

The Vacation Ownership Sentiment Index: FEBRUARY 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

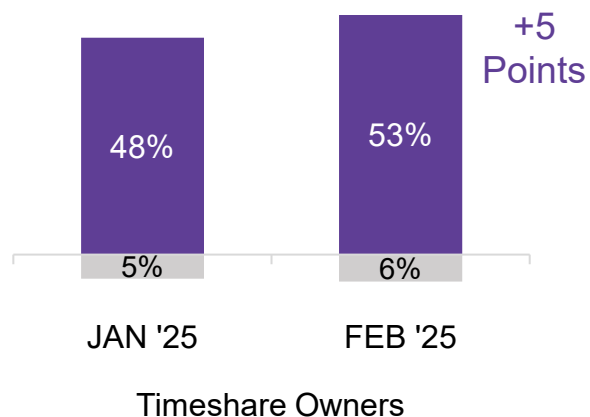
Study Methodology:

- 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.

Key Take-Aways

Overall Vacation Ownership Index **up** to **107.8** driven by: **7 of 11** Measures Up
(Among the Biggest Movers)

I expect my overall satisfaction on my next timeshare vacation to exceed my expectations.

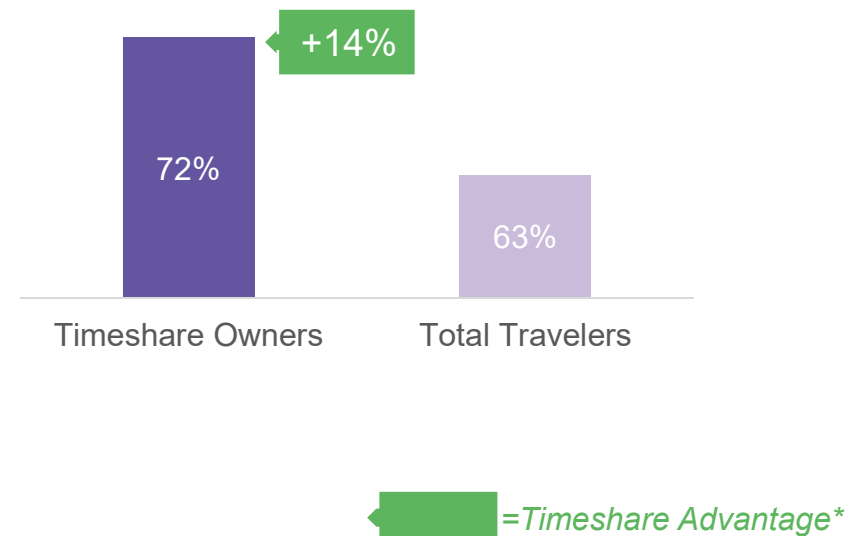


I would highly recommend timeshare ownership to my friends who enjoy vacation travel.

up +3 points from
last month



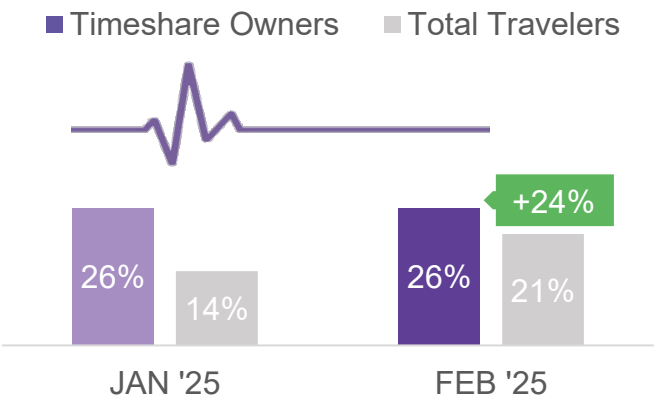
Considered their most recent vacation to be an exceptional vacation experience.



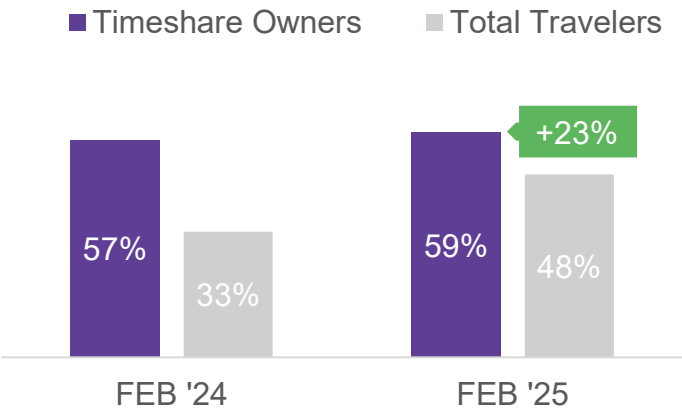
Key Take-Aways

Timeshare Owners Continue to Actualize Despite Tepid Economic Outlook

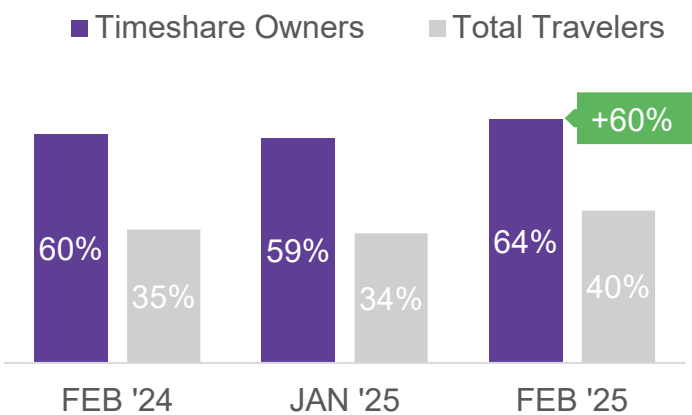
Economic conditions in the U.S. are better than they were a month ago.



Strongly agree that “Nothing is going to stop me from taking a vacation.”



Made a reservation for their next planned vacation.



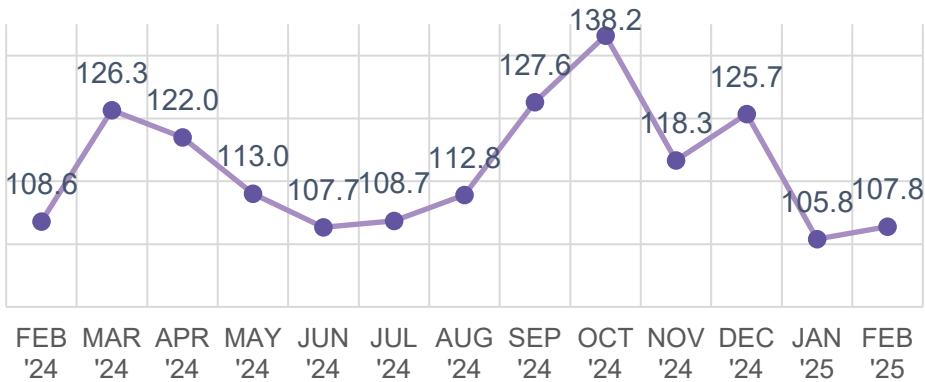
57% of timeshare owners plan to take their next timeshare vacation within four months, **up +6 points** from January.

=Timeshare Advantage*

*Stated as the actual percentage difference, which is calculated comparing each percentage as a proportion of the other, not simply the number of points difference.

OVERALL

Vacation Ownership Sentiment Index



KEY FACTORS

that moved the Sentiment Index this month

- The Vacation Ownership Sentiment Index improved to 107.8 in February, marking its 13th consecutive month over 100. 76% of timeshare owners strongly agreed that their most recent vacation was significantly better than their typical vacation, +12% better than overall travelers.
- 72% of timeshare owners strongly considered their most recent vacation to be an exceptional experience, consistent with both January'25 and February'24 results.
- 64% of timeshare owners have made a reservation for their next vacation; a + 5 point improvement over January and 60% higher than the incidence of overall travelers.
- 59% of timeshare owners strongly agree that nothing is going to stop them from taking a vacation, +23% higher than travelers overall.
- 57% of timeshare owners plan to take their next timeshare vacation within four months, up +6 points from January.
- While only 26% of timeshare owners strongly agreed that U.S. economic conditions were better than a month ago, that is 24% higher than that observed among travelers in general.

KEY COMPARISONS OF TIMESHARE OWNERS VS. TRAVELERS IN GENERAL

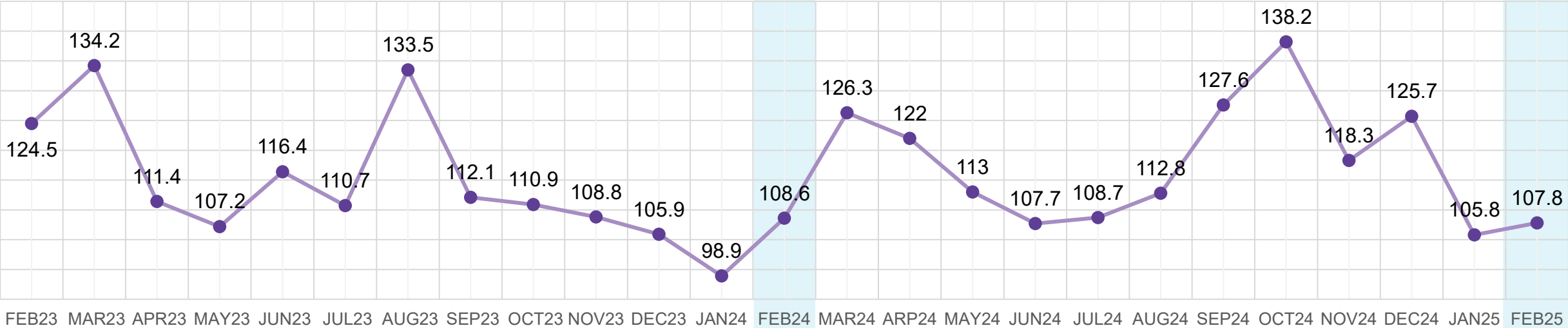
for FEBRUARY of 2025 (arrows reflect meaningful month over month movement)

	 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	 29%	 18%	+61%
ARE MORE PASSIONATE ABOUT TRAVEL			
 Have made a reservation for their next planned vacation	 64%	 40%	+60%
 Took a commercial flight in the past month	31%	 19%	+63%
NOT LETTING ANYTHING GET IN THE WAY OF VACATIONS			
 Strongly agree that “Nothing is going to stop me from taking a vacation”	59%	 48%	+23%
 Plan to spend significantly more money on vacation over the next six months	 40%	 34%	+18%
 Strongly agree that “economic conditions in the U.S. are better than they were a month ago.”	26%	 21%	+24%



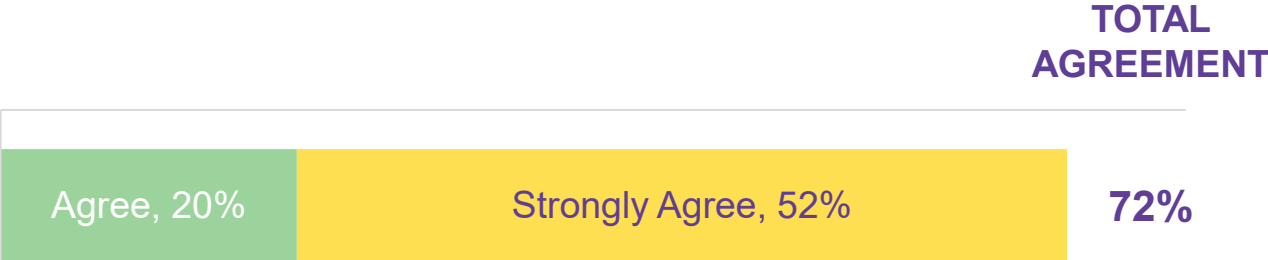
VACATION OWNERSHIP INDEX FOR FEBRUARY 2025

OVERALL VACATION OWNERSHIP SENTIMENT INDEX



Timeshare is a Cost Effective Alternative to Peak Season Travel/Vacation Homes

My timeshare enables me to save money by avoiding peak travel season rates.



I chose to purchase a timeshare as an alternative to investing in a vacation home/second home.

