



**Executive Summary**  
**Unboxing Kids Hospitality**

*Highlights from The Global Kids Hospitality Report 2025*

# This Summary

The Global Kids Hospitality Report is the first industry report that examines the intersection between kids & teens hospitality and kids & teens industries (encompassing video gaming, toys, games, publishing, media & entertainment). Drawing out insights, best practice and tricks of the trade from the kids industries, we explore new ways for hotels to wow kids, win over teens, delight parents and lock in family loyalty.

This executive summary highlights findings and insights from our Kids & Hospitality Report. The report was prepared in partnership with KidsKnowBest® and Data Think Lab. It draws on research carried by industry-leading organisations, including:

Skift, McKinsey, Deloitte, Family Travel Association, Hospitality Net, EHL Insights, Expedia Group, Booking.com, Globetrender, Pew Research Center, British Airways, International Journal of Hospitality Management, Rob Report, Harvard Business Review, CoStar, Travel Weekly Group, Mews, Mastercard Data, Mordor Intelligence, Center of Hospitality at NYU School of Professional Studies, World Economic Forum, Euromonitor International.

## Authors



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## Acknowledgements

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Wanderland is supported by, and partners with, small, independent businesses that care about kids.



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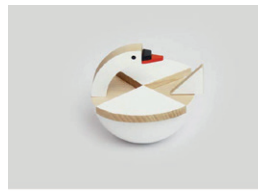
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# Contents

<b>Why we wrote this report</b>	<b>6</b>
Hotels have an opportunity like never before	7
<b>Family travel is strong, getting stronger</b>	<b>8</b>
<b>Kids are making the decisions</b>	<b>10</b>
When you win over kids you win over parents	10
Teens are travelling and talking about it	10
<b>Kids Industries: Learning from the markets that know kids best</b>	<b>12</b>
Kids as consumers	12
Brand loyalty: Families & kids stay for the long haul	12
Video Gaming: The engagement experts	13
Gamification: Putting play into practice	13
Toys & Games: The value of play	14
Media & Entertainment: Defining the culture and stories of hospitality.	14
The Holiday Mindset	17
Space & Attention: Hotels as the purveyors of unexpected value	18
<b>KidsKnowBest® Market Research</b>	<b>19</b>
<b>Kids Hospitality: The New Paradigm</b>	<b>20</b>
A snapshot of hospitality & families	21
Pet-friendly Hotels	21
Review Volume & Loyalty	22
Looking Forward	22
Personalisation & Segmentation	22
Generations	23
Bleisure & Kids	24
Time Travel: The Nostalgia Effect	24
<b>Current Practice: What hotels do today</b>	<b>25</b>
Family Friendly	26
Ad-hoc scrambling vs. corporate dragging	27
<b>Where do hotels go from here?</b>	<b>28</b>
Small touches. Big impact.	29
How kids can bring their parents	29
The Child Cortex	30
How play applies to everyone	31
The future of Kids Hospitality	32





**Kids & Teens:**  
The Decisive  
Generation of  
Travellers

## Why we wrote this report.

### There's much to learn from the industries that know kids best.

Outside of hospitality, 'kids industries' such as toys, video gaming and entertainment are thriving in their understanding of what delights their increasingly discerning young audience, and by capitalising on what they know.

By utilising insights and borrowing tricks-of-the-trade from these industries, hotels can add immeasurable (and measurable) emotional and commercial value.

We are making the case that adopting family-friendly and kid-focused enhancements represents cutting-edge thinking in hospitality, potentially positioning any hotel as a leader in catering to the lucrative family travel market.

In our report, we make the case that hotels, especially luxury and upscale city hotels, can earn big wins with very small tweaks, compared to most other investments in differentiation, guest satisfaction and loyalty.

Resort hotels, and 'Disney destinations' have the facilities, space and resources to wow kids. But city hotels need to get in the game, even without the kids club, swimming pools or enchanted castle. **City hotels don't need to create a magical world, just a magical moment.**

**This is one of the largest and most overlooked, and yet lucrative, commercial opportunities for hotels today and going forward.**

As the chief authority in kids hospitality, we founded a Think Tank and partnered with Kids Know Best® and Data Think Lab to provide hoteliers with insights on this significant segment, with the hope of ushering a paradigmatic shift and a future where kids and teens feel welcomed and sought after, for the benefit of hotels and hotel brands, for the satisfaction of families, and as a boon for the entire industry.



*"Dialling into the family experience is definitely something we've been working on... A lot of hotels are eyeing this market as well. Rather than just putting a kid's tent in a room, we can create an end-to-end, integrated, holistic experience that can be delightful."*

- Kuok Hui Kwong, Executive Chairman, Shangri-La

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"Children as co-decision makers in the family? The case of family holidays. Young Consumers", Gram, M. 2007

## Hotels have an opportunity like never before.

Hotels compete to delight and impress 'grown-up' guests with the most elegant of lobbies, the most Michelin-starred of chefs, the most sumptuous suites and the car fleet with the most prestigious marques. The list goes on. Linens, florals, spas, artwork, champagne, views, butlers...

What do kids get? The same old crayons and a colouring book. A cookie. A robe. A teddy. A tent... Representing a serious lack of imagination, nothing at all for teens and a wasted opportunity.

In fact, across the board, hotels do more for pets than they do for kids. Furry friends certainly get more air time on most hotel websites than their human counterparts.

The industry needs to see more top-tier amenities, activities and experiences. Moreover, these offerings can be optimised for the metrics hotels are looking to boost, from raising RevPAR to increasing online reputation and marketing engagement.

Defining, attracting and upselling to new micro-segments, such as kids and teens, is of vital importance.

In itself and as a whole, family is one of the most significant segments of hospitality, as we shall see next, and catering and marketing to kids and teens is crucial for its future.



*"It's rare that I'm presented with a truly yawning gap in the market."*

- Matthew Freud,  
Freud Communications



*"Hotels have a tremendous opportunity to revolutionise their guest experiences by prioritising hospitality for kids."*

- Yu-kai Chou, The Octalysis Group

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"Exploring Drivers of Innovation in Hospitality Family Firms", International Journal of Contemporary Hospitality Management, May 2018

"Children as customers in luxury hotels: What are Parisian hotel managers doing to create a memorable experience for children?", International Journal of Contemporary Hospitality Management, 2020

"An analysis of children's play in resort mini-clubs: potential strategic implications for the hospitality and tourism industry", World Leisure Journal, 2020

## Family travel is strong, getting stronger.

Family travel accounts for 30% of global outbound tourism and is one of the fastest-growing segments of the industry, according to STR, compared to all other forms of leisure travel.

Research by Deloitte, STR, Phocuswright, Euromonitor, US Travel Association, Family Travel Association, as well as TripAdvisor and Expedia surveys, show families stay longer at hotels than other guests, require larger or more rooms, consume more food and beverages at the hotel, and spend more on on-site services and amenities.

It's important to note that this sector has a strong preference for hotel stays (84%).

Loyalty as well is high - families are very likely to return to the same hotel or chain for future vacations.

It's no surprise then, that from our survey of London luxury hotels, we found a significant number of them investing in connecting rooms (and other family provisions), based on a dramatic increase in guest inquiries. Families want to stay together, even when parents travel with their teens and 20+ year olds.

The Family Travel Association (FTA), based on findings from a recent survey of family travel, highly recommends hotels investing more in family-friendly room options, entertainment options in the room, family-friendly dining options, and child-friendly activities and rooms. A significant portion of participants in the survey demanded the travel sector serves families better than it currently does.

It's important to mention that according to the FTA, 65% of families intend on taking city vacations, as opposed to other destinations. Contrary to popular belief, families don't just vacation at resorts.

And yet, families are not catered to nearly well enough by city hotels and other properties that are not resorts or family destinations.

During our review, at the thousands of hotels examined, we found not one role title of a single member of staff that included the word 'family' or 'kids'. Almost exclusively, ownership and responsibility for the family sector is bundled into roles that manage and execute over other sectors. We believe this is a glaring omission, unfortunate lack of attention or specialist expertise and a strong indicator for the proper and expert advancement of the family sector.

*In our full report (pages 9-11) we provide supporting figures and elaborate on the analysis.*

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"Booking.com reports surge in family travel bookings for Summer 2024", Travel Daily News, Sep 2024

"Travel Trends 2024", Booking.com, May 2024

"Family Travel Survey", Family Travel Association, Center of Hospitality, NYU School of Professional Studies, Edinburgh Napier University, 2022-2023

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"Travel and tourism statistics: Data and reports for hotels", Siteminder, June 2024

"Family Travel Statistics 2024", Condor Ferries, 2024

"Rising Traveler Types Gen Alpha: Next Generation of Travelers", Hilton Trends Report, 2025

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"Unpack '24 insights: What hotel guests want", Expedia Group, February 2024





*"Kids are powerful brand advocates ... for larger purchases, including vacations."*

- John Marshall,  
Global CEO of Lippincott



*"Children's purchasing power is undeniable, not just influencing what's bought for them but also household decisions from tech to vacations."*

- Nick Richardson,  
CEO of Kids Insights



*"Kids are part of the planning process now, it's never been like that before."*

- Derek Price, Expedia  
Group Media Solutions



*"Directing service gestures towards people's kids is a particularly clever thing to do. Making a fuss of people's kids actually gratifies the parents more than if you make a fuss of them."*

- Rory Sutherland,  
Vice-Chairman, Ogilvy



*"We have seen that family and multigenerational travel has been an important force in the tourism industry. Now is the time to double down on family travel."*

- Rainer Jenss, Founder,  
Family Travel Association

## Kids are making the decisions.

### When you win over kids you win over parents.

Whilst it is the parents who pay, children are in fact, and increasingly so, the ones who 'spend'.

Children play a significant role in family purchasing decisions, especially when it comes to travel.

- 77% of parents are influenced by their children about their vacation activities.
- An Expedia study shows that nearly 9 in 10 respondents enjoy planning trips involving the entire family.
- 67% said that travel ideas come from the children when planning trips.
- A recent Hilton survey found that 70% of global respondents who travel with their children pick the vacation destination based on kids' needs and interests.
- 56% of families will choose hotels based on their kids' club or youth programming.
- When it comes to restaurant choices, 63% of parents always or often let their kids pick where they dine while travelling.

*In our full report (pages 12-13) we elaborate on the analysis and provide supporting figures.*

### Teens are travelling and talking about it.

Teens (and to some extent tweens) are a nut worth cracking.

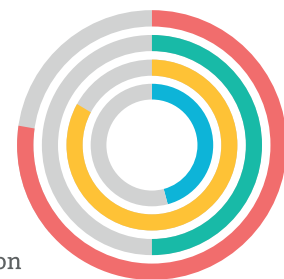
- They are highly connected, actively creating content, with vast reach on social media.
- They have a high influence factor in face-to-face social interactions.
- They are much more likely to become brand ambassadors than their younger siblings or parents.
- They are much closer to becoming independent travellers in their own right.
- Teens (Gen Z, age 12+) play a crucial role in family travel decisions, often based on their interests and needs. 60% have influenced their family's travel decisions based on what they've seen online.

• Teens, especially 'high-net-worth teens', are partial to urban destinations, with 65% of them preferring cities over the alternative.

A kids club might entertain a 6 year old, but a 14 year old won't step foot there.

*In our full report (pages 15-16) we elaborate on the analysis and provide supporting figures.*

- 77% influenced by their children about their vacation activities
- 50% included their children's wishes in their holiday planning
- 85% Teens happiness is a key factor in choosing a destination
- 43% Gen Alpha child or grandchild influenced travel decisions



"How Families and Their Children Make Travel Decisions", Expedia Group Media Solutions + Skift, Jun 2019

"The Return of International Family Travel & The Rising Influence of Gen Alpha", Expedia Group Media Solutions, December 2022

"Generation Alpha: How the World's Youngest Generation is Already Influencing Travel", WTM Global Hub, Nov 2019

"Generation Alpha and Family Travel Trends", HSMIAI Marketing Strategy Conference, 2020

"Kids Exert a Powerful Influence on Household Decisions", Paramount Insights, 2017

"Children's play: potential strategic implications for the hospitality and tourism industry", World Leisure Journal, September 2019

"Study on generation Z travellers", European Travel Commission, July 2020

"Exploring Gen Z and Millennial Travel Habits", Varsha Arora + Skift Team, January 2024



*“Generation Z are stepping into the role of key influencers in family travel decisions, redefining the landscape of travel.”*

- Alexandra Jaritz, Senior Vice President,  
Brand Management, Hilton



*“Gen Z are prioritising travel, but they are much more receptive to inspiration and information, influenced by social media.”*

- Lisa Lindberg,  
Vice President of Product,  
Expedia Group Media



*“Children have growing influence over where families go on holiday.”*

- Jenny Southan,  
Editor, CEO, Globetrender



*“TikTok is fast becoming the home of both spontaneous discovery and intentional travel planning. Brands are tapping into this engaged community.”*

- Hannah Bennett,  
Head of Travel at TikTok UK

*“Winning over kids isn’t just a nice-to-have; it’s a powerful way to win over parents.”*

- Jeremy Wells, Hotelier, Brand Strategist



## Learning from the markets that know kids best.

The economy of goods and services for kids (and their parents), or 'Kids Industries', **know how to engage with kids and teens, and are significantly profiting from business practices that utilise this know-how**, fuelling markets collectively worth close to \$850 billion.

**To grow, these industries constantly compete for certain assets - space, attention and brand recognition/positioning.**

Kids Industries are seeking novel 'spaces' to engage with customers, as demonstrated by the 'experiential retail' and 'immersive experiences' trends, as well as established practices of event sponsorships, free trials/samples and demos.

**Hotels are rich with these resources, yet are only capitalising on them in traditional fashion (accommodation, f&b, etc.)** With the right partnerships, hotels can not only feed their existing revenue streams but can expand their target markets and find new and lucrative avenues for revenue, especially in a future of a fluctuating commercial landscape.

*In our full report (pages 20-48) we review what hotels can learn from 'Kids Industries' to capture the young audience.*

*Here are the highlights:*

**Kids as consumers:** Kids might not do the actual buying, but they are a target for marketing. For example, in one survey, 69% of parents reported that their children asked for specific products after seeing advertisements.

**Families & kids stay loyal for the long haul:** By the age of 7, many children already establish brand loyalty. Up to 25% of brand preferences formed in childhood persist into adulthood.

Brands that engage children before the age of 16 are more likely to retain them as loyal customers throughout adulthood.

Once brand loyalty is established during childhood, it becomes harder to break, making it a lucrative long-term investment.



A study published in the Journal of Research in Interactive Marketing (2024) discusses how kids develop brand loyalty through "value co-creation practices". These practices, which involve consumer participation with a brand, contribute to a sense of ownership and emotional commitment.

**Video Gaming: The engagement experts:** Video Gaming has become the definitive pastime for kids. Hotels can harness insights from this industry not just between bookings but even within a stay, with the potential for increased spend, extended length of stay and deepened loyalty.

*In our full report (pages 26-29) we elaborate on Gamings growing role in our culture, extending to physical commerce (see Virgin Gamepad case study), and partnerships with hotels (see Marriott Bonvoy and Hilton case studies).*

**Gamification: Putting play into practice:** Loyalty programmes might be the chief and most successful commercial application of gamification. According to studies, incorporating game elements into loyalty programs can lead to a staggering 47% increase in engagement, a 25% to 95% increase in profit, a 22% rise in brand loyalty, and a 15% boost in brand awareness.

Kids are highly more susceptible to such game mechanics. According to Yu-kai Chou, one of the world's foremost experts in gamification:

"By creating spaces and services that engage young guests in fun and meaningful ways, hotels can not only provide memorable experiences for children but also win the hearts of parents through seamless and thoughtful hospitality.

"In the hotels industry where emotional connections and loyalty are paramount, focusing on kids can create lifelong brand advocates and set hotels apart from their competition."



*"Understanding how games retain users may help us design loyalty systems for any business."*

- Dori Adar, Gamification Chief,  
TabTale, Matific



**Toys & Games: The value of play:** A recent and growing trend in these markets encompasses travel and pocket games, made portable in order to be available to families and friends when they are away from home and out-and-about.

A particular example of a 'travel toy' is Polly Pocket. Over the years, an estimated 75% of girls in Great Britain owned a Polly Pocket.

The interesting feature here is that each set is self-contained and can occupy a child playing on their own. **Play happens mostly in the mind of the child (the original augmented reality).** This contrasts with the assumption that to wow kids a whole fancy production is necessary.

A hotel does not need a fantastically designed themed room. The kid's imagination has infinite space, with unlimited production value.

**Hotels with limited space, budget and restrictive brand and aesthetic constraints, can still create a 'show piece' of an experience, with small or miniature items and an immersive back-story or play-style.**

*In our full report (page 31) we elaborate on other toy and game experiences relevant to hotel, such as unboxing and travel games.*



*"We don't just sell toys; we create experiences that resonate with children. Their preferences shape not only what toys are bought but how families engage with our brand. Understanding kids' desires has been critical in every success we've had."*

- Brian Goldner, former CEO of Hasbro

**Media & Entertainment - defining the culture and stories of hospitality:** Media and entertainment are vital elements of consumer perception. As vacation rentals became a ravenous market competitor, and Online Travel Agents (OTAs) keep biting into profit margins, hotels still remain a travel trope that cannot be deposed so easily.

Hotels are an age-old dramatic stage, and a plot device in and of itself, which will remain an archetype in our collective storytelling enterprise for years to come.

One cannot possibly imagine The White Lotus (HBO's critically acclaimed hit show, 2021-ongoing) taking place in an airbnb condo, or even in a luxury 'onefinestay' villa. Or The Grand Budapest Hotel being nearly as high grossing at the box office had it been called The Grand Budapest Rental.

This cultural presence extends to the young audience, forming their cultural references 'as we speak'.

Media and entertainment are especially influential in the inspiration phase of planning time away from home. US families find their travel inspiration in movies (81%) and shows (73%). Globally, 55% of families say they are inspired to travel based on what they have seen on a show or movie.

From streaming TV shows to blockbuster movies, Gen Z and Gen Y are drawn to destinations that offer the promise of stepping into the worlds they see on screen.

Media Tourism (also 'Location Scouting' or 'Set Jetting') is a phenomenon where set locations of popular films or TV shows become tourist attractions.

Younger travellers are eager to immerse themselves in the places where their favourite stories unfold, creating opportunities for destinations to capitalise on their moment in the cultural spotlight.

Despite the perennial place hotels take in media and entertainment, hotels must be proactive in partnering and preparing for such influence in order to optimise its benefits to the industry.

**Disney: retail-media-hospitality synergy:** One corporation which has historically, and increasingly over the years, taken advantage of the symbiosis potential between media and hospitality, is Disney.

Walt Disney himself championed this connection when he financed the construction of Disneyland by creating a television series for ABC under the condition that the network will fund the work. The show, hosted by Walt, became a huge success. It not only secured the significant capital for the park but contributed to its massive popularity.

Disney Parks and Experiences are well known for their ability to leverage emotional connection with their media assets, almost exclusively for kids and families. For Q2 2024 alone, the division generated \$8.3 billion in revenue.

Other media companies (Netflix, Universal, Amazon MGM Studios, etc.) have a much more limited range of physical attraction, if at all.

Viewing parks and resorts as a completely different type of accommodation to city hotels leads to a marketing myopia in hospitality.

*"Having a famous brand collaborate with amazing resorts is such an exciting trend and is becoming a key factor in some clients opting for one resort over another. We fully expect this trend to keep growing."*

- Rebecca Turner, head of product, Elegant Resorts



*"It is incredible to see the direct impact that TV and cinema has on our customers' travel habits."*

- Claire Bentley, Managing Director, British Airways Holidays

Consider the Four Seasons Hotel Philadelphia, which in 2021 partnered with Comcast to design their kids amenities, from Minions welcome gifts to Minion-themed plates at all their dining outlets. Yes, a Minions colouring book as well.

In this case, Four Seasons didn't develop a state-of-the-art roller coaster nor adapted its conference hall into an immersive exhibition. But it did, with small (quite literally) touches, reap the brand recognition rewards and made itself a preferable option for families.



Four Seasons Hotel Philadelphia TripAdvisor review, 2022

As one top reviewer wrote on TripAdvisor, "I didn't think of this as a "family hotel", but it really was... the hotel far exceeded my family-friendly expectations."

**Hotels do not need to be Disney to profit from meaningful and memorable moments with media icons.** At the same time, owners of these IP assets such as Netflix, Amazon MGM Studios, Apple Studios and others, have much to gain from the special setting and state of mind that hotels deliver their guests .

*In our full report (pages 37-43) we elaborate on the increasing premium of attention, the rule of retail and its struggles, and the rise of experiential retail.*

"Children as Consumers," Global Issues, August 2024

"The Lifestyle Era: Luxury's Opportunity in Home and Hospitality", BoF Insights, 2023

"The surprising stickiness of the "15-minute city", World Economic Forum, March 2022

"Luxury Hotel Market Size, Share, Trends & Outlook 2033", Future Market Insights, Aug 2023

"Luxury brands use retail to fuel growth", JLL, Jul 2023

"2023 Hotel and Travel Trends", Boutique Hotel News, Dec 2022

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"Customer service: Happiness is a purple balloon", Disney, July 2021

"The Walt Disney Company Reports First Quarter Earnings for Fiscal 2024", Feb 2024

"Video games: the next IP source for theme parks?", Bloolooop, January 2023

"How the business of gaming is evolving", McKinsey & Company, Jan 2022

"Video Game Publishers Flip the Switch on Business Model", Morgan Stanley, 2018

"Cinematic and interactive universes: Games and studios come together to bring the biggest stories to life", Deloitte 2023 TMT Predictions, November 2023



**The Holiday Mindset:** With similarities to 'Spend Mode' (as established in behavioural studies) this traveller mindset is characterised by the following behaviours:

A. Spending in order to make and keep the holiday 'perfect': Research shows that travellers are willing to invest in comfort and enjoyment. Parents are particularly interested in providing quality experiences for their kids.

In many ways regular rules are suspended whilst on holiday which applies to increasing spend but also increasing 'presence' and attentiveness towards their children. Any activities or products that are conducive to cultivating memorable family time will be held in high esteem, with the positive association lasting long after the holiday is over.

For hotels and partner companies, this understanding is worth its weight in gold.

B. Paying a premium as an acceptable practice during travel: It's common for guests to accept higher costs while travelling, especially when they perceive value in the form of experiences worth paying for.

A McKinsey report highlights that top-tier hotels differentiate through unique experiences, encouraging guests to spend more as part of their holiday indulgence. Additionally, surveys show a growing trend of travellers justifying higher spending.

C. Perceiving experiences and products positively: Research indicates that travellers are more likely to perceive products and services positively during their holiday, associating higher quality with the overall experience.

The prolonged engagement with a hotel contributes to 'brand lift'. Results of a global meta-analysis show more impactful impressions with longer engagement durations, with high attention yielding a consistent improvement with longer dwell times.

It's not hard to imagine how reading a book while sipping on prosecco poolside makes the book more special than reading it at home. This works in the other direction as well. Whatever is perceived favourably, such as a well chosen gift, adds to the subjective sentiment of the holiday when enjoyed in it.

D. Sharing experiences: Telling and re-telling friends, co-workers and extended family about their holiday is a most common social activity that happens naturally and one of the most prevalent forms of word-of-mouth. Parents are more likely to engage in such sharing due to their lively social circle.

This is even before considering social media activities, where sharing holiday media is one of the most prolific types of sharing, as anyone who scrolls through Instagram and Facebook can attest. 72% of vacationers post photos on social media during their trip, and this figure rises to 97% among Millennials.



Kids share as well. According to surveys by the audience research agency KidsKnowBest, the topic of their vacations plays a large role in their lives. Kids are no less likely to talk about their travel experiences, voluntarily at the playground or prompted by teachers and inquisitive relatives.

Clearly, Holiday Mindset is a highly valuable state for brands to exploit, making hotels extremely lucrative as a commercial partner.

**Space & Attention: Hotels as the purveyors of unexpected value:** Hotels are more valuable than they seem. We can begin to chart new avenues for revenue for hotels.

On the most basic level, hotels own spaces which can be occupied by manufacturers, brands, vendors and distributors. By space we do not refer to square footage, but prime product placement and promotional space.

Hotels also possess a wealth of a much more valuable resource - their guests' attention.

*In our full report (page 47) we go into more detail on how to create and optimise such partnerships.*



*“People judge holidays primarily based on how they felt at the peak points... Research suggests that novelty and surprise enhance memory retention... Some moments are vastly more meaningful than others.”*

**- Dan Heath,  
The Power of Moments**

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“How the world’s best hotels deliver exceptional customer experience”, McKinsey & Company, Mar 2024

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2023 Family Travel Survey Results, Family Travel Association, 2023

“Offering Unique Experiences to Travelers and Increased Profitability to Businesses”, Strategic Innovative Marketing and Tourism, May 2019

“Service Quality, Tourist Satisfaction, and Destination Loyalty in Emerging Economies”, Marketing Tourist Destinations in Emerging Economies, Nov 2021

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“Beyond Traditional Hospitality: The Impact of Consumer Behavior on Hotels”, eZee, Nov 2023

“What luxury travellers want, and how to attract them”, hospitality.net, Feb 2024

“Social? That’s for Consumers. For Travel Companies, Social Media Means Business”, Deloitte, 2018

“The Power of Moments: Why Certain Experiences Have Extraordinary Impact”, Chip Heath and Dan Heath, Oct 2017

Understanding what captivates kids isn't easy.

Luckily, we have partnered with leading kids marketing agency KidsKnowBest® to conduct one of the first and only surveys of kids and parents (UK and US) about their travel and hotel opinions and preferences.

By utilising their community of over 3,000 kids aged 3-18 across the UK and US, they were able to draw data from their robust monthly tracker surveys and daily qualitative interviews, as well as an array of engaging methodologies.

*In our full report (pagse 49-54) we showcase the results and insights pertaining to kids, parents and hotels.*



## Highlights

- Most children state that it is 'very important' for a hotel to have offerings specifically for kids.
- On the whole, kids believe hotels do not do enough for them.
- 76% of kids get treated to 'more fun stuff' on holiday than at home.
- 70% of parents are more inclined to spend money on their kids for treats, gifts and experiences when on holiday.
- Parents overwhelmingly believe it's very important for hotels to offer activities and amenities for kids.

### About KidsKnowBest®.

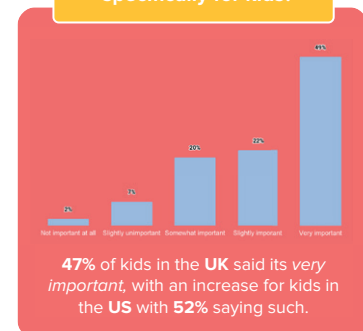
Our team of researchers, analysts and strategists use various techniques and segmentation to bring kids' voices to life, ensuring our insights are useful and always generating a response or action. This enables our clients to make better kid-centric decisions.

Whether it's bespoke insights, adhoc asks or trend trackers, we design research with kids in mind.

info@kidsknowbest.co.uk



How important is it for a hotel to offer things specifically for kids?



# Kids Hospitality: The New Paradigm



## **A snapshot of hospitality & families.**

Travel has become a top priority, especially for younger generations. 66% of the travellers surveyed say they're more interested in travel now than they were before the pandemic.

A McKinsey report\* provides several strategies for hotels, such as “aspire to bring back the magic of travel. Understand the science and value behind delight”.

Interestingly, one of the purposes of our Kids & Teens Hospitality report in particular is to understand the science and value behind delighting kids.

These drivers corroborate the establishment of trends such as Experiential Travel and Hotel Lifestyle-brands. Families in particular are increasingly drawn to hotels that offer unique experiences. And parents do not want to choose between superlative accommodations for themselves and offerings for their kids.

*In our full report (pages 55-71) we review how families, kids and teens fit within the current landscape of travel and hospitality.*

### **Pet-friendly Hotels**

We must mention the ‘pet-friendly’ hotels trend, as it would seem hotels care more about people’s pets than their kids.

While it might not be surprising that hotels would want to capitalise on an enthusiastic audience, it is worth noting the stark contrast to family friendly accommodations, a much larger piece of the market with a stalled landscape of innovations.

This is an especially poignant point considering the fact that cats and dogs lack the ability for brand loyalty, no matter what The Secret Life of Pets film may suggest. A dog may be a loyal companion, but dogs don’t make loyal customers.

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\* “Rebooting customer experience to bring back the magic of travel”, McKinsey & Company, 2021

“Some of the World’s Best Luxury Resorts Are Geared to the Whole Family”, Rob Report, January 2020

“The value of keeping the right customers,” Harvard Business Review, October 2014, hbr.org

“Pet Friendly Hotel Market, Global Trend and Future Outlook 2024-2032”, Market Intelligence, January 2022

## Review Volume & Loyalty

Happy kids = Happy family = Happy reviews.

Consumers have become more selective in leaving reviews, choosing to share only the best or worst experiences they had.

A sentiment analysis of Tripadvisor from the United States, Europe, and Asia found the emotional intensity of customer reviews increased considerably from 2019 to 2021.

All the while, families are increasingly reading online reviews before they book a hotel.

There is a potential for a wave of satisfied customers at a time when loyalty is up for grabs. This is particularly important in the travel sector with its strong reliance on loyalty programs.

According to reports, now is the time for companies who have maintained their satisfaction and performance levels to reprioritize customer experience (CX) and gain an even greater competitive advantage.

With high-volume business travel down, traditional loyalty programs no longer make sense. Schemes based on frequency of travel are out of step with the behaviours of the new traveller.

Hotels that regroup loyalty programs in the dynamics of new demand patterns are in the best position to build loyalty.

Such market disruptions bring about opportunities to diversify customer bases. Families are particularly ripe for the taking. They show high brand loyalty, not to mention the ability to grab the next generation of travellers early.

## Looking Forward

One area where hotels can grab more of their customers' 'mind real-estate' is post-booking pre-arrival. Studies have shown that the anticipation of a journey can lead to higher levels of happiness than the journey itself. As with many of the principles we cover in this report, this is especially true for kids for whom the novelty factor of holidays is at its peak.

The most hotels currently do (and very few of them do) is inquire about the age of the kids booked to arrive, and one or two of their interests, scrambling to purchase an appropriate welcome present. This leaves the entire period before the stay as an open opportunity for connection.

## Personalisation & Segmentation

Guests in 2022-2023 increasingly preferred highly localised and personal experiences.

Hotels that fail to articulate target customer segments and adapt their offerings accordingly risk getting left behind.

Families in particular have the potential to provide more opportunities and additional levels of segmentation and personalisation, as well as data discovery.

Hoteliers need not pull out all the stops, but simply pay a bit more attention and put into place small touches that produce significant 'personalisation impact'.

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"State of the Hotel Lodging Industry", American Hotel & Lodging Association in collaboration with Accenture, Jan 2022

"Global Hospitality Statistics", TrustYou, 2023

Hotel Brand DNA®, Jan 2018–Dec 2019 and Jan 2020–July 2021

Transparent analysis from January to August 2019, 2020 and 2021

American Customer Satisfaction, ACSI Travel Report, April, 2021, theacsi.org

"Children as co-decision makers in the family? The case of family holidays", Gram, M. 2007

"The way we travel now", McKinsey & Company, May 2024

"Hotel Supplier Will Again Surpass OTAs", Phocuswright, March 2022

"Upscale Hotels Bet on Personalization", Skift, April 2022

## Generations

### Millennials (ages 28-43)

Younger generations appear to propel much of the rising interest in travel. Early evidence from millennials suggests that they've retained their interest in international travel even as they've begun to age and form families. Millennials are rejecting the standard tourism models of the past. For them, travel is not just a break from routine but an integral part of their identity.

### Zinfluencers (ages 12 – 27)

Gen Z are the most plugged-in generation on Earth and when it comes to travel, these impressionable social media natives are hungry for inspiration from influencers, while their parents are the ones who foot the vacation bill. Gen Z now makes up about one-third of the global population. They are already a powerful consumer group that have so much inspiration to share – or so much clout when it comes to family decision making.

For travel brands and destinations, understanding these evolving expectations is crucial to remaining relevant in a rapidly changing market. Unlike previous generations who might have sought comfort in predictability, both Gen Y and Gen Z crave spontaneity, adventure and personal growth.

### The Alpha post-gamer Generation (ages 0-12)

According to Derek Price, director of business development at Expedia Group Media Solutions, Gen Alpha love to travel and are actively involved in planning trips with their parents. Most families need help planning their trips, and the biggest opportunity is using appealing imagery in digital marketing. "They're making their decision based on the destination activities available," says Price.

### Multigenerational and Skip-Gen Travel

A 2023 research reveals that 70% of families "actively seek opportunities to reconnect and make cherished memories".

"More and more families are travelling with grandparents and even other extended family like aunts, uncles and cousins as part of family vacations," said David Sangree, president of Hotel & Leisure Advisors. "This trend should continue in the future."

Older travellers are effective word-of-mouth marketers and now require rooms with a flexible layout, as well as facilities, amenities and bonding activities and experiences for all generations.

By making holidays seamless for blended generations and embracing family-wide experiences, brands stand to gain their long-term loyalty.



*"The most satisfying part of booking a holiday which includes a number of generations is knowing I have helped create amazing memories of precious time spent together."*

- Liz Shaw, destination specialist, Elegant Resorts' Europe

## Bleisure & Kids

As remote work and flexible schedules are normalised, Gen Z and Millennials are increasingly turning long weekends into opportunities to travel. 12% of Gen Z/Y travellers plan to take a workation in 2025. 23% of Gen Z/Y travellers would like to mix business with leisure.

Working parents are a key demographic in this trend, often bringing family members along to business destinations with extended stays for sightseeing and family activities. Companies like Marriott and American Airlines have adapted by extending accommodations and services tailored to bleisure travellers (Global Travel Media, 2024). More travel and hospitality providers can gain market share by being more welcoming to the families of professional travellers.

## Time Travel: The Nostalgia Effect

Whether it's taking the kids to old favourite destinations or returning home to reminisce at a family reunion, travellers are chasing after the chance to relive childhood memories. In fact, "recreating memories" was the third most-cited reason for leisure travel in the US.

According to a Hilton trends report, when vacationing with their kids, 58% of travellers revisit childhood travel destinations. Interestingly, nostalgia does not need to harken back many years, with 49% returning to the same place year after year.

All are a great opportunity to facilitate bringing the kids along and sharing the experience with them.



**HOME ALONE: FUN IN NEW YORK**

Get lost in New York, Kevin McCallister-style. Through this whimsical offer, "guests of the new Celebrity Ding Dang Dong stay[ing] at the world-renowned Plaza Hotel", can live out all their Kevin dreams by recreating some of their favorite iconic scenes from the popular '90s film.

Start your experience with an exciting 4 hour private limousine ride around New York City to visit the famous filming locations from the movie including the Empire State Building, Rockefeller Center, Central Park, Carnegie Hall, and Radio City Music Hall. Of course, no limousine ride would be complete without your very own delicious hot cheese pizza to savor while you relive Kevin's famous limo pizza scene. After you've visited all the sightseeing locales Kevin saw, and returned to your room with "one of those little soft-igniters you have to open with a key", make yourself cozy in your "extra large bed," Kevin-style, and call down for your over-the-top ice cream sundae delivered right to your bed. Two scoops? Make it three. You're not driving.

**Package includes:**

- Limousine ride around New York City (visit filming locations including the Empire State Building, Rockefeller Center, Central Park, Carnegie Hall, and Radio City Music Hall) \*The limo ride is not a guided tour. \*\*Limo color may vary.
- Large cheese pizza
- A decadent sundae (16 scoops of assorted ice cream, whipped cream, maraschino cherries, M&M's, brownie bits, chocolate, caramel, and raspberry sauce)

[theplazany.com/special-offers/](https://theplazany.com/special-offers/)

"What To Know About Bleisure Travel in 2024", Navan, January 2024

"Bleisure, Multi-Generational Travel Intent Is Up in 2024", Travel Agent Central, February 2024

"Go Get It: How Gen Z/Y Will Travel in 2025", Summer 2024 ibis-commissioned consumer survey of 9,000 people across eight countries, conducted by OnePoll

"Nostalgia is a National Mood: (Re)Creation Vacation", Campspot, October 2024

"Travel Trends Nostalgic Travel And The Yearning For The Past", Outlook Traveller, July 2023



## Current Practice: what hotels do today.

The Wanderland team has spent a year surveying what city luxury hotels in our home base of London and in major Gateway cities around the world, do for kids - amenities, offerings, activations and provisions.

Here is the list of the most common current kids hospitality provisions in city hotels:

What luxury hotels do for kids...

### Often:

- Colouring/activity Book
- Bath products
- Kid sized robe and slippers
- Individually selected gifts
- 'Welcome pack'
- Teddy/Mascot
- Food Treats



What luxury hotels do for kids...

### Sometimes:

- Tent
- Treasure hunt around the hotel
- Kids Passport
- Hotel-specific story book
- Christmas/Festive gift
- Board games to borrow
- Video Game console
- Books to borrow
- Movie night setup
- Easter egg hunt



What luxury hotels do for kids...

### Occasionally:

- Children's trunk
- Pastry/cooking workshop
- Picnic in room setup
- Holiday entertainment/sessions
- Kids Pyjamas
- Kids bed linen
- Play area



*\*Note that this list excludes deals and discounts, family-friendly setups, such as connecting rooms, and provisions for babies, such as bottle warmers and bed-guards.*

It would appear as though a colouring book marks the cutting edge of amenities for kids, and has done for the past 20+ years. We have also found that the quality of amenities provided by the very top echelons of luxury hotels is often the same quality of amenities as one might find in entry-level economy locations.

And yet, kids are nowadays much savvier consumers, for whom a tipi tent no longer titillates.

### **Family Friendly.**

Even aside from kids, city hotels can improve dramatically their marketing and servicing for parents.

One notable example is the lack of visibility of the Families sections on many hotel and group websites, if such sections exist at all. It's a simple tweak that can claim a lot of business currently lost.

And indeed, recent studies highlight that city hotels are increasingly aiming to enhance amenities and services tailored for families travelling with children.

A key study\* examined the offerings of 88 city hotels and found that while many hotels provide basic child-friendly services, there is a gap between what is offered and what parents expect.

The study reveals that while city hotels generally recognize the need for such services, they often view children as a homogeneous group, lacking varied amenities that cater to different age groups.

And indeed, recent studies highlight that city hotels are increasingly aiming to enhance amenities and services tailored for families travelling with children.



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\* "Services and Amenities Offered by City Hotels within Family Tourism as One of the Factors Guaranteeing Satisfactory Leisure Time", International Journal of Environmental Research and Public Health, 2022

## Ad-hoc scrambling vs. corporate dragging.

How do city hotels do Kids Hospitality today?

Our surveys show 2 main practices coming up again and again.

1.

When a VIP, returning, extended-stay or otherwise valuable family is booked to arrive, front-of-house or guest experience managers at the property attempt to find out a bit about the kids coming - their ages, gender, interests - by way of a post-booking call or email (directly to the family, the family office, or to the travel agent).

Then, someone at the hotel - the manager themselves or another member of staff (e.g., butler) - procures a welcome gift, either by ordering it online, or calling a toy shop (for example, Hamleys or Harrods Toys in London) for recommendations based on the information.

This is a very ad-hoc method that puts stress on staff every time anew, as they scramble to find the information, arrive at what they believe is the most appropriate gift, and purchase it.

2.

The marketing department/team purchases (and/or brands) amenities, activations and gifting. The brief might be specific to holiday seasons (New Year's, Ramadan, Summer, etc.) or as standard throughout the year.

A standard offering might be an amenity or activation designed specifically for the hotel. For example, a colouring book custom made for the property (featuring the hotel's facade, mascot or any other distinctive features) or a treasure hunt or passport designed around locations at the premises. For another example, a group might commission a gift-package/welcome-pack to roll out across its hotels.

Occasionally, these amenities and activations require alignment with the brand, and often approval of the brand team or executive team. It's often a (needlessly) long process involving too many decision makers to produce something that ultimately ends up being unremarkable and undifferentiated.

Hotels would do well to commission the involvement of external expertise, as most hotel professionals and teams lack the domain knowledge and skills for delighting kids.



Jumeirah Carlton Tower



Grand Resort Bad Ragaz



*“Looking at travelling through the eyes of children is another way to help us ensure our guests enjoy time well spent with the most important people in their life.”*

- Anaïs Dessales-Quentin, Novotel Brand Marketing Director Europe & North Africa

## Where do hotels go from here?

Resorts and destination hotels tend to do Kids Hospitality fairly well. They know that families come for the kids to be occupied and have a good time. City hotels, especially luxury and upscale, absolve themselves of that responsibility.

It could be that they, to a larger extent, service non-families, such as business and couples travellers, though that balance is changing. It could be that they expect, perhaps rightly so, that families spend the majority of their time touring the city.

However, from our survey of hotels at major cities such as London, Paris and New York, as well as hotel groups, a majority of managers and executives realise the significance of families, and that they should do more in order to provide better hospitality to kids.

Kids are right there. They are coming to the hotel, yet they are largely under-served and under-utilised as satisfied customers. As we make clear in this report:

- Return on Investment (ROI) is at a record high right at this moment in time.
- Differentiation is there for the taking.
- The opportunity for adding to RevPAR has barely scratched the surface.
- Hotels aren't giving families enough opportunity to spend more on kids and teen experiences within the hotel setting.

The parents' purse is open, desperate to make the holiday unforgettable, stress-free, indulgent for the kids and there is not much there for them to spend their money on.

With current and forthcoming changes to the industry, fueled by tech and societal shifts, hotels have to diversify revenue. Let's open up hotels to the Kids Industries, valued at \$850 billion. Let's establish partnerships with leading toy, game, video gaming and media companies. Let's grab some attention, brand presence, income from the booming kids industries and bring it into our hospitality spaces.

A saying we've heard time and time again - "happy kids - happy parents". In this report we collate many reasons, and establish a strong case, for investing more in kids hospitality, allowing us to state - **"happy kids - happy parents - happy hotels"**.

We have found that there is very little informed thinking on how to achieve this currently in the industry. Even the people who have 'written the books' on the industry are not thinking out of the box, satisfied with uninspiring recommendations. Even marketing teams with all the data at their fingertips cannot come up with suggestions much more original than a colouring book featuring the hotel's facade.



*“The next frontier lies less in the data and insights, and more in the speed at which that data can be put to use... standing out from the competition—while bringing back the magic of travel. Those who fail to take advantage of this moment may risk falling behind.”*

- McKinsey & Company, May 2024

## Small touches. Big impact.

It is our intention in this part of the report to illustrate that not much is required in order to stand out from the pack and form remarkable differentiation.

You, the hotelier, do not need a waterslide installed in the lobby, nor a budget of hundreds of dollars (or pounds, or euros) to wow the kids and their parents. Here we would like to dispel the myopia that attending to kids is an expensive and complicated undertaking. One way to correct the lens is by showing that kids hospitality is not an all-or-nothing endeavour.

A recent Harvard Business School review found the development of dedicated themed areas or suites (e.g., Lego, Marvel-themed rooms) in luxury hotels often generates significant brand awareness and organic reach, free viral marketing and social media buzz, and up to 200% higher bookings compared to standard rooms.

And yet, a themed room doesn't need to mean interior redesign and renovations. As we've seen from the Four Seasons Hotel Philadelphia case study (see 'Media & Entertainment'), a theme can be implemented with cleverly curated items along a child's stay.



*“Things with normally minimal value become immensely valuable when given with thoughtful intention. In fact, many studies have shown that things of relatively low value can trump things of monetarily high value.”*

- John Ruhlin, Giftology

## How kids can bring their parents.

Attending to kids doesn't just charm them. It brings their parents along for the ride, as we establish here. Anything done for the child is far from invisible to her/his parents, who often appreciate it much more than a hospitality gesture aimed at themselves.

In “Giftology: The Art and Science of Using Gifts to Cut Through the Noise, Increase Referrals, and Strengthen Client Retention”, John Ruhlin sums it up beautifully:

“With everyone competing for that executive's attention, it's easy to forget [his or her family]... that tends to be the most underappreciated—and that's where there's an opportunity to make some magic happen...”

“When you take care of the family, everything else seems to take care of itself. Furthermore, it's a way to stand out and be memorable as you seek to deepen those key relationships... to create moments where a potential client can be a hero to his or her family.”

“When someone thinks of something classy, thoughtful, and personalised that the entire family can enjoy, everybody wins.”

Referring to W. Chan Kim and Renee Mauborgne and their book - “Blue Ocean Strategy: How to Create Uncontested Market Space and Make the Competition Irrelevant.” - Ruhlin identifies “another ocean—one in which few people are playing, where profits are higher, life is easier, and there's less competition. That's the family and kids.”

One of our own examples is - the free coffee coupon for adults (a common practice to woo guests to a lounge) has limited impact or efficacy. Were the coupon replaced with a mystery key for a child, and the suggestion it opens something secret at the same lounge - you can be sure the entire family will race to unlock the mystery and settle there for the afternoon.

Hoteliers can also 'utilise' kids hospitality to draw parents' attention to what is done for guests on the whole. Sustainability, for example, is not just a preference of the modern consumer, it is a requirement for hotels. Hotels can therefore leverage providing eco-friendly products to kids to highlight their environment-conscious attitude, not just to parents but to any discerning customer and policy inspector.

### The Child Cortex.

Hotels would do well to capitalise on the 'Child Cortex' to extract very high ROI. Relative to recruiting a celebrity chef, renovating the lobby and/or providing VIP guests with expensive bottles of Champagne, small touches can be cheap and yet impactful.

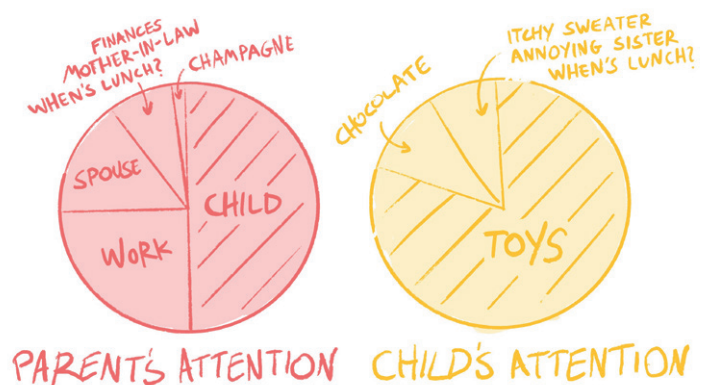
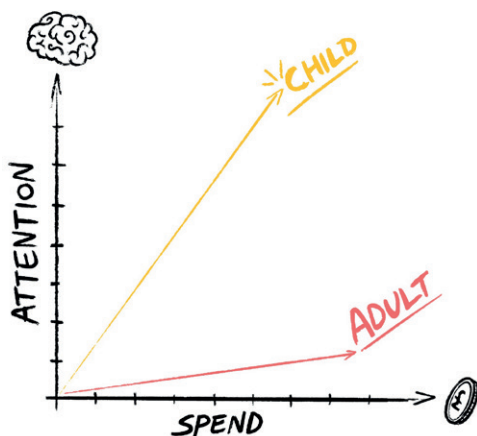
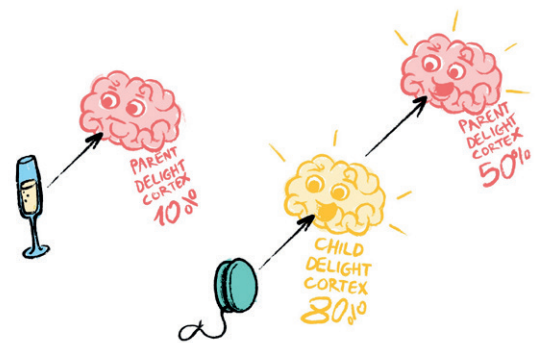
To delight a 40 year old, your hotel needs a view of lake Como, a Michelin starred restaurant and a newly renovated lobby.

To delight a 4 year-old, you need a yo-yo and a bit of imagination.

What's more, when the child is delighted, so is the parent.

Here's an example - a hotel could remove a pastry option from their breakfast menu and no one will notice, instead investing that budget in creating pink pancakes (quite simply pancakes with some natural food colouring) - a breakfast a child would remember it for the rest of their lives.

These types of activations can encourage increased ADR, added spend, repeat and longer stays, higher occupancy, higher guest satisfaction and with the positioning of these small additions as a 'kids programme', can make an urban family stay an attractive alternative to a resort vacation.



## How play applies to everyone.

As the world wakes up to the power of play – and as customers demand more immersive, authentic and memorable experiences – how should the travel industry respond?

Play has been perceived as a childhood activity for too long. Now, a growing body of research demonstrates that it is a fundamental human need. It is critical to personal development; it underpins global industries like sports, culture and entertainment; and it creates significant economic value too.

Just to put it in perspective, since 2019, construction has begun in Riyadh, Saudi Arabia, for Qiddiya - an entertainment and tourism megaproject focusing almost singularly on play, with the slogan “Play Life”. It is a public investment of billions of dollars and expected to create 325,000 jobs (There is a partnership with the University of Central Florida to train young Saudis on hospitality, tourism and sports management).

As this report attempts to convey, there is a new play economy on the rise, and hotels have the opportunity to prioritise playful experiences and thereby stand out, inspire delight and deliver commercial success. Play is not just the domain of kids anymore, and is in fact moving from a childhood activity to a lifelong pursuit.



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'Exploring the Power of Play', a World Travel Market panel with Annie Emmerson, Mike Waterman, Butch Spyridon, Lubna Hussain and Seth Borko.

"Taj Hotels, Resorts and Palaces", Faculty & Research, September 2010

"Philadelphia Family Vacation at Four Seasons Hotel Philadelphia at Comcast Center", sophibee, January 2023

"Giftology: The Art and Science of Using Gifts to Cut Through the Noise, Increase Referrals, and Strengthen Client Retention", John Ruhlin, 2016

## **The future of Kids Hospitality.**

We predict that Kids Hospitality (as distinct from Family Travel) will continue to progressively receive a similar (or even greater) level of attention and standing as other market segments, such as 'business travel' or 'wellness travel', are now experiencing.

There's a vast scope for creativity when focusing on kids. However, kids hospitality is not just a market segment but a new discipline for marketing and services, to become the new gold standard. And it may even grow to inspire the adult segments of hospitality.

### **The vision for kids hospitality includes many compelling avenues for development.**

Kids programmes may (and eventually must) maximise payoff for hotel brands, and include loyalty features. kids hospitality practices ought to (and will) be designed and work in tandem with customer capture, satisfaction and marketing.

Segmentation (by age, gender and interests) will become more refined and at the same time easier to manage. Teens, currently the most underserved segment, will receive their deserved attention.

The gap between resorts and city hotels will be bridged, not with higher budgets and bigger productions but with better research and more creativity, making urban family holidays as much of an attractive proposition as any other destination.

By harnessing 'The Power of Moments'<sup>\*\*</sup> and 'Unreasonable Hospitality'<sup>\*\*\*</sup>, hotels will be championing stand out and iconic touchpoints for which a holiday is forever remembered.

