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Changing Lives Through Travel

Credit: White Stallion Ranch

US Family Travel Survey 2021

Family Travel Association

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

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INTRODUCTION

By Rainer Jenss
Founder, Family Travel Association

You probably don't need me or this survey to tell you that the COVID-19 global pandemic had a major impact on the travel industry during most of 2020 and 2021. In fact, the lingering effects of border closures, mask mandates and vaccines will probably continue to play a major role in how people plan, book, and travel for many months if not years to come.

Because of the pandemic, we felt conducting this annual survey in 2020 while the virus was wreaking havoc all around the world was somewhat pointless. After all, since travel, and our businesses took such a major hit, trying to figure out how our customer's attitudes and behaviors were changing seemed like an exercise in futility, especially given how rapidly conditions were changing. What was happening one month proved at times to be almost completely irrelevant the next. With so much fluctuation, how could we produce any meaningful and lasting research that would help our members better plan how to serve traveling families?

But throughout all this, our members, the industry, and the travelers we serve hunkered down and stayed patient, and now that vaccines are widely available and travel restrictions have started to lift, it's safe to say the travel industry's recovery is finally underway.

That's why I'm so excited to announce that with this report, the FTA is back on track in producing this important annual industry survey—for the sixth time since 2015. Even though each of our previous studies have helped us discover emerging trends, we would also drill down more deeply into an area that our industry wanted to know more about. Whether focusing on multigeneration travel, or learning more about why parents were not using all their vacation time, our research always aimed to help our industry better serve the unique needs and expectations of traveling families.

As we started preparing for what this year's study should prioritize, there was little doubt that the overriding issue would be on discovering how the COVID-19 pandemic has changed families' attitudes, expectations, and plans to travel now, and in the future. This report is meant to reveal these findings in such a way that will help our members and the industry at large better plan and prepare for the new travel landscape we find ourselves in.

What has not changed this or any other year, is our ongoing partnership with New York University's School of Professional Studies and Dr. Lynn Minnaert, Clinical Associate Professor at the Jonathan M. Tisch Center of Hospitality. Our collective goal has always been to learn more about American families, their travel habits and attitudes, and we feel this study is arguably the most comprehensive. We so appreciate Lynn's continued leadership in this endeavor.

This year, we also want to thank Macaroni Kid by CertifiKid, for helping us capture the most broad and diverse group of survey respondents possible. Finally, we want to thank Celebrity Cruises and The White Stallion Ranch for their financial and promotional support and partnership. They have made a serious commitment to serving families, and believe research like this can help us all serve the consumer better.

So, take a deep dive into this year's report and make sure to share with us your opinions and insights. As a member of the FTA, you have complete access to all the data and we are happy to provide a deeper analysis for you, if that would be helpful. 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
Clinical Associate Professor, NYU SPS Jonathan M. Tisch Center of Hospitality

In this sixth 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 the impact of the COVID-19 pandemic on family travel behaviors, preferences and attitudes. With the support of sponsor Celebrity Cruises and media sponsor MacaroniKid, 2,365 responses were collected between June 14 and July 26, 2021. The following themes are featured in the 2021 US Family Travel Survey:

Travel Demand is Strong After a Steep Decline in 2020

- **88%** of parents are likely or very likely to travel with their children in the next 12 months. This means that travel demand from US families in 2021 is at the same level as it was in 2017. Travel intent in 2021 is higher than in 2019, when it was at 70%, and in 2018, when it was at 79%. For families who do not intend to travel, affordability concerns trump COVID concerns.
- In contrast, only **44%** of respondents took a family trip in 2020. **80%** of respondents reported that they made changes to their travel plans due to the pandemic: 64% cancelled or postponed domestic travel arrangement, and 23% cancelled or postponed international travel arrangements.

While Domestic Demand Rebounds, International Demand is Weaker

- Respondents reported a median family travel spending of around $2,500 in 2019. We asked whether they intended to spend more on less on family travel in the next 12 months, for domestic and international travel. **44%** expect they will spend more on domestic travel, whereas **43%** expects to spend around the same amount. Only **13%** of respondents expect to spend less on domestic travel.
- The situation is however very different for international family travel: only **22%** of respondents expect to spend more on international trips, **36%** expect their spending to stay the same, and **42%** expect to spend less.

While Many Family Travel Behaviors Remain Unchanged, the Pandemic Has Led to Some Changes

- Many aspects of family travel have remained unchanged, despite the pandemic. Domestic travel remains much more prevalent than international travel. In this survey, **83%** of respondents plan to take a multi-day vacation in the US, whereas only **19%** plan to take a multi-day international vacation. Families with higher annual household incomes are more likely to plan international vacations.

- In terms of the types of trips respondents are planning to take, visiting family and friends (**62%**) and beach vacations (**61%**) are the top two choices. Theme/water parks and state/national parks are the following two choices, with **51%** and **46%** of respondents planning to take these kinds of trips respectively. These preferences are in line with pre-pandemic family travel behaviors we have reported in previous studies.
- Some trip types however are less popular with families now than before the pandemic. In our 2019 survey, 68% of respondents reported they planned to visit a museum or cultural attraction: that percentage has decreased to **36%**. Events have decreased from 51-60% in 2019 to **23%**. Cruises also decreased from 36% to **10%**.
- Booking windows for family travel remain in line with those reported in the past. Most respondents (**38%**) plan to book their trip 2 or 3 months prior to departure. **24%** plan to book 4 to 6 months prior to departure and **19%** plan to book a month prior to departure.
- In terms of preferred accommodations for family travel, hotels were the most-selected answer (**74%**). Vacation rentals come in second at **54%**, and resorts third at **45%**. This top three is similar to what this survey has previously found, however it is noticeable that vacation rentals have steadily increased in popularity since the inception of this survey.
- A change induced by the pandemic is that families report they pay more attention to cancellation policies (**56%**) and to health and safety considerations when choosing travel destinations (**55%**). **80%** of respondents either agree or agree strongly that they will only book travel with companies that have flexible cancellation policies in place.

Travel Agents May Get Boost From Pandemic Travel Chaos

- **17%** of respondents have booked travel with a travel adviser during the past two years. However, a much larger share of **65%** of respondents say they would consider using a travel adviser for their family travel needs in the next two years. The respondents who indicated that they would consider using a travel adviser, were asked whether the pandemic had affected their answer: **31%** said it had, and that they are more likely to consider using a travel adviser after the disruptions caused by COVID.

COVID-19 Continues to Cause Travel Concerns

- When asked what makes family travel more difficult, affordability is identified as the top challenge by **79%** of respondents: it has been the top answer since the inception of this survey in 2015. In contrast with previous years however, two COVID-19 related concerns now appear in the top 5 of concerns: concerns about limitations on activities and amenities (**41%**) and concerns about vaccination and health protocols adherence in the destination (**33%**). Three further COVID-19 related challenges appear in the top 10: concerns about vaccination and health protocols on our transportation providers (**28%**), concerns about the sanitation and health protocols in hotels and restaurants (**28%**) and dealing with potential cancellations (**24%**).

Health Protocols and Vaccine Passports Divide Respondents

- In our sample, **16%** of respondents report that all family members are vaccinated, **67%** that some family members are vaccinated and **17%** that nobody in the family is vaccinated. Children in particular are likely to be unvaccinated. At this time, children under the age of 12 are not yet eligible for the vaccine, and 72% of respondents report that none of the children have been vaccinated.

- Respondents were split on the question of vaccine passports: while **53%** agree or strongly agree with them, **28%** disagree or strongly disagree. Respondents are equally split on the questions about avoiding travel to destinations/states with low vaccination rates or few health protocols. For **42%** of the respondents, these are strong deterrents, whereas **58%** have either no strong opinion on the matter or disagree that they would avoid travel on this basis. Unvaccinated families are most likely to say they disagree strongly with all three statements.

US Families Evaluate the Travel Sector: Travel Advisers and Vacation Rentals Rank Highest

- US families give the travel sector a **C+** for its handling of the shutdown, and the resulting cancellations and refunds. 44% of respondents give a good (B – 32%) or excellent score (A – 12%), and 49% think the sector did OK considering the circumstances (C).

- Respondents gave the sector a higher score of **B-** for its ability to provide safe travel environments in 2021. 54% give a good to excellent score, 42% say the sector is doing OK considering the circumstances.

- Travel agents and vacation rentals receive the highest score, a **B+**. Online booking platforms, restaurants, hotels and tour operators all receive a **B**. Airlines and car rental companies receive a **B-**, and cruise companies receive a **C+**.

Cleanliness, Clear Communications and Flexible Cancellations Top Family Wishlist

- Family travelers expect frequent, visible cleaning of common areas and often-touched surfaces. Despite the recent criticism that some of this is ‘hygiene theatre’, this was one of the most common requests families raised when asked how the travel sector could serve them better.

- Family travelers also ask that travel companies provide them with an honest and clear assessment of what they can expect at the destination in terms of amenities and health protocols. While some look for reassurance that health protocols are being followed, others want to know in advance if any amenities will be closed or have restricted access.

- Flexible cancellation and refund policies are seen as important considerations when researching and booking family travel at this time.

Dr. Lynn Minnaert
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SURVEY OVERVIEW AND RESPONDENTS

Survey Design and Administration

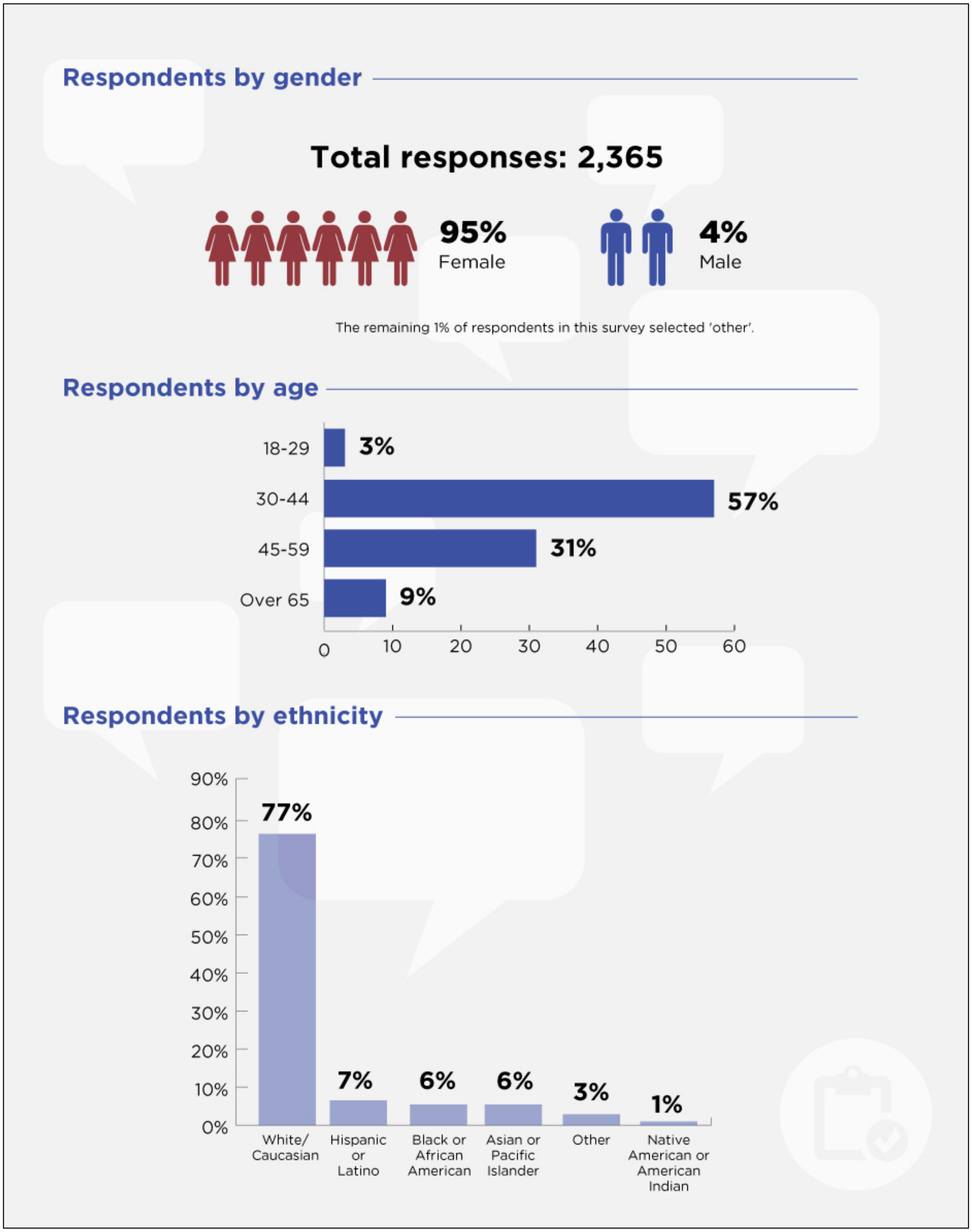
The study presented here includes the findings of a survey conducted with parents in 2021. Only respondents who were over the age of 18 and who had children 26 years of age or younger were eligible to take the survey. Respondents who were unlikely to travel with their children in the coming year were filtered out at the end of the first question block. The survey remained open for five weeks between June 14 and July 26, 2021. The total number of respondents was 2,365.

The survey included seven question blocks: intent to travel, the impact of COVID-19 on travel behavior, the types of trips planned in the coming year, travel behavior (including transportation, accommodation preferences and spending), the use of travel advisers, travel attitudes and an evaluation of how well the travel sector serves families.

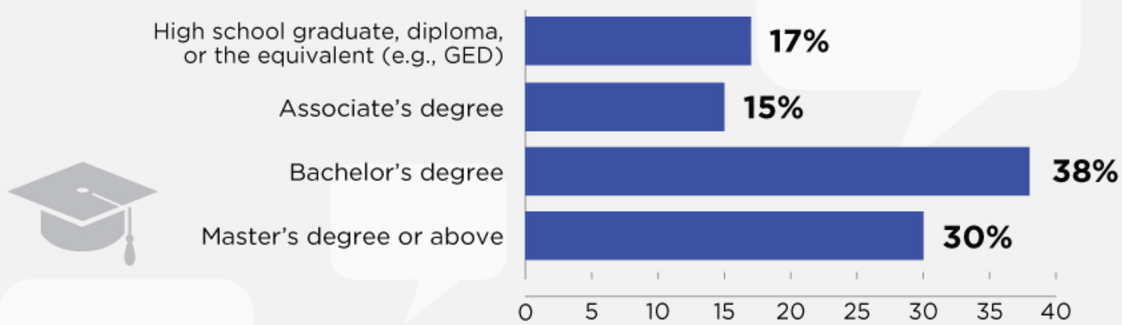
The survey was circulated via the mailing list of MacaroniKid, a publishing platform that provides local activity guides and news for more than 3,000,000 families in 4,000+ communities across the United States. We want to thank Celebrity Cruises and White Stallion Ranch for their generous financial and promotional support in the facilitation of the survey.

Credit: OARS

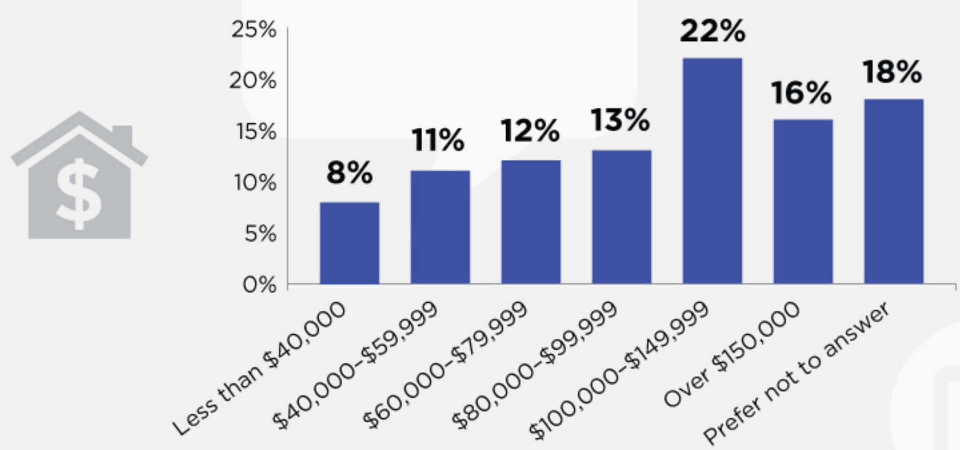
Survey Respondents



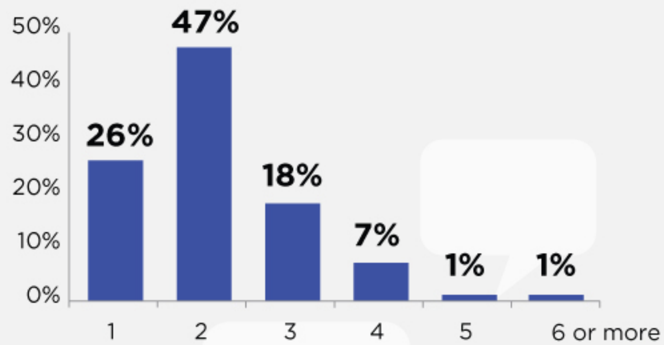
Respondents by level of education



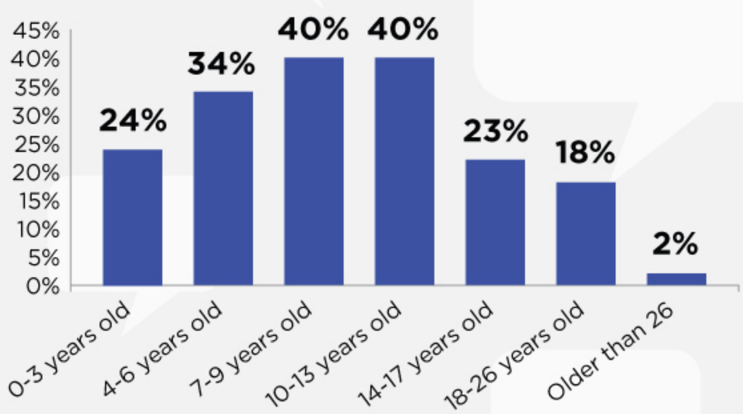
Respondents by household income

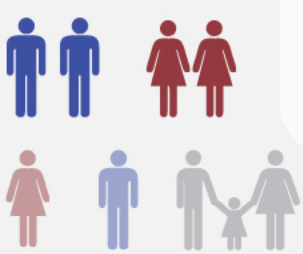


Respondents by number of children



Respondents by age range of children





14% of the respondents are single parents
13% of respondents have a child/children with special needs
7% of the respondents have a stepchild or stepchildren
2% of the respondents represent LGBTQ+ families

SURVEY FINDINGS

Intent to Travel

In our sample, **88%** of parents are likely or very likely to travel with their children in the next 12 months. Of the remaining 12%, 9% are undecided and 3% 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 2021 is at the same level as it was in 2017. Travel intent in 2021 is 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 most dominant factor, with 70% of the non-traveling respondents indicating they could not afford to take a family vacation. The COVID-19 pandemic however also impacted intent to travel: 29% of respondents is not planning to travel because not everyone in the family is vaccinated, 24% report they do not feel safe because of the pandemic, and 21% feel that COVID restrictions make travel less desirable.

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

Answer	Percentage
I/We cannot afford it	70%
Not everyone in our family is vaccinated against COVID	29%
We don't feel safe traveling as a family because of the ongoing pandemic	24%
Travel, activity and/or dining restrictions created by the pandemic make travel less desirable	21%
Traveling with children is not relaxing for me/us	14%
I/we don't have any / enough vacation time	13%
Our children are too young	13%
It's too difficult / time-consuming to plan	8%
Health problems or physical limitations	3%
Our children won't like it, are too busy with other activities, or prefer staying at home	3%
I/we don't think a family trip is worth the money	2%

In this edition of the US Family Travel Survey, we also asked parents about their intent to travel with their older children, between the ages of 18 and 26. We added a focus on children in this age bracket, as they are often still dependent on their parents, and may still be included in family travel decisions. The respondents in this survey who have older children reported that:

- 76% have at least one child between 18 and 26 who lives at home
- 74% have at least one child between 18 and 26 who is financially dependent on them
- 67% have at least one child between 18 and 26 who is in school/college
- 29% have at least one child between 18 and 26 who returned to live at home due to the pandemic

Survey results show that older children are part of the family travel plans of the respondents at almost the same rates as younger children are: 84% of parents are likely or very likely to travel with their older children in the next 12 months (compared to 88% of parents with only younger children). Of the remaining 16%, 10% are undecided and 6% are unlikely or very unlikely to travel.

When asked about why respondents were unlikely or very unlikely to travel with their older children in the next 12 months, COVID considerations are much less common than for families with younger children. Instead, 53% of respondents say that their older children cannot take time off from their jobs at the same time as the planned family vacation, and 42% report that their older children prefer to travel with their friends or partners.

Table 2: Why are your older children unlikely to join you on a family vacation in the next 12 months?

Answer	Percentage
My older children cannot take time off from their jobs at the same time as we are planning our family vacation	53%
My older children prefer to travel with their friends or partners	42%
My older children no longer want to take family vacations with us	21%
We cannot afford it	11%
I/we want our older children to be independent and no longer wish to cover their travel expenses	5%
My older children cannot take time off from school/college at the same time as we are planning our family vacation	5%
Coronavirus and global health concerns (e.g. cleanliness, sanitary conditions, medical facilities)	0%
Not everyone in our family is vaccinated against COVID	0%

Impact of COVID-19 on Family Travel

Impact on 2020 Travel

This section of the survey examines how the COVID-19 pandemic impacted travel behavior in 2020, and continues to impact family travel in 2021.

Only **44%** of respondents took a family trip in 2020. This is well below the 70% that were projected to travel in 2019's US Family Travel Survey.

80% of respondents reported that they made changes to their travel plans due to the pandemic: **64%** cancelled or postponed domestic travel arrangements, and **23%** cancelled or postponed international travel arrangements. The respondents who did still travel often adjusted their trips: 36% picked a destination they could drive to instead of flying, 31% adjusted their trip to the travel restrictions that were in place, and 28% picked a destination where social distancing would be easier.

Table 3: Did you make any changes to your travel plans in 2020 due to the COVID-19 health crisis?

Answer	Percentage
We cancelled/postponed domestic travel arrangements we had made	64%
We picked a destination we could drive to instead of flying	36%
We adjusted our planned family trip to the travel and health restrictions that were in place at the time	31%
We picked a destination where social distancing would be easier	28%
We cancelled/postponed international travel arrangements we had made	23%

Looking specifically at cancellations, while **45%** of the respondents were unaffected, **24%** reported that a theme park or attraction they planned to visit was closed. Airline cancellations affected **17%** of respondents, and accommodation reservations were cancelled for **15%**. Cruise and tour package cancellations affected fewer respondents, **9%** and **3%** of respondents respectively: this reflects the fact that these vacation types are less commonly booked than attractions, airlines and accommodations.

Table 4: Were any of your 2020 travel plans canceled due to the pandemic? Please select all that apply.

Answer	Percentage
None of these	45%
A theme park or attraction we had tickets for was closed	24%
An airline cancelled our flight(s)	17%
Our accommodations cancelled our stay	15%
Our cruise company cancelled our trip	9%
Other	7%
Our tour company cancelled our trip	3%

The respondents who reported having experienced cancellations, were then asked whether they received full or partial refunds, and/or full or partial travel credit. **43%** of respondents received a full refund and **27%** received full travel credit.

Table 5: Did you receive a refund or travel credit for your cancelled plans? You may have received different outcomes for different components of a booked trip, so please select all that apply.

Answer	Percentage
Yes, we received a full refund	43%
Yes, we received a partial refund	8%
No, we did not receive a refund	9%
Yes, we received full travel credit	27%
Yes, we received partial travel credit	6%
No, we did not receive travel credit	3%
Not applicable	19%

Credit: Celebrity Cruises

Family Vaccination Status

As the travel sector reopens in 2021, vaccinations are often central points of discussion. Therefore, the survey asked about the respondents' vaccination status in some detail.

In our sample, **16%** of respondents report that all family members are vaccinated, **67%** that some family members are vaccinated and **17%** that nobody in the family is vaccinated.

Table 6: What is the vaccination status of your family?

Answer	Percentage
We are all vaccinated	16%
Some family members are vaccinated	67%
Nobody in the family has been vaccinated	17%

Respondents who report that nobody in the family has been vaccinated are more likely to report a lower household income and level of education than respondents in the other two groups.

At the time of writing, no COVID vaccines have been approved for children younger than 12, which means that all families with children below that age will by default have unvaccinated family members. Of the 67% of respondents who reported that some family members are vaccinated, **2%** report that all children have been vaccinated, **21%** that some children have been vaccinated, and **72%** that none of the children have been vaccinated. (The remaining 5% selected the 'not applicable/don't know' option.) Of the 72% of respondents who say none of the children have been vaccinated, **61%** say they plan to have the children vaccinated, and **39%** say they do not plan to.

The respondents who indicated that nobody in the family is vaccinated (17% of total sample) were asked whether they and their families plan to get vaccinated. **73%** of respondents in this group say nobody in the family plans to get vaccinated, **19%** say that some family members plan to get vaccinated, and **2%** say that they and their family will get vaccinated.

Credit: AMA Waterways

Credit: Karen Akpan

Impact on Future Family Travel

In the following question, we asked to which extent and how the pandemic had affected the respondents' attitudes towards future family travel. The two top responses are that families pay more attention to cancellation policies (**56%**) and to health and safety considerations when choosing travel destinations (**55%**). **40%** of respondents report that they are now more likely to travel using their own car, rather than opting for other forms of transportation. **26%** are more likely to buy travel insurance.

In terms of long-term attitudinal changes, fewer respondents indicate lasting concerns, although **26%** of respondents say they will be less likely to consider a cruise even after COVID-19 has been contained. **15%** of respondents say they will be less likely to consider international travel even after COVID-19 has been contained. Respondents who indicate that their family is fully or partially vaccinated are more likely to report these lasting concerns than respondents with families where nobody has been vaccinated.

Table 7: Which of the following statements about future family travel apply to you? Please select all that apply.

Answer	Percentage
We pay more attention to cancellation policies now when making travel arrangements	56%
We pay more attention to health and safety now when choosing travel destinations	55%
We are more likely to travel using our own car/vehicle rather than in any other form of transport (plane, train, cruise, bus)	40%
We are more likely to buy travel insurance now	26%
We are less likely to consider a cruise even after COVID 19 has been contained	26%
We will be hesitant to take a trip far away from home until we know that all virus-related issues have been resolved	22%
We are more likely to take day trips instead of overnight trips now	17%
We are less likely to consider international travel even after COVID 19 has been contained	15%
None of these statements apply to me	14%

Travel Plans in the Next Year

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 (**83%**). Weekend getaways come in second (**68%**), followed by day trips (**57%**). Multi-day international vacations are planned by **19%** of respondents. Families with higher annual household incomes are more likely to plan international vacations.

Table 8: We would like to know what types of trips you are planning to take with your children in the coming year. Please select all that apply.

Answer	Percentage
Day trip	57%
Weekend getaway	68%
Multi-day vacation in the US	83%
Multi-day international vacation	19%

When asked how long respondents were willing to drive for a weekend getaway, **47%** of respondents say they will drive between 2 and 4 hours. **27%** of respondents is willing to drive between 4 and 6 hours.

Trip Type

In terms of the types of trips respondents are planning to take, visiting family and friends (**62%**) and beach vacations (**61%**) are the top two choices. Theme/water parks and state/national parks are the following two choices, with **51%** and **46%** of respondents planning to take these kinds of trips respectively. These preferences are in line with pre-pandemic family travel behaviors we have reported in previous studies.

Some trip types however are less popular with families now than before the pandemic. In our 2019 survey, 68% of respondents reported they planned to visit a museum or cultural attraction: that percentage has decreased to **36%**. Events have decreased from 51-60% in 2019 to **23%**. Cruises also decreased from 36% to **10%**.

While these travel plans are generally similar for families who are fully vaccinated, partially vaccinated and unvaccinated, there is one trip type where there are differences. **70%** of unvaccinated families plan to visit theme and water parks in the coming 12 months (making it their joint top choice with beach vacations), compared to **59%** of partially vaccinated families and **50%** of fully vaccinated families.

Table 9: Which of the following types of trips are you planning to take with your children in the coming year? Please select all that apply.

Answer	Percentage
Visiting friends and family	62%
Beach vacation	61%
Theme or water park	51%
National or State Parks	46%
Nature vacation excluding National Parks (e.g. lake, mountain)	37%
Museum or cultural attraction	36%
Active vacation (e.g. camping, hiking, biking, sports)	36%
City vacation	34%
All-inclusive resort	23%
Events (e.g. concerts, sport events, larger social events)	23%
Cruise	10%
A group tour through a tour operator (e.g., Adventures by Disney, Trafalgar, safaris etc.)	7%
Dude ranch	5%

Next, respondents were asked whether they were planning to travel in larger family groups. **52%** 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. **45%** of respondents say they are planning a trip with family members beyond parents and in-laws.

Table 10: 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)	52%
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)	45%

Credit: J. Lee Photography

Trip Season

In this section of the survey, respondents were asked when they plan to travel as a family in 2021 and 2022. The summer season is the most popular travel time: **64%** of respondents plan family travel in the summer of 2021, and **56%** in the summer of 2022. The fall of 2021 and the spring of 2022 are the next most popular options, with **35%** or **32%** of the respondents planning trips then respectively.

Table 11: When are you planning to take a family vacation in 2021 and 2022? Please select all that apply.

Answer	Percentage
Summer 2021	64%
Summer 2022	56%
Fall 2021 (including Thanksgiving)	35%
Spring 2022	32%
Holidays 2021	29%
Winter 2022	18%
Holidays 2022	18%
Fall 2022 (including Thanksgiving)	17%

Most respondents (**38%**) plan to book their trip 2 or 3 months prior to departure. **24%** plan to book 4 to 6 months prior to departure and **19%** plan to book a month prior to departure. The pandemic has not substantially shortened booking windows compared to what this survey has found in prior years.

Table 12: Approximately when do you plan to book travel in the coming 12 months? Please select the answer that reflects your average booking period most accurately.

Answer	Percentage
A week prior to departure	2%
Two weeks prior to departure	4%
A month prior to departure	19%
Two or three months prior to departure	38%
Four to six months prior to departure	24%
Six to twelve months prior to departure	11%
Over a year prior to departure	2%


Credit: Red Horse Mountain Ranch

Travel Behavior

Air Travel

Respondents were asked if they were willing to fly at the time of taking the survey. **72%** of respondents is willing to fly on a domestic trip, and **40%** on an international trip. Only 15% of respondents is unwilling to fly on an international trip, as 45% of respondents say they are not planning international travel at this time.

Table 13: At this time, are you willing to fly / take a plane for a family vacation? Please indicate your answer for both domestic and international trips.

Trip Type	Not planning to take this type of trip	Yes, willing to fly	No, not willing to fly
Domestic Trips	11%	72%	17%
International Trips	45%	40%	15%

Accommodations

When asked in which type of accommodations they planned to stay in the coming year, hotels were the most-selected answer (**74%**). Vacation rentals come in second at **54%**, and resorts third at **45%**. (For both vacation rentals and resorts, the probability that respondents plan to stay in these accommodation type increases with income – higher income groups are more likely to select these options than lower income groups).

The top 3 ranking of hotels, vacation rentals and resorts is similar to what this survey has previously found, however it is noticeable that vacation rentals have steadily increased in popularity since the inception of this survey. Motels in contrast have become less popular for family travel: they were the third most common accommodation option in 2017, the sixth most common in 2019, and have now dropped to 11th place.

Table 14: Do you plan to stay in each of the following types of accommodations on a family vacation in the coming 12 months? Please select all that apply.

Answer	Percentage
Hotel	74%
Vacation rental property (a home/condo, Airbnb, VRBO, etc.)	54%
Resort	45%
Homes belonging to friends/family members	38%
Cabin rental	25%
Campsite	24%
Bed and Breakfasts, small inns	11%
Cruise ship	11%
Timeshare	11%
RV / trailer	11%
Motel	8%
Your own vacation property	5%
Home exchange	1%
Other	1%

Travel Spending

Respondents reported a median family travel spending of around $2,500 in 2019. We asked whether they intended to spend more on less on family travel in the next 12 months, for domestic and international travel. **44%** expect they will spend more on domestic travel, whereas **43%** expects to spend around the same amount. Only **13%** of respondents expect to spend less on domestic travel.

The situation is however very different for international family travel: only **22%** of respondents expect to spend more on international trips, **36%** expect their spending to stay the same, and **42%** expect to spend less.

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 2019, before the outbreak started?

Location	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	44%	43%	13%
Outside of the US	22%	36%	42%

USE OF TRAVEL ADVISERS

17% of respondents have used a travel adviser to book at least one family trip in the past two years, **83%** of respondents have not. Families with a household income higher than $100,000 per year are slightly more likely to have used a travel adviser (**20%**) than families in lower income brackets.

For the respondents who have used a travel adviser for family travel in the past two years, the biggest motivations were the expertise travel advisers have about certain destinations or vacation types (**48%**) and their access to better rates and prices (**43%**). The pandemic influenced the decision to use a travel adviser to some extent. For **26%** of respondents, the fact that travel advisers have the most up to date information about health protocols and restrictions related to COVID-19 is an important motivator. For **25%** of respondents also highlight that the support travel advisers can offer in times if global crises is a factor in deciding to use one.

Table 16: Why did you decide to use a travel adviser/agent to help plan/book at least one family vacation in the past 2 years? Please select all that apply.

Answer	Percentage
Travel advisers/agents have an in-depth understanding of the destination or vacation type I was interested in	48%
Travel advisers/agents have access to better rates and prices	43%
Travel advisers/agents can best deliver the vacation experience we are looking for	38%
If something goes wrong, a travel adviser/agent is there to help	36%
Travel advisers/agents minimize the risk of problems on vacation	29%
Travel advisers/agents are better equipped to plan and book more complicated trips (i.e., multi-generational trips, travel to off-the-beaten path destinations, etc.)	28%
Travel advisers/agents have the most up to date information about health and vaccination protocols, rules and restrictions, and sanitation status of destinations we are interested in visiting	26%
Travel agents/advisers are invaluable in cancelling/rescheduling travel plans affected by global crises (e.g. Coronavirus)	25%
Planning and booking on my own is time-consuming	22%
Planning and booking on my own is too overwhelming/confusing as there are too many options to choose from	21%
A travel adviser/agent gets to know me and my preferences and can tailor recommendations for me	20%

Of the respondents who have not used a travel adviser for family travel in the past two years, **56%** say that they can find all the information they need online, and **44%** report that they enjoy researching and planning family vacations themselves.

Table 17: Why did you decide not to use a travel adviser/agent in planning/booking your family vacations in the past 2 years? Please select all that apply.

Answer	Percentage
I can find all the information I need online	56%
I enjoy the process of researching, planning and booking a family vacation	44%
I trust myself more to find the right travel options for my family	39%
It would add to the cost of the vacation	37%
We tend to go to places we know very well	24%
I think the cost of using a travel adviser/agent would not pay back in terms of the assistance received	17%
I don't know how to select a travel adviser/agent	13%
I don't know how travel advisers/agents work/what they do	13%
I don't have time to visit or call a travel adviser/agent	11%
I have not found a travel adviser/agent that I can trust	6%

65% of all survey respondents say they would consider using a travel adviser for their family travel needs in the next two years, **35%** say they would not. The respondents who indicated that they would consider using a travel adviser were asked whether the pandemic had affected their answer: **31%** said it had, and that they are more likely to consider using a travel adviser after the disruptions caused by COVID.

Credit: White Stallion Ranch

TRAVEL ATTITUDES

In this section of the survey, respondents were first presented with a question about the value they place on family vacations, especially since the pandemic heavily limited family travel in 2020. The question also probed whether families were planning to make up for lost travel time by either traveling more or spending more on travel.

The table below show that US families place great value on the educational importance of family travel (**4.6/5**), and that they agree with the statement that having to forego travel during the pandemic has made them realize how valuable family vacations are (**4.1/5**).

However, the respondents were more ambivalent on the following two prompts. While 41% of respondents agreed or agreed strongly that they saved up money during the pandemic that they intend to use on travel, the mean response for this statement was **3.1/5**. While 32% of respondents say they plan to take more or longer trips to make up for canceled travel plans, the mean response for this statement was **3.0/5**.

Table 18: How much do you agree with each of the following statements about family travel?

Statement	Disagree strongly (1)	Somewhat disagree (2)	Neither agree nor disagree (3)	Somewhat agree (4)	Agree strongly (5)	Mean
Family travel expands my children's horizons/education	1%	1%	5%	23%	70%	4.6
Having to forego travel during the pandemic has made me realize how valuable family vacations are	2%	3%	20%	34%	41%	4.1
We saved up money during the pandemic that we intend to spend on travel	13%	16%	30%	29%	12%	3.1
We are planning more or longer trips to make up for canceled travel plans	13%	17%	38%	22%	10%	3.0

Credit: Aidan Mullan

In the next question, we asked respondents about their comfort level with certain travel practices, and the appeal of certain booking incentives.

Respondents report that they are generally comfortable with visiting indoor attractions (**4.0/5**) and dining indoors (**3.9/5**). They also are generally fairly comfortable with traveling in a group, although the mean score for this statement is lower at **3.6/5**.

In terms of booking incentives, flexible cancellation and refund policies are of great importance: 80% of respondents either agree or agree strongly that they will only book travel with companies that have these policies in place (**4.2/5**). Discounts, while less important, also hold appeal for 67% of respondents (**3.8/5**).

Respondents were split on the question of vaccine passports: while 53% agree or strongly agree with them, 28% disagree or strongly disagree, and 19% has no strong opinion (**3.3/5**). Respondents are equally split on the questions about avoiding travel to destinations/states with low vaccination rates (**3.1/5**) or few health protocols (**3.1/5**). For 42% of the respondents, these are strong deterrents, whereas 58% have either no strong opinion on the matter or disagree that they would avoid travel on this basis. Unvaccinated families are most likely to say they disagree strongly with all three statements.

Table 19: How much do you agree with each of the following statements about family travel?

Statement	Disagree strongly (1)	Somewhat disagree (2)	Neither agree nor disagree (3)	Somewhat agree (4)	Agree strongly (5)	Mean
We will only consider booking travel with companies that have flexible cancellation and refund policies	1%	3%	16%	41%	39%	4.2
We are comfortable visiting indoor attractions in our destination	3%	11%	11%	41%	35%	4.0
We are comfortable dining indoors in restaurants in our destination	5%	12%	9%	35%	40%	3.9
We will only consider travel if we can find a good deal or big discount	2%	8%	23%	43%	24%	3.8
We are comfortable traveling in a group	6%	15%	18%	35%	25%	3.6
We support the use of vaccine passports in travel	22%	6%	19%	22%	31%	3.3
We avoid travel to destinations/states where vaccination rates are low	17%	11%	30%	24%	18%	3.1
We avoid travel to destinations/states where there are few health and safety restrictions in place (e.g. masks, social distancing)	16%	14%	27%	25%	17%	3.1


Credit: Kirsten Maxwell

When asked who they trust for accurate travel advice, **69%** of respondents indicate they trust government agencies such as the CDC and state health departments. **44%** trust friends and family, and **35%** trust fellow travelers they interact with via social media or word of mouth. Travel companies are seen as trustworthy sources of information by **30%** of the respondents, and are trusted more than traditional news sources, which are only trusted by **23%**. Travel advisers/agents are trusted by **17%** of the respondents, although this percentage increases to **43%** for respondents who have used a travel agent in the past 2 years.

Table 20: Who do you trust for accurate travel advice at this time? Please select all that apply.

Answer	Percentage
Government agencies, e.g. US CDC, state health departments	69%
Friends and family	44%
Fellow travelers (social media, word of mouth)	35%
Travel companies, e.g. airlines, destinations, tour operators, attractions	30%
Traditional news sources	23%
Travel advisers/agents	17%
None of the above	6%

There were marked differences between the answers of respondents with different vaccination status for this question. Respondents who reported that nobody in the family has been vaccinated are much less likely to trust government agencies than respondents who say everyone in the family has been vaccinated (**34%** vs. **78%**). A similar difference in trust levels is noticeable when it comes to traditional news sources: these are trusted by **12%** of families where nobody has been vaccinated, and **31%** of families where all members have been vaccinated. Respondents who reported that nobody in the family has been vaccinated are more likely to trust friends and family (**50%**) and fellow travelers (**41%**).

Completing the section on travel attitudes, respondents were asked to identify up to five factors that make family travel more difficult. Affordability is identified as the top challenge by **79%** of respondents: it has been the top answer since the inception of this survey in 2015. In contrast with previous years however, two COVID-19 related concerns now appear in the top 5 of concerns: concerns about limitations on activities and amenities (**41%**) and concerns about vaccination and health protocols adherence in the destination (**33%**). Three further COVID-19 related challenges appear in the top 10: concerns about vaccination and health protocols on our transportation providers (**28%**), concerns about the sanitation and health protocols in hotels and restaurants (**28%**) and dealing with potential cancellations (**24%**).

Table 21: 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? Please select your top 5 challenges.

Answer	Percentage
Affordability	79%
Concerns about limitations on activities and amenities	41%
Timing of school breaks	39%
Concerns about vaccination and health protocols adherence in the destination	33%
Available vacation time	30%
Concerns about vaccination and health protocols on our transportation providers (airplane, ship, train, etc.)	28%
Concerns about the sanitation and health protocols in hotels and restaurants	28%
Dealing with potential cancellations	24%
Finding a destination or activity everyone will enjoy	23%
Traveling by car with children	20%
Planning the trip	18%
Finding adult time while traveling with children	18%
Age(s) of my children	17%
Passport and visa requirements	13%
Dining out while traveling	10%
Health concerns other than Coronavirus	6%
Family members getting along	5%

Credit: AMA Waterways

TRAVEL SECTOR EVALUATION

In this section of the survey, we asked respondents to evaluate the travel sector on its handling of the COVID-19 shutdown, and on its delivery of safe travel environments in 2021.

US families give the travel sector a **C+** for its handling of the shutdown, and the resulting cancellations and refunds. 44% of respondents give a good or excellent score, and 49% think the sector did OK considering the circumstances.

Table 22: Overall, what grade would you give the travel industry for how it handled the Coronavirus shutdown, refunds and cancellations?

Answer	Percentage
A – Excellent	12%
B – Good	32%
C - OK, considering the circumstances	49%
D - Needed a lot of improvement	6%
F – Bad	1%

Respondents gave the sector a higher score of **B-** for its ability to provide safe travel environments in 2021. 54% give a good to excellent score, 42% say the sector is doing OK considering the circumstances.

Table 23: Overall, what grade would you give the travel industry for providing safe travel environments in 2021?

Answer	Percentage
A - Excellent	14%
B - Good	40%
C - OK, considering the circumstances	42%
D - Needed a lot of improvement	4%
F - Bad	0%

Credit: OARS

We then asked respondents to give different sub-sectors an individual score for how they handled the pandemic. (If the respondents had no experience with a certain provider, they were invited to select the 'Not Applicable' answer choice. These answers were excluded to present the table below.)

Travel agents and vacation rentals receive the highest score, a **B+**. Online booking platforms, restaurants, hotels and tour operators all receive a **B**. Airlines and car rental companies receive a **B-**, and cruise companies receive a **C+**.

Table 24: More specifically, what grade would you give each of the following family travel providers for how they handled the pandemic? If you have no experience with a certain provider, please select 'Not Applicable' (N/A).

Travel Provider	A	B	C	D	F	Average
Travel agents	52%	30%	14%	3%	2%	B+
Vacation rentals	47%	36%	14%	2%	1%	B+
Online travel booking	44%	39%	12%	2%	2%	B
Restaurants	41%	40%	16%	2%	1%	B
Hotels	39%	43%	14%	2%	1%	B
Tour operators	39%	35%	20%	4%	3%	B
Airlines	30%	37%	21%	7%	4%	B-
Car rental	30%	31%	21%	8%	10%	B-
Cruise companies	25%	20%	23%	15%	16%	C+

Finally, we asked respondents what they need or expect from the travel sector to make them feel safe on their next trip. A text box was provided for respondents to type in their answers. Common themes are:

- Cleanliness and hygiene: travelers expect frequent, visible cleaning of common areas and often-touched surfaces. Despite the recent criticism that some of this is 'hygiene theatre', this was one of the most common requests for this question.
- Clear and reliable communications: travelers ask that travel companies provide them with an honest and clear assessment of what they can expect at the destination in terms of amenities and health protocols.
- Flexible cancellation and refund policies are often mentioned as important considerations for family travel.
- When it comes to masks and vaccines, respondents were split, as indicated earlier in this survey. A large group of respondents advocate for vaccine and mask requirements, and stronger consequences for non-compliance of health protocols. They express concerns for their younger children who are unvaccinated. A smaller but still sizable group feel strongly that vaccines and masks should not ne required, and that many existing health protocols are too restrictive. Some comment that they explicitly choose destinations where the health protocols are more relaxed. This amplifies the importance of the prior point on clear communications: as travel businesses cannot satisfy both groups simultaneously, it is vital that they are transparent in their expectations and requirements prior to the traveler's arrival.

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ABOUT THE FAMILY TRAVEL ASSOCIATION

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