US FAMILY TRAVEL SURVEY 2023

FAMILY TRAVEL ASSOCIATION

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With generous support provided by:

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INTRODUCTION

BY KENNETH SHAPIRO

President of the Board of Directors, Family Travel Association

Welcome to the eighth edition of the U.S. Family Travel Survey, produced by the Family Travel Association (FTA), Edinburgh Napier University and the New York University School of Professional Studies' Jonathan M. Tisch Center of Hospitality. This year's study is based on more than 3,300 responses from parent and grandparent travelers, and it represents the most comprehensive look at family travel habits, motivations, deterrents and desires available.

In particular, the FTA would like to thank Dr. Lynn Minnaert of The Business School at Edinburgh Napier University, Anna Abelson of the NYU School of Professional Studies' Jonathan M. Tisch Center of Hospitality and Peter Bopp, Research Advisor for the FTA, for their extensive work on the study. We are also grateful for additional support from the Shubert Organization, Telecharge, Trafalgar/The Travel Corporation's Family of Brands and Club Med.

As you will discover as you read through the following pages, this study is wide-ranging — covering a number of topics that are especially relevant as families continue to put the effects of the COVID-19 pandemic behind them.

So, what does the research tell us?

After a period of extremely robust travel activity, families are still eager to take vacations, although the excitement seems to be slowing just a bit — intent to travel over the next year is at 81%, but that's a slight decline from the past two years' studies. However, families also say that they intend to maintain, or increase, their level of spending on travel in the coming year from what they reported in 2022.

The pandemic-era behavioral shifts related to travel have largely dissipated and are no longer leading factors in travel decisions, yet some elements remain powerful, such as the importance of cleanliness and sanitation in lodging selection.

Interest in family group travel continues to be strong — 55% of families are planning to take a multigenerational trip within the next year; 41% are planning to take a trip with extended family members (siblings, cousins, etc.); and 40% are planning to take a trip with other families that they are not related to.

This year's study also looks at the emotional and social impacts of family travel on both the family unit and on the children, specifically. A new section this year examines the value of family travel for children ages 7 and older, with specific questions on how travel helps with kids' pandemic recovery. Most parents (88%) feel that family travel is helpful to their children in overcoming the impacts of the pandemic, and 84% of respondents believe travel makes their children more adaptable and open to new experiences.

Finally, willingness to engage with a travel advisor for family travel has increased among parents (to 71%) and among grandparents (to 70%) this year.

Of course, the study contains many more data points for you to discover. However, what we see is a family travel industry that remains strong, driven by the desire of parents and grandparents to inspire and educate their children and impart on them the inherent benefits that travel brings.

At the FTA, we strongly share the belief that travel has important developmental benefits. Making it easier for families to realize those benefits is at the core of our mission.

STUDY HIGHLIGHTS

BY DR. LYNN MINNAERT, PhD

Professor and Head of Subject, Tourism and Languages, Edinburgh Napier University

In this eighth edition of the US Family Travel Survey, the Family Travel Association (FTA), Edinburgh Napier University and the NYU School of Professional Studies Jonathan M. Tisch Center of Hospitality examine family travel in the United States. This year, the study focuses on family travel trends as the industry continues its post-pandemic recovery. It also examines the potential lingering effects of the pandemic on children and the potential role of family travel in overcoming these. This year's study includes perspectives from parents and grandparents. It is based on 3,370 electronic survey responses (1,227 parents and 2,143 grandparents).

The following themes are featured in the 2023 US Family Travel Survey:

INTENT TO TRAVEL REMAINS HIGH, BUT SHOWS SOME SIGNS OF SOFTENING

Our survey shows that 81% of parents are likely or very likely to travel with their children in the next 12 months. Comparing this finding to prior editions of the family travel survey, the data show that travel demand from US families has been in a slight decline for two consecutive years: it stood at 85% in 2022 and 88% in 2021. This could be an indication that the price inflation and frequent disruptions in recent years are starting to have an effect and are softening demand. Many of the families who are planning to travel in the next 12 months however plan to increase (or at minimum, maintain) their level of travel spending, as we'll explain below.

TRAVELING FAMILIES PLAN TO MAINTAIN OR INCREASE SPENDING

31% of parent respondents plan to spend more on domestic travel in the next year, whereas 48% plan to keep their spending the same. 40% of respondents plan to spend more on international travel in the next year, whereas 27% plan to keep their spending the same. This indicates a strong spending forecast for family travel in the coming year, and may also reflect the fact that traveling families are anticipating and prepared for further price increases.

TRAVEL ADVISORS SHOW STRONG MARKET POTENTIAL IN FAMILY TRAVEL

38% of parents have used a travel advisor to book at least one family trip in the past three years. This is an increase over 2022, when 25% of respondents reported having used a travel advisor. For grandparents, the percentage is slightly lower at 30%, but still significant.

The survey shows that both parents and grandparents are open to using travel advisors in the future. 71% of parents indicate that they are willing to use a travel advisor for their family travel needs in the next 2 years, which is again an increase over 2022 (52%). Grandparents show similarly high levels of willingness to use travel advisors at 70%.

AFFORDABILITY CONCERNS ARE STARTING TO CHANGE BEHAVIORS

Despite the strong spending forecasts, affordability is identified as the top challenge to family travel by 59% of parent respondents. In response, 50% of parents say they will avoid hotels and airlines that charge extra fees. 49% of

Continued...

parents say they will pay closer attention to cancellation and refund policies. 36% say they will choose more affordable accommodations than they did in the past.

Dining is also an area identified by a significant percentage of parents as an area where they may cut back on spending: 38% of parents say they will seek out lodging options that offer kitchen facilities for in-room meals, and 35% say they will seek out budget dining options when traveling.

DEMAND FOR TRAVEL IN LARGER FAMILY GROUPS IS STRONG

The US Family Travel Survey has shown over several editions that family travel in larger groups is common and popular. Two types of travel are researched in-depth in this study:

Multi-generational travel: travel that includes the children, their parents and their grandparents

Skip-generational travel: travel that includes the children and their grandparents, without the parents present

55% of parent respondents say they are planning a multi-generational trip in the coming year. 41% of respondents say they are planning a trip with family members beyond parents and in-laws. 40% of respondents say that they are planning a trip other families who are not related to them.

Grandparents are strong drivers of family travel. Half (50%) of the grandparent respondents have taken a multi-generational trip in the past 3 years, and 40% are likely to take one on the next 3 years. In comparison, 20% of respondents have taken a skip-generational trip in the past 3 years, and 25% are likely to take one in the next 3 years. When it comes to funding a multi-generational vacation, half (50%) of grandparents say they pay for the trip, and 48% say they share the cost with their children. For skip-generational travel, 90% of grandparents pay for the trip.

MULTI-GENERATIONAL AND SKIP-GENERATIONAL TRAVEL SHOW DIFFERENT CHARACTERISTICS

Multi-generational and skip-generational travel display different characteristics in trip length, trip type and associated spending.

Multi-generational trips are the more common travel type of the two, and multi-generational trips tend to be longer than skip-generational trips. Day trips and weekend getaways are more common in skip-generational travel, and while for both types, multi-day domestic vacations are most typical, these trips are more frequently multi-generational. In addition, international skip-generational travel is less common than multi-generational international travel.

Multi-generational and skip-generational travel also show differences in the typical vacation types families take part in. Beach vacations were the top choice for multi-generational trips, whereas museums and cultural attractions are the most popular skip-generational trip type. Two other trip types that are more appealing to grandparents for skip-generational than for multi-generational trips are cruises and city trips.

Grandparents report spending more on multi-generational trips than on skip-generational trips. This is due to the fact that multi-generational travel parties are larger, and that multi-generational trips tend to be longer.

PANDEMIC-RELATED CONCERNS HAVE MOSTLY WANED, BUT A FEW INFLUENCES REMAIN

Two years ago, our survey showed that the pandemic strongly affected family travel behavior. For example, outdoor and active vacation types, such as camping and visits to National Parks, increased strongly in popularity. We see that the effects of the pandemic have mostly waned, and that families are often returning to their pre-pandemic preferences. Last

STUDY HIGHLIGHTS

Continued...

year, 26% of respondents considered COVID-related concerns such as social distancing in their lodging choices, whereas this year, that has now dropped to 9%. However, the effect of the pandemic can potentially still be noticed in how families choose accommodations for family travel: cleanliness and sanitation is the dominant factor, outweighing proximity to attractions and activities and value for the price paid.

LINGERING IMPACTS OF THE PANDEMIC ON CHILDREN, AND THE ROLE OF FAMILY TRAVEL

Our study has found that 50% of parents feel that the pandemic has had a lasting impact on the behavior, well-being and social relationships of their children. Examples of these lingering impacts are that the children are more anxious or worried, that they spend more time alone, and that they are less physically active.

88% of parents feel that family travel is helpful to their children in overcoming some of the lingering impacts of the pandemic. 84% of respondents say that it makes their children more adaptable and open to new experiences. 62% say family travel gives their older children a more positive outlook on life, 61% say it helps them with their social skills, and 61% agree that it helps children spend more time outdoors. Other benefits include that family travel makes children less isolated (58%), that it encourages them to try new foods (48%) and that it makes them more comfortable around strangers (44%)

A FAMILY TRAVEL WISH LIST

Each year, the US Family Travel Survey asks respondents to rate the travel industry on how well it serves the needs of traveling families. This year, parents and grandparent respondents both gave a grade of B+, between good and excellent, a significant improvement over the last 2 years, when that score was C+. This is an indicator that the industry is recovering from the disruptions caused by the pandemic.

Despite this positive evaluation, families note that there are several areas of friction that they would like to see the industry address. Particular areas of dissatisfaction are:

- The challenge and added cost of being seated together on flights
- The scarcity of family rooms or connected rooms in hotels
- The high cost of family travel, and the desire for lower-cost options and discounts
- The need to improve quality and level of service across the industry, with regular references to the labor shortage across the sector
- The dislike of hidden fees and charges that make pricing lack transparency

Dr. Lynn Minnaert
Professor and Head of Subject, Tourism and Languages, **Edinburgh Napier University**

Survey Design and Administration

The study presented here includes the findings of a survey conducted with parents and grandparents in 2023. Only respondents who were over the age of 18 and who had children or grandchildren 18 years of age or younger were eligible to take the survey. Respondents who were unlikely to travel with their children or grandchildren in the coming year were filtered out at the end of the first question block. The survey remained open for five and a half weeks between July 12 and August 19, 2023. The total number of respondents was 3,370: this total comprised of 1,227 parent respondents and 2,143 grandparent respondents.

The survey covered the following themes: intent to travel, the types of trips planned in the coming year, travel behavior (including transportation, accommodation preferences, spending and the use of travel advisors), travel attitudes, post-pandemic travel experiences of children aged 7 and older, and an evaluation of how well the travel sector serves families.

The survey was circulated electronically via the mailing lists of the following partner organizations: Shubert Organization, Telecharge, Trafalgar/The Travel Corporation's Family of Brands. Survey respondents were offered the opportunity to enter a prize draw at the end of the survey. The prize was generously sponsored by Club Med.

PARENT FINDINGS

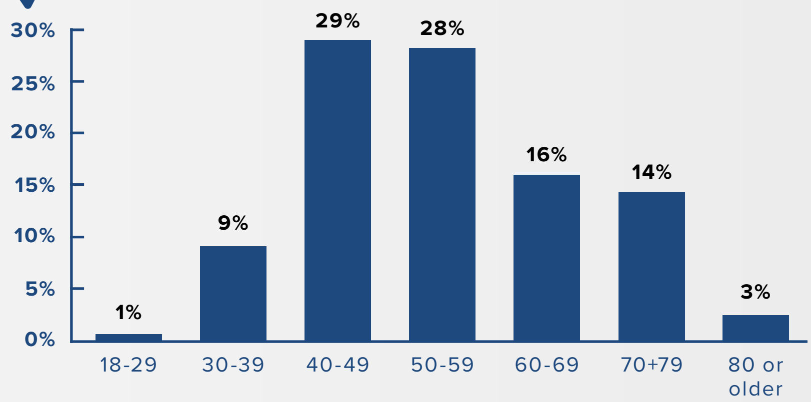
PARENT RESPONDENTS

Survey Respondents

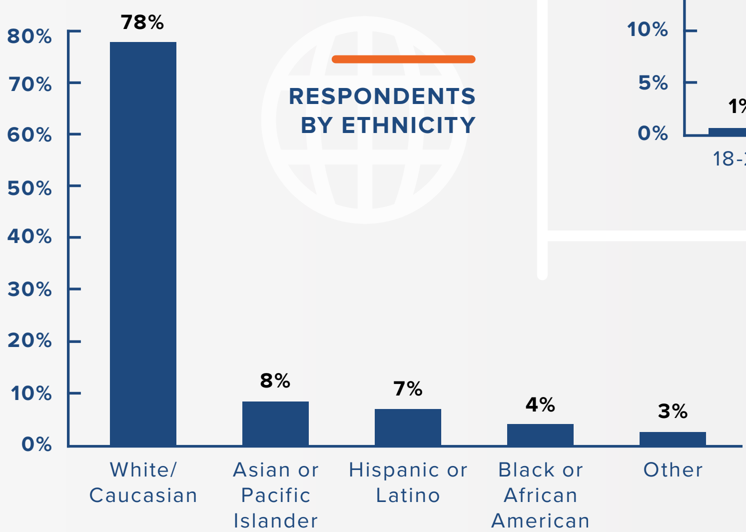
NUMBER OF RESPONDENTS

1,227

RESPONDENTS BY AGE



RESPONDENTS BY ETHNICITY

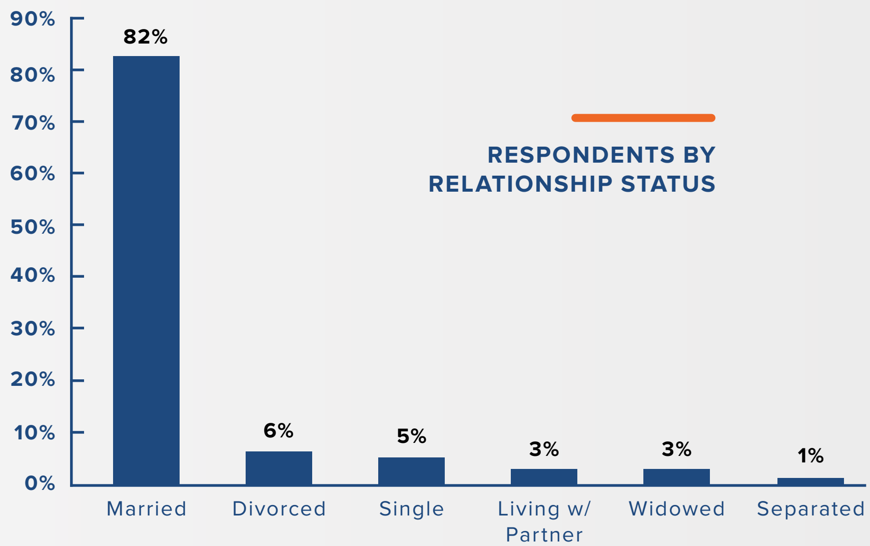


RESPONDENTS BY GENDER

74% / 26%

FEMALE **MALE**

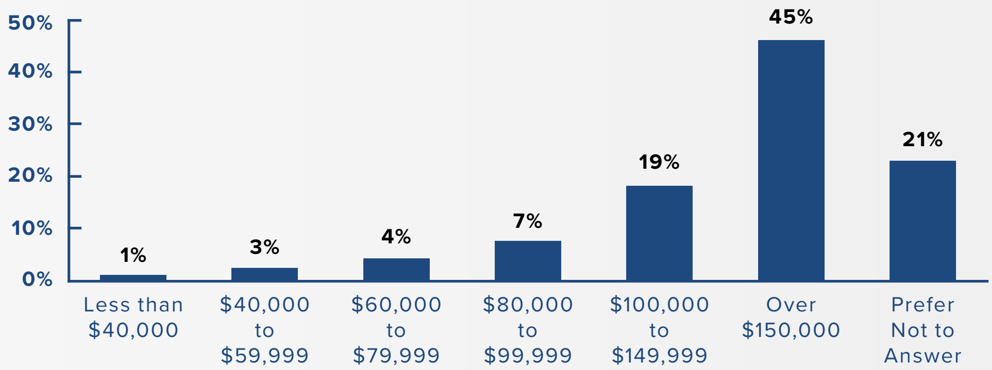
RESPONDENTS BY RELATIONSHIP STATUS



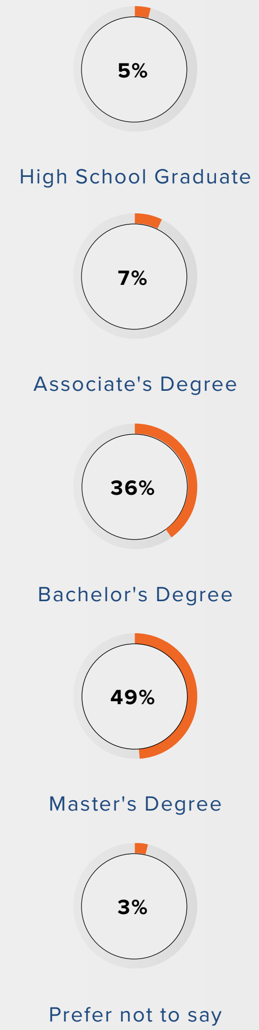
PARENT RESPONDENTS

Survey Respondents continued...

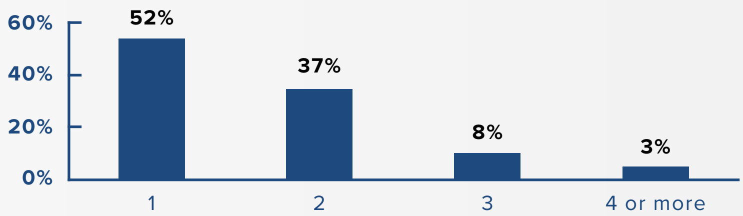
RESPONDENTS BY HOUSEHOLD INCOME



RESPONDENTS BY EDUCATION



RESPONDENTS BY NUMBER OF CHILDREN (AVG: 1.65)



11% are mixed race families

9% have at least one child with special needs

9% are single parent families

5% are LGBT families

4% have at least one stepchild

Intent to Travel

In our sample, **81% of parents are likely or very likely to travel with their children** in the next 12 months. Of the remaining 19%, 5% are undecided and 14% are unlikely or very unlikely to travel.

Comparing this finding to prior editions of the family travel survey, the data show that travel demand from US families has been in decline for two consecutive years: it stood at 85% in 2022 and 88% in 2021. Travel intent in 2023 is however higher than in 2019, when it was at 70%, and in 2018, when it was at 79%. It is lower than the peak in 2015 and 2016, when 93% of parents were very likely or likely to travel with their children.

The respondents who said they were unlikely to travel with their children in the next three years were asked to select the reasons for their answer. The top reason, selected by 31% of the respondents, is that their children won't like it, are too busy with other activities, or prefer staying at home. Other main reasons, both selected by 26% of the respondents, is that there are too many other demands on the family budget, and that traveling with children is not relaxing for them.

The COVID-19 pandemic is no longer a major inhibitor to family travel, compared to the prior 2 years. For example, in 2021, 29% of respondents were not planning to travel because not everyone in the family is vaccinated, whereas in 2023 this only applies to 3% of respondents. Only 3% of the 2023 respondents choose not to travel because they worry that COVID-19 will disrupt their travel plans, and only 2% say they do not feel safe because of the ongoing pandemic.

TABLE 1: Why are you unlikely to go on a family vacation with your children in the next 12 months?

ANSWER	PERCENTAGE
Our children won't like it, are too busy with other activities, or prefer staying at home	31%
We have too many other demands on our family budget at this time to afford to travel	26%
Traveling with children is not relaxing for me/us	26%
Health problems or physical limitations inhibit our ability to travel	9%
It's too difficult / time-consuming to plan	8%
I/we don't think a family trip is worth the money	7%
I/we don't have any / enough vacation time	7%
Not everyone in our family is vaccinated against COVID-19	3%
We don't want to take the risk that COVID-19 will disrupt our travel plans	3%
Our children are too young	3%
We don't feel safe traveling as a family because of the ongoing pandemic	2%

Projected Travel

In this section of the survey, we probed **what our respondents' family travel plans are for the coming year**.

TRIP LENGTH

In the first question in this block, we asked about trips of different lengths, from day trips to multi-day vacations. **Multi-day vacations in the US** are the most common trip type the respondents plan to take (68%). Weekend getaways come in second (53%). 40% of the respondents plan to take day trips, and 11% plan to take multi-week vacations in the US.

International family travel is making a strong comeback post-pandemic. Multi-day international vacations are planned by 46% of respondents, which is a significant increase over 2021, when only 19% of respondents were planning this type of trip. 22% of respondents are planning a multi-week international vacation.

TABLE 2: We would like to know what types of trips you are planning to take with your children in the coming year.

ANSWER	PERCENTAGE
Day trip	**40%**
Weekend getaway	**53%**
Multi-day vacation in the US	**68%**
Multi-day international vacation	**46%**
Multi-week vacation in the US	**11%**
Multi-week international vacation	**22%**

TRIP TYPE

Respondents were asked what types of trips they were planning to take in the coming 12 months. Beach vacations (54%), visiting family and friends (49%) and visiting museums and cultural attractions (41%) are the three most common family travel types.

The graph below highlights how families in the US have a wide range of interests and plan to participate in various types of travel. Trips to National Parks and active vacations surged in 2021, when COVID-19 concerns still boosted tourism in outdoor settings, but interest in these travel types has now returned to pre-pandemic levels.

TABLE 3: Which of the following types of trips are you planning to take with your children in the coming year?

TRIP TYPES	PERCENTAGE
Beach vacation	**54%**
Visiting family and friends	**49%**
Museum or cultural attraction	**41%**
City vacation	**40%**
Events (e.g., concerts, sport events, larger social events)	**36%**
Theme or water park	**33%**
National or State Parks	**32%**
Nature vacation other than National Parks (e.g., lake, mountain)	**25%**
Cruise	**23%**
Active vacation (e.g., camping, hiking, biking, sports)	**22%**
Road trip (including RV trip)	**20%**
A group tour through a tour operator (e.g., Adventures by Disney, G-Adventures, safaris etc.)	**19%**
Dude ranch or farm vacation	**4%**

Trip Types continued...

Next, respondents were asked whether they were planning to travel in larger family groups. Similar to the prior editions of the US Family Travel Survey, this type of travel is common and remains popular. 55% of respondents say they are planning a **multi-generational** trip, and 11% say that their children will go on a **skip-generational** trip with their grandparents. 41% of respondents say they are planning a trip with **family members beyond parents and in-laws**. 40% of respondents say that they are planning a trip with **people who are not related** to them.

TABLE 4: Are you planning any of the following types of trips in the coming 12 months?

ANSWER	PERCENTAGE
A multi-generational trip (travel that includes your parents/in laws and your children)	**55%**
A skip-generation trip (travel that includes your children and their grandparents without you or your spouse/partner)	**11%**
A trip with extended members of your family beyond your parents/in laws (for example, aunts or uncles, nieces or nephews, or travel with your siblings and their children)	**41%**
A trip with another or other families who are not related to your family	**40%**

BOOKING WINDOWS AND PREFERRED TRAVEL SEASONS

Booking windows for family travel have remained similar over the different editions of this survey. The most common booking window (33%) for booking a family trip is **two or three months before departure**. 31% of respondents book their travel four to six months before departure. Very short booking windows (two weeks before departure or less) and very long booking windows (over a year before departure) are rare.

TABLE 5: Approximately when do you plan to book your family travel in the coming 12 months?

ANSWER	PERCENTAGE
Two weeks prior to departure	**1%**
A month prior to departure	**9%**
Two or three months prior to departure	**33%**
Four to six months prior to departure	**31%**
Six to 12 months prior to departure	**23%**
Over a year prior to departure	**3%**

Booking Windows continued...

Summer remains the most popular travel season, followed by **spring break**. 75% of respondents have taken a summer vacation in the past year, and 64% of respondents plan to take a summer vacation next year. The fall and winter seasons are appealing travel times for families: compared to when they traveled in the last year, more families would like to travel in the winter holiday season, Thanksgiving and the mid-winter break in the next year.

TABLE 6: In the past year, when do you take your family vacation(s) and when are you thinking of taking them in the next year?

ANSWER	HAVE TAKEN IN THE LAST YEAR	WOULD LIKE TO TAKE IN THE NEXT YEAR
Spring Break	**46%**	**41%**
Summer	**75%**	**64%**
Thanksgiving/Fall	**23%**	**29%**
Winter Holiday Season	**30%**	**35%**
Mid-Winter Break	**20%**	**24%**
Around Other Holidays	**20%**	**20%**
Other	**9%**	**10%**

TRANSPORTATION PREFERENCES

The next question in the survey shows that US families are returning to pre-pandemic travel preferences. While car travel and road trips strongly appealed when there were still concerns over social distancing, plane travel is now the most common choice for family travel. Cruises are also making a comeback after the reputation damage caused by COVID-19.

TABLE 7: Select the modes of transportation you plan to use on your family trips in the coming year.

88% Plane

77% Car

25% Boat/Cruise

21% Train

5% RV

ACCOMMODATION PREFERENCES

When asked in which type of accommodations they planned to stay in the coming year, **hotels** were the most-selected answer (84%). **Resorts** come in second at 50%, and **vacation rentals** third at 47%.

The top 3 ranking of hotels, resorts and vacation rentals is similar to what this survey has previously found, however where vacation rentals have been steadily growing in popularity in recent years, that continuous growth has now come to an end. Vacation rentals were a projected accommodation choice for 54% of respondents in 2021, and declining to 47% in 2022, and staying stable in 2023.

TABLE 8: Do you plan to stay in any of the following types of accommodations on a family vacation in the coming 12 months?

ANSWER	PERCENTAGE
Hotel	84%
Resort	50%
Vacation Rental Property (a home/condo, Airbnb, VRBO, etc.)	47%
Cruise ship	24%
Homes belonging to friends/family members	24%
Bed and Breakfasts, Small Inns	14%
Cabin Rental	11%
Campsite	9%
Your Own Vacation Property	7%
Timeshare	7%
Motel	7%
RV / Trailer	5%
Dude Ranch	2%
Home Exchange	1%

Accommodation Preferences continued...

Cleanliness and sanitation (70%) is the dominant factor for US families when they choose accommodations. The second most important factor is **close proximity to attractions and activities** (65%), followed by **value for the price paid** (57%). **Safety and security** are an important factor for 54% of respondents.

COVID-related concerns such as social distancing continue to decline. In 2022, 26% of respondents considered these important factors in choosing accommodations, whereas this has dropped to 9% this year.

TABLE 9: What are the factors that are most important to you when you select where to stay on your family vacation?

ANSWER	PERCENTAGE
Cleanliness and sanitation	70%
Close proximity to attractions and activities	65%
Best value for the price paid	57%
Safety and security	54%
Complimentary Wifi/Internet	47%
Complimentary breakfast included	46%
Amenities for children (pool, beach, game rooms, kids' clubs, etc.)	41%
Flexible rooms/sleeping arrangements (for example, connecting rooms or suites)	38%
User reviews	37%
Family-friendly dining options at or near accommodations	33%
Amenities for adults (spa, pool, beach, golf, sports, etc.)	33%
Complimentary parking	32%
Our preferred accommodation style	31%
Whole family can gather in our own space	30%
Kitchen area for in room meal preparation and dining	28%
Ability to use rewards points in exchange for rooms, meals, activities	23%
Brand that I am loyal to	21%
Maintaining COVID protocols for health and social distancing	9%
Entertainment options in room	7%
Opportunities for my child(ren) to meet other children	6%

DESTINATION PREFERENCES

In this section of the survey, respondents were asked to rank their top three domestic and international destinations. Domestically, the most popular states for family travel are **California**, **Florida**, **Hawaii** and **New York**.

76% of respondents plan to travel **internationally** with their children in the coming two years.

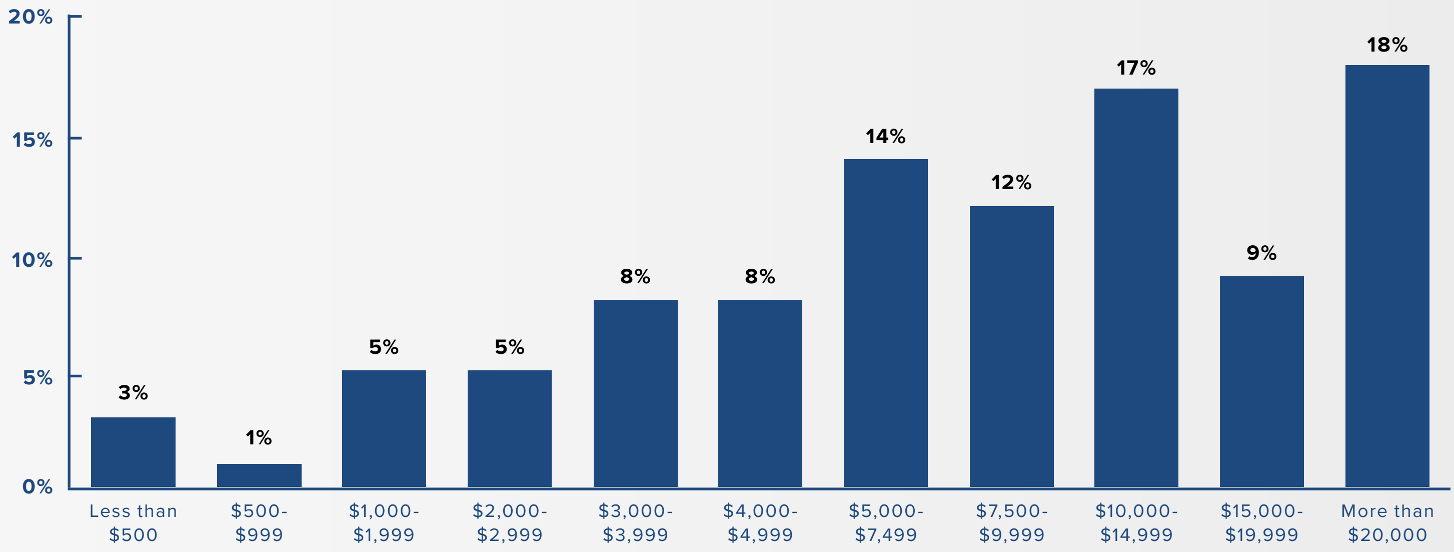
Europe is the most popular continent for family vacations. **Canada**, **Mexico and the Caribbean** also remain popular. The list below outlines the top 20 international travel destinations for US families. This list also includes Israel and Japan.

1. Italy	8. Mexico	15. Israel
2. United Kingdom	9. Germany	16. Portugal
3. France	10. Dominican Republic	17. Switzerland
4. Greece	11. Canada	18. Norway
5. Japan	12. Bahamas	19. Croatia
6. Ireland	13. Costa Rica	20. Jamaica
7. Spain	14. Iceland	

TRAVEL SPENDING

The average respondent spent around **$6,750** on family travel in 2022. 18% of respondents spent more than $20,000. This percentage is higher than in prior editions of the survey, and is reflective of the fact that a larger number of respondents this year belonged to higher income groups than in previous editions.

TABLE 10: Approximately how much did you spend in total on family travel in 2022?



Looking ahead, 31% of respondents plan to spend more on domestic travel in the next year, whereas 48% plan to keep their spending the same and 19% expect to spend less. In comparison, 40% of respondents plan to spend more on international travel in the next year, whereas 27% plan to keep their spending the same and 12% expect to spend less. This indicates continuing robust demand for international travel in the coming year, indicating a rebound after the travel restrictions related to the pandemic caused a steep decline.

TABLE 11: How much do you expect to spend on family travel in the coming 12 months, compared to your spending on family travel in 2022?

	I EXPECT TO SPEND MORE	I EXPECT TO SPEND THE SAME AMOUNT	I EXPECT TO SPEND LESS	I DO NOT EXPECT TO TAKE THIS TYPE OF TRIP
Within the US	31%	48%	19%	2%
Outside of the US	40%	27%	12%	21%

USE OF TRAVEL ADVISORS

38% of respondents have used a travel advisor to book at least one family trip in the past three years. This is an increase over 2022, when 25% of respondents reported having used a travel advisor. 71% of respondents indicate that they are willing to use a travel advisor for their family travel needs in the next 2 years, which is again an increase over 2022 (52%). These findings indicate that **the position of travel advisors in the family travel space is strong**.

The most common reason that respondents have used a travel advisor, or would be open to using one, is their in-depth knowledge of the vacation type or destination the respondent is interested in (59%). A close second is the fact that travel advisors have access to better rates and prices (55%).

TABLE 12: What are the reasons you have used or would be open to using a travel agent for your family trips?

ANSWER	PERCENTAGE
Travel advisors have an in-depth understanding of the destination or vacation type I was interested in	**59%**
Travel advisors have access to better rates and prices	**55%**
If something goes wrong, a travel advisor/agent is there to help	**47%**
Planning and booking on my own is time-consuming and/or confusing	**46%**
Travel advisors offer amenities and benefits that I cannot obtain on my own	**43%**
My travel advisors get to know me and my preferences and can tailor recommendations for me	**32%**
Travel advisors have in-depth knowledge about family and multi-generational travel	**25%**

Travel Attitudes

In this section of the survey, we asked parents about their attitudes towards travel, including the impacts of family travel, the role of their values in making travel decisions, and aspects of travel that tend to cause them worry or stress.

The findings show that parents associate travel with **positive outcomes** beyond the enjoyment of the trip itself: 82% of respondents say that travel brings their family closer, 79% that family vacations enrich a child's education, and 73% that travel makes children better global citizens. The positive perceived impacts of family travel may underpin the finding that almost two thirds of respondents (65%) prioritize travel experiences over material possessions. Just over a third of respondents (35%) feel that traveling with their children makes them a better parent.

When probed to what extent parents' values drive travel decisions, 29% of respondents say they avoid traveling to states or destinations that do not align with their values.

TABLE 13: Please select the statements in the list below that you agree with:

ANSWER	PERCENTAGE
Travel brings us closer together as a family	**82%**
Family vacations enrich a child's education	**79%**
I believe travel makes children better global citizens	**73%**
I prioritize travel experiences over material possessions	**65%**
Traveling with my children makes me a better parent	**35%**
I avoid traveling to states/destinations that don't align with my values	**29%**
I don't agree with any of these	**1%**

Travel Attitudes continued...

The survey also asked about aspects of travel that affect parents' attitudes negatively, by causing them stress or worry. The most common stressor for parents are **possible cancellations and delays**, and the question of associated compensation: this worries 67% of respondents. Over half (54%) of the respondents worry about staying within budgets, knowing costs upfront and avoiding surprise fees. International travel causes stress for 30% of respondents.

TABLE 14: Below are a list of common sources of worry or anxiety for parents when they travel with their children.

ANSWER	PERCENTAGE
Cancellations, delays and possible compensation	67%
Staying within budget, knowing costs upfront and avoiding surprise fees	54%
Worries around international travel	30%
Increased flight turbulence	17%
Kids' anxiety about travel (germophobia, other fears. etc)	13%
None of these worry or stress me	11%
Other	5%

Older Children and the Impact of the Pandemic

In this section of the survey, respondents were asked specifically about travel with their **children older than 7**: we specifically looked into the role they play in family travel decisions and the impact family travel has on them. We focused on the over-7 age group for two reasons. The first is that compared to younger children, they are likely to be old enough to have a say in planning the trip, and they are also old enough to appreciate the travel experience more fully and build memories. A second reason is that compared to younger children, the over-7s have experienced the pandemic and the associated restrictions more consciously, and this may have a more lasting effect on them than on children who are under 7.

The first question in this section asked respondents about the **travel preferences** of their children over the age of 7, and what role they play in planning the trip. 79% of respondents report that their children over 7 love to travel, and 72% that they are interested in learning about the places they visit. 59% of over-7s like to travel to other countries.

In terms of the **influence of the children on travel decisions**, we see that older children drive the choice of activities on vacation for 58% of respondents. Their influence in choosing the travel destination is lower, but is still an important factor for 39% of respondents.

Relaxation and familiarity do not appear to be big drivers for children over 7 when it comes to family vacations. 31% of respondents say their children prefer vacations where they can relax, and 13% say their children prefer travel to familiar places. Only 6% of children prefer to stay home during school breaks.

TABLE 15: Please select the statements in the list below that you agree with:

ANSWER	PERCENTAGE
My children love to travel	**79%**
My children are interested in learning about the places we visit	**72%**
My children like to travel to other countries	**59%**
My children have a lot of influence in choosing the activities we do on vacation	**58%**
My children have a lot of influence in choosing our travel destination	**39%**
My children prefer vacations where they can relax (beach, resort, etc)	**31%**
My children prefer to travel to familiar places	**13%**
My children would prefer that we stay home during school breaks	**6%**

Respondents highlight the **positive impacts of family travel on their older children** in the next question. 80% of respondents agree that travel has helped their children see the world from a broader perspective. 67% agree that their children have become more interested in other cultures because of their travel experiences, and 62% that travel has helped their children to be more confident. Over half of the respondents (55%) feel that travel has helped their children to be more engaged learners, and 41% say it has helped their children become better communicators.

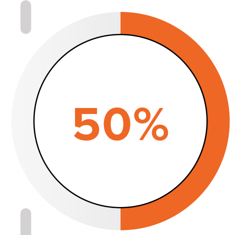
Older Children continued...

TABLE 16: Please select the statements in the list below that you agree with:

ANSWER	PERCENTAGE
Travel has helped my children see the world from a broader perspective	80%
My children have become more interested in other cultures because of our travel experiences	67%
Travel has helped my children to be more confident	62%
Travel has helped my children be more engaged learners	55%
Travel has helped my children to be better communicators	41%

We then asked parents whether they feel that the pandemic has had a lingering impact on their older children's behavior, well-being and/or social relationships, that is still noticeable today. This question received a split response: 50% of parents said yes, and 50% of parents said no.

When probing about the nature of the lingering impacts from the pandemic, the responses indicated many types. The top 3 were that the children were more anxious or worried (54%), that they spend more time alone (47%) and that they are less physically active (35%).



of parents feel that the pandemic has had a lingering impact on the behavior, well-being and social relationships of their children.

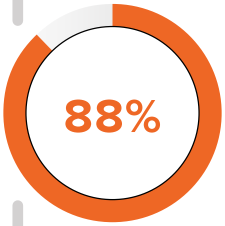
TABLE 17: What lingering effects of the pandemic do you notice in your child(ren) aged 7 or older?

ANSWER	PERCENTAGE
My children are more anxious or worried	54%
My children spend more time alone	47%
My children are less physically active	35%
My children find it more difficult to focus	26%
My children find it harder to interact with other children	26%
My children are less optimistic	25%
I worry that my children's development has slowed due to the pandemic	24%
My children have developed worse eating habits	23%
My children are less adaptable to new situations	19%
My children display more challenging behavior	17%
My children find it harder to interact with other adults	10%
My children are less curious	8%
None of the above apply to my children	5%

Older Children continued...

We then asked the parents with children who are experiencing lingering impacts of the pandemic, whether they feel that family travel can help in addressing some of these impacts. 88% of parents feel that family travel is helpful to their children in overcoming some of the lingering impacts of the pandemic.

When clarifying in which way family travel is helpful in this way, 84% of respondents say that it makes their children more adaptable and open to new experiences. 62% say family travel gives their older children a more positive outlook on life, 61% say it helps them with their social skills, and 61% agree that it helps children spend time outdoors. Other benefits include that family travel makes children less isolated (58%), that it encourages them to try new foods (48%) and that it makes them more comfortable around strangers (44%)



of parents feel that family travel is helpful to their children in overcoming some of the lingering impacts of the pandemic.

TABLE 18: What lingering effects of the pandemic do you notice in your child(ren) aged 7 or older?

ANSWER	PERCENTAGE
Family travel makes my children more adaptable and open to new experiences	**84%**
Family travel gives my children a more positive outlook on life	**62%**
Family travel helps my children develop their interpersonal skills	**61%**
My children spend more times outdoors when we travel	**61%**
Family travel makes my children less isolated	**58%**
My children like to try new dishes and cuisines when we travel	**48%**
Family travel makes my children more comfortable around strangers	**44%**

Travel Challenges

Respondents were asked to identify up to five factors that make family travel more difficult. **Affordability** is identified as the top challenge by 59% of respondents: it has been the top answer since the inception of this survey in 2015. In second and third place are challenges related to time: the **timing of school breaks** (56%) and **available vacation time** (47%).

Dealing with potential cancellations was identified as a challenge by 35% of respondents, a significant decrease from 51% in 2022: this indicates that confidence in the travel sector has grown after the widespread disruptions last year. Pandemic-related concerns are also less prominent than they were in 2021 and 2022, although concerns over sanitation and health protocols in hotels and restaurants are still perceived as a challenge by 14% of respondents.

TABLE 19: Which of the following factors listed below are the most challenging to you when considering travel with your children.

ANSWER	PERCENTAGE
Affordability	59%
Timing of school breaks	56%
Available vacation time	47%
Finding a destination or activity everyone will enjoy	44%
Dealing with potential cancellations	35%
Planning the trip	30%
Finding adult time while traveling with children	19%
Traveling on public transportation with children (plane, train, boat, etc.)	16%
Dining out while traveling	16%
Family members getting along	15%
Concerns about the sanitation and health protocols in hotels and restaurants	14%
Passport and visa requirements	11%
Age(s) of my children	10%
Traveling by car with children	9%
Health concerns other than Coronavirus	8%
Concerns about vaccination and health protocols	8%
Other	2%
None of these	2%

Travel Challenges continued...

Those respondents who indicated that affordability was a challenge for them, were presented with a follow-up question about the extent to which they had adapted their travel behaviors in response. The top response, selected by 50% of parents, is that they will avoid hotels and airlines that charge extra fees. 49% of parents say they will pay closer attention to cancellation and refund policies.

Two dining-related responses score fairly highly: 38% of parents say they will seek out lodging options that offer kitchen facilities for in-room meals, and 35% say they will seek out budget dining options when traveling. 36% say they will choose more affordable accommodations than they did in the past.

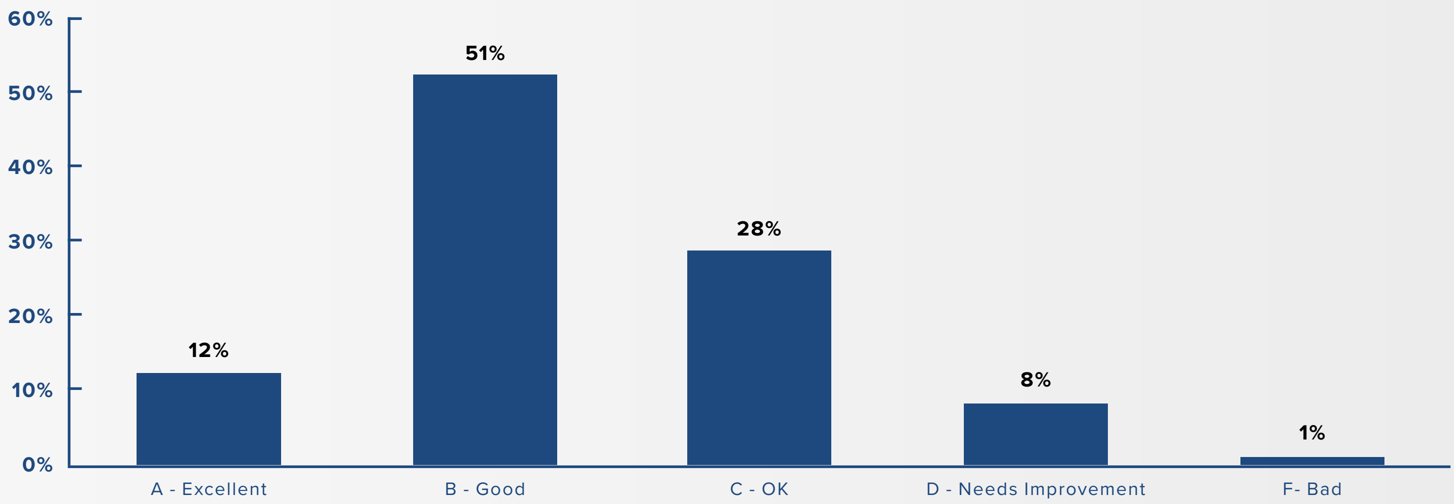
TABLE 20: Are you planning to do any of the things below to reduce the cost of family vacations?

ANSWER	PERCENTAGE
We will avoid hotels and airlines that charge extra fees (resort fees, seat booking fees, etc.)	50%
I pay closer attention to cancellation and refund policies when booking family travel	49%
We seek out lodging options that offer kitchen and dining facilities for in room meals	38%
We will choose a more affordable accommodation option than we did in the past	36%
We seek out budget dining options when traveling	35%
We limit the number of ticketed attractions and activities we visit to keep costs down	32%
I am more likely to buy travel insurance	31%
We will drive instead of fly due to the high cost of airfare	26%
We are planning more staycations or visits with family/friends due to the high cost of lodging	17%
We are planning to stay closer to home due to the high cost of transportation/gas	13%
Current travel costs are as we expected and are not inhibiting our travel plans	7%
Other	2%

Industry Evaluation

Respondents to the survey were asked to assign the travel industry a grade for having the best interests of traveling families at heart. The average grade the industry was awarded by families is a **B+**. This grade reflects that families see the industry's performance in this regard as between good and excellent. This score represents a marked improvement compared to 2022, when the average grade was C+.

TABLE 21: What grade would you give the travel industry for how well it serves the needs of traveling families?



Finally, respondents were asked what the travel industry could do to serve the needs of families better. They were presented with a textbox to enter their thoughts, and common themes in the comments were:

- Families should be guaranteed to sit together on planes (the most common answer by far!)
- Hotels need more larger or connected rooms to accommodate families
- More childcare facilities would be appreciated
- The family travel offer should include more variety beyond the typical destinations
- Many respondents highlight the high cost of travel and would like to see more affordable options, as well as transparent pricing that avoids additional fees being added at the end

GRANDPARENT FINDINGS

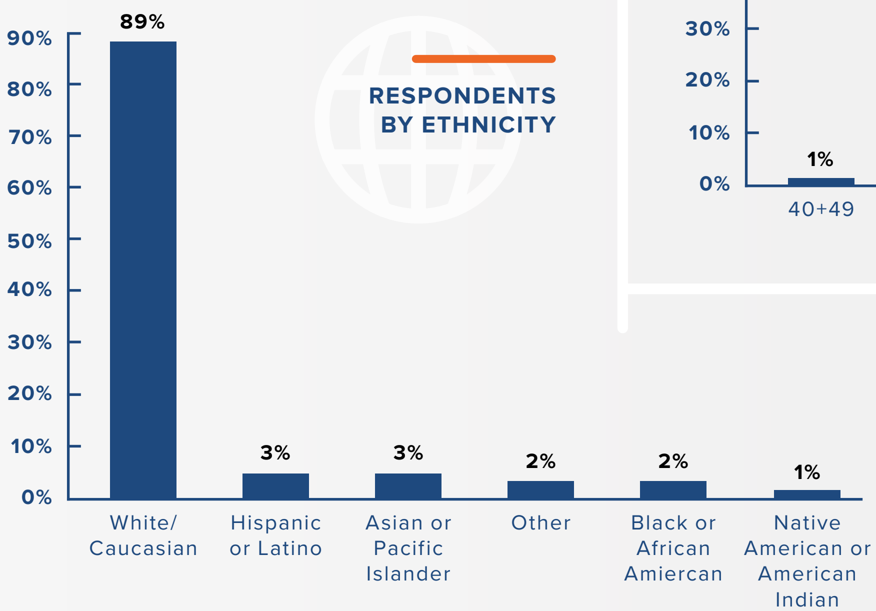
GRANDPARENT RESPONDENTS

Survey Respondents

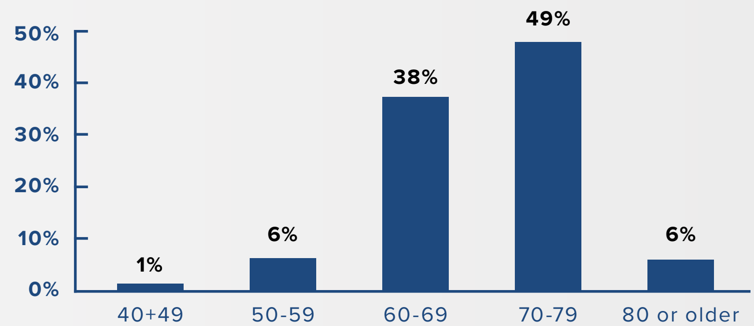
NUMBER OF RESPONDENTS

2.143

RESPONDENTS BY ETHNICITY



RESPONDENTS BY AGE



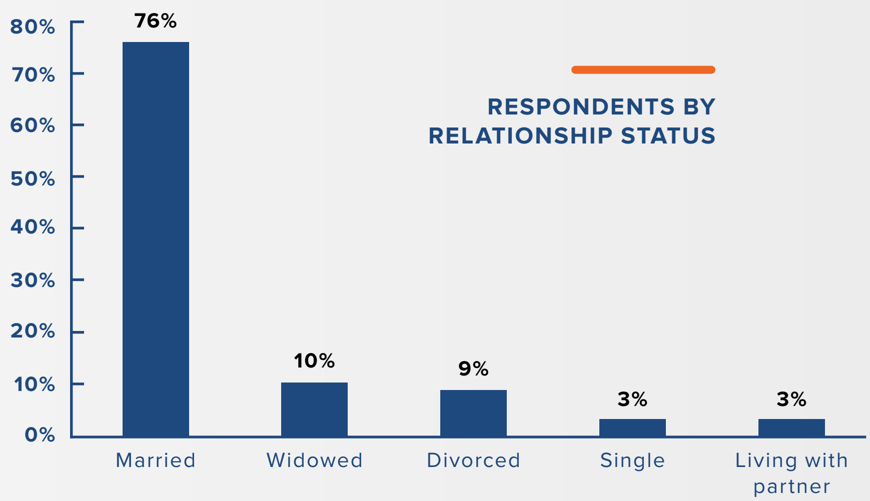
RESPONDENTS BY GENDER

65% / 35%

FEMALE **MALE**

Photo © Michael Howard

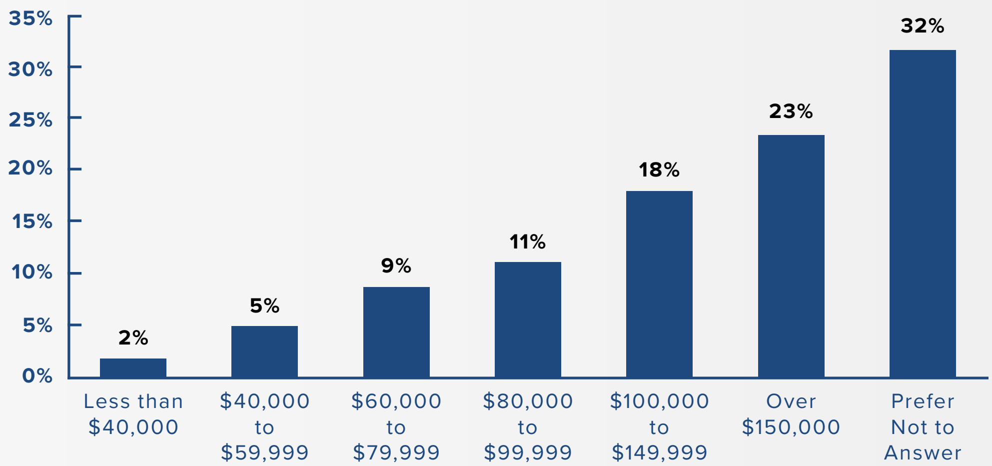
RESPONDENTS BY RELATIONSHIP STATUS



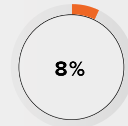
GRANDPARENT RESPONDENTS

Survey Respondents continued...

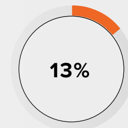
RESPONDENTS BY HOUSEHOLD INCOME



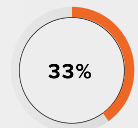
RESPONDENTS BY EDUCATION



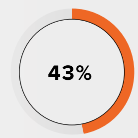
High School Graduate



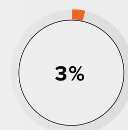
Associate's Degree



Bachelor's Degree



Master's Degree



Prefer not to say

The grandparent respondents in this survey were questioned about two types of family travel:

- Multi-generational travel: travel that includes the children, their parents and their grandparents
- Skip-generational travel: travel that includes the children and their grandparents, without the parents present

Multi-generational travel is more common in the US than skip-generational travel, yet both show robust levels of demand. Half (50%) of the respondents have taken a multi-generational trip in the past 3 years, and 40% are likely to take one on the next 3 years. In comparison, 20% of respondents have taken a skip-generational trip in the past 3 years, and 25% are likely to take one in the next 3 years.

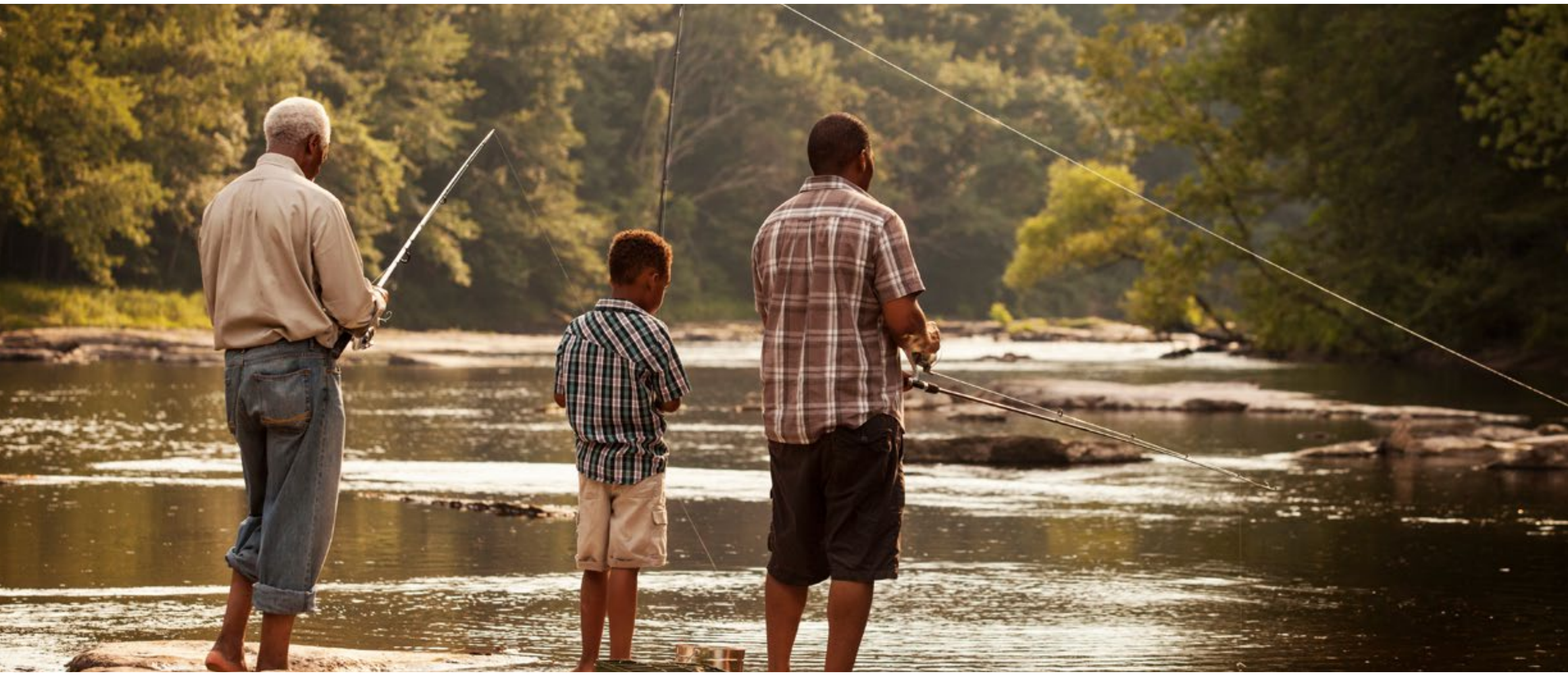


TABLE 22: What is your family's experience with multi-generational and skip-generation travel?

	HAVE TAKEN IN THE PAST 3 YEARS	LIKELY TO TAKE IN THE NEXT 3 YEARS
A multi-generational trip (travel that includes children, their parents and grandparents)	**50%**	**40%**
A skip-generation trip (travel that includes children and their grandparents, without their parents)	**20%**	**25%**

We will now review each of these travel types in turn.

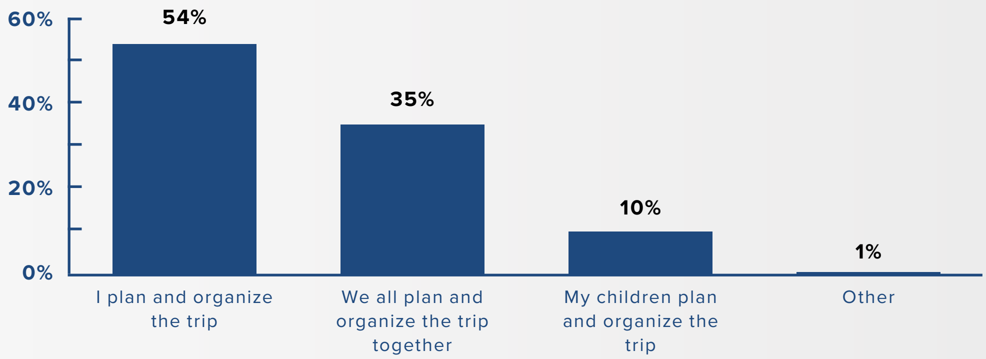
Multigenerational Travel

In this section of the survey, we asked grandparent respondents about multi-generational travel: travel that includes them, their grandchildren and the grandchildren's parents.

TRAVEL PLANNING

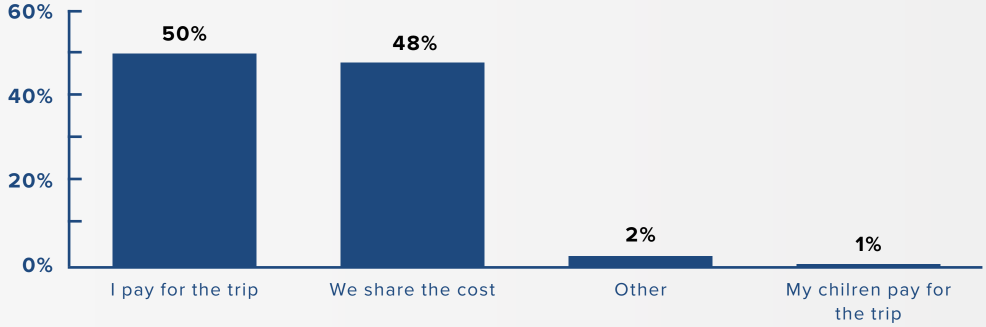
Over half of the grandparent respondents (54%) say that they plan and organize their multi-generational travel experiences. 35% say the travel party organize the trip together with their children (the grandchildren's parents). A minority of 10% of respondents say their children plan the trip. This shows that grandparents tend to be a driving force in multi-generational travel.

TABLE 23: Who primarily plans and organizes the multi-generation trip(s) you take with your children and your grandchildren?



When it comes to funding the multi-generational vacation, half (50%) of grandparents say they pay for the trip, and 48% say they share the cost with their children. Other arrangements are rare.

TABLE 24: Who usually pays for the multi-generation trip(s) you take with your children and grandchildren?



TRAVEL BEHAVIOR AND PREFERENCES

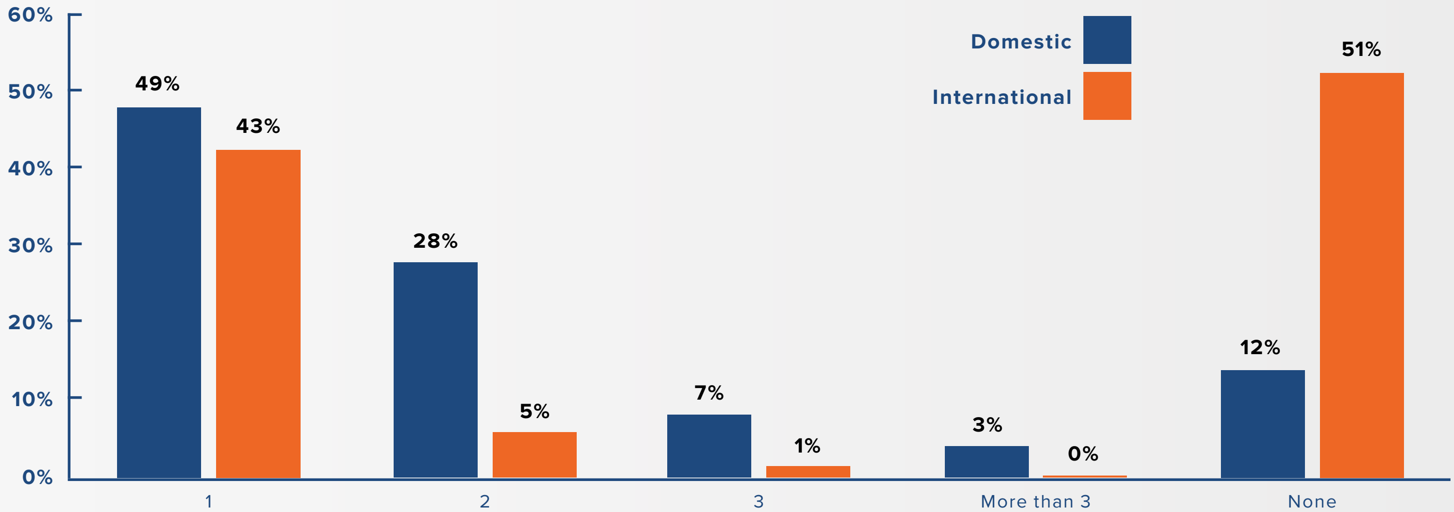
Multi-day vacations in the US are the most commonly reported multi-generational travel type: 69% of grandparent respondents report that they take at least one of these trips in a typical year. Weekend getaways (35%) and day trips (34%) are travel types that are less common, but over a third of the respondents report taking them in a typical year. International multi-generational travel is less prevalent than domestic travel, but over a quarter (28%) of respondents take a multi-day international vacation in a multi-generational group.

TABLE 25: Which of the following types of multi-generation trips do you take with your family in a typical year?

ANSWER	PERCENTAGE
Day trip	34%
Weekend getaway	35%
Multi-day vacation in the U.S.	69%
Multi-day international vacation	28%
Multi-week U.S. vacation	12%
Multi-week international vacation	11%

In terms of travel frequency, domestic multi-generational trips are more frequent than international trips, and most respondents report going on one per year. This is the typical frequency for 49% of grandparents who travel domestically, and 43% of grandparents who travel internationally. 28% of grandparents report that they take 2 domestic multi-generational vacations per year.

TABLE 26: How many multi-generation trips do you plan to take with your children and grandchildren in the next 12 months?



Travel Behavior and Preferences continued...

Multi-generational travel is marked by a great variety in trip types: while 44% of grandparents report that they are planning a beach vacation in the next year, the following experiences all attracted a response rate between 20 and 30%: visiting family and friends, museums and cultural attractions, theme or water parks, National or State Parks, and cruises. One trip type that received a relatively low response is city vacations: only 18% of grandparents are planning a city break for a multi-generational getaway. In comparison, 40% of parents identified city vacations as a trip type they were planning to engage in in the coming year.

TABLE 27: Which of the following types of multi-generational trips are you planning to take with your family in the coming year?

ANSWER	PERCENTAGE
Beach vacation	44%
Visiting family and friends	28%
Museum or cultural attraction	28%
Theme or water park	24%
National or State Parks	23%
Cruise	22%
City vacation	18%
Events (e.g. concerts, sport events, larger social events)	18%
All-inclusive resort	17%
Nature vacation other than National Parks (e.g. lake, mountain)	17%
A group tour through a tour operator (e.g., Adventures by Disney, G-Adventures, safaris etc.)	15%
Active vacation (e.g. camping, hiking, biking, sports)	13%
Road trip (including RV trip)	12%
Dude ranch or farm vacation	3%

Travel Behavior and Preferences continued...

Hotels are the most common lodging option (53%) for multi-generational travel, followed by vacation rentals (43%) and resorts (31%). 6% of respondents highlighted 'none of these' as their response, indicating they participate in day trips only. Compared to the parent survey, the percentages of respondents who plan to stay in different accommodation types are lower, and this is likely due to the fact that most only plan on taking one multi-generational trip per year, whereas parents are more likely to take multiple trips with their children.

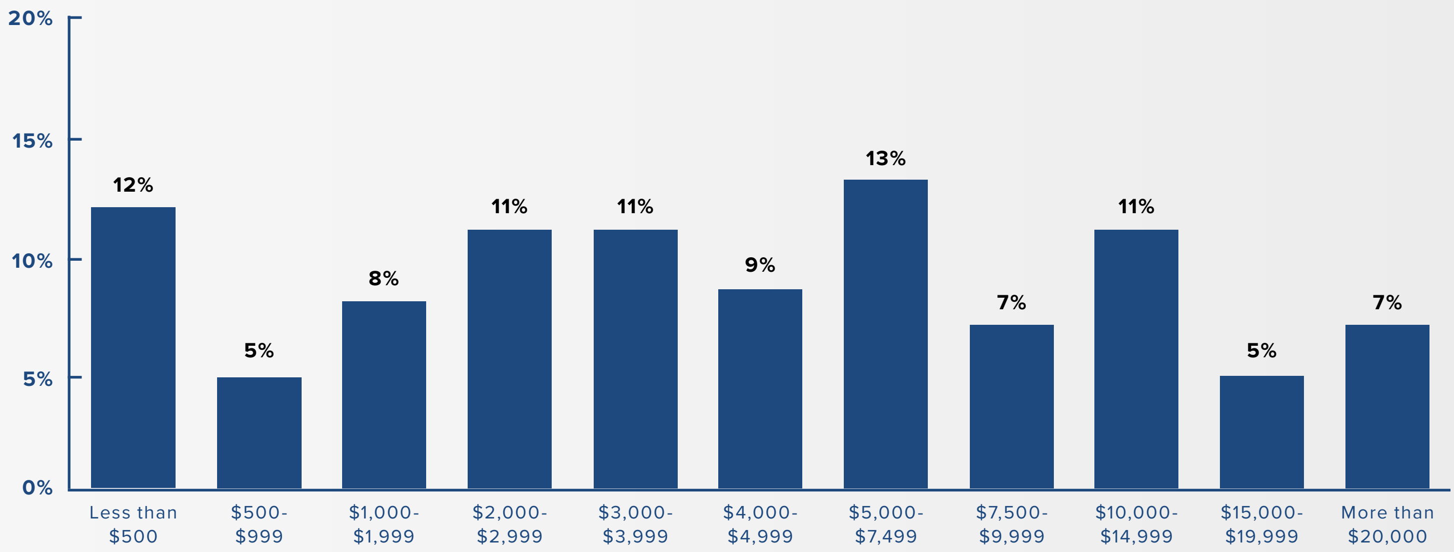
TABLE 28: Do you plan to stay in any of the following types of accommodations on a multi-generational family trip in the coming 12 months?

ANSWER	PERCENTAGE
Hotel	53%
Vacation Rental Property (a home/condo, Airbnb, VRBO, etc.)	43%
Resort	31%
Cruise Ship	24%
Homes belonging to friends/family members	15%
Motel	13%
Cabin Rental	12%
Timeshare	11%
Bed and Breakfasts, small inns	10%
Your own vacation property	9%
None of these	6%
Campsite	5%
RV / Trailer	5%
Home Exchange	2%
Dude Ranch	1%
Other	1%

Travel Behavior and Preferences continued...

Grandparents spent on average $4,750 on multi-generational family travel in 2022. It is important to note here though that this average masks wide variations in spending: 12% of respondents spent less than $500 and 12% spent over $15,000. As we have seen in this survey, multi-generational trips range from day trips to multi-week vacations, and it is that variation that likely underlies these large differences in spending.

TABLE 29: Approximately how much did you spend on multi-generational family travel in 2022?



The outlook for grandparent spending on multi-generational travel is robust: 42% of respondents say that they expect to spend more on domestic multi-generational family travel in the coming year, and 29% say they expect more on international multi-generational family travel. Relatively few grandparents expect to spend less: 9% for domestic and 6% for international multi-generational travel.

TABLE 30: How much do you expect to spend on multi-generational family travel in the coming 12 months, compared to your spending on this type of family travel in 2022?

	I EXPECT TO SPEND MORE	I EXPECT TO SPEND THE SAME AMOUNT	I EXPECT TO SPEND LESS	I DO NOT EXPECT TO TAKE THIS TYPE OF TRIP
Within the US	**42%**	**38%**	**9%**	**11%**
Outside of the US	**29%**	**19%**	**6%**	**46%**

TRAVEL MOTIVATIONS AND OUTCOMES

A first question in this section asked about the respondents' motivations for taking a multi-generational trip. The top reason is that multi-generational travel is a great way to bond as a family (76%). Other top answers were that grandparents enjoy spending extended time with their grandchildren (63%), that it is a way to give their children and grandchildren a special treat (61%) and that it is a way to create travel experiences and traditions across generations (61%).

TABLE 31: What are your reasons for taking a multi-generation trip with both your children and your grandchildren?

ANSWER	PERCENTAGE
It is a great way to bond as a family	76%
I enjoy getting to spend extended time with my grandchildren	63%
It is my way of giving our children and grandchildren a special treat	61%
It is a way to create family travel experiences and traditions across generations	61%
I want to show my grandchildren the world	44%
It is a special way for us to bring our extended family together	41%
My grandchildren enjoy getting to spend extended time with me	37%
It is a great way to celebrate a special milestone with my/our whole family (anniversary, birthday, graduation, etc.)	33%
My grandchildren enjoy it when I come along on their family trip	26%
It is a tradition in our family to travel together	22%
It is a special way for us to have a family reunion	18%
We can share childcare duties	17%
I want to show my grandchildren our family's heritage	14%

Travel Motvation and Outcomes continued...

When asked what grandparents perceive to be impacts of their multi-generational travel experiences on their grandchildren, the answers varied. Around half (48%) of respondents suggested that their grandchildren have become more adventurous as a result. 45% felt that they helped their grandchildren see the world from a broader perspective. Two further outcomes of multi-generational travel, each selected by 40% of the respondents, were that it helped grandchildren become more engaged learners, and that it made the grandchildren more flexible and adaptable.

TABLE 32: Which of the following statements about how multi-generation travel impacts your grandchildren do you agree with?

ANSWER	PERCENTAGE
My grandchildren have become more adventurous because of our multi-generation travel experiences	48%
Multi-generation travel has helped my grandchildren see the world from a broader perspective	45%
Multi-generation travel has helped my grandchildren be more engaged learners	40%
Multi-generation travel has made my grandchildren more flexible and adaptable	40%
Multi-generation travel has helped my grandchildren to be more confident	34%
My grandchildren have become more interested in other cultures because of our multi-generation travel experiences	34%
Multi-generation travel has helped my grandchildren to be better communicators	27%
My grandchildren have become better global citizens because of our multi-generation travel experiences	24%
None of the above	15%

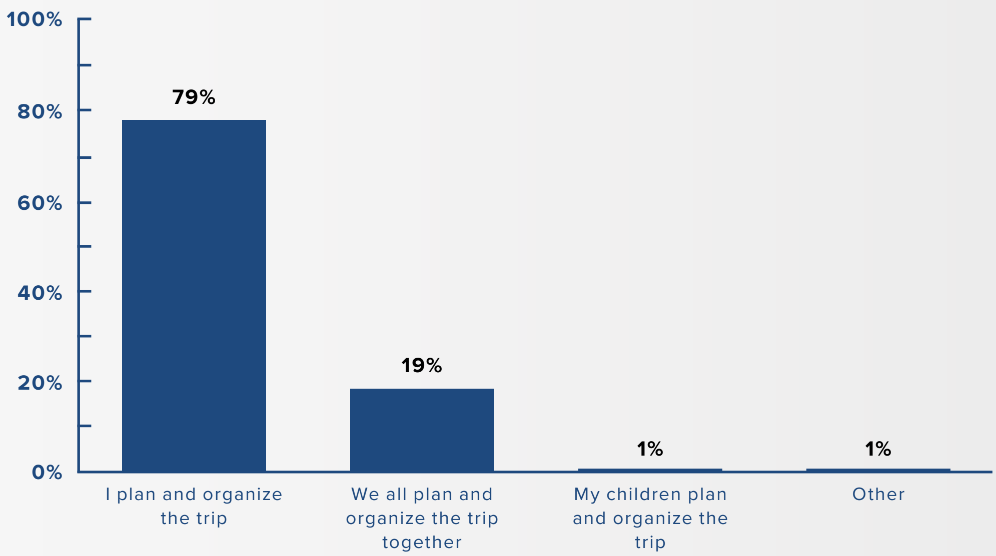
Skip-Generational Travel

In this section of the survey, we asked grandparents about skip-generational travel: travel that includes them and their grandparents, without the children's parents present.

TRAVEL PLANNING

Over three quarters of the grandparent respondents (79%) say that they plan and organize their skip-generational travel experiences. 19% say the travel party organize the trip together with their children (the grandchildren's parents). This shows that grandparents tend to take the lead in planning the skip-generational trip.

TABLE 33: Who primarily plans and organizes the skip-generation trip(s) you take your grandchildren on without their parents?



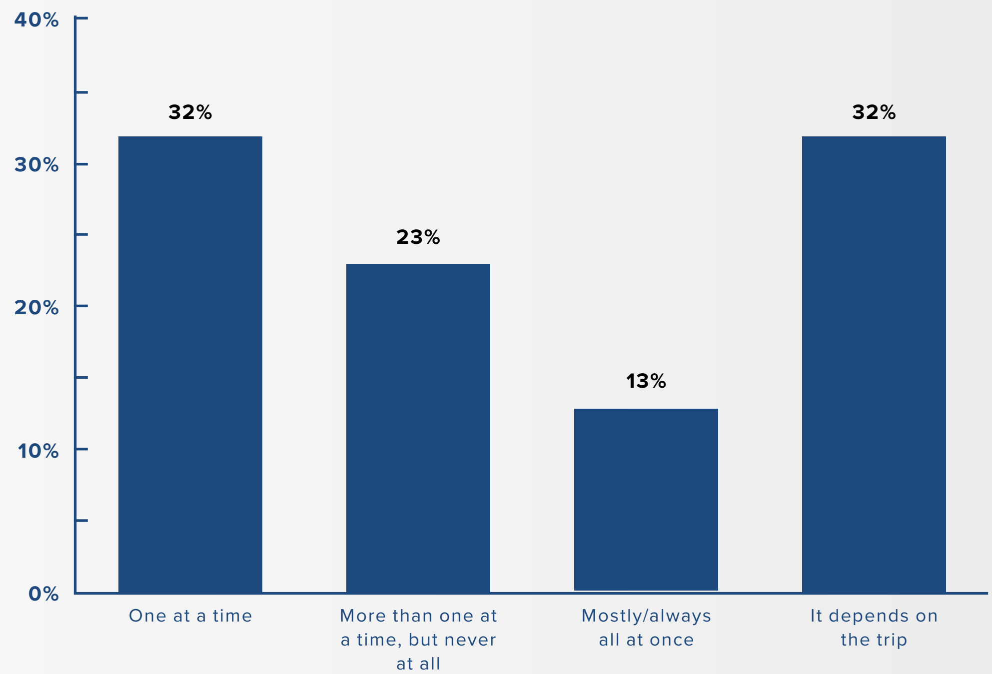
When it comes to funding the skip-generational vacation, the great majority (90%) of grandparents say they pay for the trip, and 10% say they share the cost with their children.

TABLE 34: Who usually pays for the skip-generation trip(s) you take your grandchildren on without their parents?

Travel Planning continued...

We asked grandparents with multiple grandchildren how many they would usually take on a skip-generational trip. The most common answers were that they tend to take one at a time (32%) or that it depends on the trip (32). 23% of grandparents say they tend to take more than one grandchild at a time but never all, and 13% say they usually take all grandchildren.

TABLE 35: How many of your grandchildren do you typically travel with at one time while on a skip-generation trip without their parents?



TRAVEL BEHAVIOR AND PREFRENCES

Multi-day vacations in the US are the most reported multi-generational travel type: 53% of grandparent respondents indicate that they take at least one of these trips in a typical year. However, it is noticeable that shorter trip lengths are more popular for skip-generational travel than they are for multi-generational travel.

- 54% of grandparents take skip-generational day trips, vs. 34% who take multi-generational day trips.
- 50% of grandparents take skip-generational weekend getaways, vs. 35% who take multi-generational weekend getaways.
- While 53% of grandparents take multi-day skip-generational trips in the US, this rises to 69% for multi-generational trips of the same type.

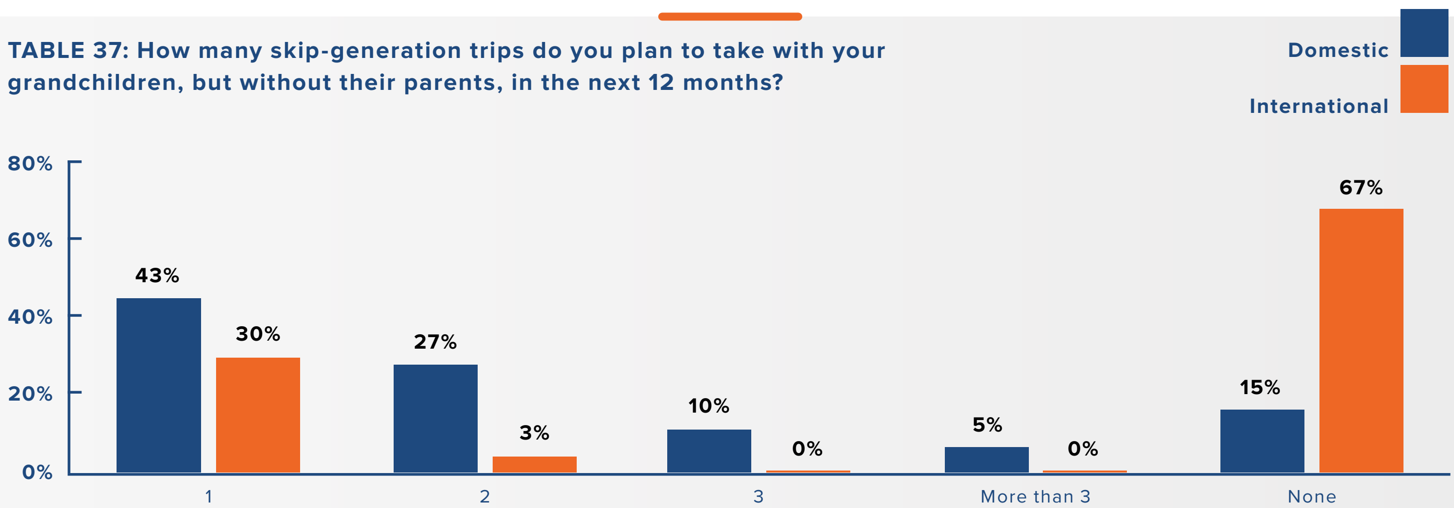
In addition, international skip-generational travel is less common than multi-generational international travel: while 28% of grandparents take a multi-generational international multi-day vacation, only 15% of grandparents take a skip-generational multi-day international vacation with their grandchildren.

TABLE 36: Which of the following types of skip-generation trips do you take with your grandchildren without their parents in a typical year?

ANSWER	PERCENTAGE
Day trip	**54%**
Weekend getaway	**50%**
Multi-day vacation in the U.S.	**53%**
Multi-day international vacation	**15%**
Multi-week U.S. vacation	**7%**
Multi-week international vacation	**8%**

Respondents typically go on one skip-generational trip per year. This is the typical frequency for 43% of grandparents who travel domestically, and 30% of grandparents who travel internationally. 27% of grandparents report that they take 2 domestic skip-generational vacations per year.

TABLE 37: How many skip-generation trips do you plan to take with your grandchildren, but without their parents, in the next 12 months?



Travel Behavior and Preferences continued...

Like multi-generational travel, skip-generational travel is marked by a great variety in trip types. Museums and cultural attractions are the most popular skip-generational trip type (selected by 40% of respondents, with beach vacations coming in second (30%). In comparison, beach vacations were the top choice for multi-generational trips (selected by 44% of grandparent respondents).

Three trip types that are more appealing to grandparents for skip-generational than for multi-generational trips are museums and cultural attractions (40% skip-gen vs. 28% multi-gen), cruises (22% skip-gen vs. 13% multi-gen), and city trips (25% skip-gen vs. 18% multi-gen).

TABLE 38: Which of the following types of skip-generational trips are you planning to take with your grandchildren in the coming year?

ANSWER	PERCENTAGE
Museum or cultural attraction	40%
Beach vacation	30%
Visiting family and friends	27%
Theme or water park	26%
National or State Parks	26%
Events (e.g. concerts, sport events, larger social events)	25%
City vacation	25%
Nature vacation other than National Parks (e.g. lake, mountain)	19%
Road trip (including RV trip)	17%
A group tour through a tour operator (e.g., Adventures by Disney, G-Adventures, safaris etc.)	13%
Cruise	13%
Active vacation (e.g. camping, hiking, biking, sports)	11%
All-inclusive resort	11%
Dude ranch or farm vacation	2%

Travel Behavior and Preferences continued...

Hotels are the most common lodging option (57%) for skip-generational travel, followed by vacation rentals (29%) and resorts (23%). 11% of respondents highlighted 'none of these' as their response, indicating they participate in skip-generational day trips only.

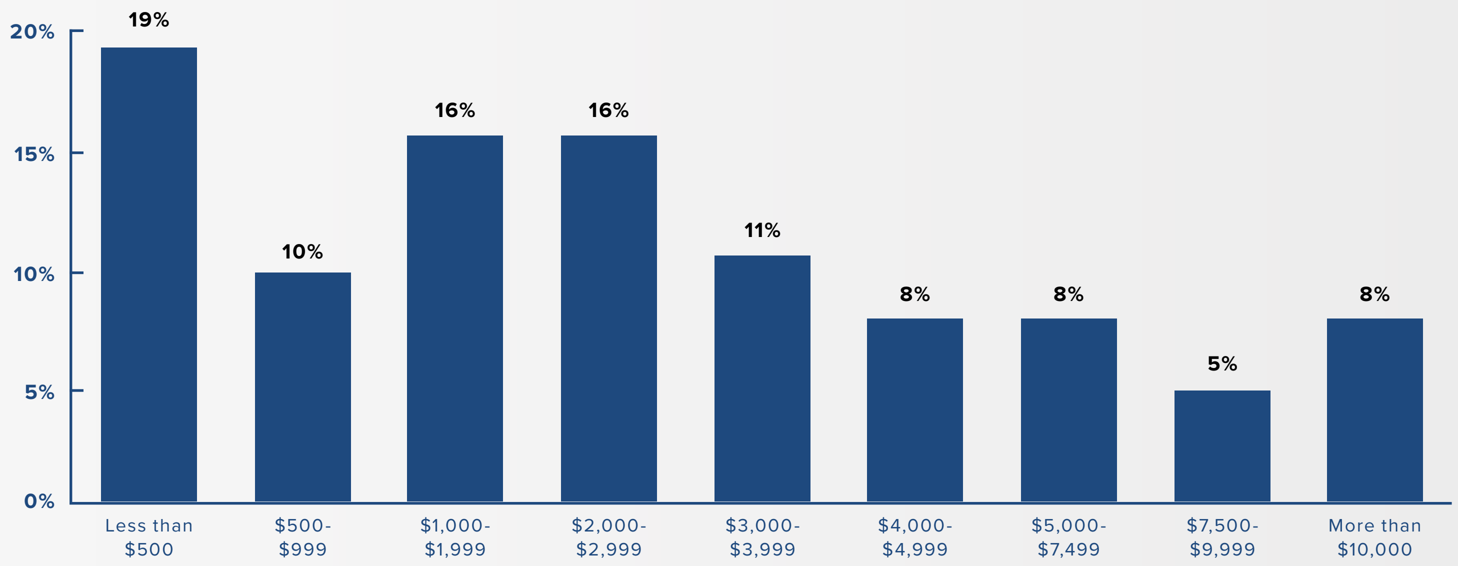
TABLE 39: Which of the following types of skip-generational trips are you planning to take with your grandchildren in the coming year?

ANSWER	PERCENTAGE
Hotel	57%
Vacation rental property (a home/condo, Airbnb, VRBO, etc.)	29%
Resort	23%
Motel	20%
Homes belonging to friends/family members	16%
Cruise ship	15%
None of these	11%
Bed and Breakfasts, small inns	10%
Your own vacation property	10%
Cabin rental	10%
Timeshare	8%
RV / trailer	6%
Campsite	6%
Dude ranch	1%
Home exchange	1%

Travel Behavior and Preferences continued...

Grandparents spent on average $2,250 on skip-generational family travel in 2022, which is well below the average of $4,750 they spent on multi-generational travel. 19% of respondents spent less than $500. This is due to the higher percentage of skip-generational trips that are short in length (e.g. day trips and weekend getaways).

TABLE 40: Approximately how much did you spend on skip-generational travel with your grandchildren in 2022?



The outlook for grandparent spending on skip-generational travel is however strong: 48% of respondents say that they expect to spend more on domestic skip-generational family travel in the coming year, and 29% say they expect more on international skip-generational family travel. Relatively few grandparents expect to spend less: 7% for domestic and 6% for international skip-generational travel.

TABLE 41: How much do you expect to spend on skip-generational family travel in the coming 12 months, compared to your spending on skip-generational family travel in 2022?

	I EXPECT TO SPEND MORE	I EXPECT TO SPEND THE SAME AMOUNT	I EXPECT TO SPEND LESS	I DO NOT EXPECT TO TAKE THIS TYPE OF TRIP
Within the US	48%	37%	7%	8%
Outside of the US	29%	16%	6%	49%

TRAVEL MOTIVATIONS AND OUTCOMES

The top reasons grandparents choose to take skip-generational travel is that it is way for them to give their grandchildren a special treat (69%) and that they enjoy spending extended time with their grandchildren (69%). Another common reason is that it is a great way for the grandparents and grandchildren to bond (66%). For 41% of respondents, the skip-generational trip is also a way to give their children a break from parenting duties.

TABLE 42: What are your reasons for taking a skip-generation trip with your grandchildren without their parents?

ANSWER	PERCENTAGE
Travel is a way for me to give my grandchildren a special treat	69%
I enjoy spending extended time with my grandchildren	69%
It is a great way for my grandchildren and I to bond	66%
My grandchildren enjoy spending extended time with me	47%
I want to show our grandchildren the world	41%
Traveling with my grandchildren is a way to provide their parents with a break from parenting duties	41%
Travel is a great way to celebrate our grandchildren's special milestones (graduation, birthdays, etc.)	31%
I want to show our grandchildren our family's heritage	13%
Other	3%
None of these	2%

When asked what grandparents perceive to be impacts of their skip-generational travel experiences on their grandchildren, just over half (51%) of respondents suggested that their grandchildren have become more adventurous as a result. 49% felt that skip-generational travel helped their grandchildren become more flexible and adaptable. 47% said it made their grandchildren more confident – this is a higher percentage than for multi-generational travel, where 34% of grandparents indicated the same outcome.

TABLE 43: What are your reasons for taking a skip-generation trip with your grandchildren without their parents?

ANSWER	PERCENTAGE
My grandchildren have become more adventurous because of our skip-generation travel experiences	51%
Skip-generation travel has made my grandchildren more flexible and adaptable	49%
Skip-generation travel has helped my grandchildren to be more confident	47%
Skip-generation travel has helped my grandchildren see the world from a broader perspective	46%
Skip-generation travel has helped my grandchildren be more engaged learners	45%
Skip-generation travel has helped my grandchildren to be better communicators	36%
My grandchildren have become more interested in other cultures because of our skip-generation travel experiences	35%
My grandchildren have become better global citizens because of our skip-generation travel experiences	25%
None of the above	11%

Grandparent Use of Travel Advisors

30% of grandparent respondents have used a travel advisor to book at least one family trip in the past three years. 70% of respondents indicate that they are willing to use a travel advisor for their family travel needs in the next 2 years.

The most common reason that grandparent respondents have used a travel advisor, or would be open to using one, is that travel advisors are there when something goes wrong (58%). This reason scored higher for grandparent respondents than for parent respondents (47%). Other reasons are that that travel advisors have in-depth knowledge of the vacation type or destination the respondent is interested in (57%), and the fact that travel advisors have access to better rates and prices (54%).

TABLE 44: What are the reasons you have used or would be open to using a travel agent for your family trips?

ANSWER	PERCENTAGE
If something goes wrong, a travel advisor/agent is there to help	**58%**
Travel advisors have an in-depth understanding of the destination or vacation type I was interested in	**57%**
Travel advisors have access to better rates and prices	**54%**
Travel advisors offer amenities and benefits that I cannot obtain on my own	**49%**
Planning and booking on my own is time-consuming and/or confusing	**38%**
My travel advisor gets to know me and my preferences and can tailor recommendations for me	**38%**
Travel advisors have in-depth knowledge about family and multi-generational travel	**34%**
Other (please explain):	**2%**
None of these	**2%**

Grandparent Travel Attitudes

In this section of the survey, we asked grandparents about their attitudes towards travel, including the impacts of family travel, the role of their values in making travel decisions, and aspects of travel that tend to cause them worry or stress.

The findings show that grandparents, like parents, associate travel with positive outcomes beyond the enjoyment of the trip itself: 85% of respondents say that travel brings their family closer and 74% that family vacations enrich a child's education. 60% of grandparent respondents prioritize travel experiences over material possessions. When probed to what extent grandparents' values drive travel decisions, 27% of respondents say they avoid traveling to states or destinations that do not align with their values.

TABLE 45: Please select the statements in the list below that you agree with:

ANSWER	PERCENTAGE
Travel brings us closer together as a family	**85%**
Family vacations enrich a child's education	**74%**
I prioritize travel experiences over material possessions	**60%**
I believe travel makes children better global citizens	**54%**
Traveling with my grandchildren makes me a better grandparent	**47%**
I avoid traveling to states/destinations that don't align with my values	**27%**
I don't agree with any of these	**2%**

The survey also asked about aspects of travel that affect grandparents' attitudes negatively, by causing them stress or worry. The most common stressor for grandparents are possible cancellations and delays, and the question of associated compensation: this worries 50% of respondents. 49% of the respondents worry about staying withing budgets, knowing costs upfront and avoiding surprise fees. International travel causes stress for 23% of respondents. However, these worries tend to affect grandparents less than parents: twice as many grandparents (22%) as parents (11%) say that none of the factors listed worry or stress them.

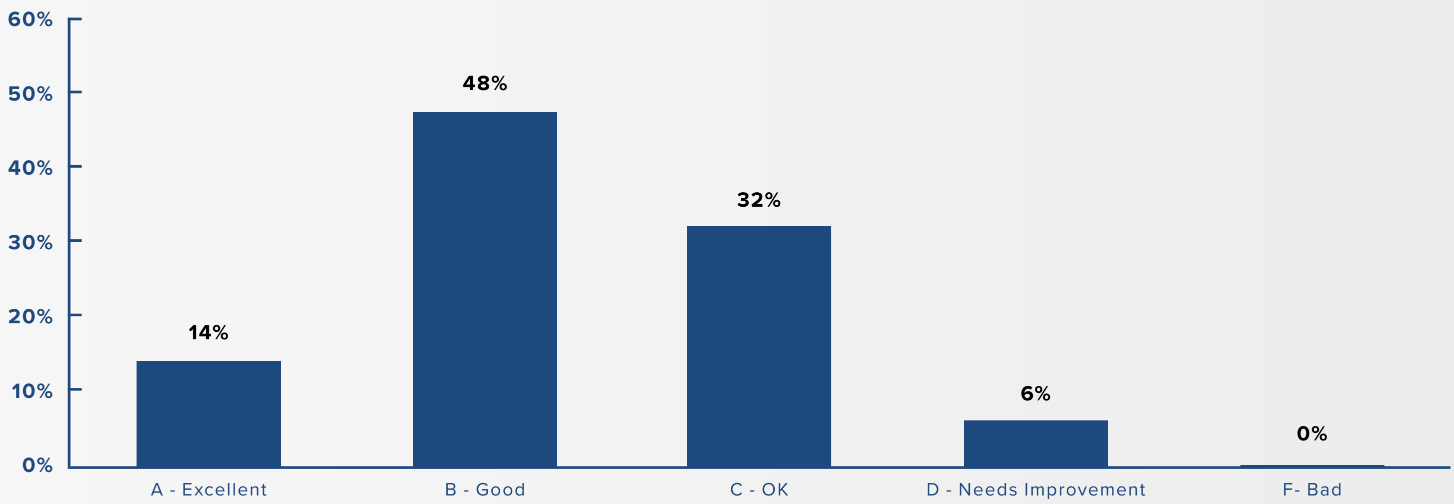
TABLE 46: Below are a list of common sources of worry or anxiety for grandparents when they travel with their grandchildren:

ANSWER	PERCENTAGE
Cancellations, delays and possible compensation	**50%**
Staying within budget, knowing costs upfront and avoiding surprise fees	**49%**
Worries around international travel	**23%**
None of these worry or stress me	**22%**
Grandchildren's anxiety about travel (germophobia, other fears. etc)	**15%**
Increased flight turbulence	**12%**

Grandparent Industry Evaluation

Grandparent respondents to the survey were asked to assign the travel industry a grade for having the best interests of traveling families at heart. The average grade the industry was awarded by families is a **B+**, which is the same score as the one awarded by the parent respondents.

TABLE 47: What grade would you give the travel industry for how well it serves the needs of traveling families?



Finally, grandparent respondents were asked what the travel industry could do to serve the needs of families better. They were presented with a textbox to enter their thoughts, and common themes in the comments were:

- The high cost of family travel, and the desire for lower-cost options and discounts
- The need to improve quality and level of service across the industry, with regular references to the labor shortage across the sector
- The perceived increased frequency of flight delays
- The challenge and added cost of sitting together on planes
- The dislike of hidden fees and charges that make pricing lack transparency

ABOUT

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.

Edinburgh Napier University's Tourism Research Centre

ENU's Tourism Research Centre is home to cutting-edge research that is internationally recognized and addresses real-world challenges. Our research areas include tourism, hospitality and festivals and events. This interdisciplinary group of researchers engages in research and knowledge exchange activities to drive economic, social and cultural recovery and growth across destinations and communities.

Learn more at https://www.napier.ac.uk/about-us/our-schools/the-business-school/our-research/tourism-research-centre.

NYU School of Professional Studies

For 88 years, the NYU School of Professional Studies (NYU SPS) has been a deeply respected institution of higher education that is grounded in applied learning. From its early years, training returning World War II veterans to fulfill the nation's urgent need for skilled technical workers, it has evolved into a professional education powerhouse that offers 20 graduate degrees, 14 bachelor's degrees for traditional and post-traditional students, four associate's degrees, and a plethora of continuing education courses and credentials.

NYU SPS is a thought leader, and serves as an incubator for new ideas in industries that are constantly changing, including real estate, real estate development, and construction management; hospitality, tourism, travel, and event management; global affairs and global security, conflict, and cybercrime; global sport and sports business; publishing; marketing; public relations; project management; executive coaching and organizational consulting, human resource management and development, and human capital analytics and technology; management and systems; translation; and professional writing. It is focused on building skills that open doors to opportunities in emerging fields and global markets NYU SPS faculty members are leading experts in their areas of discipline, with a hands-on approach that encourages students to push beyond their limits and to break new ground.

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NYU SPS Jonathan M. Tisch Center of Hospitality

The NYU School of Professional Studies Jonathan M Tisch Center of Hospitality, now celebrating 26 years of academic excellence, is a leading center for the study of hospitality, travel, and tourism. Founded in 1995, the Tisch Center was established in response to the growing need for hospitality and tourism undergraduate and graduate education. Its cutting-edge curricula attract 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, tourism management, and event management; a plethora of Professional Pathways programs; and its world-renowned hospitality investment conference, students gain the knowledge and the skill sets that enable them to manage change, to communicate, to thrive in complex work environments, and to advance the businesses of hospitality, travel, and tourism. The Tisch Center recently launched the Hospitality Innovation Hub (HI Hub), which will foster entrepreneurship and creative solutions for the industries it serves. The state-of-the-art facilities offer students, start-ups, established industry partners, and investors opportunities to learn, discover, innovate, and invest.

For more information about the NYU SPS Jonathan M Tisch Center of Hospitality, visit sps.nyu.edu/tisch.

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