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FAMILY TRAVEL ASSOCIATION
Changing Lives Through Travel

US FAMILY TRAVEL SURVEY 2022

FAMILY TRAVEL ASSOCIATION

DR. LYNN MINNAERT

Jonathan M. Tisch Cetner of Hospitality

NYU School of Profesional Studies

With generous support provided by:

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The Shubert Organization

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INTRODUCTION

BY RAINER JENSS
Founder, Family Travel Association

The Family Travel Association (FTA) was founded in the fall of 2014 with one primary objective: to bring the leading authorities in family travel together so we could inspire more families to travel – and to travel more. After all, travel's power to transform children and potentially change their lives is something that most of us really understand, appreciate and get behind.

To learn more about what's really going on in this country when it comes to families and their travel habits, behaviors, expectations and attitudes, we joined forces with the NYU School of Professional Studies Tisch Center of Hospitality to take a snapshot of the marketplace with a goal of informing our industry to help us better serve traveling families. A partnership that I'm proud to say is now in its 8th year.

What we've gotten back every year since has been new and 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. We've also asked parents to hand out grades on how our industry is doing in hopes that those segments that are not getting a high grade will step up their game.

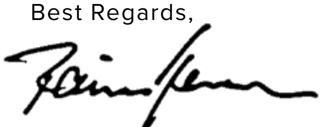
"We've been honored and excited to work with the Family Travel Association on this study," says study author, Dr. Lynn Minnaert. "Together, we hope that the annual studies have and will continue to help the travel industry provide better products and services for families in the future."

With the global Covid pandemic now mostly behind us in 2022, what have we learned? For starters, we've seen that family and multigenerational travel has been an important force in the tourism industry's recovery, with reports indicating that there have been a record number of families now traveling during the summer and holiday periods. This was mainly a result of the strong pent-up demand for seeing our loved ones created as a result of being subject to all kinds of restrictions and lock downs. That really speaks volumes to the priority families are now placing on spending time together and traveling. This is why I believe that now is precisely the time to double down on family travel. Beyond the not-so-inconsequential looming economic downturn, inflation, and war in Eastern Europe, I still believe strongly that in addition to the steady increase in family/multigenerational travel, there's still plenty of room for growth!

As we sifted through this year's data, we also found that travel spending is robust, and that as the worst effects of the pandemic are receding, international vacations, city trips and events are making a comeback. Hotels strengthened their position vis-à-vis vacation rentals, and travel advisors continue to solidify their position in a post-pandemic travel landscape.

As a member of the FTA, you have complete access to all the information and we are happy to provide further analysis in the categories of your interest. After all, helping our members better understand this market also is one of our top priorities.

Best Regards,



Rainer Jenss
Founder, **Family Travel Association**

STUDY HIGHLIGHTS

BY DR. LYNN MINNAERT
Professor and Head of Subject, Tourism and Languages, Edinburgh Napier University
Former Academic Chair and Clinical Associate Professor, Jonathan M. Tisch Center of Hospitality, New York University

In this seventh edition of the US Family Travel Survey, the Family Travel Association (FTA) 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 whether and how the COVID-19 pandemic and the recent economic uncertainty have affected family travel behaviors, and if so, to what extent these are lasting changes. With the support of partners Broadway Inbound and the Shubert Organization, 1,002 responses were collected between June 22 and July 23, 2022. This year's sample included a higher percentage of respondents in higher income brackets, and with more advanced educational backgrounds, than in prior editions. The following themes are featured in the 2022 US Family Travel Survey:

INTENT TO TRAVEL REMAINS HIGH

This year's study shows that **85%** of parents are likely or very likely to travel with their children in the next 12 months. That is slightly lower than in 2021, when it stood at 88%. Travel intent in 2022 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.

Demand for travel in larger family groups also remains strong. Almost half of the respondents report that they are planning to take family vacations with people outside of their immediate family unit: 47% of respondents say they are planning a **multi-generational** trip; 46% of respondents say they are planning a trip with **family members beyond parents and in-laws**; and 44% of respondents say that they are planning a trip with **people who are not related** to them.

Family travel spending remains robust and the outlook is strong. 53% of respondents plan to spend more on domestic travel in the next year, and 49% expect to spend more on international travel. Only 8% of respondents expect to spend less on domestic travel in the coming year, and 20% expect to spend less on international travel.

US FAMILIES ARE DIVIDED OVER THE PANDEMIC, BUT ITS IMPACT ON TRAVEL DECISIONS IS WANING

While **57%** of respondents feel that the pandemic is mostly contained and feel comfortable traveling without many restrictions, **43%** feel the pandemic isn't yet contained and remain cautious when making travel decisions.

Some aspects of family travel are still heavily influenced by concerns about COVID-19. **Cruise tourism** is most affected by the lasting effects of the pandemic, with 27% of respondents saying they are less likely to consider a cruise now. **Cleanliness and sanitation** are the second most important consideration when choosing accommodations, after value for money. **Dealing with potential cancellations** is the second most common travel challenge respondents identify, after affordability.

Two other COVID-related concerns however appear lower on the list than last year, when they were in the top 5. Concerns about limitations on activities and amenities are identified by 25% of the respondents in 2022, compared to 41% in 2021. Concerns about vaccination and health protocols adherence in the destination received a score of 25% in 2022, compared to 33% in 2021. This points to the fact that the impact of COVID-19 concerns on family travel behavior, while still noticeable, is waning.

Continued...

The COVID-19 pandemic still impacts intent to travel, however significantly less so than last year, when it was the second most common inhibitor for families who decided not to take a family trip:

- In 2021, 24% of respondents were not planning to travel because they did not feel safe because of the pandemic, whereas in 2022 this only applies to 10% of respondents.
- In 2021, 29% of respondents were not planning to travel because not everyone in the family is vaccinated, whereas in 2022 this only applies to 3% of respondents.

SOME PRE-PANDEMIC TRAVEL BEHAVIORS ARE MAKING A COMEBACK

While many families made changes to their vacation habits in the past two years, some of these trends seem to be reversing and some pre-pandemic travel types are making a return.

- **Multi-day international vacations** are planned by 38% of respondents, which is a significant increase over 2021, when only 19% of respondents were planning this type of trip.
- **City vacations** are also experiencing a considerable rebound: the percentage of families expecting to take a family trip has increased from 34% in 2021 to 65% in 2022.
- The percentage of families expecting to travel for **events** has doubled compared to last year: events received a score of 23% in 2021, and of 46% in 2022.
- **Museums and cultural attractions** also show an increase in appeal from 36% (2021) to 48% (2022).

Conversely, the increased interest from families in nature/active vacations appears to be waning. The percentage of families planning to visit **National or State Parks** has dropped from 46% (2021) to 32% (2022), and the demand for **active vacation types** (such as camping and hiking) has seen a decline from 36% (2021) to 19% (2022).

Vacation rentals seemed to be experiencing an unstoppable rise in popularity in previous editions of this survey, but this trend isn't continued this year. Vacation rentals were an accommodation choice for 54% of respondents in 2021, and this has declined to 47% in 2022. Conversely, the percentage of families projecting to stay in **hotels** has risen from 74% to 84%. Reflecting a decrease in the percentage of families planning active/outdoor vacations, **campsites** have decreased in projected use from 24% to 8%.

BUT THERE ARE ALSO CHANGES IN HOW US FAMILIES APPROACH TRAVEL

When asked whether their travel behaviors and preferences had changed in the past two years, 45% of respondents say they have changed somewhat, and 13% say they have changed a lot.

For 49% of respondents, the **COVID-19 pandemic** triggered the change. 28% of respondents point to their **financial situation** (including the impact of inflation). For 17% of respondents, changes in personal or professional circumstances played a role.

US families indicate that they have made certain changes to their travel behavior that reduce risk and provide peace of mind. 67% of respondents report that they now **check cancellation policies** when making travel arrangements. 47% say they now buy **travel insurance**. 42% say they place a greater emphasis on comparing prices to find the best value, and 41% place greater value on **cleanliness and hygiene** now.

Inflation, the rise in gas prices and the hike in interest rates are likely to influence travel behavior in the coming year, especially when it comes to accommodations: 42% of respondents said they will look for cheaper lodging options. 27% say that they will be looking for travel options closer to home. However, only 13% of respondents report that they will forego family travel altogether.

Continued...

TRAVEL ADVISORS STRENGTHEN THEIR POSITION

25% of respondents have used a travel advisor to book at least one family trip in the past three years. This is an increase over 2021, when 17% of respondents reported having used a travel advisor. 52% of respondents indicate that they are willing to use a travel advisor for their family travel needs in the next 2 years, which is a similar percentage to 2021's findings (56%). For 30% of the respondents, the travel challenges caused by COVID-19 made them more willing to consider a travel advisor, however 70% of respondents said that that did not influence their answer.

SOURCES OF INSPIRATION AND INFORMATION

The respondents' children emerged as a big source of inspiration for family travel (76%), followed by friends (53%) and other family members (52%). Almost half of the respondents are inspired by travel bloggers (49%). In terms of providing travel information, travel advisors (80%) and journalists (56%) are the top sources.

The top three resources that provide US families with travel inspiration are **movies** (81%), **TV shows** (73%) and **Pinterest** (71%). Other social media platforms that provide inspiration are Instagram (68%), Facebook (61%) and TikTok (58%). Travel advertising inspired 61% of respondents.

The social media outlets US families engage with for travel content have undergone considerable changes compared to our findings in 2019. Pinterest's reach has grown from 52% to 71%, Instagram's has increased somewhat from 60% to 68%, and Facebook's has declined from 79% to 61%.

The top three sources for travel information are **government agencies** (92%), **travel supplier websites** (77%) and **tourism offices** (73%). Travel clubs (72%) and travel websites (69%) follow closely behind.

TRAVEL 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 C+. This grade reflects that families see the industry's performance in this regard as between satisfactory and good. The industry received the highest grade for offering safe and sanitary travel environments (B), followed by offering family-friendly products and services (B-). It scored a C+ for customer service and value for money.

Respondents were also asked to assess how much trust they have that travel providers of different types would treat their family fairly and considerately if there were problems in an upcoming family vacation. **Hotels** received the highest trust score, followed by **restaurants**, **theme parks**, **travel agents** and **vacation rentals**. The three sub-sectors that received the lowest trust scores are **online booking sites**, **airlines** and **cruise lines**.

Finally, respondents were asked what the travel industry could do to serve the needs of families better. The top answer, selected by 43% of the respondents, was that travel suppliers should offer **better value for money**. 35% of respondents feel that more accommodations should have **family-friendly room options**, and 20% feel accommodations should **invest more in in-room entertainment**. 14% of respondents do not feel that the travel industry can do anything to serve families better.

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 in 2022. Only respondents who were over the age of 18 and who had children 18 years of age or younger were eligible to take the survey. Respondents who were unlikely to travel with their children in the coming year were filtered out at the end of the first question block. The survey remained open for four and a half weeks between June 22 and July 23, 2022. The total number of respondents was 1,002.

The survey included five question blocks: 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, and an evaluation of how well the travel sector serves families.

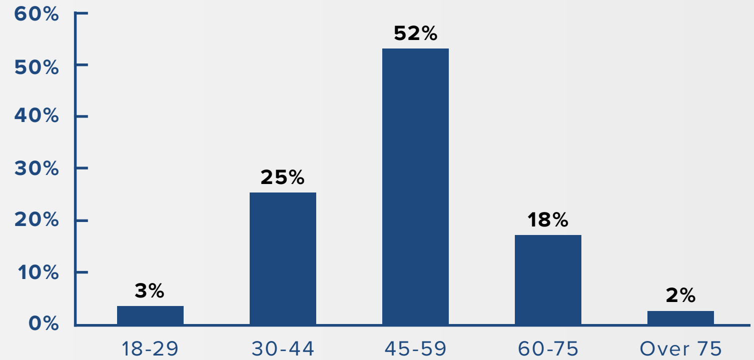
The survey was circulated via the mailing list of Telecharge, a division of The Shubert Organization and the leading provider of ticketing services for Broadway and off-Broadway events.

Survey Respondents

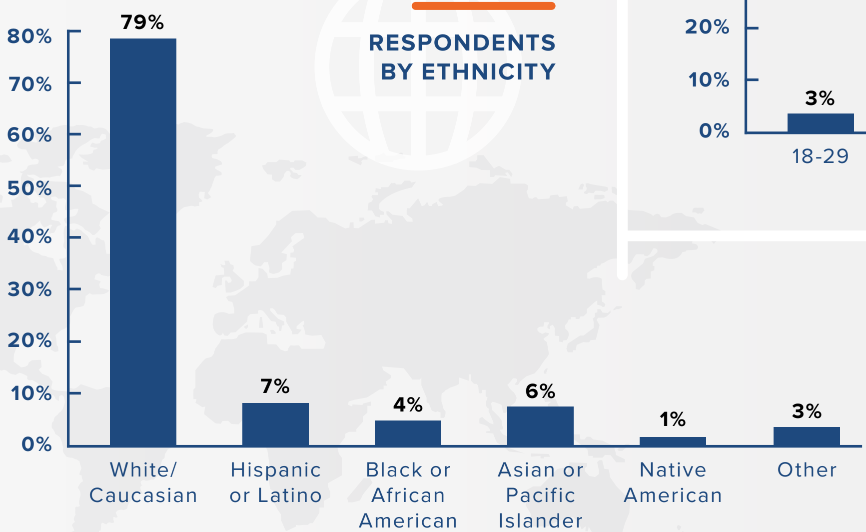
NUMBER OF RESPONDENTS

1,002

RESPONDENTS BY AGE



RESPONDENTS BY ETHNICITY



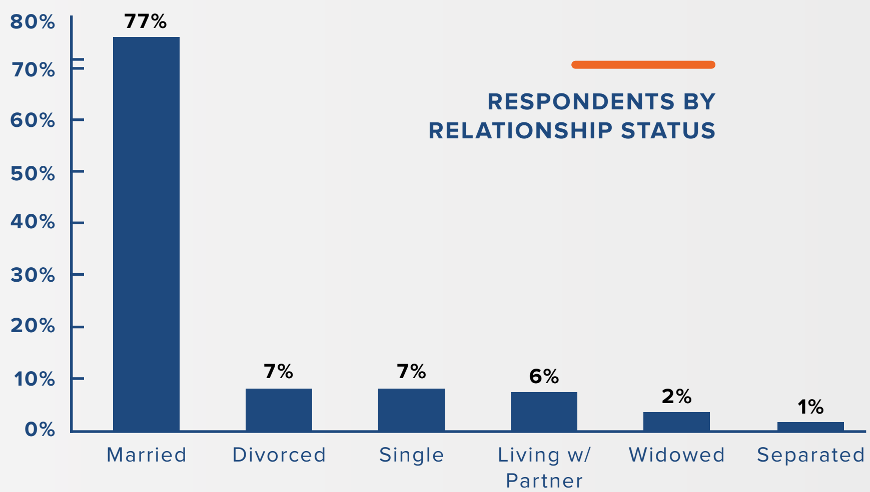
RESPONDENTS BY GENDER

75% / 25%

FEMALE **MALE**

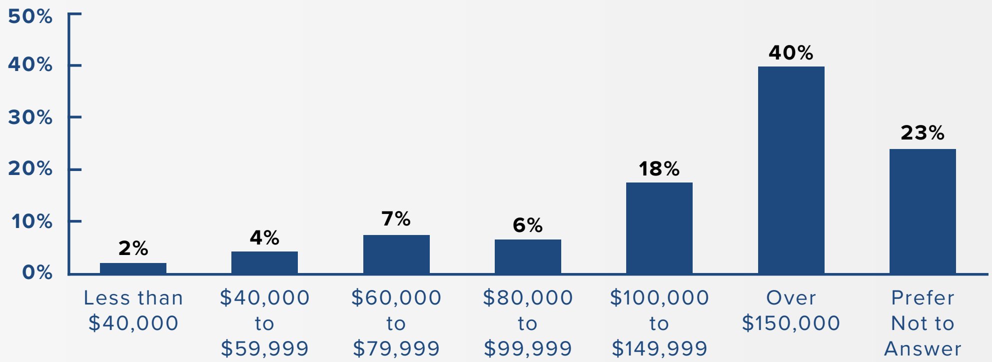
Photo © Michael Howard

RESPONDENTS BY RELATIONSHIP STATUS

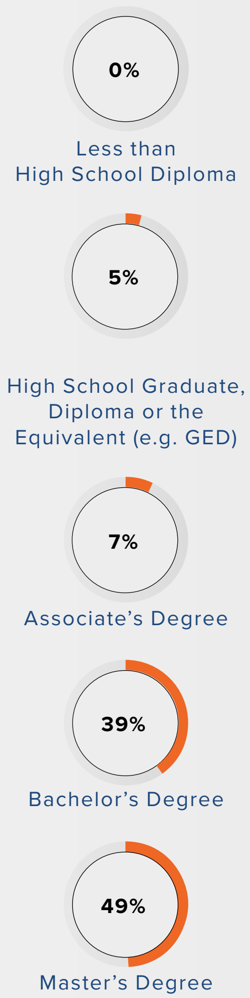


Survey Respondents continued...

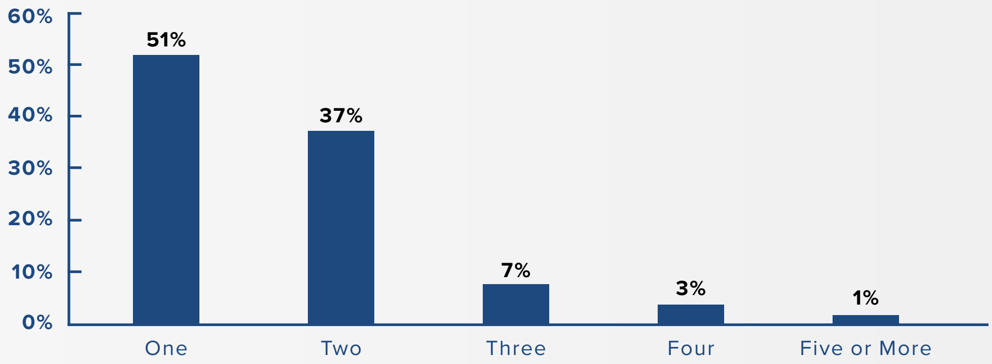
RESPONDENTS BY HOUSEHOLD INCOME



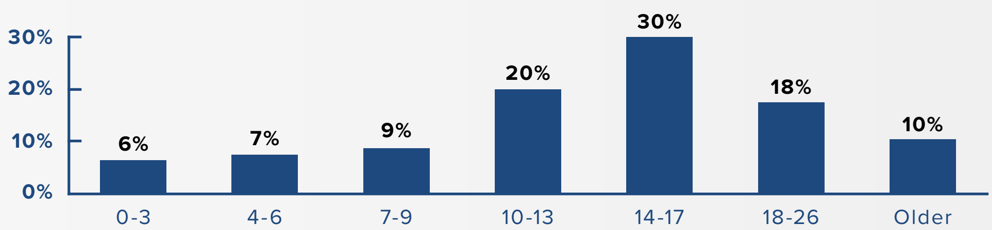
RESPONDENTS BY EDUCATION



RESPONDENTS BY NUMBER OF CHILDREN 18 OR YOUNGER



RESPONDENTS BY AGE RANGE OF THE CHILDREN



10% of the respondents are single parents.

10% of the respondents are in mixed race families.

7% of the respondents have a child or children with special needs.

8% of the respondents are in LGBTQ+ families.

4% of the respondents have at least one stepchild.

SURVEY FINDINGS

Intent to Travel

In our sample, **85%** of parents are likely or very likely to travel with their children in the next 12 months. Of the remaining 15%, 9% are undecided and 6% 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 in 2022 is slightly lower than in 2021, when it stood at 88%. Travel intent in 2022 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. **Affordability** emerged as the dominant factor, with 31% of the non-traveling respondents indicating they could not afford to take a family vacation. This percentage is lower than in previous editions of the survey, which is likely tied to the fact that the average household income of the respondents was higher in this sample than in previous surveys. The **COVID-19 pandemic** still impacts intent to travel, however significantly less so than last year, when it was the second most common inhibitor:

- In 2021, 24% of respondents were not planning to travel because they did not feel safe because of the pandemic, whereas in 2022 this only applies to 10% of respondents.
- In 2021, 29% of respondents were not planning to travel because not everyone in the family is vaccinated, whereas in 2022 this only applies to 3% of respondents.

Other reasons for not participating in family travel include the fact that the children won't like it or have other activities (20%), the fact that the children are older and don't want to travel with their parents any more (17%) and the fact that family travel is nor relaxing for some respondents (14%).

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

ANSWER	PERCENTAGE
We have too many other demands on our family budget at this time to afford to travel	31%
Our children won't like it, are too busy with other activities, or prefer staying at home	20%
Our children are older and don't want to travel with us	17%
Traveling with children is not relaxing for me/us	14%
We don't feel safe traveling as a family because of the ongoing pandemic	14%
We don't want to take the risk that COVID-19 will disrupt our travel plans	10%
I/we don't have any / enough vacation time	8%
Health problems or physical limitations inhibit our ability to travel	7%
Our children are too young	5%
It's too difficult / time-consuming to plan	5%
I/we don't think a family trip is worth the money	5%
Not everyone in our family is vaccinated against COVID-19	3%

SURVEY FINDINGS

Projected Travel

TRIP LENGTH

In this section of the survey, we probed what our respondents' family travel plans were for the coming year. 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 (76%). Weekend getaways come in second (56%), followed by day trips (43%). Multi-day international vacations are planned by 38% of respondents, which is a significant increase over 2021, when only 19% of respondents were planning this type of trip. While this reflects the reopening of travel destinations in many global regions, it can also be tied to the fact that this year's respondent group includes a higher percentage of families with higher annual household incomes. These families are typically more likely to plan international vacations.

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	**43%**
Weekend getaway	**56%**
Multi-day vacation in the US	**76%**
Multi-day international vacation	**38%**

We also asked respondents how many trips they projected they will take in the coming 12 months by length, from day trips (without an overnight stay) to trips of 14 days or more. On average, respondents reported they will take 3.16 day trips, 2.27 trips of 1-3 nights, 1.37 trips of 4-6 nights, and 0.93 trips of 7-13 nights. Trips of 14 nights or more are rarer, with an average score of 0.29.

TABLE 3: How many of the following types of family vacations are you planning to take with your children in the coming year?

	AVERAGE
Day trip (no overnight stay)	**3.16**
1-3 nights	**2.27**
4-6 nights	**1.37**
7-13 nights	**0.93**
14 nights or more	**0.29**

Projected Travel

TRIP TYPES

Respondents were asked what types of trips they were planning to take in the coming 12 months. Beach vacations (66%), city vacations (65%) and visiting family and friends (61%) are the three most common family travel types.

TABLE 4: Which of the following types of trips are you planning to take with your children in the coming year?

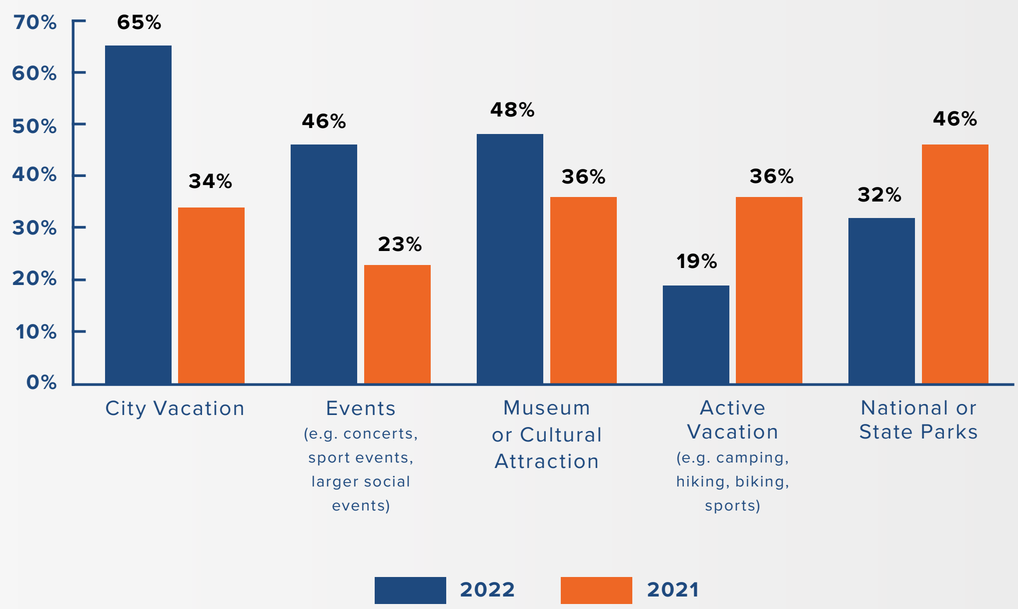
TRIP TYPES	PERCENTAGE
Beach vacation	66%
City vacation	65%
Visiting family and friends	61%
Museum or cultural attraction	48%
Events (e.g., concerts, sport events, larger social events)	46%
Theme or water park	38%
National or State Parks	32%
Nature vacation other than National Parks (e.g., lake, mountain)	26%
All-inclusive resort	20%
Active vacation (e.g., camping, hiking, biking, sports)	19%
Cruise	15%
Road trip (including RV trip)	14%
A group tour through a tour operator (e.g., Adventures by Disney, G-Adventures, safaris etc.)	9%
Dude ranch or farm vacation	4%
None of these	1%

Compared to last year's survey, there are noticeable differences in the types of trips families are planning to take. **City vacations** are experiencing a considerable rebound: the percentage of families expecting to take a family trip has increased from 34% in 2021 to 65% in 2022. The percentage of families expecting to travel for events has doubled compared to last year: **events** received a score of 23% in 2021, and of 46% in 2022. Museums and cultural attractions also show an increase in appeal from 36% (2021) to 48% (2022). Demand for all three trip types was suppressed in 2021 due to the restrictions associated with the COVID-19 pandemic, and are now experience a recovery.

Conversely, the increased interest from families in nature/active vacations appears to be waning. The percentage of families planning to visit National or State Parks has dropped from 46% (2021) to 32% (2022), and the demand for active vacation types (such as camping and hiking) has seen a decline from 36% (2021) to 19% (2022).

Trip Types continued...

TABLE 5: 2021/2022 Comparison



Next, respondents were asked whether they were planning to travel in larger family groups. Similar to the prior two editions of the US Family Travel Survey, this type of travel is common and remains popular. 47% of respondents say they are planning a **multi-generational** trip, and 15% say that their children will go on a **skip-generational** trip with their grandparents. 46% of respondents say they are planning a trip with **family members beyond parents and in-laws**. 44% of respondents say that they are planning a trip with **people who are not related** to them.

TABLE 6: 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)	**47%**
A skip-generation trip (travel that includes your children and their grandparents without you or your spouse/partner)	**15%**
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)	**46%**
A trip with another or other families who are not related to your family	**44%**

SURVEY FINDINGS

Travel Behavior

BOOKING WINDOWS AND PREFERRED TRAVEL TIMES

Booking windows for family travel have remained similar over the different editions of this survey. The most common booking window (35%) for booking a family trip is **two or three months before departure**. 28% 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 7: Approximately when do you plan to book your family travel in the coming 12 months?

ANSWER	PERCENTAGE
A week prior to departure	2%
Two weeks prior to departure	3%
A month prior to departure	16%
Two or three months prior to departure	35%
Four to six months prior to departure	28%
Six to 12 months prior to departure	15%
Over a year prior to departure	1%

Summer remains the most popular travel season, followed by **spring break**. 66% of respondents have taken a summer vacation in the past year, and 62% 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 last year, more families would like to travel in the winter holiday season, Thanksgiving and the mid-winter break in the next year. It is likely that as COVID concerns wane, more family get togethers will be planned in the coming holiday season.

TABLE 8: 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%	44%
Summer	66%	62%
Thanksgiving/Fall	23%	33%
Winter Holiday Season	31%	42%
Mid-Winter Break	20%	30%
Around Other Holidays	20%	24%
Other	10%	11%

Travel Behavior

TRANSPORTATION PREFERENCES

The **car** is the most common mode of transportation for family vacations in the US (46%). 36% of respondents travel by **plane**. Other modes of transportation are less common; however, it is worth noting that **trains** have increased in projected use from 2% in 2015 to 14% in 2022.

Photo © Nicole Thibault

TABLE 9: Select the modes of transportation you plan to use on your family trips in the coming year.

ANSWER	PERCENTAGE
Car	**41%**
Plane	**36%**
Train	**14%**
Boat/Cruise	**6%**
RV	**2%**

When asked what factors influence the choice of transportation method, convenience is the most common consideration (78%), followed by cost (73%). Health concerns play a lesser role, and are an influencing factor for 23% of respondents.

TABLE 10: What factors influence your choice of transportation for family travel?

ANSWER	PERCENTAGE
Convenience	**78%**
Cost	**73%**
Distance to Be Traveled	**63%**
Travel Time	**57%**
Comfort of Transportation Method	**41%**
Desire to Be Seated Together	**23%**
Health Concerns (including social distancing)	**23%**

Photo © Fernanda Villacis

Travel Behavior

ACCOMMODATION PREFERENCES

When asked in which type of accommodations they planned to stay in the coming year, **hotels** were the most-selected answer (84%). **Vacation rentals** come in second at 47%, and **resorts** third at 45%.

The top 3 ranking of hotels, vacation rentals and resorts 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 this has declined to 47% in 2022. Conversely, the percentage of families projecting to stay in hotels has risen from 74% to 84%.

Reflecting a decrease in the percentage of families planning active/outdoor vacations, campsites have decreased in projected use from 24% to 8%.

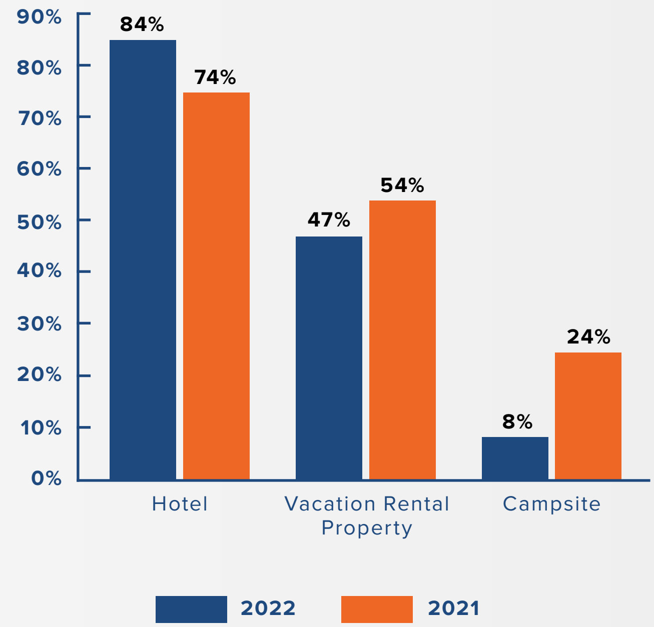
Photo © Aidan Mullan

TABLE 11: 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%
Vacation rental property (a home/condo, Airbnb, VRBO, etc.)	47%
Resort	45%
Homes belonging to friends/family members	33%
Bed and Breakfasts, small inns	14%
Cruise ship	13%
Timeshare	11%
Your own vacation property	9%
Campsite	8%
Motel	7%
Cabin rental	6%
RV / trailer	3%
Dude ranch	2%
Home exchange	1%

Accommodation Preferences continued...

TABLE 12: 2021/2022 Comparison



Value for the price paid (68%) is the dominant factor for US families when they choose accommodations. The second most important factor is **cleanliness and sanitation** (64%), followed by close proximity to **attractions and activities** (63%). Safety and security are an important factor for 50% of respondents, and 26% of respondents considers COVID-related concerns such as social distancing.

Accommodation Preferences continued...

Geronimo Trail Guest Ranch.

TABLE 13: What are the factors that are most important to you when you select where to stay on your family vacation?

ANSWER	PERCENTAGE
Best value for the price paid	68%
Cleanliness and sanitation	64%
Close proximity to attractions and activities	63%
Our preferred accommodation style	55%
Safety and security	50%
Complimentary WIFI/Internet	46%
Amenities for children (pool, beach, game rooms, kids' clubs, etc.)	41%
Complimentary breakfast included	37%
Flexible rooms/sleeping arrangements (for example, connecting rooms or suites)	37%
Complimentary parking	34%
Whole family can gather in our own space	33%
Amenities for adults (spa, pool, beach, golf, sports, etc.)	32%
Kitchen area for in room meal preparation and dining	31%
Family-friendly dining options at or near accommodations	28%
Maintaining COVID protocols for health and social distancing	26%
Ability to use rewards points in exchange for rooms, meals, activities	23%
Kid-friendly environment	21%
Special treatment by accommodation (i.e., upgrades, recognition, special treats)	20%
Brand that I am loyal to	20%
Entertainment options in room	6%
Opportunities for my child(ren) to meet other children	4%

Travel Behavior

TRAVEL DESTINATIONS

Domestically, the most popular states for family travel are **California**, **Florida**, **New York** and **Hawaii**.

62% of respondents plan to travel **internationally** with their children in the coming two years. This is an increase over 2021, when 55% of respondents indicated international travel intent.

Europe is the most popular continent for family vacations. 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, Japan, Thailand and Australia.

1. Italy	8. Bahamas	15. Aruba
2. United Kingdom	9. Canada	16. Bermuda
3. France	10. Israel	17. Costa Rica
4. Greece	11. Japan	18. Turks and Caicos Islands
5. Ireland	12. Portugal	19. Thailand
6. Spain	13. Germany	20. Australia
7. Mexico	14. Dominican Republic	

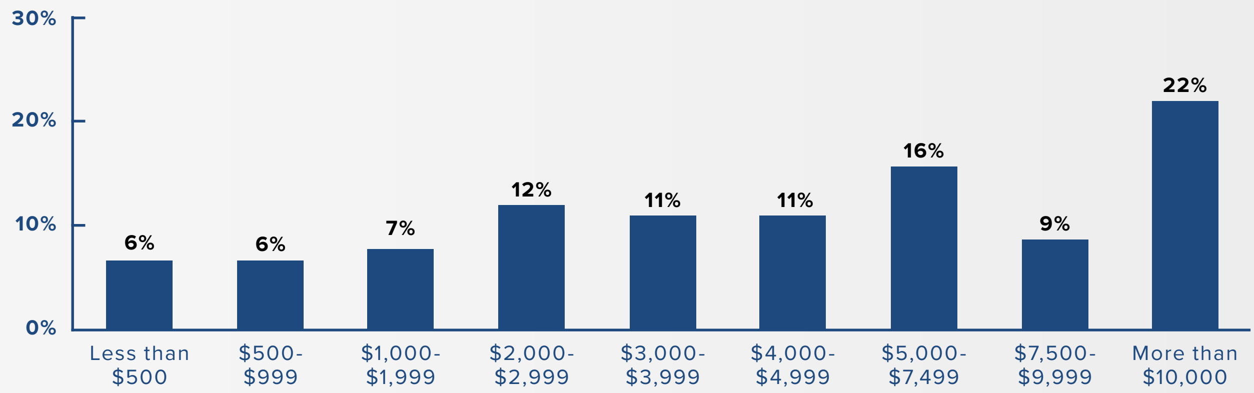
Photo © Karen Akpan

Travel Behavior

TRAVEL SPENDING

The average respondent spent around **$4,750** on family travel in 2021. 22% of respondents spent more than $10,000. 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 the higher income groups than in previous editions.

TABLE 14: Approximately how much did you spend in total on family travel in 2021?



Looking ahead, 53% of respondents plan to spend more on domestic travel in the next year, and 49% expect to spend more on international travel. Only 8% of respondents expect to spend less on domestic travel in the coming year, and 20% expect to spend less on international travel. These figures indicate that travel demand is robust, and currently not much affected by fears of a potential economic downturn.

TABLE 15: How much do you expect to spend on family travel in the coming 12 months, compared to your spending on family travel in 2021?

	I EXPECT TO SPEND MORE ON FAMILY TRAVEL IN THE NEXT YEAR	I EXPECT TO SPEND THE SAME AMOUNT ON FAMILY TRAVEL IN THE NEXT YEAR	I EXPECT TO SPEND LESS ON FAMILY TRAVEL IN THE NEXT YEAR
Within the US	53%	39%	8%
Outside of the US	49%	30%	20%

Travel Behavior

USE OF TRAVEL ADVISORS

25% of respondents have used a travel advisor to book at least one family trip in the past three years. This is an increase over 2021, when 17% of respondents reported having used a travel advisor. 52% of respondents indicate that they are willing to use a travel advisor for their family travel needs in the next 2 years, which is a similar percentage to 2021's findings (56%). For 30% of the respondents, the travel challenges caused by COVID-19 made them more willing to consider a travel advisor, however 70% of respondents said that that did not influence their answer. These findings indicate that **the position of travel advisors in the family travel space is currently strengthening**.

SOURCES OF TRAVEL INSPIRATION AND INFORMATION

In this section of the survey, we asked the respondents which people and sources provided them with travel inspiration and/or information. The respondents' children emerged as a big source of inspiration (76%), followed by friends (53%) and other family members (52%). Almost half of the respondents are inspired by travel bloggers (49%). In terms of providing travel information, travel advisors (80%) and journalists (56%) are the top sources.

TABLE 16: When planning your family trip, who gives you inspiration or information for where you go and what you do?

	INSPIRE ME	PROVIDE ME WITH TRAVEL INFORMATION
Your Children	76%	24%
Friends	53%	47%
Other Family Members	52%	48%
Bloggers	49%	51%
Journalists	44%	56%
Travel Advisors/Agents	20%	80%

Inspiration and Information continued...

The top three resources that provide US families with travel inspiration are **movies** (81%), **TV shows** (73%) and **Pinterest** (71%). Other social media platforms that provide inspiration are Instagram (68%), Facebook (61%) and TikTok (58%). Travel advertising inspired 61% of respondents.

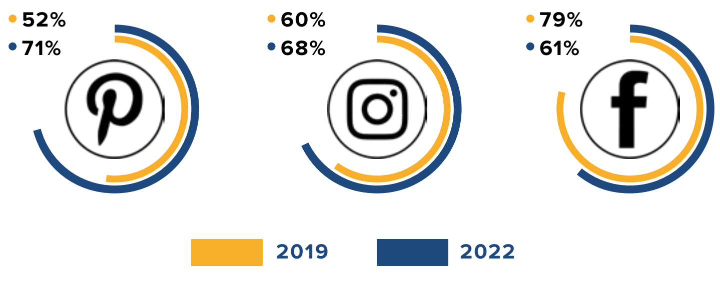
The top three sources for travel information are **government agencies** (92%), **travel supplier websites** (77%) and **tourism offices** (73%). Travel clubs (72%) and travel websites (69%) follow closely behind.

TABLE 17: What other resources give you inspiration or information for where you go and what you do?

	INSPIRE ME	PROVIDE ME WITH TRAVEL INFORMATION
Movies	81%	19%
TV shows	73%	27%
Pinterest	71%	29%
Instagram	68%	32%
Advertising (TV, print, online)	61%	39%
Facebook	61%	39%
TikTok	58%	42%
Podcasts	57%	43%
Newspapers, magazines and their websites	47%	53%
YouTube	46%	54%
Guide books	40%	60%
Search engines (Google, Bing etc.)	34%	66%
Travel websites (TripAdvisor, Expedia, etc.)	31%	69%
Travel clubs (AAA, etc.)	28%	72%
Tourist offices/websites (destinations, activities, etc.)	27%	73%
Travel supplier websites (airlines, tour operators, etc.)	23%	77%
Government agencies, e.g., US CDC, state health departments	8%	92%

The social media outlets US families engage with for travel content have undergone considerable changes compared to our findings in 2019. Pinterest's reach has grown from 52% to 71%, Instagram's has increased somewhat from 60% to 68%, and Facebook's has declined from 79% to 61%.

TABLE 18: 2019/2022 Comparison



Travel Priorities

When we asked respondents what their main priorities are for family travel, the top three answers are to **have children discover new places and new experiences**, to **bond and grow closer as a family**, and to **relax and unwind**. This ranking remains unchanged from when we asked this question last, in 2018. The effects of the travel restrictions related to the pandemic seem to have largely waned, as ‘to get out of our family’s pandemic rut’ received the lowest score.

To have my children discover new place and have new experiences
To bond and grow closer as a family
To relax and unwind
To learn about the culture, cuisine and/or language of the place we visit
To experience great family entertainment
To visit family and friends
To tick places off our 'bucket list'
To get my kids off their phones and social media and back into experiencing life through travel
To experience nature, such as national/state parks
To be pampered and experience luxury
To be physically active
To get out of our family's pandemic rut

Photo © Audrey Sutherland

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 64% of respondents: it has been the top answer since the inception of this survey in 2015. **Dealing with potential cancellations** was the second most common challenge, identified by 51% of the respondents: this is a significant increase over 2021, when this challenge received a score of 24%. While this challenge is linked to the COVID-19 pandemic, two other COVID-related concerns now appear lower on the list than last year, when they were in the top 5. Concerns about limitations on activities and amenities are identified by 25% of the respondents in 2022, compared to 41% in 2021. Concerns about vaccination and health protocols adherence in the destination received a score of 25% in 2022, compared to 33% in 2021.

TABLE 19: We would now like to ask you about the factors that make family travel more difficult. Which of the following factors listed below are the most challenging to you when considering travel with your children?

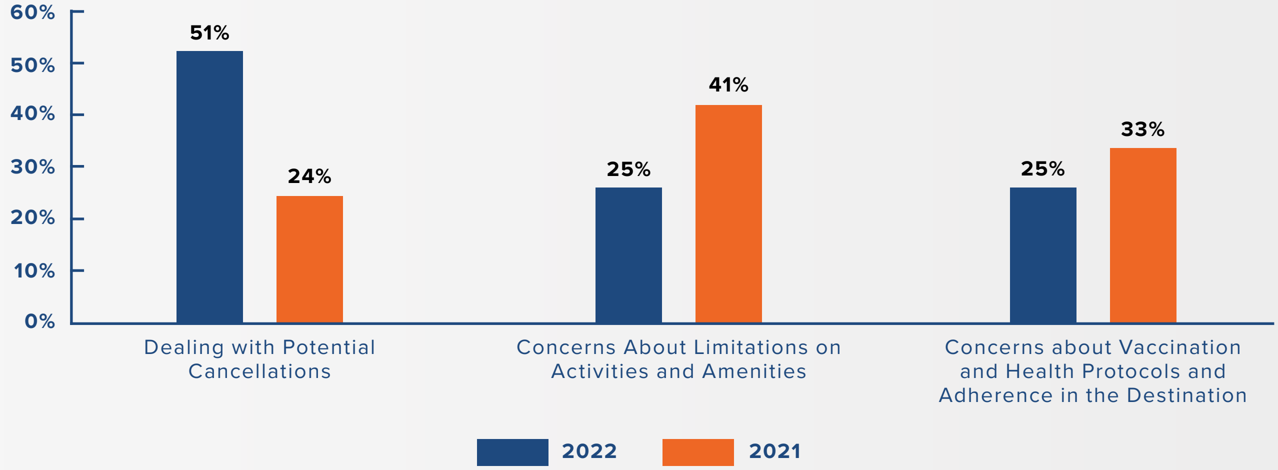
ANSWER	PERCENTAGE
Affordability	**64%**
Dealing with potential cancellations	**51%**
Timing of school breaks	**43%**
Available vacation time	**28%**
Finding a destination or activity everyone will enjoy	**27%**
Concerns about vaccination and health protocols and adherence in the destination	**25%**
Concerns about limitations on activities and amenities	**25%**
Planning the trip	**21%**
Concerns about vaccination and health protocols on our transportation providers (airplane, ship, train, etc.)	**19%**
Concerns about the sanitation and health protocols in hotels and restaurants	**19%**
Traveling on public transportation with children (plane, train, boat, etc.)	**12%**
Dining out while traveling	**11%**
Passport and visa requirements	**9%**
Finding adult time while traveling with children	**9%**
Age(s) of my children	**9%**
Family members getting along	**8%**
Traveling by car with children	**7%**
Health concerns other than Coronavirus	**4%**
None of these	**2%**

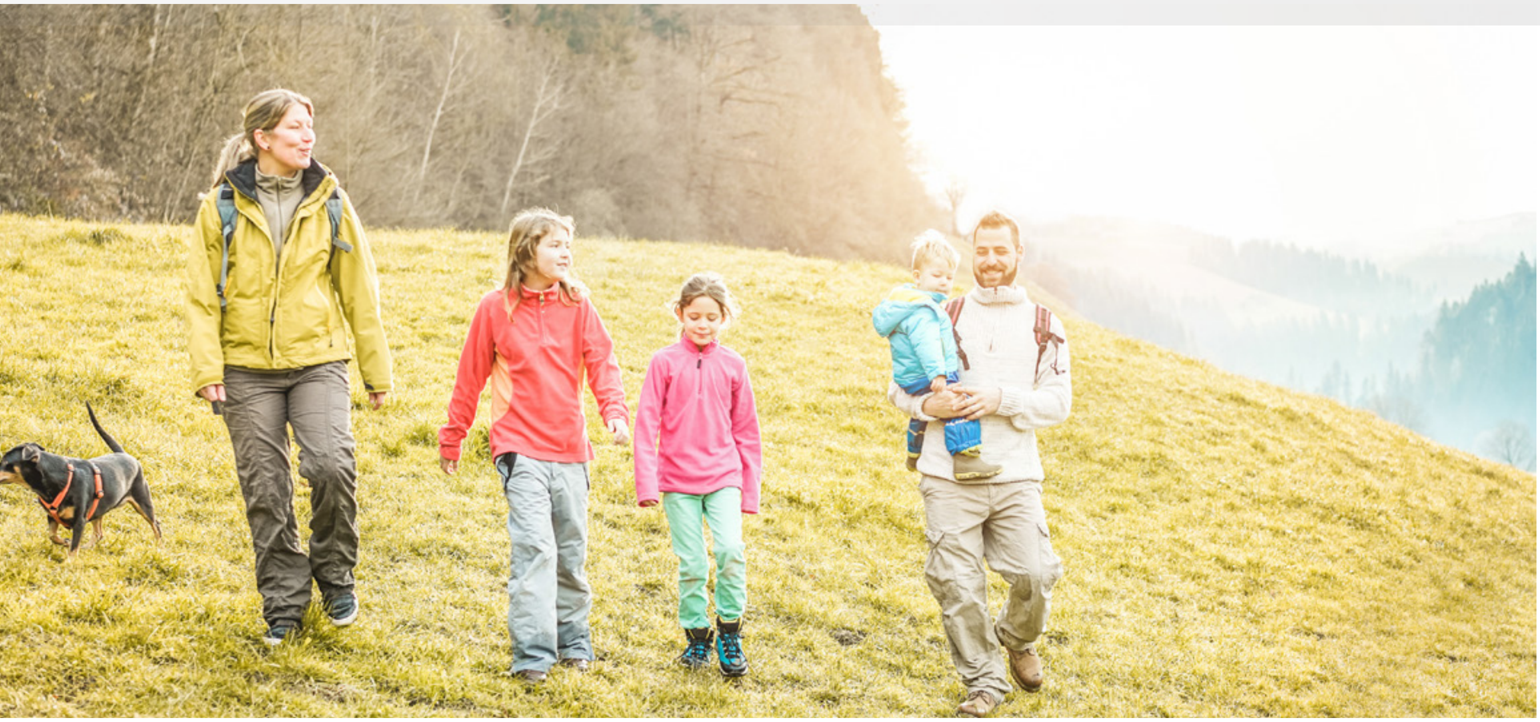
TRAVEL ATTITUDES

Travel Challenges continued...

Photo © Mike Janes

TABLE 20: 2021/2022 Comparison





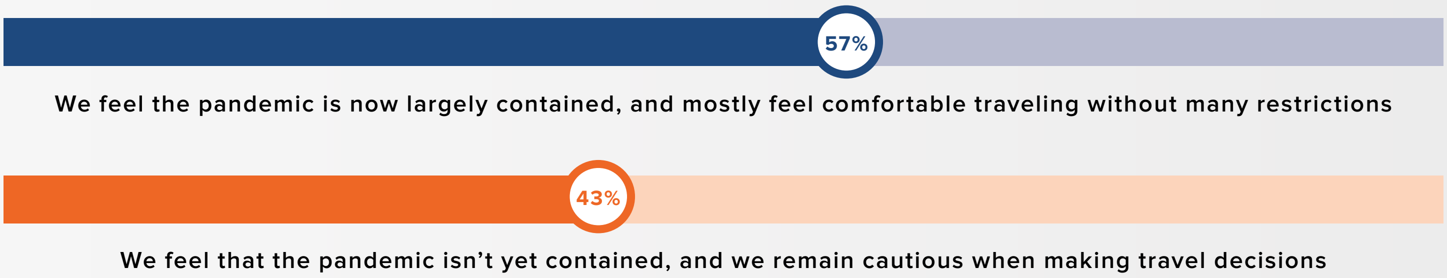
COVID-19 and Family Travel

To establish the attitudes of US families towards the pandemic and its continued impacts on travel, respondents were asked which of the following two statements they most agreed with:

- We feel the pandemic is now largely contained, and mostly feel comfortable traveling without many restrictions
- We feel that the pandemic isn't yet contained, and we remain cautious when making travel decisions

While several findings in this survey point to the fact that the pandemic is becoming less of a dominant factor in family travel decisions, this question shows that US families remain divided in their attitudes towards COVID-19. While 57% of respondents feel that the pandemic is mostly contained and feel comfortable traveling without many restrictions, 43% feel the pandemic isn't yet contained and remain cautious when making travel decisions.

TABLE 21: When it comes to family travel, which of the two statements below do you most agree with?



More specifically, respondents were asked whether the pandemic still influenced certain family travel preferences and decisions. **Cruise tourism** is most affected by the lasting effects of the pandemic, with 27% of respondents saying they are less likely to consider a cruise now. This is similar to the percentage of respondents who agreed with that statement in 2021 (26%).

21% of respondents prefer to use their **own car** for travel, which is a substantial reduction over 2021, when 40% of respondents agreed with that statement. 16% are **less likely to travel internationally** now, which is similar to 2021 (15%).

TABLE 22: Which of the following statements about future family travel apply to you?

ANSWER	PERCENTAGE
We are less likely to consider a cruise now	**27%**
We are more likely to travel using our own car/vehicle rather than in any other form of transport (plane, train, cruise, bus)	**21%**
We are less likely to take an international trip now	**16%**
We still feel restricted on family travel because we have vulnerable/elderly family members we are concerned about	**10%**
We still feel restricted on family travel because our young children are not vaccinated	**4%**
None of these statements apply to me	**22%**

Changes in Family Travel Behavior and Attitudes

While the COVID-19 pandemic has had a far-reaching impact on the last three years, there are also other factors, such as the economic outlook, that may have caused changes in how US families approach many aspects of life, including travel. To explore whether and how the mindsets of US families have changed with regards to travel, we dedicated a section of the survey to this theme.

While 42% of respondents say that their travel preferences have stayed largely the same, 45% of respondents say they have changed somewhat, and 13% say they have changed a lot.

TABLE 23: Do you feel your travel preferences have changed a lot over the past three years?

ANSWER	PERCENTAGE
No, they have stayed largely the same	**42%**
Yes, they have changed somewhat	**45%**
Yes, they have changed a lot	**13%**

Those whose travel preferences have changed were presented with follow-up questions. The first of these probed into what the causes were for the changes in travel behavior. For 49% of respondents, the COVID-19 pandemic triggered the change. 28% of respondents point to their financial situation (including the impact of inflation). For 17% of respondents, changes in personal or professional circumstances played a role.

TABLE 24: Have any of the factors below caused the change in your travel behavior?

ANSWER	PERCENTAGE
The COVID-19 Pandemic	**49%**
Your financial situation (inflation, changes in family income)	**28%**
Changes in my personal or professional circumstances	**17%**
Other	**3%**
None of these factors have caused the change in my travel behavior	**3%**

Behavior and Attitudes continued...

A second follow-up question explored the ways in which the respondents' travel behavior has changed. 67% of respondents report that they now **check cancellation policies** when making travel arrangements, an increase over 2021, when 56% of respondents agreed with this statement. 47% say they now buy **travel insurance**, again an increase over 2021, when 26% of respondents agreed with this statement. 42% say they place a greater emphasis on **comparing prices** to find the best value, and 41% place greater value on **cleanliness and hygiene** now.

TABLE 25: Indicate how your travel behaviors have changed. Compared to three years ago, I am now more likely to:

ANSWER	PERCENTAGE
Check cancellation policies when making travel arrangements	67%
Buy travel insurance	47%
Compare prices to find the best value family travel options	42%
Place an emphasis on cleanliness and hygiene when choosing travel providers	41%
Take multiple short trips instead of one long vacation	32%
Place an emphasis on social distancing and COVID protocols	31%
Avoid international travel due to the regulations and tests required to cross borders	27%
Select more family travel options in the great outdoors	19%
Stay close to home for our family vacations	18%
Select more cultural or educational family travel options	18%
Stay in vacation rentals rather than hotels	15%
Select more environmentally conscious travel options	15%
Select more active or adventurous family travel options	13%
Use a travel agent rather than make our own travel arrangements	10%

Seward, AK. Photo © Carolyn Weber

Behavior and Attitudes continued...

In the next question, all survey respondents were presented with a list of statements regarding the reopening of the travel industry, and factors that are commonly seen to be supportive of family travel. They were asked to check the statements that applied to their projected family travel in the next 12 months.

TABLE 26: When thinking of the family vacations you are planning to take in the coming 12 months, which of the following statements apply to you?

ANSWER	PERCENTAGE
We are keen to visit large cities again now that they are reopening	44%
Reconnecting with family and friends is a key priority for our vacations in the coming year	37%
Because of work-from-home policies, we have more flexibility in when and where we travel as a family	24%
We will be attending at least one wedding, family reunion or other celebration that was postponed because of the pandemic	21%
The need to keep everyone healthy and safe has made me more accepting of single use plastics / packaging when we travel	16%
We will still only travel in 'bubbles' of family members and friends in the coming year	10%
We upgraded our car since the pandemic started with the specific goal to take more family road trips	8%
We have invested in outdoor equipment during the pandemic (e.g., camping equipment, sport equipment) that we will be using on our family trips	6%
None of the above apply to me and my family	18%

44% of respondents expressed a desire to **visit large cities**, and 37% reported that **reconnecting with family and friends** will be a priority for the coming year. While **work-from-home** policies are often touted as potential catalysts for more flexibility in family travel, only 24% of respondents felt this statement applied to them.

The **pandemic** still affects some respondents, as 21% report that they be attending at least one wedding, family reunion or other celebration that was postponed. 10% of respondents will still travel in ‘bubbles’. 16% of respondents report they are more accepting of single use plastics now, as a means to keep everyone safe and healthy.

Photo © Melissa DaSilva

Behavior and Attitudes continued...

Conversely, in the next question, all survey respondents were presented with a list of statements regarding factors that are commonly seen as challenges for future family travel. They were asked to check the statements that applied to their projected family travel in the next 12 months.

TABLE 17: When thinking of the family vacations you are planning to take in the coming 12 months, which of the following statements apply to you?

ANSWER	PERCENTAGE
Inflation, the rise in gas prices and the hike in interest rates are causing us to look for cheaper accommodation options	42%
Inflation, the rise in gas prices and the hike in interest rates are causing us to look for travel options closer to home	27%
Testing requirements and ever-changing travel regulations are deterring us from traveling internationally at this time	19%
The pandemic has made us less adventurous family travelers	17%
The rise in gas prices has deterred us from planning a road trip	15%
Inflation, the rise in gas prices and the hike in interest rates may cause us to forego family travel altogether in the coming year	13%
Because the increase in airfares, we are foregoing air travel this year	13%
I don't trust travel companies as much as I used to, and am more hesitant in booking family trips because of it	7%
The fact that not everyone in our family is vaccinated is putting a dampener on our travel plans	5%
None of the above apply to me and my family	29%

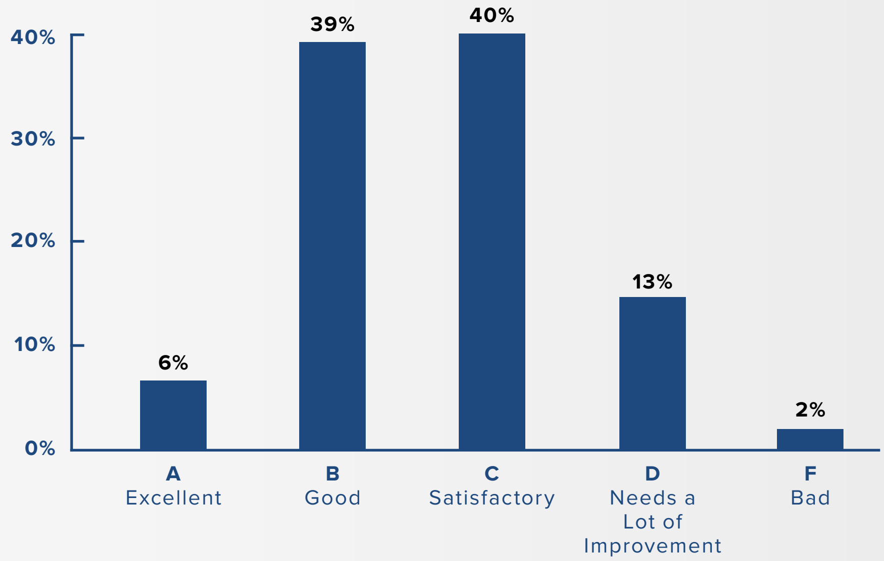
Inflation, the rise in gas prices and the hike in interest rates will likely influence travel behavior, especially when it comes to accommodations: 42% of respondents said they will look for cheaper lodging options. 27% say that they will be looking for travel options closer to home. However, only 13% of respondents report that they will forego family travel altogether. The impact on transportation choices is also limited: 15% of respondents say they are reconsidering taking a road trip because of higher gas prices, and 13% of respondents say they will forego air travel.

Testing requirements and ever-changing travel regulations are also not having a major impact on family travelers: they deter 19% of respondents from traveling internationally. Only 17% of respondents feel that the pandemic has made them less adventurous family travelers.

TRAVEL 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 C+. This grade reflects that families see the industry's performance in this regard as between satisfactory and good.

TABLE 28: Overall, what grade would you give the travel industry for having the best interests of traveling families at heart?



Austin Adventures.

More specifically, respondents were asked to evaluate the travel industry on four criteria: value for money, customer service, offering safe and sanitary travel environments, and offering family-friendly products and services. The sector received the highest grade for offering safe and sanitary travel environments (B), followed by offering family-friendly products and services (B-). It scored a C+ for customer service and value for money.

TABLE 29: More specifically, what grade would you give the travel industry for how well it performs in the following areas?

ANSWER	PERCENTAGE
Offering Safe and Sanitary Travel Environments	B
Offering Family-Friendly Products and Services	B-
Customer Service	C+
Value for Money	C+

Travel Industry Evaluation continued...

The next question in the survey probed the respondents for their level of trust in different sub-sectors of the travel industry. They were asked to score each sub-sector out of 5, where 1 stood for ‘do not trust at all’ and 5 for ‘trust a lot’, reflecting how much trust they have that the travel provider would treat their family fairly and considerately if there were problems in an upcoming family vacation. **Hotels** received the highest trust score, followed by **restaurants**, **theme parks**, **travel agents** and **vacation rentals**. The three sub-sectors that received the lowest trust scores are **online booking sites**, **airlines** and **cruise lines**.

Photo © Kimberly Anwar

TABLE 30: More specifically, what grade would you give the travel industry for how well it performs in the following areas?

	DO NOT TRUST AT ALL	DISTRUST A LITTLE	NO OPINION / UNSURE	TRUST A LITTLE	TRUST A LOT	AVERAGE (SCORE OUT OF 5)
Hotels	1%	8%	14%	51%	25%	3.91
Restaurants	2%	5%	23%	47%	23%	3.86
Theme Parks	5%	13%	28%	34%	19%	3.49
Travel Advisors/Agents	5%	9%	46%	24%	16%	3.36
Vacation Rentals	5%	16%	30%	37%	12%	3.36
Tour Operators	6%	12%	45%	28%	9%	3.23
Car Rental Companies	7%	25%	26%	30%	12%	3.15
Online Booking Sites	12%	21%	24%	30%	14%	3.13
Airlines	13%	28%	15%	32%	12%	3.02
Cruise Lines	19%	19%	35%	17%	10%	2.80

Travel Industry Evaluation continued...

Finally, respondents were asked what the travel industry could do to serve the needs of families better. They were presented with a list of options and were invited to select up to three answers. The top answer, selected by 43% of the respondents, was that travel suppliers should offer **better value for money**. 35% of respondents feel that more accommodations should have **family-friendly room options**, and 20% feel accommodations should **invest more in in-room entertainment**. 14% of respondents do not feel that the travel industry can do anything to serve families better.

TABLE 31: What would make family travel easier for you? Select the top three improvements the travel sector could make to serve families better. (Maximum of three answers).

ANSWER	PERCENTAGE
Travel suppliers should offer better value for money	**43%**
More accommodations should have family-friendly room options (e.g., connecting rooms)	**35%**
Accommodations should invest more in entertainment options in the room (e.g., better WIFI, streaming services)	**20%**
More restaurants should offer family-friendly dining options	**17%**
More accommodations should have child-friendly activities and rooms (e.g., kids' club, game room, media room, outdoor play areas)	**16%**
Travel suppliers should do more to make families feel safe when they travel	**16%**
More travel suppliers should have family-friendly policies	**14%**
More travel advisors should offer services specifically for families	**12%**
Travel suppliers should have more personnel that can support families with their needs	**11%**
I don't feel the travel sector can serve families better than it does now	**14%**

ABOUT

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

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.

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