



Our thanks to the attendees who participated wholeheartedly and shared their ideas to better the family traveler experience.

Kari Astrid-Haugeto – AwayIsHome.com
Linda Ayares – M Silver, Division of Finn Partners
Laura Bennett – Bennett & Company
Dewayne Bevil – Orlando Sentinel
Kevin Broom – Go RVing
Lisa Cole – Hilton Worldwide
Danielle Courtenay – Visit Orlando
Grace Cutler – Fox News.com
Richard Edwards – Morgan's Rock
Christopher Elliott – National Geographic Traveler
Jeffrey Eslinger – D.K. Shifflet & Associates
Jamie Espinosa – Trafalgar
Susan Flower – SeaWorld Parks & Entertainment
Amy Foster - Disney Destinations Marketing
Janelle Gordon – Hearst Digital Media
Robb Henshaw – GetGoing
Jyl Johnson Pattee – Mom It Forward Media
Samantha Lane - LEGOLAND® Florida
Marie Anne MacRae – Trafalgar
Laura Manske – Women's magazines
Neal McCord – Give Kids The World
Jennifer Miner – The Vacation Gals
Donna Mirus Bates – Universal Orlando Resort
Lynn O'Rourke Hates – FamilyTravel.com
Mark Orwoll – American Express Publishing
Amie O'Shaughnessy – Ciao Bambino!
Laura Parquette – Vail Resorts
Krista Parry – Powdr Enterprises
Karen Pitcherello – Mears Transportation
Lissa Poirot – Family Vacation Critic
Lee Rose – Lee County Visitor & CBDiana
Rowe – USA Today's 10Best.com
Linda Rutherford – Southwest Airlines
Denise Spiegel – Visit Orlando
Dave Wiggins – Widness & Wiggins PR
Peter Yesawich – MMGY Global
Tamara Young – JetBlue Airways



TMS Family Travel Summit

Family travel is a multi-billion dollar market and the leading segment of the leisure travel industry.

To better understand how to meet family needs, we invited 35 travel editors, publishers and social media marketers to join executives from various facets of the travel industry, to hear and discuss the latest travel research. The invitation-only TMS Family Travel Summit was held May 3-5, 2013 at the Hilton Orlando .

We hope you find this brief report useful and will join us next year.

Eileen Ogintz, Taking the Kids

Kyle McCarthy, Family Travel Forum

Joanne Vero, Travel Media Showcase and TMS Family Travel

@TMSfamtrav

How Family Travel Has Changed

Eileen Ogintz, Taking the Kids

- Family travel represents 40% of trips taken by Americans, largest segment of Leisure Travel.
- 100 million+ trips per year taken by adults traveling with children; includes 37% by grandparents spending \$77 Bn on travel annually

How Families Have Changed

Kyle McCarthy, Family Travel Forum

- 1 in 6 families in industrialized world headed by a single parent; 16% of children live in step or blended households.
- The traditional family - “married-couple-biological-children” -- represents minority of US families.

How Parents Value Family Vacations

Amy Foster, Disney Consumer Insights

- Gen X families want to knit together extended family, creating strong bond or “parachute” should they need each other in the future.
- On vacation, 75% of parents say they are more relaxed, creating opportunities for bonding and memory making.
- Families are seeking variety of experiences to meet needs of travel party that consists of multiple age kids, themselves, extended family.

What Travelers Do on Vacation: Traveler Profile & Experiences

Jeffrey Eslinger of DK Shifflet & Associates presented the latest research on what US families do on vacation.

- Average cost of a trip with children to US destinations is \$845. In Florida, with many family-oriented attractions, it is \$1,416.
- 54% of today's family travelers are Generation X but they will soon be grandparents doing multigenerational travel.
- Millennials born after 1981 (now 20% of travelers) will take over soon.
- Travel industry must devise new strategies for this worldly, sophisticated demographic. They are willing to pay but want value – “Don't dumb it down” warns Eslinger.

Leisure Travel Trends for 2013 and Beyond

Peter Yesawich of MMGY Global shared insights from Travel Horizons & Portrait of American Travelers

- 40% of travelers have taken their kids along on business trips; busiest night in hotels is now Saturday.
- International trips (Caribbean, Western Europe, Mexico are top destinations) were taken by 4 out of 10 families in 2012.
- Families say Internet access at lodgings is the #1 preferred amenity, more important than fancy sheets, five-star service, kids clubs or kids discounts.
- 51% say their kids have a major voice in choosing destinations and activities at these destinations so marketers should talk to kids too.
- Average family travel planner looks at 6 sites before booking
- Last minute travel taken by 1/3 of survey sample; 20% of families booked a hotel room or vacation from an unexpected travel "sale" e-mail.

International Family Market

Mark Orwoll, Travel & Leisure

- China: Affluent urban families have money to travel; party is usually a family of 3, so they enjoy frequent driving trips and 1- 2 longer trips per year.
- Southeast Asia: Increasingly sophisticated; lots of travel to nearby countries by expatriate families as well as increasing business travel with family.
- India: Multigenerational travel is huge among a substantial middle and upper middle class of dual income households.
- Russia: Only the extremely wealthy travel, and they are looking for upscale, educational, adventure experiences.
- Germany: Average family travels with 1.35 children and goes by car because airfares are very expensive, even with discounted children's fare.
- Great Britain: Self-catering popular to save money on hotels. Willing to fly internationally, especially fond of Florida

Volunteer and Special Needs Travel

Neal McCord, Give Kids the World

- Families with acute needs are tied economically and medically to their home community; 80% have never traveled by air.
- Volunteer orgs can get corporate employees who come for team building, families who seek opportunities to give back on vacation; college spring breakers.

Think Tank Identifying Family Traveler Best Practices

1. Make Family Vacations Affordable: Simple Planning, Booking & Price Comparison Tools Are Necessary to Select Best Family Vacations
2. Maximize Memory-Making Opportunities – Help Families Enjoy Each Other and Precious Time Together
3. Provide Larger Family-Style Hotel Rooms to Accommodate Family Groups Comfortably
4. Serve Healthier Kids Meals, Fresher Menus, More Engaging Recreational Experiences so Vacation Improves Family Well-Being
5. Provide Activities for All Ages So Everyone is Engaged in the Vacation

13 Key Takeaways from TMS Summit

1. The traveling family has changed: the industry has to innovate to welcome **diverse** family groups with different ages and varied needs.
2. Families are **demanding**; they expect emotional value and unique experiences for themselves and their children that will become positive memories.
3. Families seek **value** rather than cheapest price; families will pay for luxury amenities, especially customized service, if it enhances the family-together experience.
4. There is immediate need for **family-centric** hotels and facilities at all price points.
5. The industry must create better, **healthier** menus and value pricing for kids; more needs to be done to improve the family travel dining experience overall.
6. The surge in **multigenerational** travel means that the industry needs to offer activities for all ages.
7. **Personalized** service and unique moments of interaction provide the best guest satisfaction.
8. Marketers must reach school-age children who will **influence** the mom vacation planner; she welcomes input from every stakeholder.
9. Airlines must help **de-stress** the airport and security process and guarantee seating for family groups.
10. The industry has to provide and market more affordable family vacations; the huge market of those with HHI under \$50K is under-served.
11. Families will use **social media** to share negative experiences such as charging for WiFi, resort fees, and service charges
12. Families deserve the breaks of **group** pricing; hotels need to adapt to the changing family structure by offering deep discounts for an adjoining room.
13. Consumers and the media both want direct, truthful information about safety issues.