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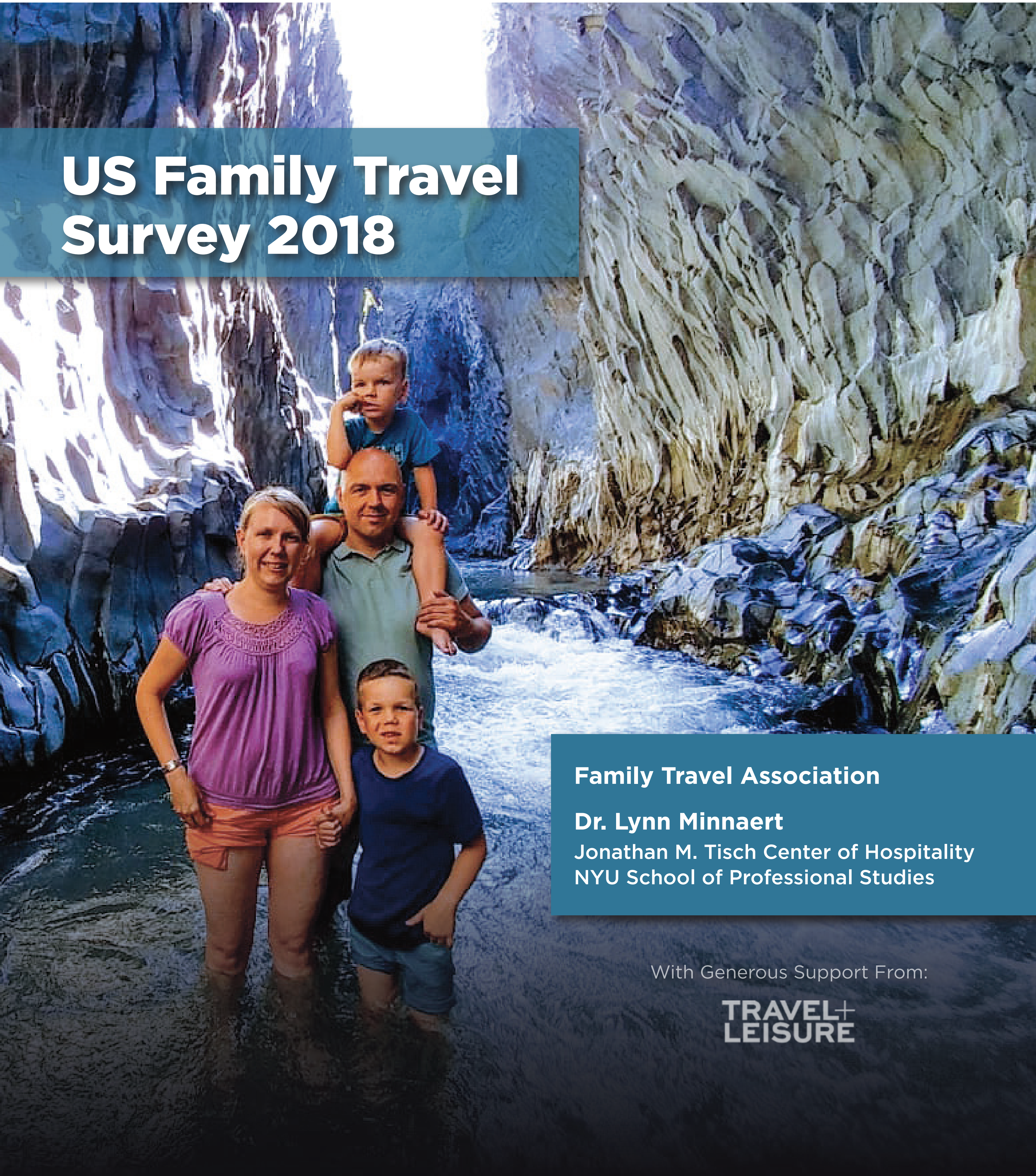
FAMILY TRAVEL ASSOCIATION
Changing Lives Through Travel

US Family Travel Survey 2018



Family Travel Association

Dr. Lynn Minnaert
Jonathan M. Tisch Center of Hospitality
NYU School of Professional Studies

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US FAMILY TRAVEL SURVEY 2018
Learning More About Today's Modern Traveling Family
By Rainer Jenss, President & Founder, Family Travel Association

In October 2014, the Family Travel Association was officially launched with one primary objective: 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.

Since then, numerous industry media outlets and travel agent consortia have proclaimed family and multi-generational travel to be one of the most significant areas of opportunity in our industry. More specifically, "Millennial Family Travel" has been identified as the biggest growth area in all of travel. So in effect, they have confirmed that we as an industry have an opportunity to really grow this segment of the market and seriously advance the FTA mission.

With all that, I continue to strongly believe the time is now 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, and yet there does seem to be a consensus among strong voices in the industry with whom I have talked about this.

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 fourth 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 the barriers they face in doing so, as well as how differently parents prioritize traveling with their kids. Three years later, we continue to explore these issues in hopes of identifying trends while adding a fresh set of data points to expand our understanding of this complex consumer group.

This year, we also joined forces with Travel + Leisure and Meredith, a leading company in consumer media. We're grateful for their contributions in helping access American families to use for the study, and disseminating the research findings to identify what they mean for traveling families to their subscribers and online audience.

I welcome you to 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 also 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 of Hospitality

In this fourth edition of the US Family Travel Survey, the Family Travel Association and the NYUSPS Jonathan M. Tisch Center of Hospitality examine the under-researched phenomenon of family travel in the US The survey represents families of diverse incomes, education levels, ethnicities and sizes. 1724 responses were collected. The study examines the following about families':

- Travel behavior
- Travel attitudes and motivations
- Children's ages and their effect on travel preferences
- Travel decision-making process
- Evaluation of the travel industry

Key Findings

This study provides a snapshot of family travel behaviors and preferences in the US. Key findings this year are:

SAMPLE

- The sample for this year's study closely mirrors US census data in terms of ethnic background and educational attainment. Comparisons with Census data also show that the income categories between $40,000 and $150,000 per annum are proportionally represented in the sample. The lowest income quintile however is slightly over-represented, and the highest slightly under-represented.

TRAVEL BEHAVIOR

- While the most popular family travel times are spring break and summer, the winter holiday season and the mid-winter school break are appealing options for future vacations. To illustrate, 22 percent of the respondents are planning to travel during the winter holiday season next year—the same percentage of respondents that are planning a summer vacation in the next year.
- The most popular vacation types for US families are visiting friends and family, theme parks and beach vacations. The vacation types US families would most like to try for the first time are cruises and all-inclusive resorts.

- The five most popular US states for family travel are Florida, California, Hawaii, New York and Colorado. In terms of international destinations, Europe is the most coveted continent, with Italy, France and the UK as most desired destinations. Canada and the Bahamas complete the top 5.
- When choosing lodging options for a family vacation, the respondents are looking for value for their money, free Wi-Fi and amenities for children (such as pools, beaches, game rooms and kids' clubs). A kid-friendly environment and proximity to attractions and activities also are key considerations.
- Our respondents highlighted that their main sources for travel inspiration are search engines, Facebook, TV shows and travel websites. Their main sources for travel information are search engines, travel websites and tourist offices.
- For the fourth year in a row, fewer than half of the respondents who have access to paid vacation days indicated using all of them. Only 42 percent of respondents used all their vacation days.

AGE OF THE CHILDREN

- In a new addition to the survey, we looked into how the age of the children affects the family's travel choices and preferences.
    - 62 percent of families with children younger than 5 years old report that their travel behaviors have changed somewhat, or a lot, in the past 5 years. This percentage was higher than the one reported by families with children in other age groups. Respondents with children in the 0-5 age group were most likely to be more focused on selecting child-friendly family travel options. 60 percent of the respondents 'agreed strongly' and 29 percent 'agreed somewhat' that their travel preferences had changed in this way in the past three years.
    - From the age of 6 on upwards, more respondents indicate that their children make them more adventurous when they travel. From that age, the children also have a bigger influence in choosing destinations.
    - From the age of 10 on up, children tend to become more interested in trying new dishes and cuisines.
    - Children over the age of 14 tend to be less interested in meeting other children on vacation than those between the ages of 6 and 13.

TRAVEL CHALLENGES

- The affordability of travel remains one of the biggest challenges for families. Of the 10 percent of the respondents who were unlikely or very unlikely to travel with their children in the coming two years, 69 percent indicated that they are unable to afford to travel.

TRAVEL INDUSTRY EVALUATION

- For the second year in a row, respondents were asked to give the travel industry a grade to assess how well it meets the needs of families. The grade this year is the same as last year—a lackluster B-. Airlines score the lowest, restaurants the highest.
- We also asked respondents about usage of travel providers in the past three years. When we only consider the evaluations of those respondents who had used a certain type of travel provider before, the scores often increased, with the biggest gains for cruises and travel agents.
- The study concludes with recommendations the respondents have for the travel industry. The top four suggestions they made concern travel costs, pricing and budgeting. In order of preference, the respondents requested more deals and discounts; clearer pricing information and fewer surcharges; packaged travel options in the USA; and more extensive financing options for family vacations.

Dr. Lynn Minnaert
NYU School of Professional Studies
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SURVEY OVERVIEW AND RESPONDENTS

Survey Design and Administration

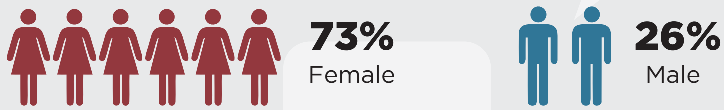
The survey presented here consisted of seven survey blocks:

- *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 two years, were filtered out after the first question block.
- *Travel Behaviors, Attitudes and Motivations:* Questions in this block focused on the frequency of travel; the travel types respondents had participated in; the travel types in which respondents were likely to participate in the future; preferred destinations; and factors influencing lodging choice.
- *Age Group Comparisons:* Questions in this block focused on whether and how the age of the children affects the family’s travel attitudes and decisions. Respondents were also 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 and inspiration sources for travel.
- *Travel Industry Evaluation:* In this block, respondents were asked to evaluate the family travel industry and its sub-sectors, and suggests ways in which the industry can respond to their needs better.
- *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.

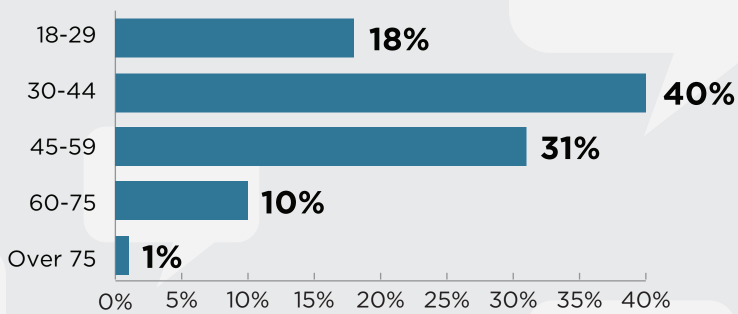
Survey Respondents

Respondents by gender

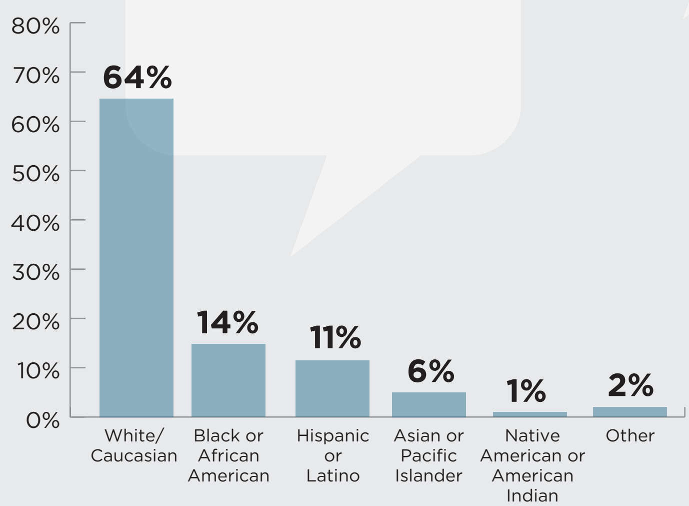
Total responses: 1,724



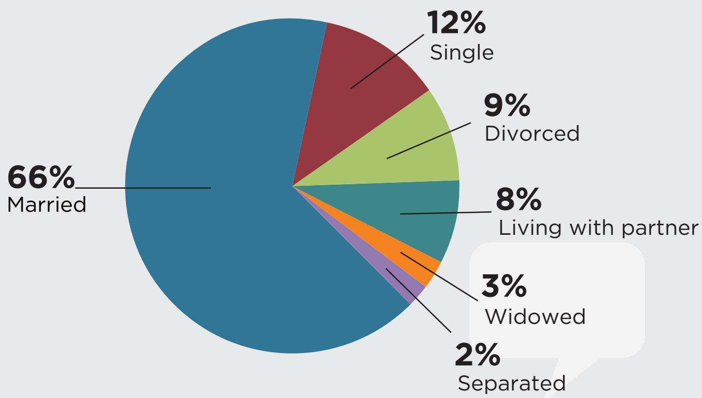
Respondents by age



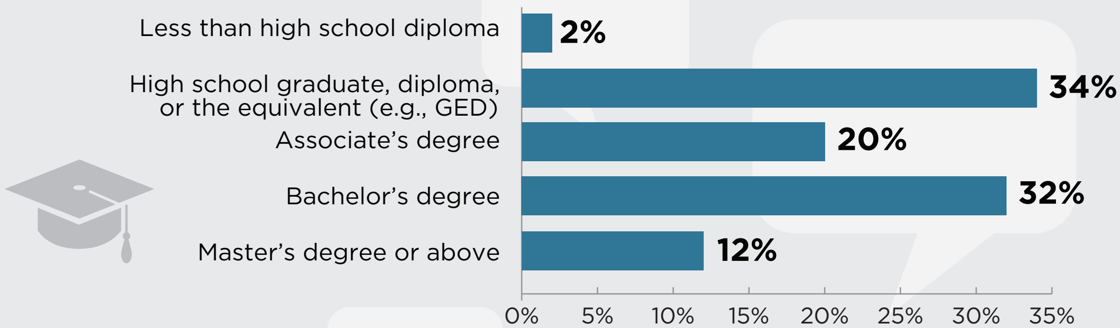
Respondents by ethnicity



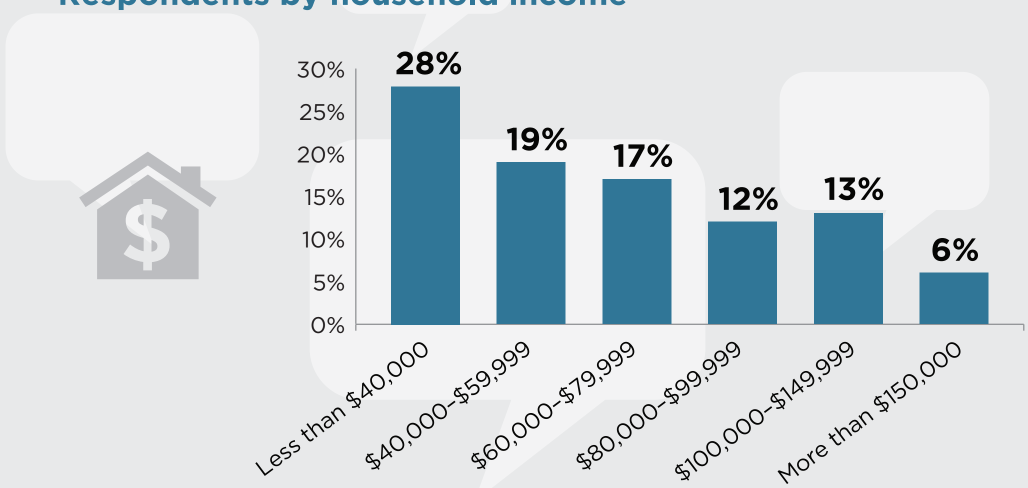
Respondents by marital status

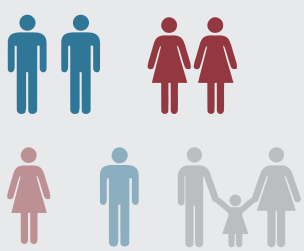


Respondents by level of education



Respondents by household income





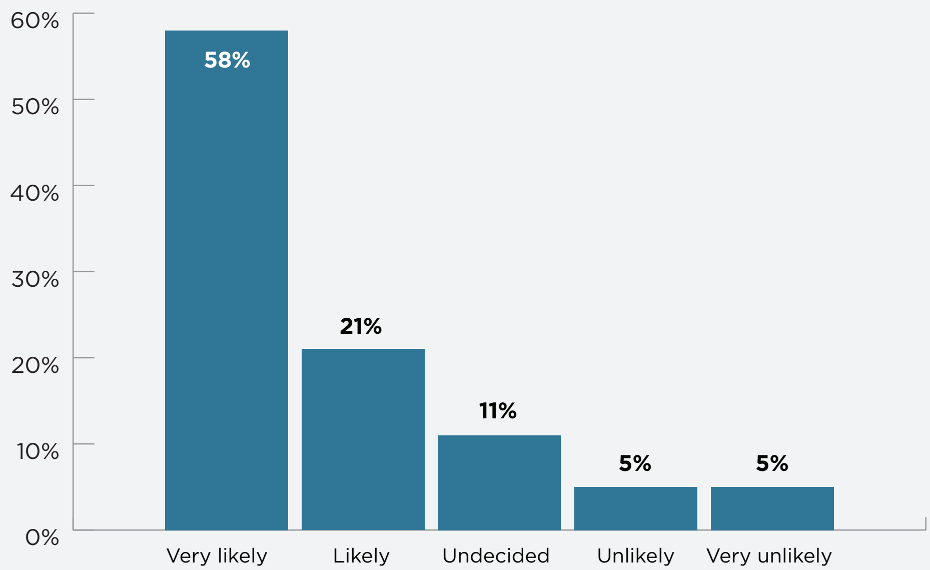
The sample reflects a wide range and diversity of families:

- **23%** of respondents are single parents
- **15%** of respondents have three or more children
- **12%** of respondents have a child/children with special needs
- **7%** of respondents have stepchildren
- **3%** of respondents are LGBT families

TRAVEL BEHAVIORS AND MOTIVATIONS

79 percent of the respondents are either 'very likely' or 'likely' to travel with their children in the next two years. Only 10 percent are 'unlikely' or 'very unlikely' to travel with their children. 11 percent are undecided.

How likely are you to go on a family vacation with your children in the next 12 months?



Respondents who were either unlikely or very unlikely to travel with their children in the next two years were asked what their reasons were for not doing so. They were then asked to select all the options that applied.

Reason for not traveling (select any):

I/We cannot afford it	48%
Our children are too young	6%
I/we don't have any / enough vacation time	6%
Traveling with children is not relaxing for me/us	5%
Other (please explain)	5%
Air travel is too much of a hassle	5%
Our children are too busy other activities	4%
Traveling with my/our family for vacation is not a priority	4%
Health problems or physical limitations make it difficult to travel	3%
I/we don't think a family trip is worth the money	3%
It's too difficult / time-consuming to plan	2%
Our children would rather spend vacation time at home	2%
It is tough to plan family travel around school vacations	2%
Safety concerns	2%
I/We don't like traveling	1%
Our children won't like it	1%

They were then asked for their main reason for not wanting to travel with their kids.

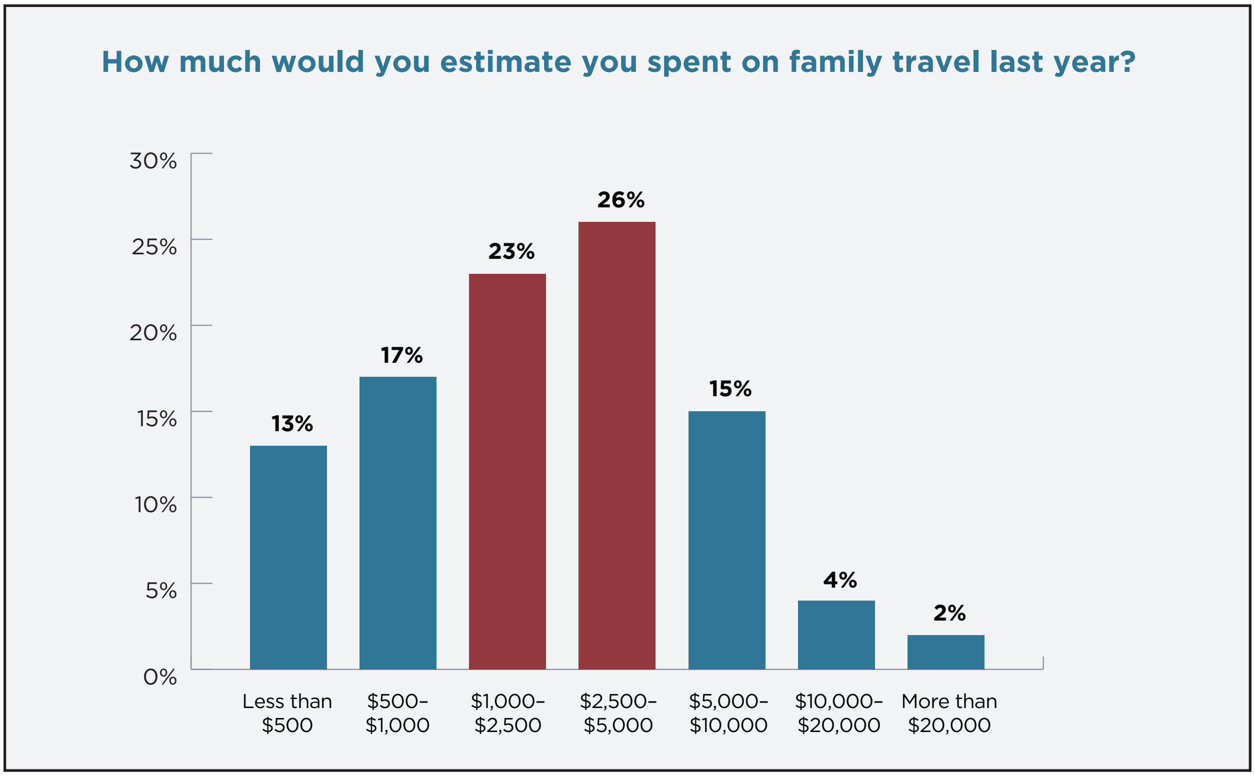
Main reason for not traveling:

I/We cannot afford it	69%
Our children are too young	8%
Other (please explain)	5%
Our children are too busy other activities	3%
I/we don't think a family trip is worth the money	2%
I/we don't have any / enough vacation time	2%
Health problems or physical limitations make it difficult to travel	2%
It is tough to plan family travel around school vacations	2%
Traveling with children is not relaxing for me/us	2%
I/We don't like traveling	2%
It's too difficult / time-consuming to plan	1%
Traveling with my/our family for vacation is not a priority	1%
Safety concerns	1%

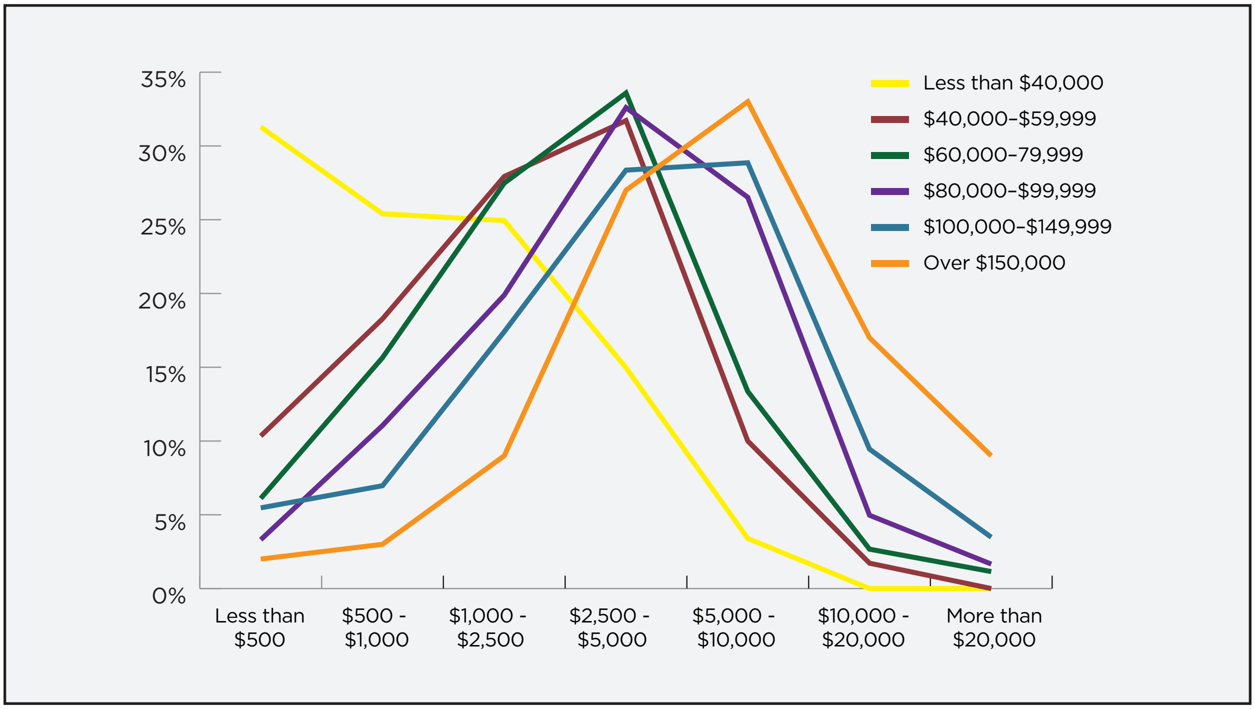
For the fourth year in a row, affordability emerged as the main reason for not participating in family travel. The age of the children also is a factor for families with very young kids: all respondents in this category have children between 0-5 years old. A potential explanation for this finding may be that some families view travel with very young children view travel as too cumbersome. In the 'other' category, responses were recorded and ranged from having been on vacation already this year, difficulties in arranging pet care, and a child having behavioral issues.

Travel Spending

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



Unsurprisingly, travel spending and household income is closely related. In the lowest income group, with an annual household income under $40,000, 57 percent of respondents spent less than $1,000 last year on family travel. In the highest two income groups, with annual household incomes over $100,000, 26 percent of respondents spent over $10,000 on family travel last year.



Family Vacation Types

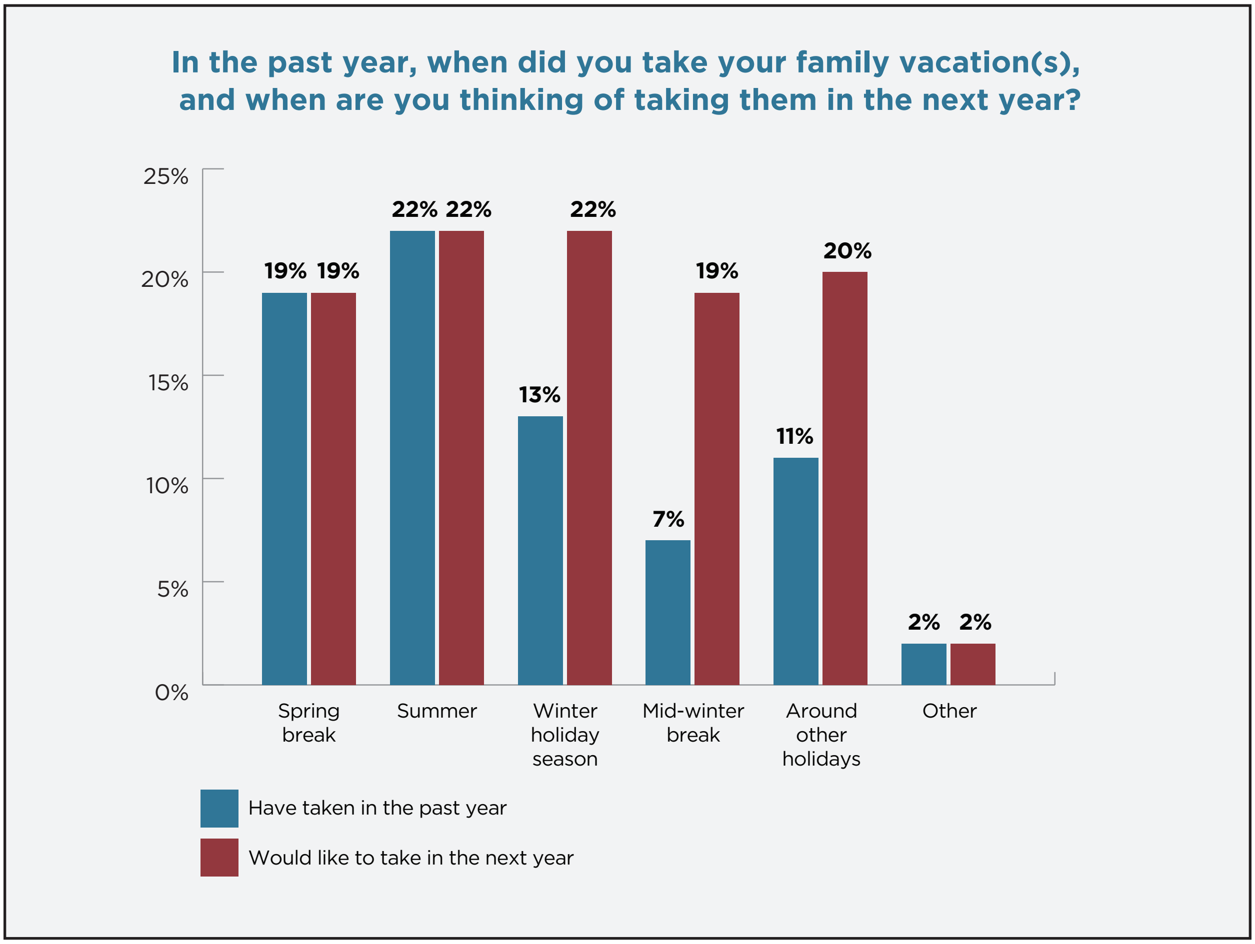
Respondents were asked to indicate the number of vacations they had taken of various lengths in the past year: 1-3 nights, 4-6 nights, 7-13 nights, 14 or more nights. **Shorter vacations** were more popular: 73 percent of respondents had taken at least one vacation of 1-3 nights, and 50 percent had taken at least one vacation of 4-6 nights. Trips of 14 nights or more were in comparison 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
0	27%	50%	66%	85%
1	35%	31%	21%	8%
2	20%	10%	7%	2%
3	9%	4%	3%	2%
4	4%	2%	1%	1%
5	2%	1%	1%	1%
6 or more	3%	2%	1%	1%
Average number of trips taken	**0.70**	**0.50**	**0.30**	**0.15**

Higher income groups travel more often, and are more likely to take a longer vacation. 22 percent of respondents with an annual household income of $100,000 to $149,999 have taken a vacation of 14 nights or more in the past year. This rises to 26 percent of those with an annual household income of $150,000 or more. Of respondents in the lowest income group, earning an annual household income of $40,000 or less, only 8 percent has taken a vacation of 14 nights or more in the past year.

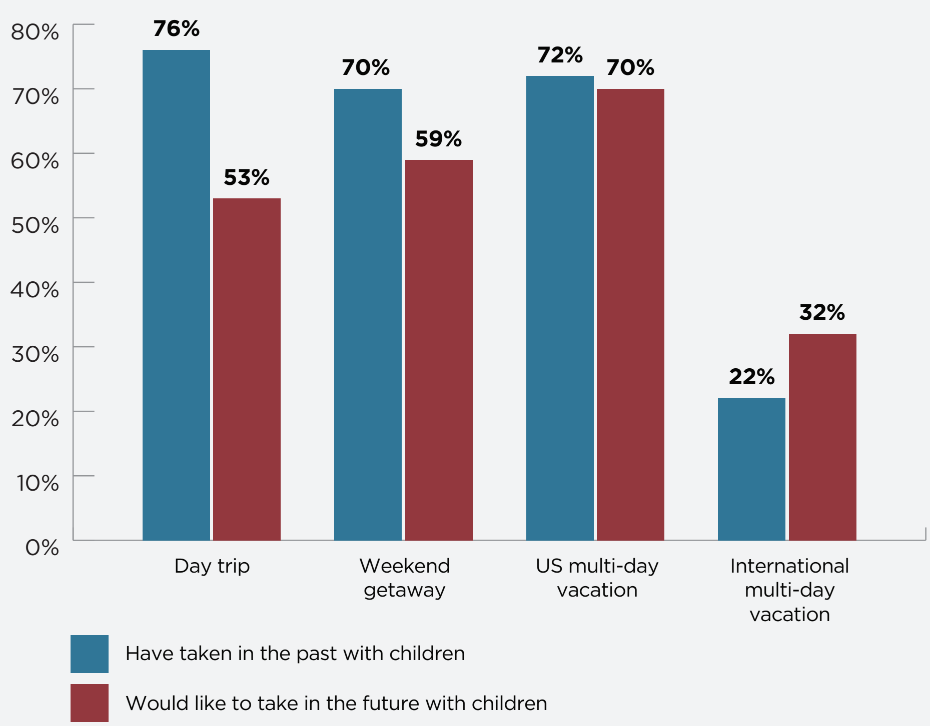
The following question addressed the time of the year in which families had traveled in the past year, and when they were planning to travel in the coming year. While **summer** remains the most popular time to travel, the **winter** holiday season and mid-winter break are appealing options for future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



The survey also looked into the **vacation types and lengths** US families have taken, and which ones they are planning in the coming year with children. Day trips and weekend getaways are travel options US families commonly engage in. While 22 percent of the respondents had taken an international multi-day vacation, 32 percent are planning one in the coming year.

Household income level is an important factor in the family travel types respondents engage in. For all four vacation types, respondents with higher incomes are more likely to have taken different types of family vacations. This is most pronounced in for multi-day international vacations. Of the respondents with an annual household income of $100,000 or more, 70 percent have taken a multi-day international vacation in the past year. Of the respondents with an annual household income of $40,000 or less, 31 percent have done so.

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 then looked more specifically into the types of activities US families prefer when they vacation. **Family visits, theme parks and beach vacations** are the most common vacations the respondents have taken. Visits to dude ranches and cycling trips are the least common.

When analyzing which vacation types US families would like to try in the future, **cruises and all-inclusive resorts** show the greatest appeal. **River cruises, ski/snowboard trips, RV trips and volunteer trips** also score well with respondents who have not experienced this type of vacation before.

We would like to know what kinds of trips you've taken with your children in the past, and how likely you are to consider these types of trips in the future.

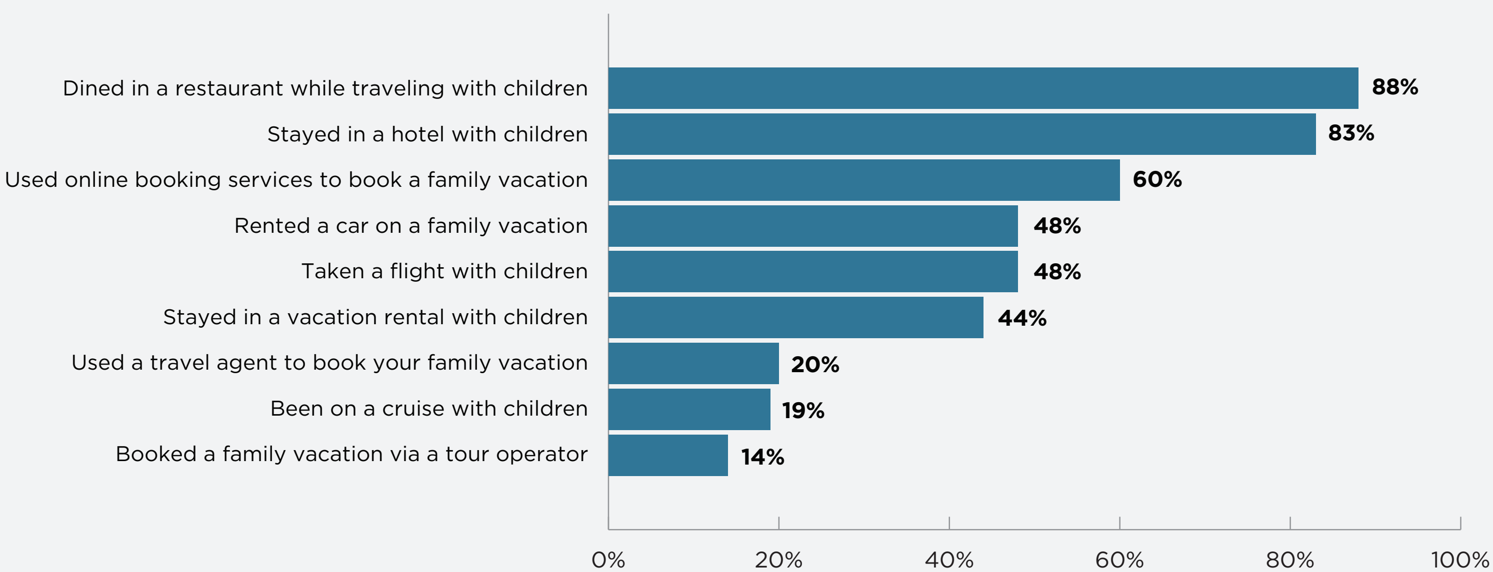
	Have taken in the past with children	Would like to take in the future with children
Visiting family and friends	71%	53%
Theme park	59%	49%
Beach vacation	58%	52%
Family road trip	56%	48%
Museum or cultural attraction	39%	32%
Family reunion	37%	27%
City vacation	35%	30%
National Park	34%	33%
Camping trip	33%	33%
Lakeside vacation	25%	25%
Hiking trip	19%	20%
Cruise	17%	29%
All-inclusive resort	17%	26%
Safari or wildlife viewing	14%	18%
RV trip	10%	16%
Ski/snowboard trip	9%	15%
River cruise	8%	15%
Volunteer or mission trip	7%	12%
Dude ranch	5%	10%
Cycling trip	5%	10%
Other	1%	2%

In some cases, annual household income has an influence on the type of vacations families have taken:

- Families with an annual household income of $100,000 or more are much more likely to have taken a ski and snowboard trip than families in other income bands
- Family road trips are popular with respondents across income levels, although respondents with a higher annual household income are slightly more likely to have taken one
- Visiting family and friends, camping trips and mission trips show the lowest variation across different income levels (both in terms of trips respondents they have taken, and trips they are planning to take in the coming year).

The following question examined which types of **travel products and services** the respondents had used **in the past 3 years**. While dining out in restaurants on family vacations and staying in hotels are most common (with 88 percent and 83 percent respectively), it is interesting to see that only 60 percent of respondents have used online booking services. 48 percent of the respondents have rented a car, and 48 percent have taken a flight with children in the past 3 years. 44 percent have stayed in a vacation rental. One in five respondents (20 percent) have used a travel agent, and a similar number (19 percent) have been on a cruise with children in the past 3 years. Only 14 percent have booked a family vacation via a tour operator.

Travel Products and Services Used by Respondents in the Past Three Years



Use of Travel Agents

Those respondents who had used a travel agent in the past three years were asked to select the reasons why they did so. Travel agent's access to better rates, as well as their in-depth knowledge of the destination or vacation type, were top motivators.

Why did you decide to use a travel agent to help plan/book at least one family vacation in the past 3 years? Select all that apply.

Travel agents have access to better rates and prices	48%
Travel agents have an in-depth understanding of the destination or vacation type I was interested in	41%
Travel agents can best deliver the vacation experience we are looking for	39%
If something goes wrong, a travel agent is there to help	34%
A travel agent gets to know me and my preferences and can tailor recommendations for me	34%
Travel agents minimize the risk of disappointment on vacation	32%
Planning and booking yourself is time-consuming	31%
Planning and booking yourself is too confusing as there are too many options to choose from	21%
Other	2%

Those respondents who had not used a travel agent in the past three years were asked to select the reasons why they did not do so. Half of the respondents reported they could find all the information they needed online, and 43 percent mentioned enjoying the planning process. 11 percent of respondents answered that they don't know how travel agents work.

Why did you decide not to use a travel agent to help plan/book at least one family vacation in the past 3 years? Select all that apply.

I can find all the information I need online	50%
I enjoy the process of researching, planning and booking a family vacation	43%
I trust myself more to find the right travel options for my family	38%
It would add to the cost of the vacation	36%
We tend to go to places we know very well	28%
I think the cost of a using a travel agent would not pay back in terms of assistance received	22%
I don't know how travel agents work / what they do	11%
I don't know how to select a travel agent	10%
I don't have time to visit or call a travel agent	9%
I have not found a travel agent that I can trust	6%
Other	2%

Interestingly, the concern that using a travel agent would add to the cost of the vacation was checked by 33-38 percent of respondents across income levels—only in the highest income group, with an annual household income of $150,000 or more, does this percentage decrease to 23 percent.

As family income rises, respondents are more likely to say that they ‘can find all the information they need online’ and that ‘they enjoy the process of researching, planning and booking a family vacation’.

Families in the lowest two income bands (with annual family incomes below $60,000) are more likely to say they ‘don’t know how travel agents work’ and that they ‘don’t know how to select a travel agent’.

Travel Destinations

The next section of the survey examined the destination preferences of US families. Respondents were first asked to select the **US states** they would most like to visit on a family vacation in the coming three years. The top 10 most selected states were:

1	Florida
2	California
3	Hawaii
4	Colorado
5	New York
6	Alaska
7	Texas
8	Arizona
9	North Carolina
10	South Carolina

Respondents were also asked to identify their second and third preferences. Georgia entered the top 10 as a second preference, Tennessee and Nevada joined the top 10 as third preferences. **Florida, California, Hawaii, New York and Colorado** made up the top 5 states US families would most like to visit across the first, second and third preferences.

Respondents were then asked to select international destinations they would most like to visit on a family vacation in the coming three years. **Europe** is the top destination across the first, second and third preferences. Canada, Mexico, Central America and the Caribbean consistently rank as second most preferred. Asia is the third choice for the first and second preference, and is replaced by Oceania and South Pacific as the third preference. The top 20 most desired countries are:

1	Italy
2	France
3	United Kingdom
4	Canada
5	Bahamas
6	Mexico
7	Ireland
8	Germany
9	Australia
10	Antarctica

11	Greece
12	Japan
13	Jamaica
14	Spain
15	India
16	Philippines
17	Brazil
18	Denmark
19	South Africa
20	Virgin Islands (US)

Factors Influencing Accommodation Choices

Respondents were asked to identify which factors were important to them when choosing a **accommodations for their family vacation**. Value for money was the top factor, followed by free Wi-Fi, amenities, proximity to attractions and activities and free breakfast. Brand loyalty was the least important factor.

What are factors that 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	69%
Free Wi-Fi/Internet	58%
Amenities for children (pool, beach, game rooms, kids' clubs, etc.)	57%
Close proximity to attractions and activities	56%
Free breakfast included	54%
Kid-friendly environment	53%
Family-friendly dining options at or near accommodations	50%
Free parking	44%
Flexible rooms/sleeping arrangements	40%
Whole family can gather in our own space	39%
Amenities for adults (spa, pool, beach, golf, sports, etc.)	38%
Kitchen area for in room meal preparation and dining	36%
Our preferred accommodation style	24%
Entertainment options in room	24%
Ability to use rewards points in exchange for rooms, meals, activities	21%
Special treatment by accommodation (i.e. toys for the kids, special treats, upgrades, recognition etc.)	18%
Opportunities for my child(ren) to meet other children	17%
Brand that I am loyal to	13%

Respondents were then asked to select their top priority among the factors they had selected in the previous question. While **value for money** remains the top priority, a **kid-friendly environment** moves into second position.

Best value/price for our budget	36%
Kid-friendly environment	11%
Close proximity to attractions and activities	10%
Amenities for children (pool, beach, game rooms, kids' clubs, etc.)	8%
Whole family can gather in our own space	6%
Free breakfast included	4%
Our preferred accommodation style	4%
Free Wi-Fi/Internet	3%
Family-friendly dining options at or near accommodations	3%
Amenities for adults (spa, pool, beach, golf, sports, etc.)	3%
Flexible rooms/sleeping arrangements	3%
Kitchen area for in room meal preparation and dining	2%
Special treatment by accommodation (i.e. toys for the kids, special treats, upgrades, recognition etc.)	2%
Entertainment options in room	1%
Brand that I am loyal to	1%
Ability to use rewards points in exchange for rooms, meals, activities	1%
Opportunities for my child(ren) to meet other children	1%
Free parking	1%

Travel Attitudes and Motivations

Respondents were asked to **rank their top 3 motivations** for family travel, choosing among 11 prompts. The top motivation was 'to have my children discover new places and have new experiences', followed by 'to bond and grow closer as a family' and 'to relax and unwind'. The other prompts received significantly lower scores. 'To be physically active' received the lowest score.

1	**To have my children discover new place and have new experiences**
2	**To bond and grow closer as a family**
3	**To relax and unwind**
4	To experience great family entertainment
5	To visit friends and family
6	To experience nature, such as national/state parks
7	To disconnect from technology and everyday pressures
8	To learn about the culture, cuisine and/or language of the place we visit
9	To be pampered and experience luxury
10	To tick places off our 'bucket list'
11	To be physically active

In this section of the survey, respondents were also 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 examines travel attitudes from the perspective of the parents. All questions received a mean response of 4 (agree somewhat). The response show that families frequently discuss vacation memories, and that parents value the social and educational benefits of family travel. They also show that recent world events have had an impact on many parents' travel decisions.

	AVERAGE
We often discuss memories of our trips as a family	4.31
It is important to me that my children understand different cultures	4.12
Travel is an important part of my child(ren)'s education	4.02
Travel has changed my relationship with my children for the better	4.00
We love to share images and impressions of our trip on social media	3.68
Recent world events have had an impact on my travel decisions	3.50

In the following questions, respondents were asked to assess the impact of travel on their child(ren). The responses show that parents see beneficial changes in their children as a result of family travel across a range of different aspects—all statement received a mean response of 4. The only statement where those impacts were not seen as clearly, regarded the anxiety levels of the children—either the benefit did not occur, or the respondent's children were not very anxious to begin with. This statement received a mean response of 3.

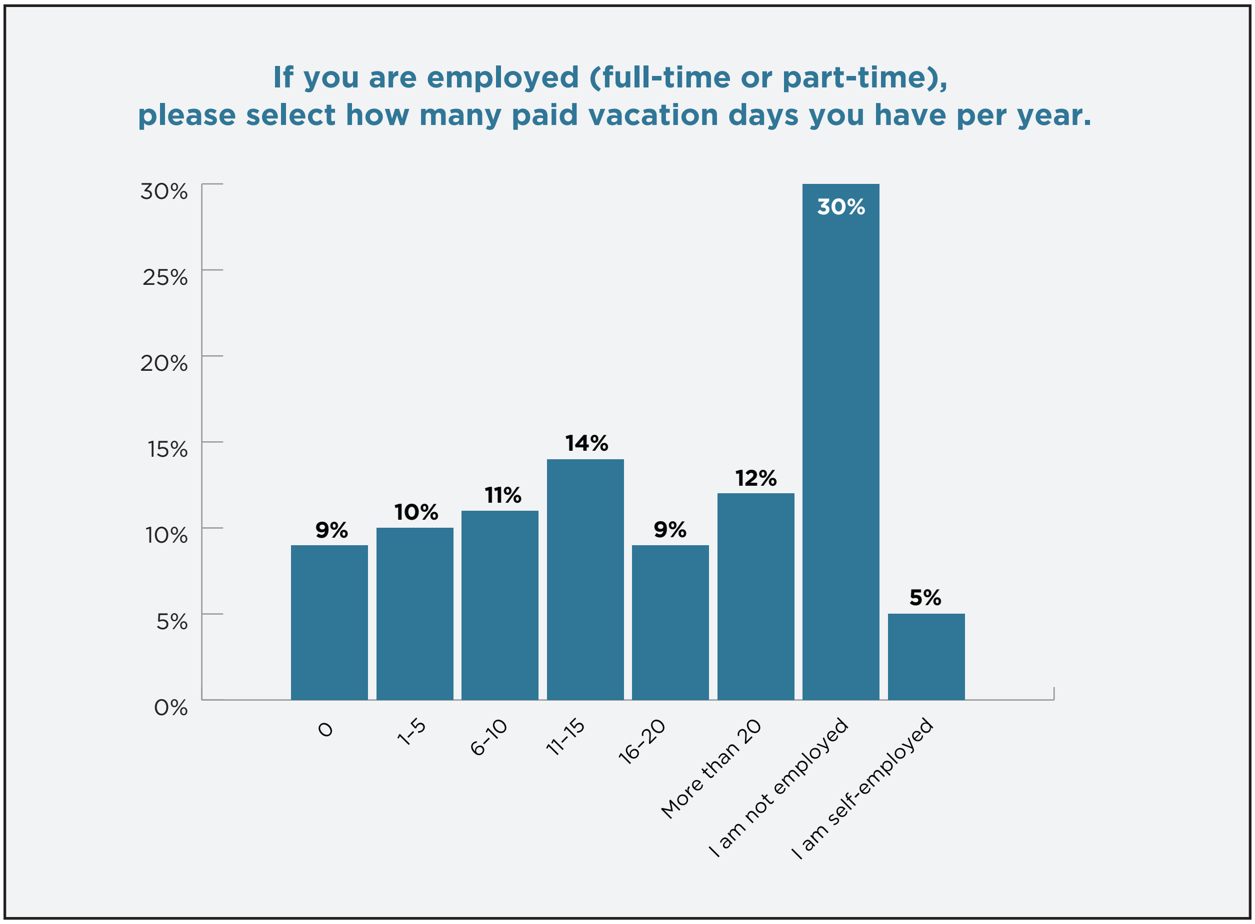
	AVERAGE
Travel has helped my children see the world from a broader perspective	3.97
Travel has helped my children be more engaged learners	3.89
My child(ren) have become more adventurous because of our family travel experiences	3.88
Travel has made my children more flexible and adaptable	3.86
Travel has helped my children to be more confident	3.82
My child(ren) have become more involved in planning trips because of our family travel experiences	3.76
My child(ren) have become more interested in other cultures because of our family travel experiences	3.75
Travel has helped my children to be better communicators	3.75
Travel has helped my children to be less anxious	3.50

Best Things About Family Travel

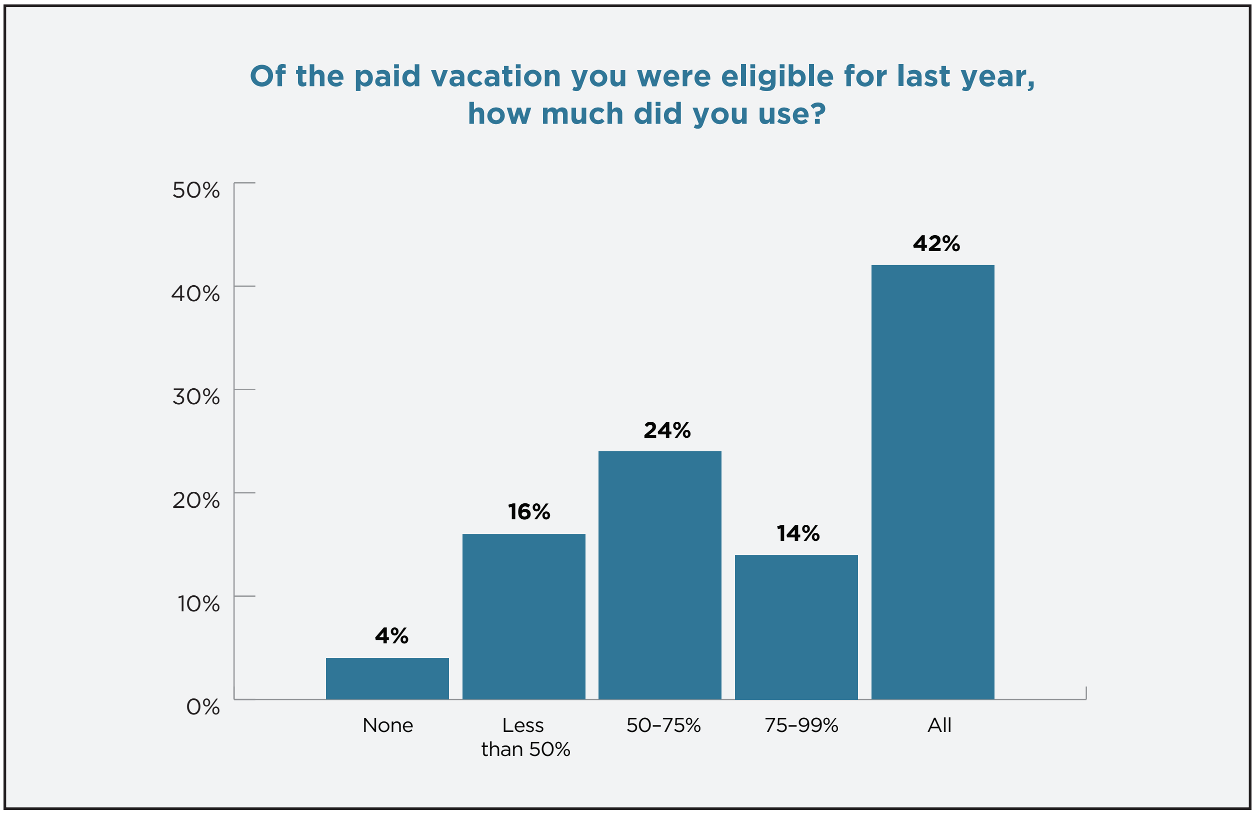
In an open-ended question, we also asked what the respondents thought was the best thing about traveling with their children. The word cloud below highlights the most common words that were entered for this question. Family travel is a time to make memories, experience new things together, and sharing a time to bond and learn.

Vacation Time Usage

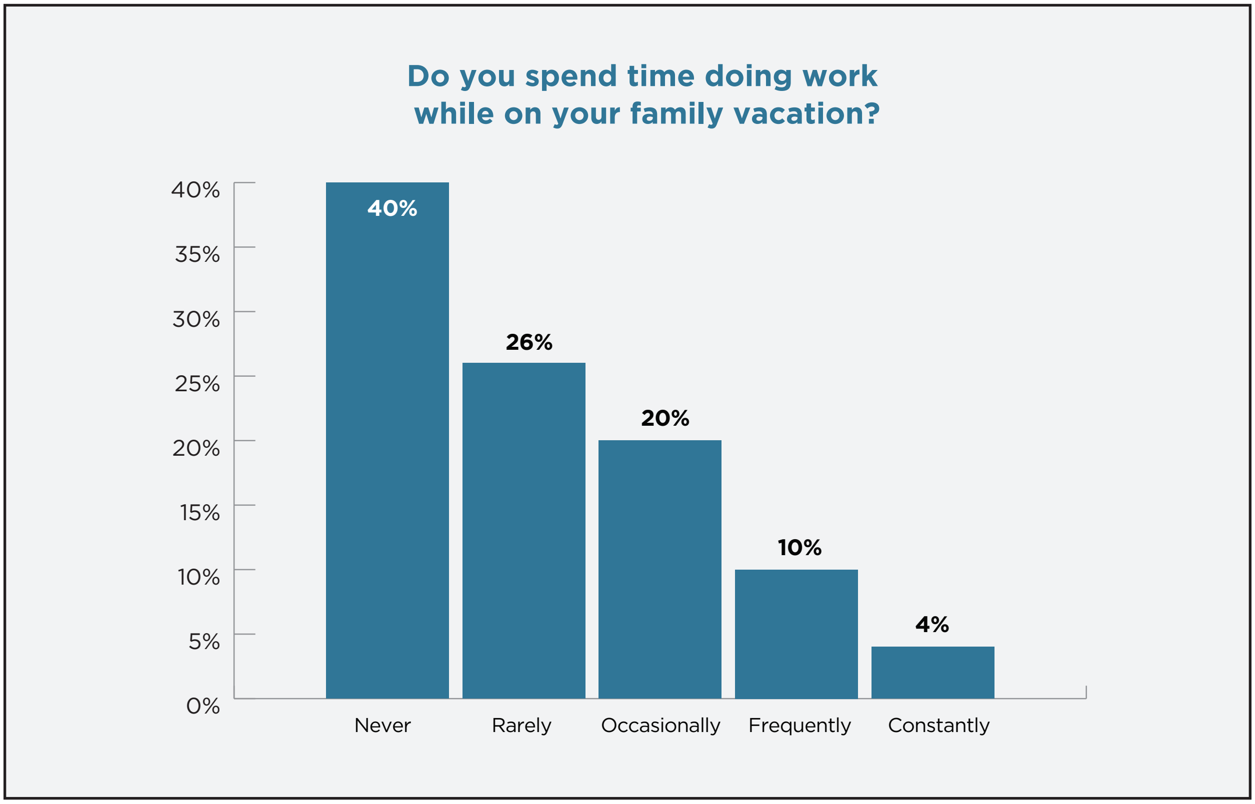
The survey asked respondents how much vacation time they had and if they were employed full- or part-time. The relatively high percentage of respondents who are not employed may be associated with the fact that many may be stay-at-home moms.



Of the respondents who had paid vacation days, over 50 percent did not use all days last year.



The survey also included a question asking whether respondents tended to engage in work-related activities while on vacation. 66 percent of the respondents reported that they rarely or never spend time doing work on their family vacation. 20 percent of the respondents worked occasionally, 10 percent frequently, and 4 percent constantly.



AGE GROUP COMPARISONS

In a new addition to the 2018 survey, respondents were asked about the travel attitudes of their children, grouping the results by the age groups. If respondents had two or more children in the same age bracket, they were asked to consider the eldest child in that bracket. 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.

For 6 of the 12 attitude statements, the age of the children did not affect the responses: the mean response was the same across age brackets.

Mean response: 4, 'agree somewhat':

- My child loves to travel
- My child is interested in learning about the places we visit
- My child prefers to go theme parks
- My child has a lot of influence in choosing the activities we do on vacation
- My child prefers vacations where they can relax (beach, resort, etc.)

Mean response: 3, 'neither agree not disagree'

- My child likes to travel to other countries

For the other 6 statements however, the mean responses differed by age category. The results are presented by average value.

Please select the extent to which you agree or disagree with the following statements. If you have more than one child in this age range, please consider the eldest child – Average values

	0 to 5	6 to 9	10 to 13	14 to 17
My child loves to travel	3.94	4.23	4.12	4.09
My child is interested in learning about the places we visit	3.72	4.03	3.97	3.91
My child prefers to go theme parks	3.71	4.07	3.93	3.69
My child prefers to travel to familiar places	3.39	3.52	3.45	3.38
My child would prefer that we stay home during school breaks	2.52	2.43	2.46	2.42
My child pushes me to be more adventurous when we travel	3.36	3.60	3.56	3.47
My child has a lot of influence in choosing our travel destination	3.39	3.60	3.60	3.58
My child has a lot of influence in choosing the activities we do on vacation	3.61	3.82	3.78	3.76
My child tries to like new cuisines and dishes	3.16	3.28	3.36	3.53
My child likes to travel to other countries	3.18	3.36	3.37	3.33
My child prefers vacations where they can relax (beach, resort, etc.)	3.59	3.83	3.92	3.94
My child likes to meet other children when we travel	3.80	3.86	3.53	3.24

- **Children aged 6 to 13 are more likely to prefer to travel to familiar places**.
  - *My child prefers to travel to familiar places*: age brackets 6 to 9 and 10 to 13 has a mean response of 4, whereas the youngest age bracket (0 to 5) and the oldest age bracket (14 to 17) have a mean response of 3.
- **The youngest children are least likely to mind staying home during school breaks.**
  - *My child would prefer that we stay home during school breaks*: age brackets 6 to 9, 10 to 13 and 14 to 17 have a mean response of 2. The youngest age bracket, 0 to 5) has a mean response of 3. This is most likely due to the children not yet being in school.
- **From age 6, the children are more likely to push their parents to be more adventurous on family vacations.**
  - *My child pushes me to be more adventurous when we travel*: age brackets 6 to 9, 10 to 13 and 14 to 17 have a mean response of 4. The youngest age bracket, 0 to 5) has a mean response of 3.

- **From age 6, the children are more likely to influence the family's travel decisions.**
    - *My child has a lot of influence in choosing our travel destination*: age brackets 6 to 9, 10 to 13 and 14 to 17 have a mean response of 4. The youngest age bracket (0 to 5) has a mean response of 3.
- **Children are more likely to have an interest in trying new foods and cuisines between ages 10 and 17.**
    - *My child tries to like new cuisines and dishes*: The two younger age brackets, 0 to 5 and 6 to 9, have a mean response of 3. The two older age brackets, 10 to 13 and 14 to 17, have a mean response of 4.
- **Children between the ages of 14 and 17 are less interested in meeting other children when they travel.**
    - *My child likes to meet other children when we travel:* The three younger age brackets (0 to 5, 6 to 9 and 10 to 13) have a mean response of 4. The oldest age bracket, 14 to 17, has a mean response of 3.

In a follow-up question, respondents were asked which of the vacations they have ever taken, or would take, with children in specific age brackets. The results show that:

- Beach vacations are appealing regardless of the age of the children.
- For all other vacation types, respondents indicate that travel with children in the youngest age bracket (0 to 5) is less appealing.
- National Parks and domestic road trips are seen as more appealing vacation option for children over 6.
- For some vacation types, the appeal increases gradually as the children grow older. This is the case for city vacations, adventure vacations, cruises, international vacations, ski/snowboard vacations and volunteer vacations.
- Respondents indicate they feel theme parks are most appealing when the children are between 6 and 13 years old.

Which of the vacation types below have you ever taken, or would you take, with children of the following ages?

	0 to 5	6 to 9	10 to 13	14 to 17
Beach vacation	44%	47%	46%	46%
Visiting a theme park	34%	47%	48%	44%
Road trip in the US	32%	38%	43%	42%
Visiting a National Park	30%	38%	40%	39%
City vacation	26%	31%	36%	37%
Camping trip	24%	33%	33%	30%
Adventure vacation	16%	24%	31%	33%
Cruise	16%	22%	28%	32%
International vacation	12%	19%	26%	31%
Ski/snowboard vacation	7%	14%	20%	22%
Volunteer vacation	5%	8%	13%	19%
None of the above	10%	9%	9%	9%

Changes in Travel Preferences

In another new addition to the survey, we looked into whether family travel preferences change depending on the age of the children. The responses show that travel preferences are most likely to change when the children are young, with the biggest changes occurring when the children are between 0 and 5 years old.

Do you feel your travel preferences have changed a lot over the past 3 years?

	No, they have stayed largely the same	Yes, they have changed somewhat	Yes, they have changed a lot
0 to 5	38%	47%	15%
6 to 9	46%	40%	14%
10 to 13	52%	38%	10%
14 to 17	50%	40%	10%
17+	50%	38%	12%
All ages	46%	42%	11%

The respondents who indicated that their travel preferences had changed either somewhat or a lot, were then asked to indicate in which areas that change occurred. When examining the overall responses, across all age ranges, a few points stand out:

- 83 percent of the respondents ‘agree somewhat’ or ‘agree strongly’ that they are now more focused on selecting **safe** travel options than they were 3 years ago.
- 81 percent of the respondents ‘agree somewhat’ or ‘agree strongly’ that they are now more focused on selecting **more affordable** travel options than they were 3 years ago.
- 76 percent of the respondents ‘agree somewhat’ or ‘agree strongly’ that they are now more focused on selecting **child-friendly** travel options than they were 3 years ago.
- 69 percent of the respondents ‘agree somewhat’ or ‘agree strongly’ that they are now more focused on selecting **more active or adventurous** travel options than they were 3 years ago. This may seem in contrast with the 83 percent of respondents who are more focused on safe travel options—however the findings show that respondents are often looking for vacation options that offer safety, as well as action and adventure.
- 63 percent of the respondents ‘agree somewhat’ or ‘agree strongly’ that they are now more focused on selecting **more cultural or educational** travel options than they were 3 years ago.

Please select the extent to which you agree or disagree with the following statements. Please select one answer per row. Compared to 3 years ago, I am now more focused on:

	Disagree strongly	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Agree strongly
Selecting safe family travel options	1%	2%	13%	33%	50%
Selecting more affordable family travel options	1%	4%	14%	35%	46%
Selecting child-friendly travel options	2%	6%	16%	33%	43%
Selecting more active or adventurous family travel options	2%	7%	21%	43%	26%
Selecting more cultural or educational family travel options	2%	7%	27%	39%	24%
Taking short trips instead of one long vacation	4%	10%	25%	38%	23%
Visiting more distant locations	5%	13%	28%	33%	21%
Selecting travel experiences that let us live like locals in the destination	4%	10%	31%	34%	20%
Selecting more environmentally conscious travel options	5%	10%	35%	30%	20%

Some statements resonated more strongly with respondents who had children in certain age groups:

- Respondents with children aged between 0-5 years old were most likely to be more focused on selecting child-friendly family travel options. 60 percent of the respondents 'agreed strongly' and 29 percent 'agreed somewhat' that their travel preferences had changed in this way in the past three years.
- Respondents with children who are 0-5 or 6-9 years old are slightly more likely to take an increasing number of short breaks instead of one long vacation.
- Respondents are more likely to visit more distant locations after their children turn 6 years old.
- Respondents were most likely to select increasingly active and adventurous family travel options when their children are 10-13 years old, closely followed by those with children who are 6-9 years old.
- Respondents with children up to 9 years old were more likely to look for more affordable travel options than those with older children (10-17).
- Selecting safe travel options and selecting more cultural or educational travel options were an increased concern for parents with children of all age brackets.
- Respondents who increasingly aspire to 'live as locals' in the destination are likely to have children of 10 years old or older.
- Respondents who 'agreed somewhat' or 'agreed strongly' that they increasingly booked more environmentally conscious travel options, were most likely to have children between 6 and 13 years old.

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 and information for family vacations. The children themselves, friends and family members are the most common sources for inspiration. Friends, family members and other parents are the most common sources of information.

When planning your family trip, who gives you information or inspiration for where you go and what you do? Please select all that apply.

	Inspire me	Provide information
Your children	57%	19%
Friends	47%	44%
Other family members	43%	43%
Other parents	26%	25%
Bloggers	16%	18%
Your children's friends	15%	10%
Your children's teachers	11%	10%
Journalists	10%	14%
Travel agents	9%	19%
Other	3%	3%

The second question focused on other sources of inspiration and information. Search engines, Facebook, TV shows and travel websites were the most common sources of inspiration. Search engines, travel websites, tourist offices and guide-books were the most common sources of information.

What other resources give you information or inspiration for where you go and what you do? Please select all that apply.

	Inspire me	Provide information
Search engines (Google, Bing etc.)	34%	46%
Facebook	31%	22%
TV shows	31%	16%
Travel websites (TripAdvisor, Expedia, etc)	30%	43%
Movies	29%	11%
Magazines	26%	21%
Online videos	24%	19%
Tourist offices/websites (destinations, activities, etc.)	22%	30%
Pinterest	21%	15%
Instagram	21%	9%
Guide books	19%	25%
Advertising / marketing	18%	19%
Travel supplier websites (airlines, tour operators, etc.)	17%	24%
Blogs	13%	14%
Travel clubs (AAA, etc.)	13%	21%
Newspapers	9%	12%
Twitter	8%	8%
Other	2%	2%

The third question focused on the resources respondents use to book their travel options. Hotel websites and online travel agents were the two top choices, followed by theme park websites, airline websites and car rental websites.

Where do you go to book travel options? Please select all that apply.

Hotel websites	21%
Online travel agent (Priceline, Expedia, Booking.com, TripAdvisor etc.)	20%
Theme park website	15%
Airline websites	13%
Car rental websites	8%
Cruise line website	6%
Home sharing website (AirBnB, VRBO, Home Exchange, etc.)	6%
Travel agent	6%
Tour operator website	3%
Other	2%

TRAVEL INDUSTRY EVALUATION

Travel Industry Score Card

In this question block, respondents were asked to give the travel industry a grade for how well it serves their families' needs. For the second year in a row, 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 – Excellent	23%
B – Good	54%
C – OK	21%
D – Needs a lot of improvement	2%
F – Bad	0%

In follow up questions, respondents were asked to grade different subsectors of the travel sector for how well it 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.

	A	B	C	D	F	OVERALL
Airlines	22%	39%	26%	9%	4%	C+
Hotels	37%	48%	12%	2%	1%	B
Vacation rentals	29%	44%	23%	3%	1%	B-
Restaurants	40%	44%	13%	2%	1%	B+
Cruise lines	28%	36%	26%	6%	4%	B-
Travel agents	23%	37%	30%	6%	4%	B-
Tour operators	22%	42%	28%	5%	3%	B-
Car rental	29%	44%	22%	4%	2%	B-
Online travel booking	36%	41%	18%	3%	2%	B

We then compared these overall grades with the grades of those respondents who had indicated that they had used the travel product or service in the past 3 years. These respondents often awarded higher grades: the scores for airlines, vacation rentals, tour operators and car rental companies for example all went up by one grade level. Cruise companies and travel agents saw a dramatic improvement in rating, and went up by two grade levels. Restaurants, however, went down one grade level, from a B+ to B.

	Overall	Recent users
Airlines	C+	B-
Hotels	B	B
Vacation rentals	B-	B
Restaurants	B+	B
Cruise companies	B-	B+
Travel agents	B-	B+
Tour operators	B-	B
Car rental	B-	B
Online travel booking	B	B

Recommendations for the Travel Industry

The survey concluded with a question about what the travel industry can do better to meet the needs of families. In the 2017 edition of the survey, we asked this question in an open-ended format. The top recommendations gathered in that study were listed in the following question, to assess their appeal to a wide range of families. For each suggestion, respondents could choose from three options: 'Would make no difference to me', 'Would be somewhat helpful to me' or 'Would be very helpful to me'.

The top four suggestions concern travel costs, pricing and budgeting. Deals and discounts were seen as most helpful, followed by clear pricing information and fewer surcharges. 46 percent of the respondents expressed a strong interest in packaged travel options in the USA, offering flights and lodging at one clear price—this indicates demand for the services usually offered by tour operators, some OTAs and airlines. 45 percent of respondents also indicated more extensive financing options would be very helpful to them.

Other suggestions include: making all types of families feel more accepted and welcome, clearer travel information on the web about child-friendly options, lodging options for larger families to stay together, a special designation/logo for child-friendly lodging and attractions, and a family concierge service at accommodations/destinations that is available for questions. One third of the respondents would find more accessible travel options for families with children or adults with disabilities very helpful.

Would any of the suggestions below help the travel industry in serving families better? Please select one answer per row.

	Would be very helpful to me	Would be somewhat helpful to me	Would make no difference to me
More deals and discounts for families	68%	25%	7%
Clearer pricing information and fewer surcharges	62%	30%	8%
More packaged travel options in the USA, offering flights and lodging at one clear price	46%	37%	17%
More financing options to spread the cost of family trips over time	45%	33%	22%
Making all types of families feel more accepted and welcomed	43%	39%	18%
Clearer travel information on the web about child-friendly options	43%	41%	16%
Lodging options for larger families to stay together	37%	35%	28%
A special designation/logo for child-friendly lodging and attractions	37%	41%	22%
A family concierge service at accommodations / destinations that is available for questions	34%	45%	21%
More accessible travel options for families with children or adults with disabilities	33%	32%	35%

In a separate, open-ended question, respondents were asked to enter their own recommendations for the travel industry. The most common recommendations regarded:

- Affordability and cost: A large number of respondents commented that family travel is expensive, and finding affordable options can be a challenge. Several respondents commented that for larger families, the challenge is even more pronounced.
- Transparency in pricing: A large number of respondents expressed dissatisfaction with the pricing information provided by travel companies. They complained that the advertised rates were misleading, and were often frustrated by added-on fees and surcharges.
- Travel information: Many respondents requested more and more accurate information about travel destinations. Often it was highlighted that the information that was available was unreliable—for example, the photos of a hotel or attraction did not match their experience. Interestingly, several respondents mentioned instead that there is too much information available, which can make it harder to make informed family travel decisions.
- Packages and bundles: Similar to the 2017 survey, many respondents requested bundled or packaged travel options, in the US and abroad (for example, a bundle of accommodations, food and attractions).
- Traveling with children in different age groups: Several respondents commented that the travel industry is not always attuned enough to the needs of families with very young children. Interestingly, respondents with older teenagers expressed the same frustration, and felt too many options were geared to young children only.
- Travel options for adults and children with special needs: Examples included mobility needs, autism and severe food allergies.
- Pets: Several respondents indicated they have difficulties finding pet-friendly accommodations.

CONCLUSION

At the end of this 2018 edition of our annual Family Travel Survey, what have we learned?

This survey gives us a snapshot of when, how and where families like to travel, and how their travel preferences change as the children grow older. In this study, respondents share where they find travel inspiration, travel information, and how they prefer to book travel products. It is clear from the results of this survey that US families see the value of family vacations as a way to bond, build memories and explore new places together: as an industry, we should be proud to be a part of this meaningful aspect of family life.

Yet, there are areas where the industry can do better. For four years in a row, affordability has emerged as a major hurdle for travel participation. While for some respondents, only low-cost travel options are within reach, this is not the case for all: value for money is often emphasized more than pure dollar value. With a world of travel information at our fingertips, the respondents still highlight that they wish they had access to clearer pricing and more accurate and comprehensive answers to their questions about destinations, accommodations and activities. As travel is a product we often buy before we have seen or experienced it, having complete and clear information available on prices, surcharges and extras is crucial in the decision-making process. It seems that while families are overwhelmed with information, what they are looking for is not always within easy reach. Simplifying the information gathering stage for families—personalized to their budget, family size, the age of the children and their preferences—has to be a priority for the industry going forward.

Another priority should be that we remain an industry that prides itself being welcoming to all. Parents of very young children, teenagers and children with special needs often commented in this study that they don't feel the travel industry understands their needs—single parents have expressed the same concern in a previous edition of this study. In a world where personalization dominates business innovation, a 'one size fits all' approach to family travel is likely to result in disappointment and frustration. The leading companies in our industry will be those who integrate an awareness of the diversity of families into their product design, marketing and recruitment processes.

For the past two years, families have given the travel industry a lackluster B- grade when it comes to understanding their needs. As our understanding grows of what US families look for when they vacation together, we increasingly have the tools to become truly hospitable to all.

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