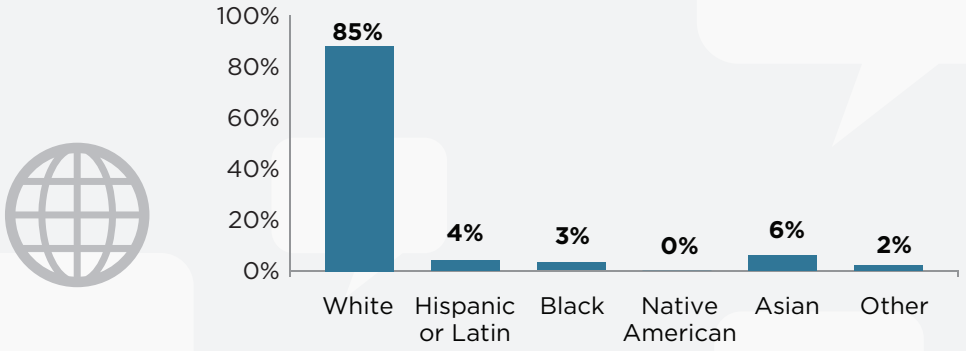
1%
Male

99%
Female

Respondents by level of education



Respondents by ethnicity



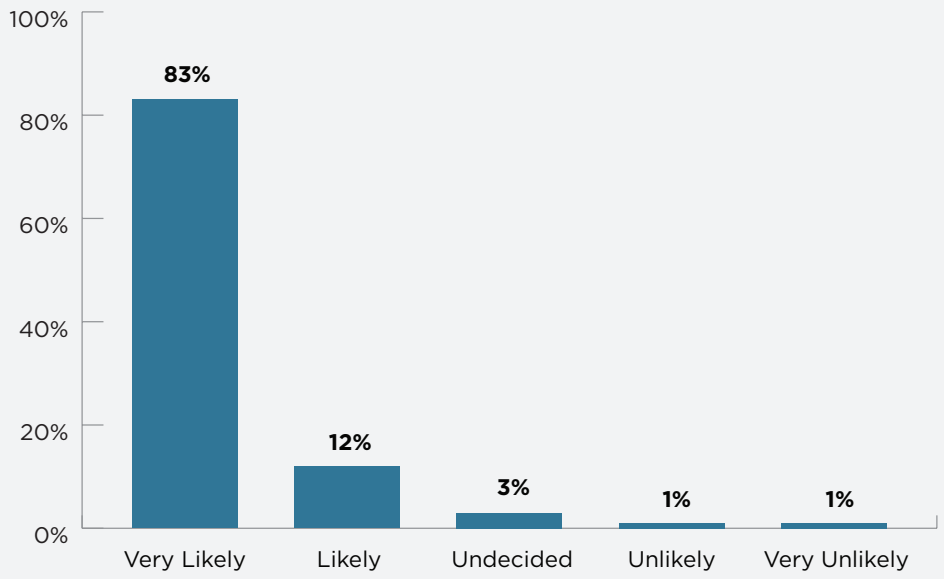
Respondents by household income

Geographical spread: 49 states represented

FAMILY TRAVEL BEHAVIOR

US families love to travel! 93 percent of the respondents are either “very likely” or “likely” to travel with their children in the next two years. Only 2 percent are “unlikely” or “very unlikely” to travel with their children.

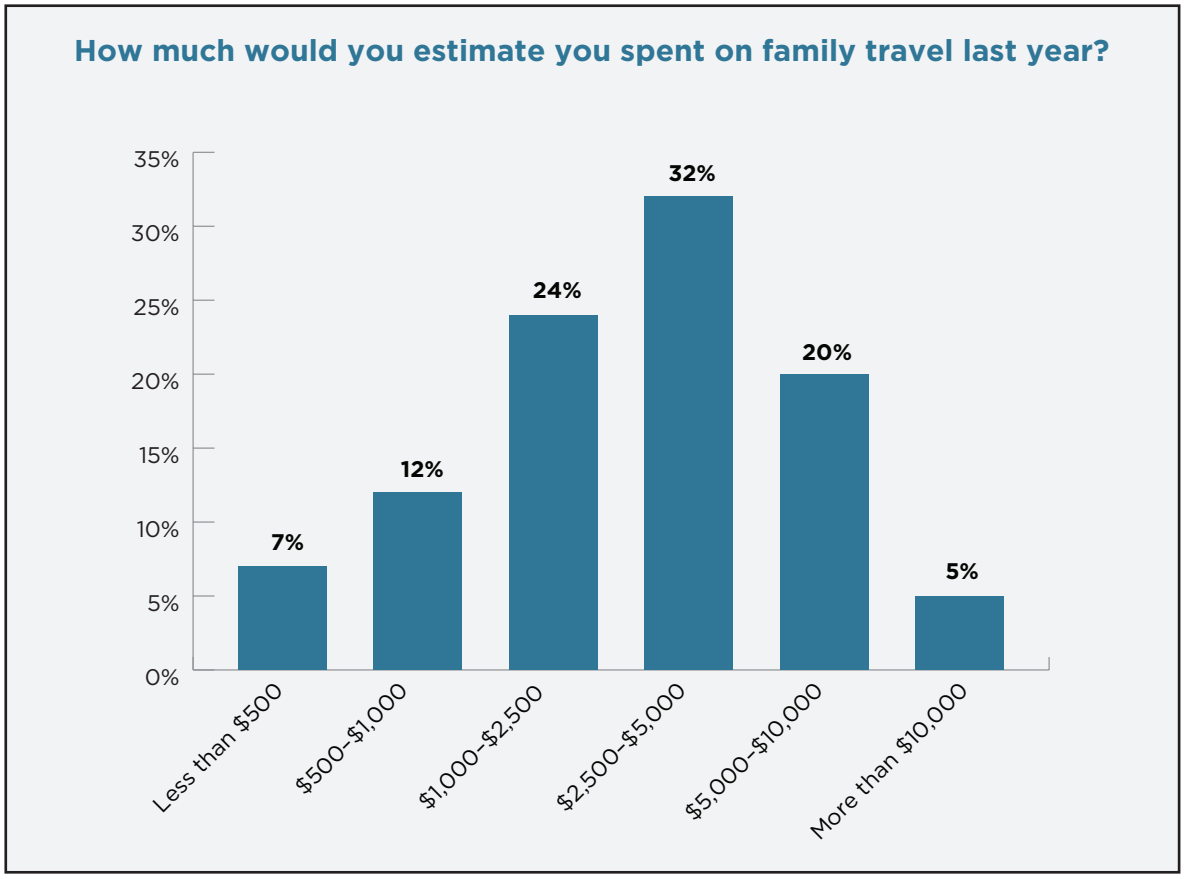
How likely are you to travel with your children in the next two years?



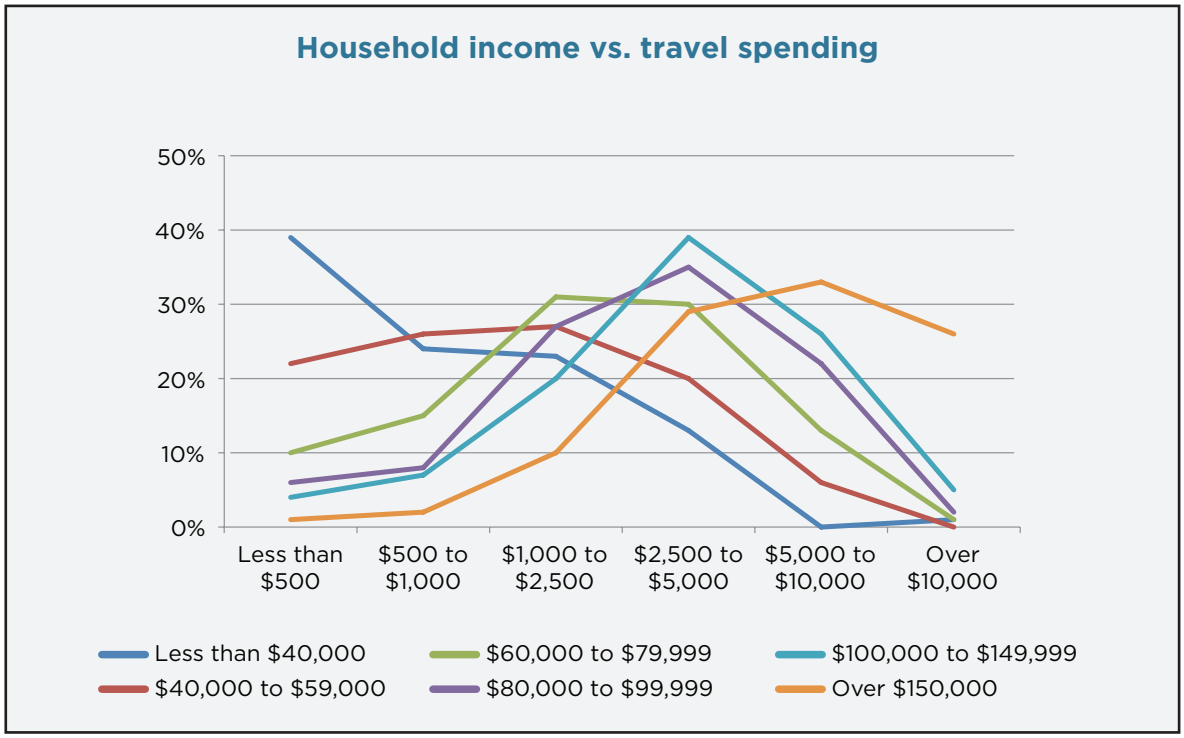
Average number of trips per household in the past 12 months

	Domestic with children	Domestic without children	International with children	International without children
Average	4.02	1.76	1.26	1.09

Over half of the respondents spend between $1,000 and $4,999 on travel each year.



Household income and travel spending are clearly linked.



Family Travel Preferences

Travel types: past trips and future plans

	Taken in the past	Likely to take in the future
Day trip	88%	99%
Weekend getaway	84%	98%
Multi-day vacation in US	84%	98%
Theme park	82%	94%
Trip to see relatives	82%	92%
Museum or cultural attraction	82%	95%
City vacation	82%	88%
Beach vacation	77%	94%
Family road trip	76%	94%
Attending sport events	59%	76%
Visit to national park	52%	92%
Camping trip	49%	69%
Family reunion	42%	61%
Competing in sport events	32%	54%
Safari or wildlife viewing	26%	60%
Multi-day vacation international	25%	57%
Cruise	20%	56%
Ski or snowboard trip	15%	40%
RV trip	13%	41%
Volunteer or mission trip	10%	38%

Some noteworthy findings:

- Volunteer trips, ski and snowboard trips, RV trips, and cruises emerge as relatively niche products for family travel.
- A quarter of the respondents have been on a multi-day international vacation, but 57 percent of the respondents are planning to take one in the future.
- National parks have great potential in the family travel market. This category shows the greatest difference between past activity (52 percent) and future plans (92 percent).

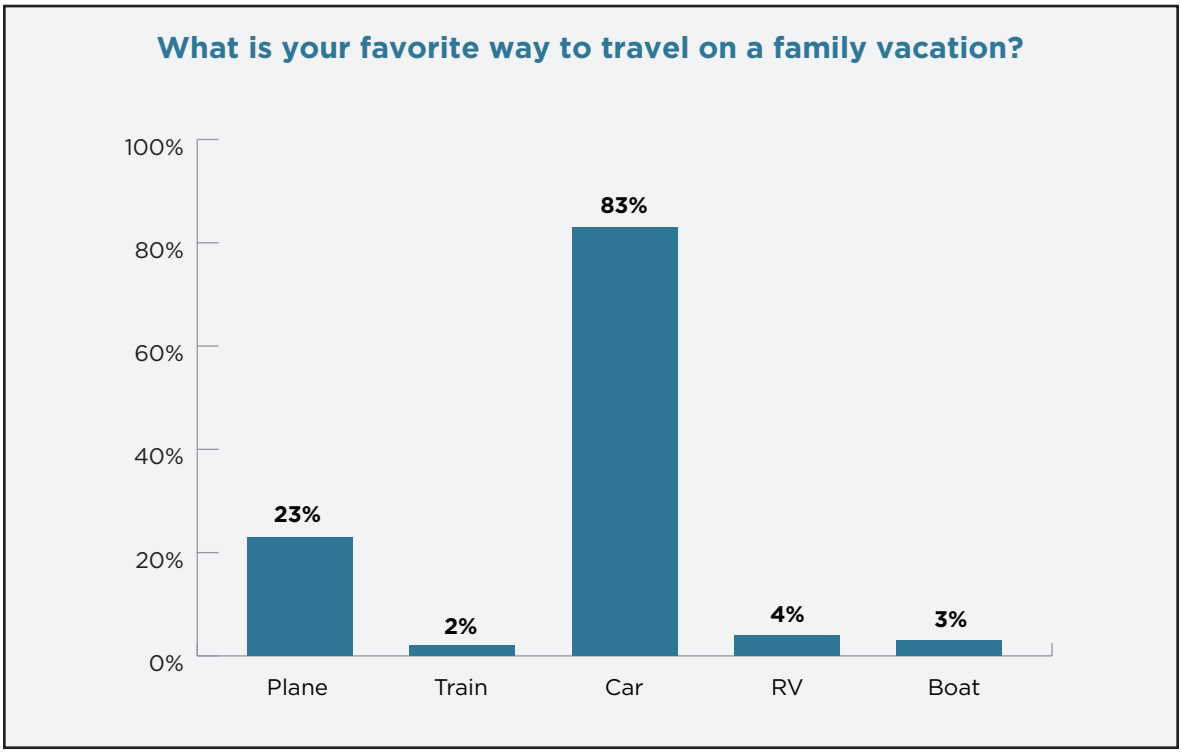
Loyalty

Respondents who have taken a certain type of trip in the past are likely to take the same type in the future. Day trips, weekend getaways, and multi-day vacations in the US have the highest loyalty; volunteer and mission trips have the lowest loyalty.

	Will take again	Will not take again
Day trip	99%	1%
Multi-day vacation in US	97%	3%
Weekend getaway	97%	3%
Museum or cultural attraction	95%	5%
Family road trip	94%	6%
Beach vacation	94%	6%
Theme park	94%	6%
Trip to see relatives	92%	8%
Visit to national park	92%	8%
City vacation	88%	12%
Attending sport events	76%	24%
Camping trip	68%	32%
Family reunion	61%	39%
Safari or wildlife viewing	60%	40%
Multi-day vacation international	57%	43%
Cruise	56%	44%
Competing in sport events	54%	46%
RV trip	40%	60%
Ski or snowboard trip	40%	60%
Volunteer or mission trip	38%	62%

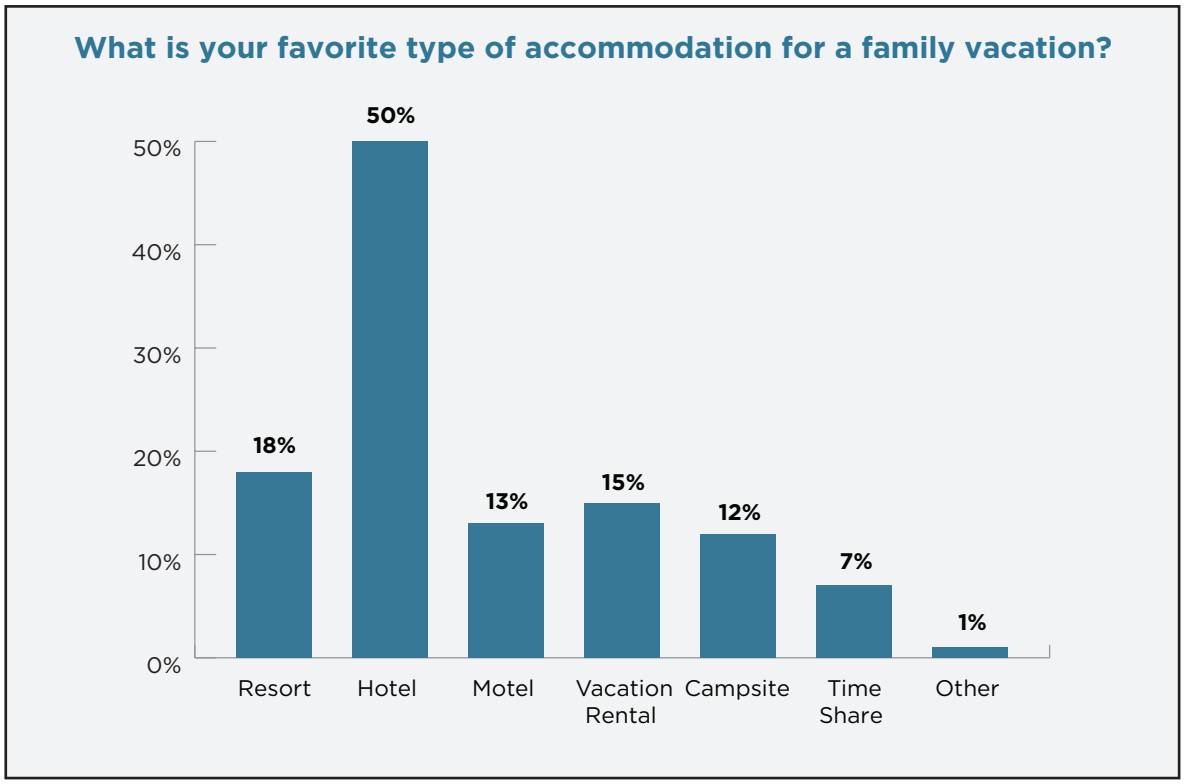
Transport Preferences

Overall, respondents prefer to travel by car. There is, however, a greater preference for air travel as income goes up: planes are the top choice for the highest income category (household income over $150,000).



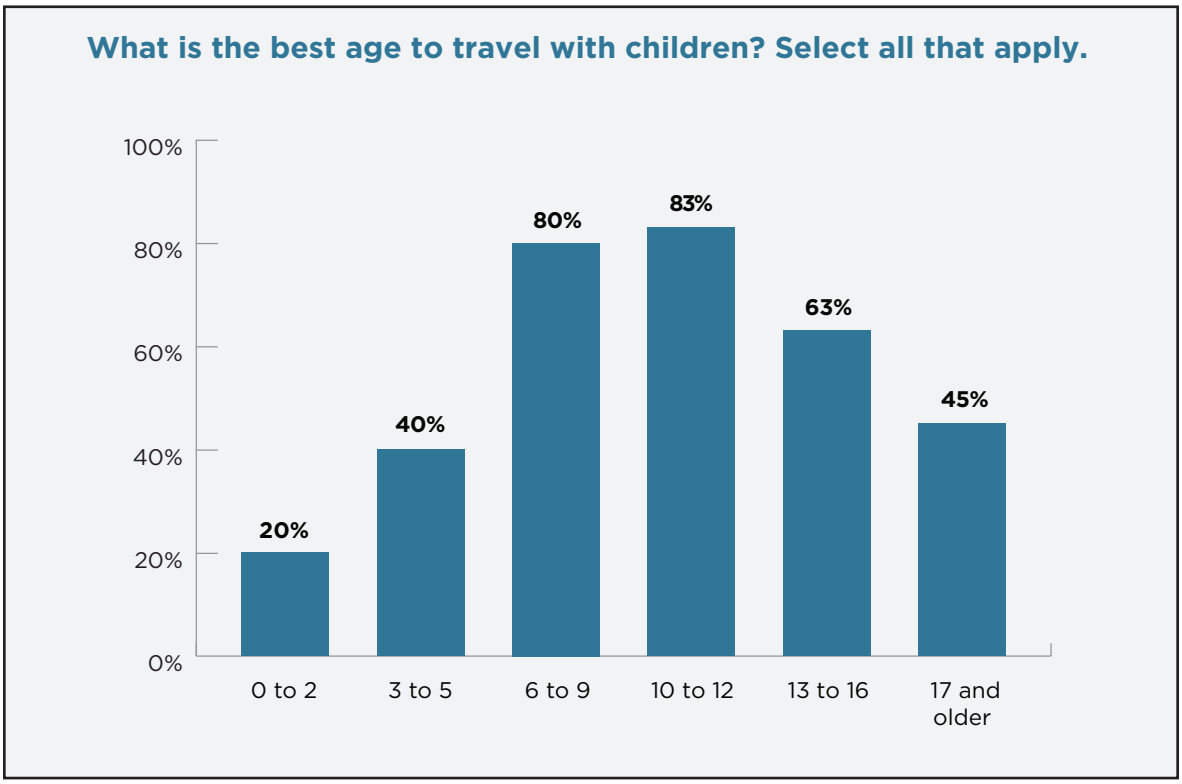
Accommodation Preferences

Overall, respondents prefer to stay in hotels. There is, however, a greater preference for resort as income goes up: resorts are the top choice for the highest two income categories. Hotels are the most popular choice for families with household incomes up to $100,000.



Age of the Children

The preferred age to travel with children is between 6 and 12 years old.



The least preferred age to travel with children is when they are the youngest: between 0 and 2 years old. Preference then rises to 40 percent for the age bracket of 3–5 years old. Most respondents feel that the best time to travel with children is when they are between 6 and 12 years old. The age category of 13–16 years old also scores high with 63 percent. Then, a decline is noticeable to 45 percent for travel with children 17 and older.

FAMILY TRAVEL CHALLENGES

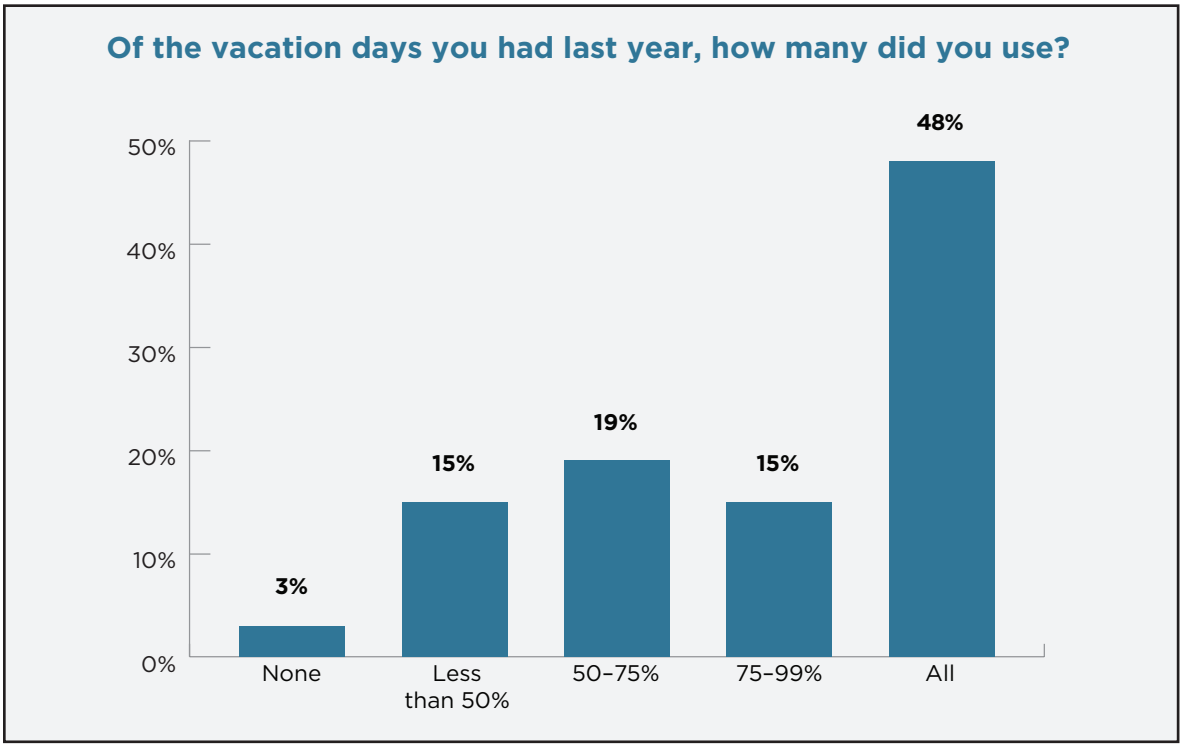
Respondents were asked to rank challenges that can make family travel more difficult on a scale of 1 to 5:

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

"Affordability" received the highest score, followed by "timing of school breaks" and "available vacation time."

	Mean
Affordability	3.38
Timing of school breaks	2.74
Available vacation time	2.65
Finding adult time while traveling with children	2.64
Planning the trip	2.29
Choosing accommodations	2.28
Finding a destination or activity everyone will enjoy	2.27
Flying with children	2.26
Packing for the trip	2.22
Dining out while traveling	2.21
Traveling by car with children	2.18
Keeping children safe and healthy when traveling	2.17
Airport security	2.12
Family members getting along	2.09
Passport and visa requirements	2.01
Age(s) of my child(ren)	1.97
Health and physical limitations	1.56

While “available vacation time” is indicated as the third biggest challenge for families, the survey results also show that over half of the respondents who have access to paid vacation days do not use all of them.

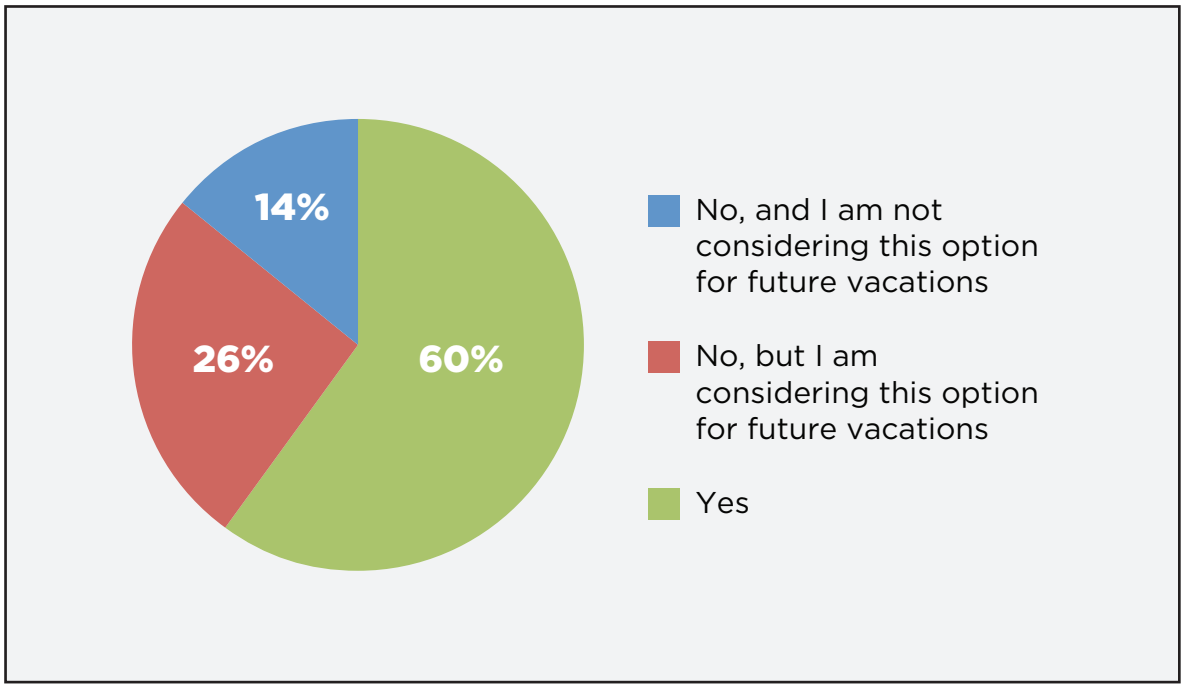


MULTIGENERATIONAL TRAVEL

A new addition to the 2016 Family Travel Survey was a series of questions about multigenerational travel. In the context of this study, "multigenerational travel" refers to trips that include at least one child under the age of 17 and their parents and grandparents.

How Common Is Multigenerational Travel?

60 percent of the respondents have taken a multigenerational trip. Of the 40 percent who have not, 26 percent are considering this option for future vacations.



Why Do Families Take Multigenerational Trips?

Family bonding is a prime motivator for intergenerational travel.

It is a great way to bond as a family	85%
My child(ren) enjoy it when the grandparents come along on the trip	67%
It is a way to create family habits and traditions	41%
It is a tradition in our family to travel together	31%
It is our way of giving our parents a special treat	30%
We can share childcare duties	29%
My parents want to show my children the world	16%
Other	5%

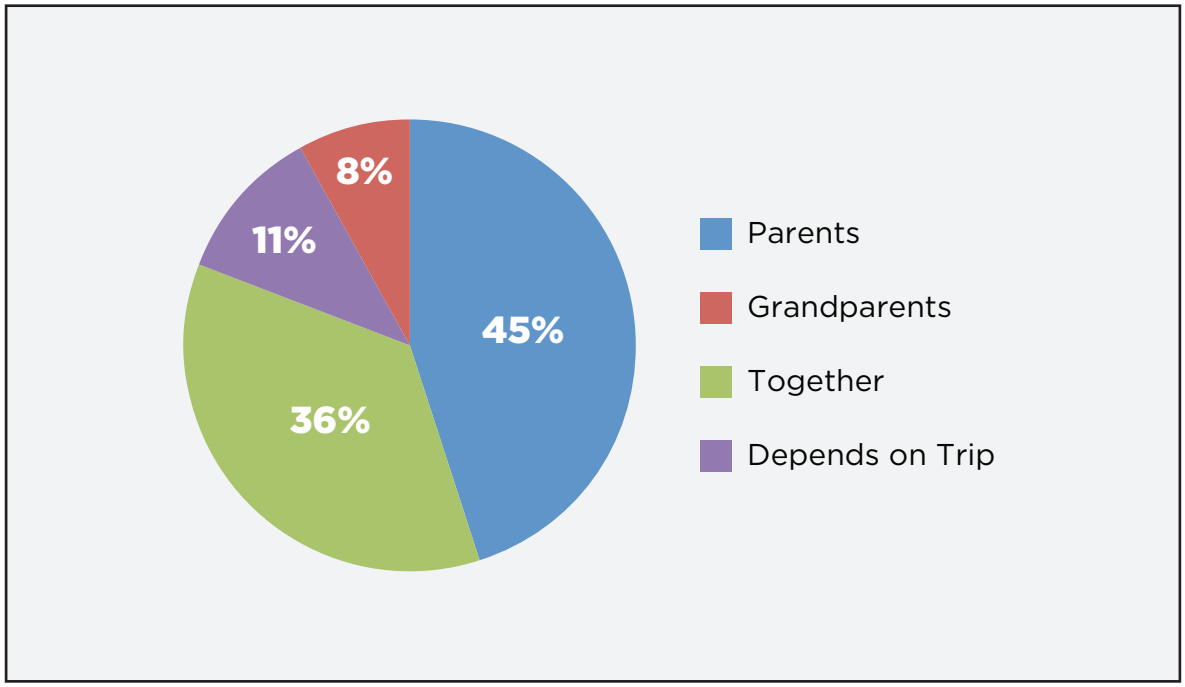
What Are Inhibitors to Multigenerational Trips?

For those who are not considering multigenerational travel, health limitations and timing are key inhibitors.

My parents have health limitations that prevent them from traveling	34%
It is hard to find a time when everyone is available	31%
I don't like to travel with my parents	20%
My parents are deceased	20%
It is hard to find a destination everyone will like	19%
It would be too expensive	19%
I worry it may lead to conflicts in the family	16%
My parents are too old to travel	12%

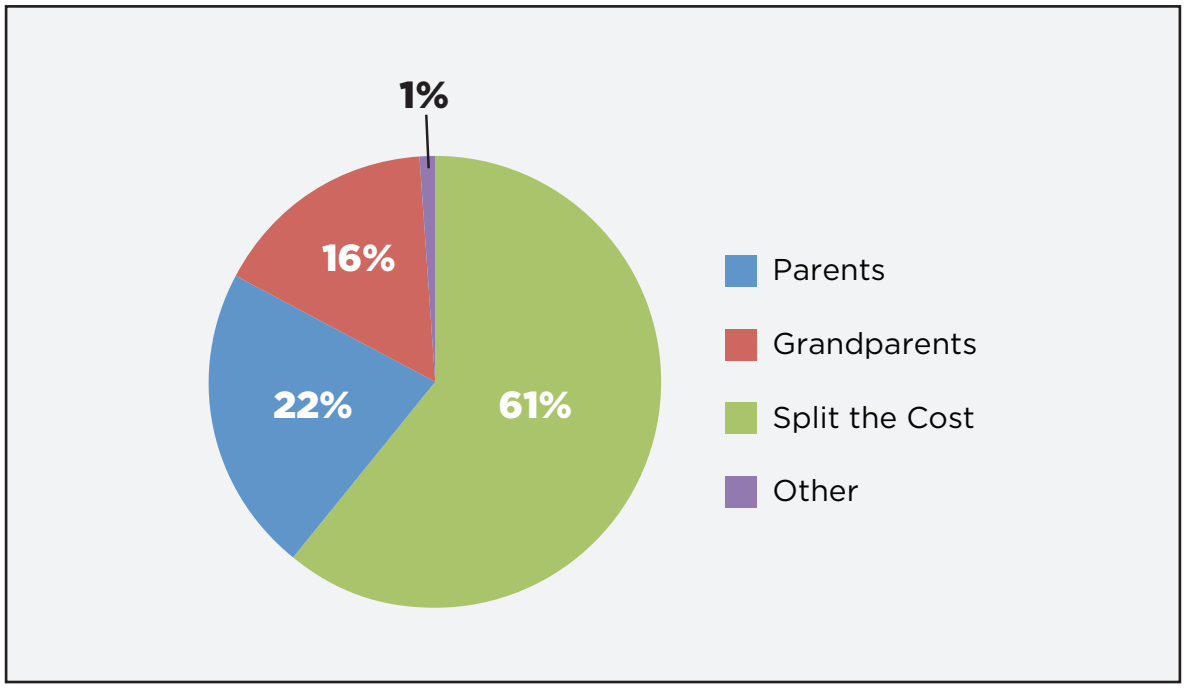
Who Plans the Multigenerational Trip?

In 45 percent of cases, the parents plan the multigenerational trip. In 36 percent of cases, the parents and grandparents plan the trip together.



Who Pays for the Multigenerational Trip?

In 61 percent of cases, the cost of the trip is split between parents and grandparents.



TRAVEL ATTITUDES

In this section of the survey, 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

	Mean
We like to make our own travel arrangements	4.18
We prefer a new destination each time we travel	3.26
We prefer to stay at vacation rentals	2.75
We prefer to stay at properties with kids' clubs	2.69
We usually travel on all-inclusive vacations	2.30
We prefer to go on a cruise	2.23
We prefer staying at home to traveling	2.21
We prefer to go on an organized group tour	2.17

The second block focused on attitudes toward destinations and activities.

	Mean
Once we find a destination we like, we tend to return to it	3.62
We travel to experience a new and different culture	3.34
I would consider having my child(ren) miss school to travel	3.20
We like to travel to unusual and off-the-beaten-path destinations	2.93
Figuring out if an activity or attraction is appropriate for the child(ren)'s age(s) is hard	2.56
Many destinations are unsafe for family travel	2.54
Travel with children is more trouble than it's worth	1.79

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

	Mean
Family vacations enrich a child's education	4.41
Travel brings us closer together as a family	4.28
I believe travel makes children better global citizens	4.09
Traveling with my child(ren) makes me a better parent	3.79
I prioritize travel experiences over material possessions	3.68

It's Not About Income, It's Attitude

Correlations between the different attitude statements, combined with qualitative data from the survey, highlight that three different family travel profiles can be distinguished. They are presented below, along with their main attributes (note: the principal characteristic is listed first). Although some attributes overlap between the different profiles, they each have their distinct characteristics.

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 believe more strongly in the value of travel for children and would consider taking their children out of school, but they are generally too worried about all the uncertainties associated with travel to go far off the beaten track.

- More likely to worry about safety
- Tend to prefer theme parks, hotels, 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
- Still may travel to experience different cultures
- More likely to take children out of school to travel

The *Cautious Travelers* are the most prominent group in this 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*. *Hassle-Free Travelers* are more likely to prefer staying at home than traveling. They also tend to place greater value on material possessions than on travel experiences.

- 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 travel with children is a hassle
- More likely to return to the same destination
- Still place value 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. 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.

- 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

TRAVEL DECISION-MAKING

This section of the survey examined the information sources the respondents use when making travel decisions. In the first question, respondents were asked to check any information source they are likely to use when planning a trip.

Recommendations of family and friends	81%
Search engine (e.g., Google, Bing)	77%
Online booking site (e.g., Expedia, Travelocity, Kayak)	61%
Travel review websites (e.g., TripAdvisor, Yelp)	60%
Social media	47%
Travel supplier website (e.g., hotel, cruise line, airline)	39%
Magazines	38%
Guidebook	34%
Travel club (e.g., AAA)	28%
Travel blogs	27%
Tourist office website	23%
Travel agent	14%
Newspapers	14%
Tourist office—in person or via phone	11%
Tour operator website or brochure (e.g., Globus, Collette)	8%

They were then asked to identify their most important information choice among the options they had checked.

Search engine (e.g., Google, Bing)	32%
Recommendations of family and friends	22%
Travel review websites (e.g., TripAdvisor, Yelp)	15%
Online booking site (e.g., Expedia, Travelocity, Kayak)	11%
Travel supplier website (e.g., hotel, cruise line, airline)	4%
Guidebook	4%
Travel club (e.g., AAA)	4%
Travel blogs	2%
Social media	2%
Tourist office website	2%
Magazines	1%
Travel agent	1%
Tourist office—in person or via phone	1%

The dominant use of search engines is clear in both questions. Findings in previous questions have highlighted that it can be challenging to identify a trustworthy source of information for family travel. This could be linked to the fact that most families are faced with an overwhelming plethora of choices when relying on search engines. That also validates the potential demand for a central information source specific to family travel.

Role of the Children

Respondents were asked to assess the level of influence the children have in travel decision-making. They were asked to evaluate the statements below on a scale of 1 to 3:

1) none – 2) a little – 3) a lot

	None	A little	A lot
Deciding whether or not to go on a trip	37%	47%	16%
Choosing the destination to go to	14%	63%	23%
Collecting information about the chosen destination	37%	47%	17%
Choosing accommodation	56%	33%	11%
Selecting activities to do while away	8%	57%	35%
Choosing a specific travel supplier or brand (e.g., hotel, airline, cruise line, tour operator)	72%	20%	8%

The results show that children have the most influence in choosing activities to do while away, and the least influence when it comes to choosing a specific travel supplier or brand.

CONCLUSIONS

This survey has examined US families'

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

This study confirms the three psychographic profiles in family travel, highlighted in the 2015 US Family Travel Survey: *Cautious Travelers*, *Hassle-Free Travelers*, and *Intrepid Travelers*. Families, just like other travelers, are not a cohesive market segment, and each segment is identified by its own behaviors, challenges, and attitudes. *Cautious Travelers* are the most prominent segment identified in this study: this points to a potential future role of the Family Travel Association as a trusted information source, which can help reduce the uncertainty associated with more off-the-beaten-track travel options.

Multigenerational travel was a new focus area in the 2016 edition of the US Family Travel Survey. The findings show that multigenerational travel is a prominent and growing niche within family travel: 60 percent of the respondents have taken a multigenerational trip in the past. Of the 40 percent who have not, 26 percent are considering this option for future vacations. While grandparents are often perceived as the driving force and the funders of these trips, the findings of this study show otherwise. In 45 percent of cases, the parents plan the trip. In 61 percent of cases, the cost of the trip is split between parents and grandparents. Marketing communications aimed at multigenerational travelers should, therefore, target parents as well as grandparents.

ABOUT

The NYUSPS Jonathan M. Tisch Center for Hospitality and Tourism

The NYUSPS Jonathan M. Tisch Center for Hospitality and Tourism has prepared global leaders in the dynamic, expanding industries of travel, tourism, and hospitality for more than 20 years. With widely recognized, cutting-edge degree and Professional Development Programs, as well as a deep commitment to integrating theory with practice, the NYUSPS Tisch Center is the perfect environment in which to embark upon an academic journey that prepares professionals for careers in hospitality and tourism. Students have access to the extraordinary resources of New York University, one of the world's greatest research and teaching institutions.

Tisch Center students benefit not only from a cadre of dedicated full-time faculty, but also from adjunct faculty members and guest lecturers who are leading professionals in their fields, unparalleled access to industry leaders, memorable site visits, and dedicated alumni employed throughout the world. Using current and relevant research, graduates receive the preparation in both knowledge and skills that are sought by leading employers. For more information about the NYUSPS Jonathan M. Tisch Center for Hospitality and Tourism, visit **sps.nyu.edu/tisch**.

The Family Travel Association

The Family Travel Association was founded in 2014 to create a single and collective voice on behalf of the travel industry and those companies that serve traveling families. As a coalition of the leading family travel suppliers, resources, and experts, its mission is to inspire families to travel—and travel more—while advocating travel be an essential part of every child's education. For additional information on the Family Travel Association, visit **familytravel.org**.