

The Art & Science of Destinations

DESTINOLOGY™



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THE ART OF THE FAMILY VACATION

What they want...How they plan...Why they go...

A National Research Project

The Fine Art of Traveling with Children

It's that delicate balance of interests, more complex than a Congressional subcommittee. It's that persistence to find the right blend of activities that satisfies everyone. It's the think-on-your-feet flexibility to adapt when things don't play out the way that you planned. It's the after-the-fact hindsight that helps you do it better next time.

And just when you think you've got the kids figured out, they change on you.

It's the family vacation, the most creative act that most families will ever undertake together. Planning, executing, and enjoying a family vacation is truly a rich and complex art form. Even for experienced destinologists like us, this particular art form defies easy understanding.

So, like a lot of challenging subjects, we decided to do some research. We commissioned H2R Market Research to conduct an original, nationwide study for us, asking families for detailed information about the reasons they visit destinations, how they plan their trips, how they rank different attributes, and how they evaluate their experience. Perhaps most importantly, we compared our family results to a control group of adults-only travelers, looking for key differences.

The results are interesting, and often surprising.

Why Do Families Matter?

They're only $\frac{1}{3}$
of the U.S. population—
but they make HALF of
all visits to attractions.



They pay more for their tickets—\$22.87 on average, almost \$2 more than the average price paid by adults without children. Families also visit attractions more often—2.9 times a year, on average, compared to 2.5 for adults without children—and they're more likely to make repeat visits.

If they've had fun, together.

The Question Freud Never Asked: What Do Families Want?

Our study establishes that there are numerous priorities for families as they travel. In descending order, here are our top ten:

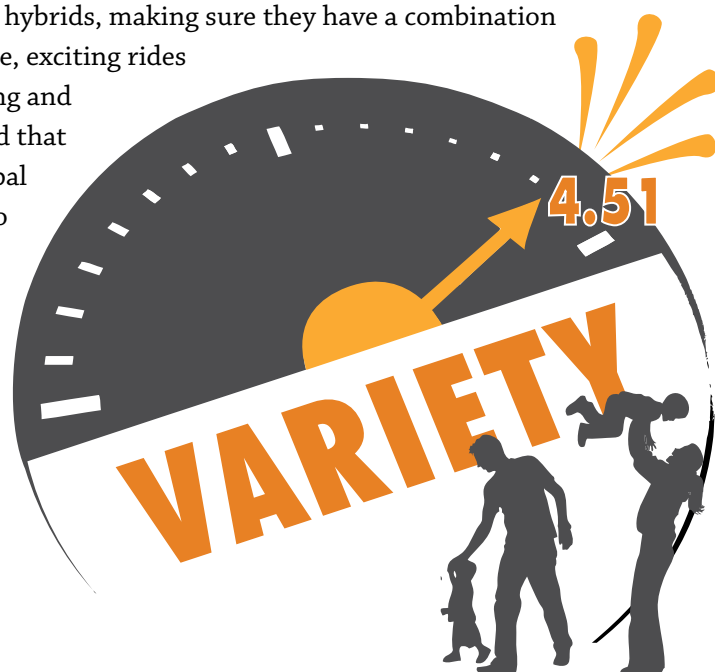
1. Togetherness
2. Fun
3. Variety
4. Unique experiences
5. Learn something new
6. See animals
7. See new rides/exhibits
8. Somewhere we've never been before
9. Have a discount/coupon
10. Special event/festival

The most important ingredient for a family is **togetherness**. Nearly 66% of the families in our study said so. Families want to do something *as a family*, even if they head off to different parts of the destination so everybody can see what interests them. At least they've all come to the same place, away from their crazy routines and their computer screens. They have a rare chance to create memories they can smile about – and tease each other about – for the next 50 years.

Once the family's together, what matters is having **fun**. Families want “fun and excitement” more than they want education, interactivity, friendliness, or anything else, ranking fun's importance 4.56 on a scale of 0 to 5. If the kids are happy, so are the grown-ups.

Variety ranked third in importance for families; they gave it a 4.51 on a 0 to 5 scale. “That's because, in order for Mom to generate that romantic view of everyone doing something together, you need different things for everyone to do,” remarks Jerry Henry. “Nearly 4 in 10 families say variety is one of the things that inspires them to visit an attraction.”

In response, more attractions are becoming hybrids, making sure they have a combination of hands-on activities, amazing things to see, exciting rides or experiences, and then, of course, shopping and dining. “Until recently, a lot of places missed that lesson,” remarks PGAV Destinations Principal Mike Konzen. “Now you see zoos starting to experiment with rides; museums coming up with fun restaurant concepts; historic sites adding unique retail experiences.”

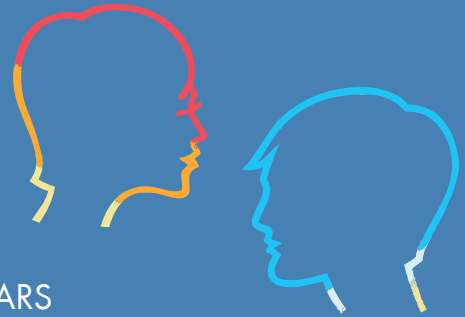


**VARIETY IS IMPORTANT TO FAMILIES,
RANKING 4.51 OUT OF 5**

Boys & Girls, Toddlers & Teens

Some of the most interesting findings of the study came from our understanding of different genders, at different ages. Of course, we need to be careful about rigidly defining gender and age traits – all kids are different – but there are some interesting trends.

Here are some categories:



SENSE AND SENSIBILITY

Ages 1 - 4

First, you appeal to a toddler's sense. Maybe you use texture, the slick-rough feel of a turtle shell, the splash of water. Or games that involve matching shapes or colors. Then you work on his or her motor skills, but so cleverly, it looks like play. Small children learn through play.

Creative play helps a child deepen her imagination, become resourceful, and understand emotions – her own, and those of others. Play also helps kids develop language and social skills. Then, as language develops, you can reach kids through storytelling, fantasy, and wonder. At this age, an experience doesn't have to be authentic. It has to be captivating.

IDENTITY QUEST

Ages 8 - 11

These are the years when gender starts to draw a few lines of its own – blurry lines, but noticeable ones. Kids are learning to think a little more abstractly; they're not so dependent on concrete, sensory learning. It's important for them to have chances to ask questions, think things through for themselves, and explain them to a grown-up. But they still crave interactive experiences: the kind that let them imagine themselves in another world, piloting a plane or fighting a 19th century battle.

For parents of boys, this is when variety starts to really matter. Boys' desire for hands-on interactivity peaks in these years, then will decline as they move toward the physical excitement of thrill rides.

THE DIY YEARS

Ages 4 - 7

These are the years when interactive experiences matter the most, especially for girls. Kids are full of energy, and need things they can see and touch. They're moving outward from the world of fantasy, learning that it's just as much fun to explore the real world. They still tend to personify objects, and they're very present-tense, but they're beginning to learn how to think about other times and places and points of view.

Beginning around age 5, our study showed that variety becomes very important to parents of both boys and girls. The need for interactivity peaks for girls in these years, then starts to decline; it will remain important for boys until they reach 12.

THE THRILL YEARS

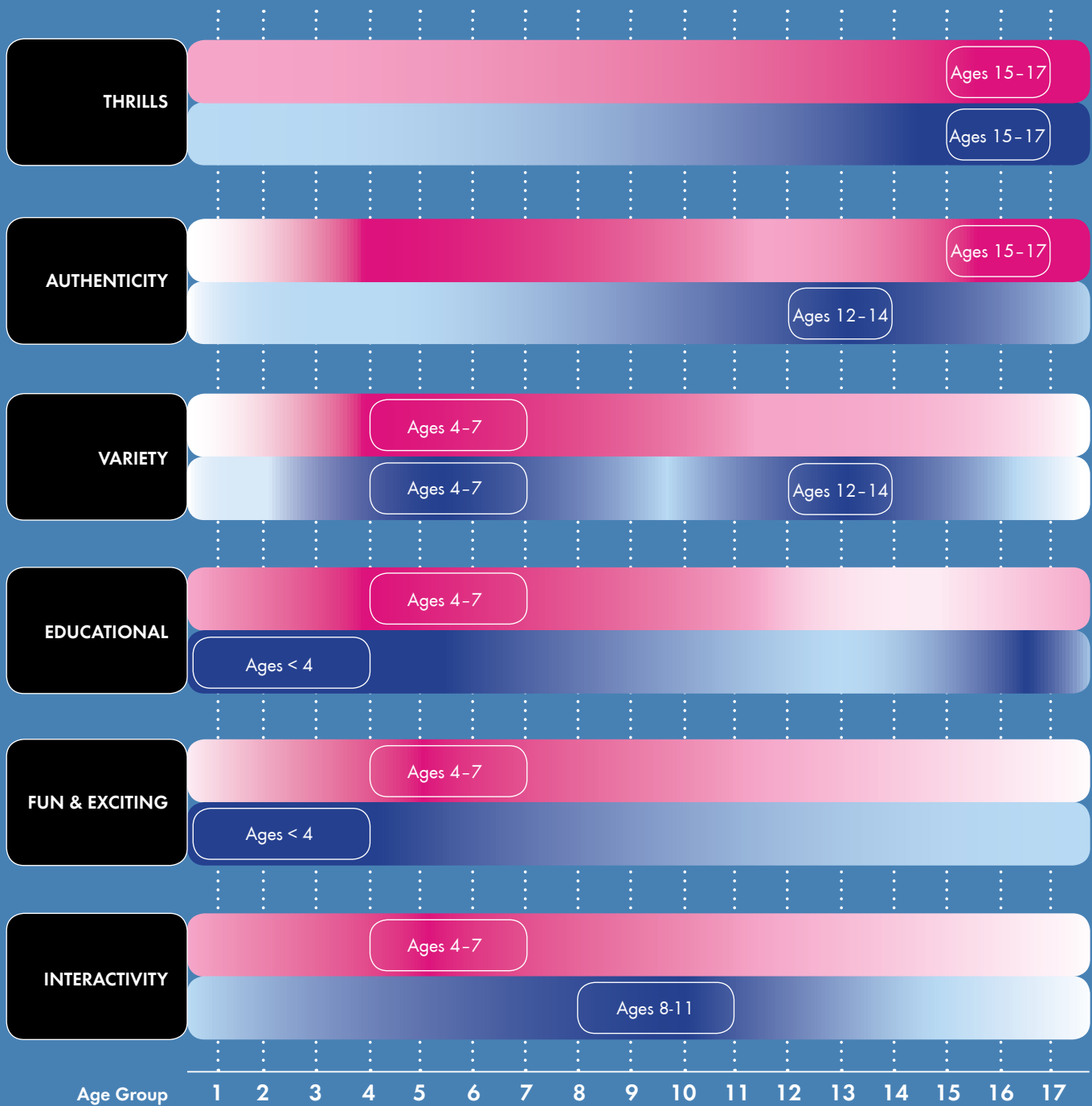
Ages 12 - 17

As teenagers get older, they crave the challenge, risk, intensity, and excitement of extreme rides. Those aren't the experiences they can get staying home to play video games; even the best games can't replicate the adrenaline.

Teens seek thrills, but also authenticity. Parents of boys over 12 and girls over 15 look actively for authentic experiences they can share with their child before the days of family vacations come to an end. Abstract ideas have begun to matter, and can be adroitly manipulated, dissected, and compared. Historic sites are becoming more interesting, because a teenager's sense of time is sophisticated, and she can consider events from different points of view and put them in context. She also has enough knowledge of the world to make connection with what's she learning.

What Kids Want Changes Over Time

Boys and Girls from age 1 to 17



Age When Girls Are Most Interested

Age When Boys Are Most Interested

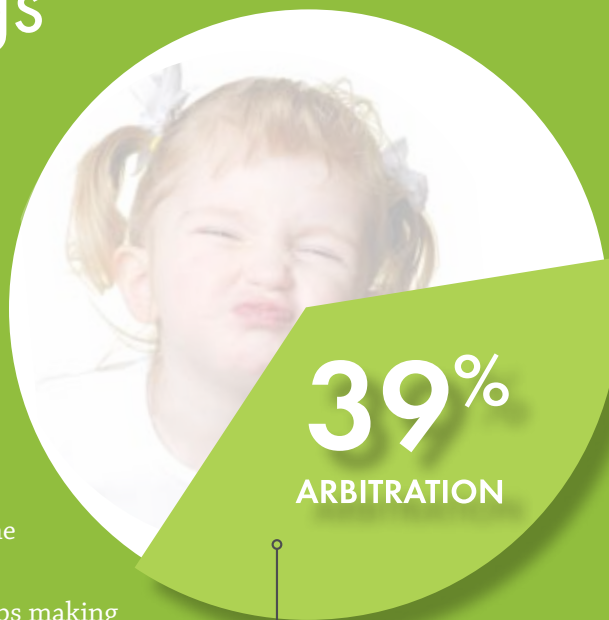
How Families Plan Their Outings

The travel industry keeps a tight focus on Mom, because study after study indicates that women make about 85% of travel decisions. What many people forget, though, is that women aren't necessarily choosing what they want. They tend to be altruists, taking their partners into account, and above all, listening to their kids.

In our study, 70% of families said that their kids help plan their trips. A full 13% of parents said the initial choice of what attraction to visit was made by their child. In 37% of families, the child may have not been the sole instigator, but he or she played a major role in the decision to visit.

Some families are dictatorships, with the grown-ups making all of the decisions. Asked what they do to encourage their child to visit an educational attraction, for example, 37% of parents said they simply insist the child go along. In other families, it's the child's power that's absolute. 24% of families said that if their child did not want to visit an educational attraction, they simply would not go. Perhaps most interesting, in situations where a child balked at visiting, 39% of parents sweetened the deal with some kind of "trade-off." We call this "arbitration."

In our study, we identified several models for how children are involved:



PARENTS OFFERED TRADE-OFF FOR EDUCATIONAL VISIT

- 1. CHECKS AND BALANCES:** Sometimes, for practical reasons, the children's power must be limited by certain realities – budget, logistics, available time, etc.
- 2. CONSENSUS:** In this model, families talk through every decision and get creative finding ways to make everybody happy. It's as collaborative as life gets.
- 3. DEMOCRACY:** Everybody gets an equal vote, and majority rules. It can be bluntly egalitarian, with the six-year old vote just as important as Dad's.
- 4. MERITOCRACY:** In this model, kids' roles expand with their age and knowledge of the world. As toddlers, they wield scant influence; by the time they've reached their teens, they're making most of the choices.
- 5. APPRENTICESHIP:** Travel is a training ground, with parents actively teaching children how to research a decision, work from a budget, and make arrangements.
- 6. ARBITRATION:** Nearly every family resorts to this at some point, and just about everything can be negotiated: where to eat, how much to spend, which souvenir to buy.

Real Thrills & Authentic Experiences: A Trip to Remember

We learned what motivates families and how they plan their trip. But it's what happens once they arrive that determines whether they will leave happy, already making plans to return.

Here are some of the elements that make a difference:

THRILLS

The delight in thrills is nearly universal, appealing even to adult couples without children. And among families, 24.9% cited thrills as one of their top motives for visiting an attraction.

INTERACTIVITY

Families rated the importance of interactive experiences as 4.23 on a 0-5 scale, much higher than adults without children. That's because for the kids, especially under 12, interactivity's the secret to holding their attention.

TECHNOLOGY

Of the families old enough and savvy enough to have an opinion, more than three-fourths preferred attractions that made the most of technology. As children get older, their hunger for technology increases.

AUTHENTICITY

Families gave authenticity, the desire to experience real or genuine activities, a rating of 4.14 on a scale of 0-5. "Everything kids do is artificial these days," remarks Tom Owen, Vice President for PGAV Destinations. "But you can't touch a real fossil through an iPhone."

DINING

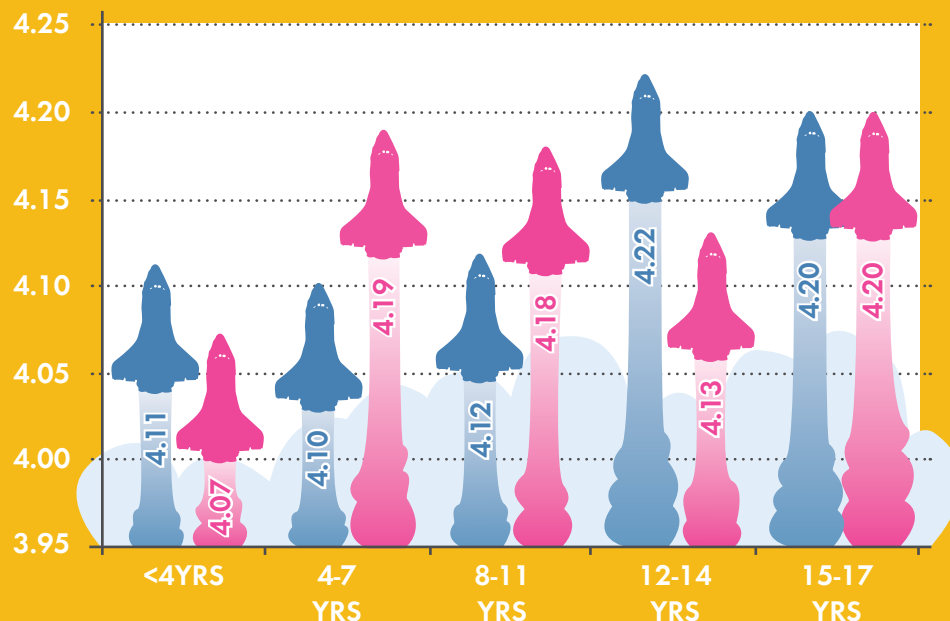
Not unexpectedly, families were far more likely to prefer informal food options than adult travelers. 33% preferred a "quick bite, and an additional 32% liked to order at a counter, and then sit down.

SHOPPING

Four out of five parents told us that they typically do some shopping when they visit attractions with their children. Over one-third (35%) said they typically shop for souvenirs, while another 30% said that they just enjoy browsing.

"AUTHENTICITY" AS AN IMPORTANT ATTRACTION FEATURE BY SEX AND AGE OF CHILD

The desire for authenticity is most important to boys over 12 years and girls over 15 years.



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