

The Vacation Ownership Sentiment Index: JANUARY 2025



ARDA
Research & Insights

The Vacation Ownership Sentiment Index: Our Mission

- Inform industry stakeholders with a regular monthly pulsing of timeshare owner sentiment and forward looking anticipated behaviors relative to the broader traveler market
- Track, trend and report out an aggregate and singular consumer driven industry sentiment index metric, alongside other related and trendable component measures including
 - Planned travel and expenditure levels
 - Willingness to travel and make reservations
 - Widening or narrowing of booking windows
 - Recent and anticipated guest experience service delivery and satisfaction
 - General sentiment and perceptions of key category engagement drivers
 - Relative variances in travel engagement levels and behaviors between timeshare owners and the broader travel market
- Provide a simple and dynamic scorecard or dashboard on consumer travel sentiment

Study Methodology:

- Online, monthly survey with nationally representative equal samples of 500 U.S. based leisure timeshare owners and augment representative sample of 500 leisure travelers to facilitate comparisons and trend analysis.
 - 10-15 question online survey
 - All respondents to have actively traveled a minimum of 50 miles from home for vacation within the past year
 - All respondents rigorously screened for timeshare ownership through multi-part validation process
 - Conduct significance testing to draw out meaningful response variances across a variety of demographic, attitudinal and behavioral attributes
- Correlation Analysis performed against each individual survey measure against a logical dependent variables tied to propensity to spend time and money on travel, to determine and isolate those measures that comprise the Index and from which to compare and trend timeshare owner sentiment over time.

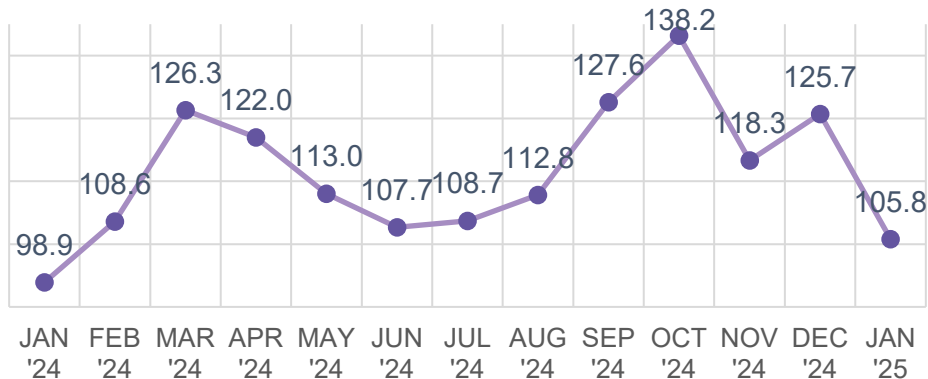
Two Minute Take-Aways

- The overall Vacation Ownership Sentiment Index slipped to 105.8 in January; still more than six points above where it stood a year ago, but also its weakest showing since that time. While the index has registered over 100 for twelve consecutive months, this is the first time that it has been below 110 since last July. Overall, indices over 100 indicate positive sentiment.
- Driving the month over month drop was a -14 point decline in those timeshare owners who strongly agreed that U.S. economic conditions were better than a month ago. The 26% of timeshare owners who felt that the economy had improved, is above year ago figures, but has fallen back to levels last seen in June and July of 2024. All Index measures slipped month over month, but all except anticipation that satisfaction on their next vacation will exceed expectations, are stronger than a year ago. 73% of timeshare owners strongly considered their most recent vacation to be an exceptional experience, a +7 point improvement relative to last January. Just under a third of timeshare owners traveled over the past month, a +5 point year over year lift, with 30% having flown commercially, and 32% vacationing in the past month.
- Despite a more tepid economic outlook, 59% of timeshare owners strongly agree that “Nothing is going to stop me from taking a vacation,” an eight point improvement from last January.
- 21% reported taking a timeshare vacation in the past month, a +4 point improvement from January of 2024, though down slightly for the second consecutive month.
- Timeshare owners continue to exhibit more positive attitudes and behaviors than the parallel sample of overall U.S. travelers. 59% of timeshare owners have made a reservation for their next vacation, 74% higher than travelers in general. They are 48% more likely to plan to spend more money and 52% more likely to spend more time on vacations over the next six months. Timeshare owners remain more active travelers, and 79% of timeshare owners feel that their most recent vacation was significantly better than the typical vacation, compared to 62% of vacation travelers in general.
- 55% of timeshare owners plan to take their next timeshare vacation within four months, up +3 points from December.
- Nearly eight in ten agree that having a timeshare helps them to prioritize family vacations, with more than two thirds agreeing that “It’s surprising how easy it is to book different destinations for their timeshare vacation.”



OVERALL

Vacation Ownership Sentiment Index












KEY FACTORS

that moved the Sentiment Index this month

- The Vacation Ownership Sentiment Index regressed to 105.8 in January, but outperformed the January 2024 index by nearly seven points, marking its 12th consecutive month over 100. 79% of timeshare owners strongly agreed that their most recent vacation was significantly better than their typical vacation, +7 points better than those who felt the same one year ago.
- 73% of timeshare owners strongly considered their most recent vacation to be an exceptional experience, a +7 point improvement relative to last January.
- 59% of timeshare owners have made a reservation for their next vacation; 74% higher than the incidence of overall travelers.
- 59% of timeshare owners strongly agree that nothing is going to stop them from taking a vacation, +8 points from last January.
- 55% of timeshare owners plan to take their next timeshare vacation within four months, up +3 points from December.
- While only 26% of timeshare owners strongly agreed that U.S. economic conditions were better than a month ago, that is up +4 points from last year and 86% higher than that observed among travelers in general.

KEY COMPARISONS OF TIMESHARE OWNERS VS. TRAVELERS IN GENERAL

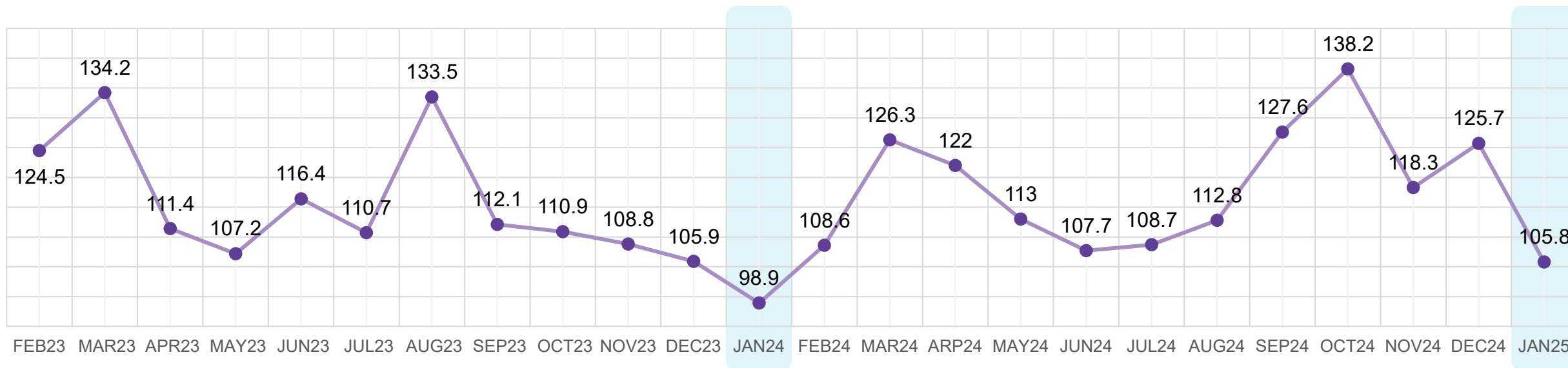
for JANUARY of 2025 (arrows reflect meaningful month over month movement)

	 Timeshare Owners	 Total Travelers	 Timeshare Advantage
SHOW GREATER REGENCY OF TRAVEL			
 Took a vacation that included travel of 50 miles or more and 1+ nights in a hotel or other paid lodging	↓ 32%	↓ 16%	+100%
ARE MORE PASSIONATE ABOUT TRAVEL			
 Have made a reservation for their next planned vacation	59%	↑ 34%	+74%
 Took a commercial flight in the past month	↓ 30%	16%	+88%
NOT LETTING ANYTHING GET IN THE WAY OF VACATIONS			
 Strongly agree that "Nothing is going to stop me from taking a vacation"	↓ 59%	↑ 41%	+44%
 Plan to spend significantly more time on vacation over the next six months	↓ 44%	↓ 29%	+52%
 Strongly agree that "economic conditions in the U.S. are better than they were a month ago."	↓ 26%	↓ 14%	+86%



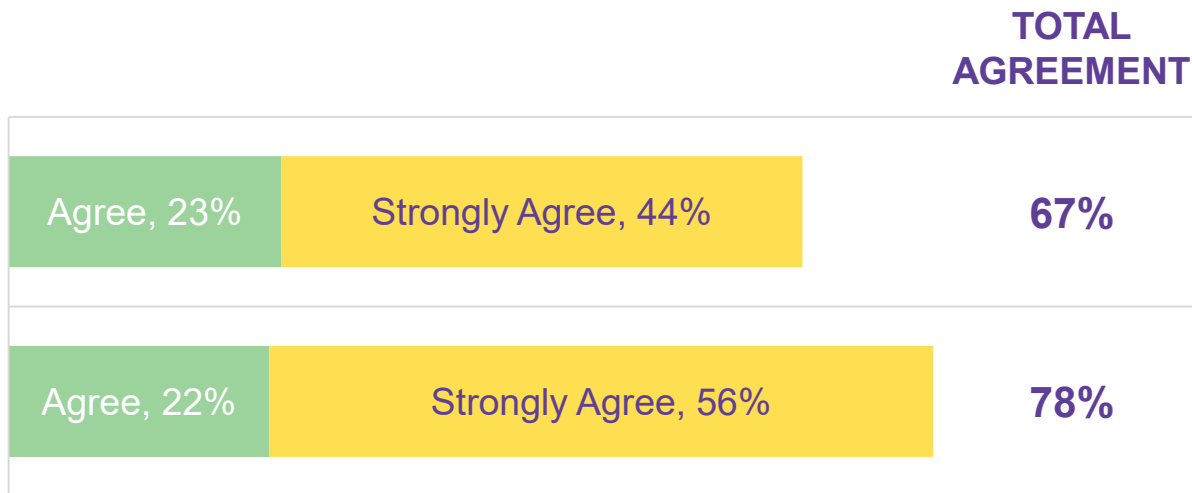
VACATION OWNERSHIP INDEX FOR JANUARY 2025

OVERALL VACATION OWNERSHIP SENTIMENT INDEX



Timeshare Owners Appreciate Booking Flexibility and the Product's Family Focus

It's surprising how easy it is to book different destinations for my timeshare vacation.



Having a timeshare helps me to prioritize family vacations.

