

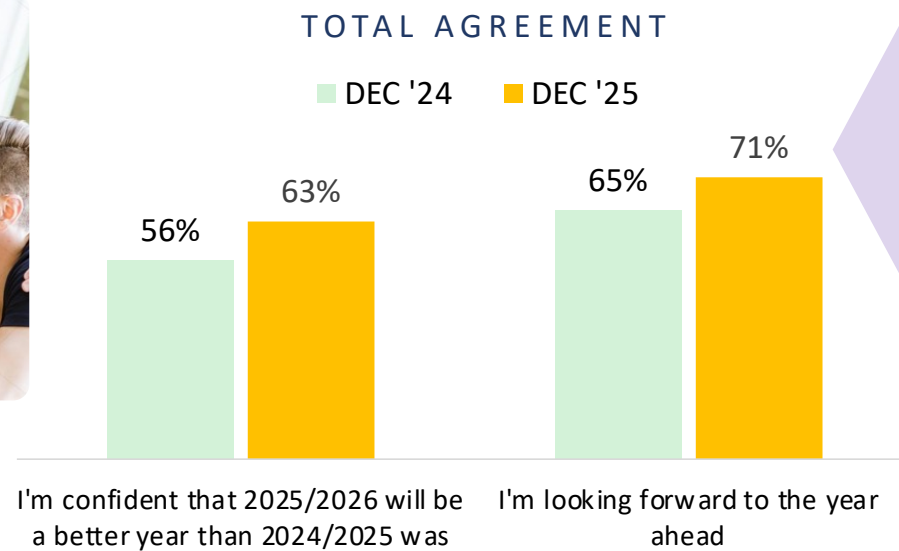
*2026 Spring*  
**CONFERENCE**

**SPORTS&  
LEISURE**  
RESEARCH GROUP

 **ARDA**

## Greater Optimism for the Year Ahead...But It's in Context

Q. Looking ahead, please indicate how much you agree or disagree with each of the following statements.

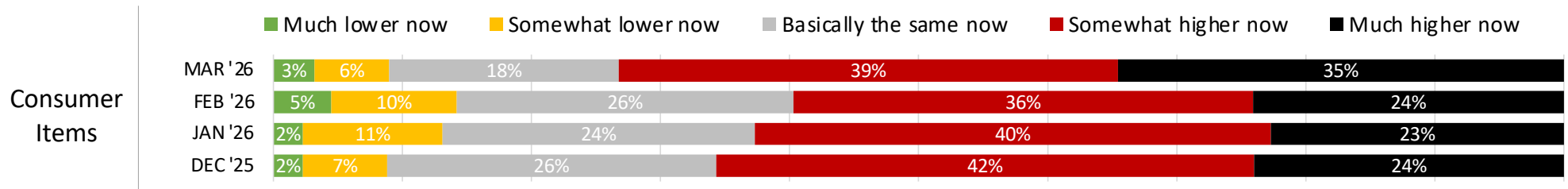


|             |     |
|-------------|-----|
| Democrat    | 68% |
| Republican  | 78% |
| Independent | 69% |
| Age 25-34   | 77% |
| Age 35-44   | 73% |
| Age 45-64   | 66% |
| Age 65+     | 62% |

- Yet only 42% agree that "Things are better now than they were before COVID."

# Nearly 3/4 See Higher Consumer Prices as Future Concerns Mount

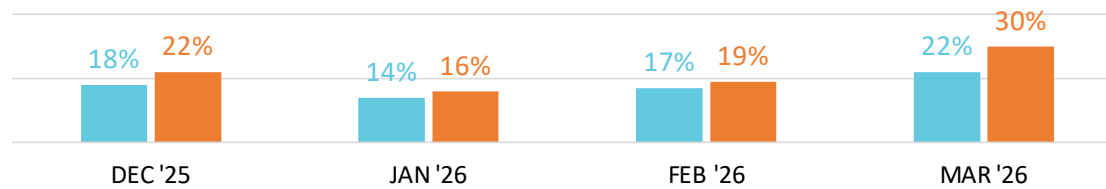
Q. Compared to six months ago, would you say that prices for \_\_\_\_\_ are...



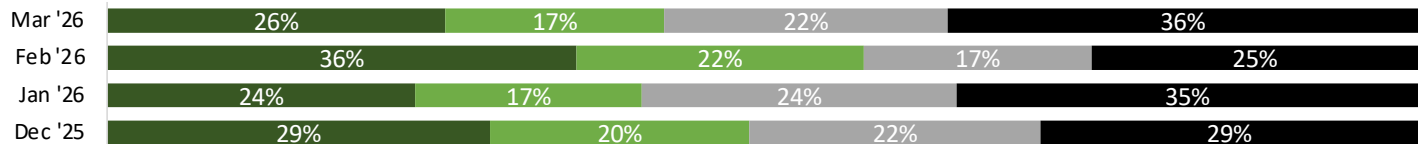
## Much Higher Now

Travel

- Hotels
- Airfare



Strongly Agree, Agree, Disagree, Strongly Disagree



*I believe that the cost of every day goods will improve in the coming months.*

# Volatile Travel Expectations Trending Downward

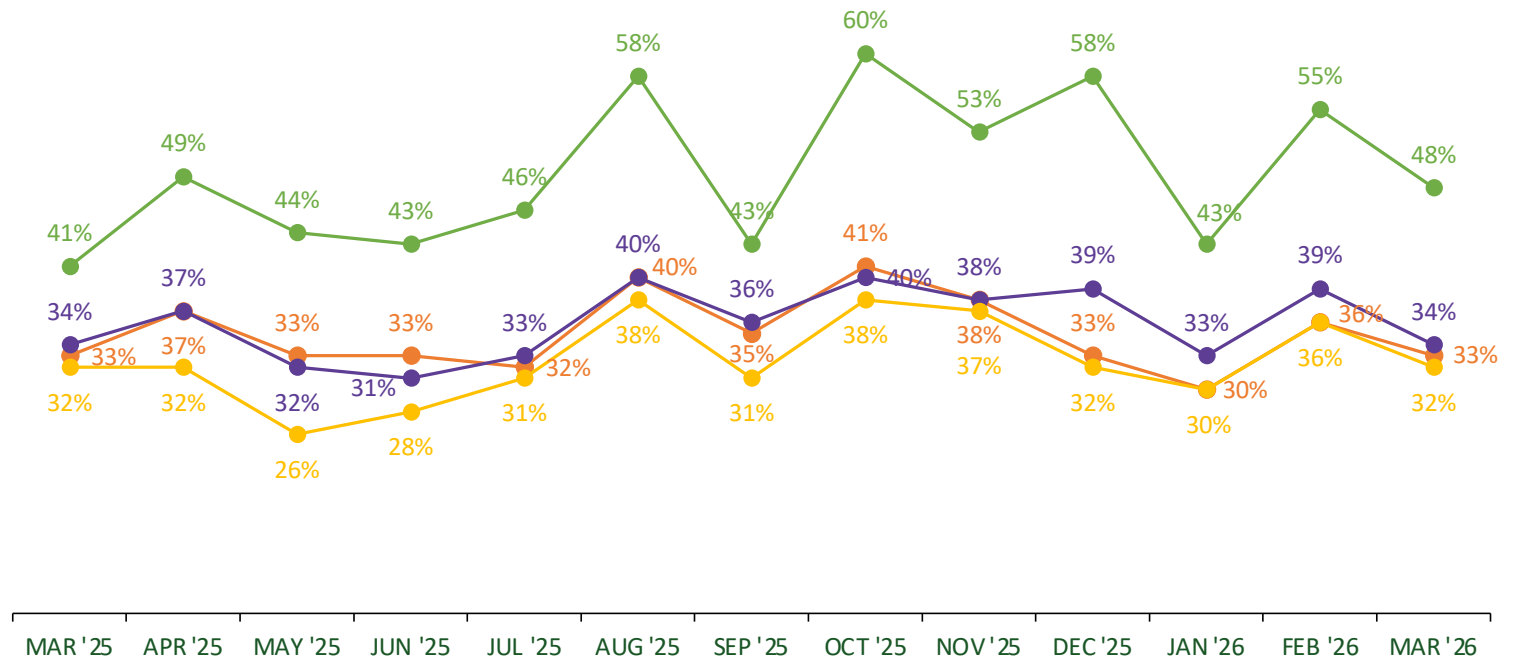
## TOP 3 BOX AGREEMENT

I'm likely to take a domestic business trip in the next six to twelve months

Taking a vacation of over 500 miles or more is a priority for me and my family in the next 12 months

I'm planning to take a major vacation this year

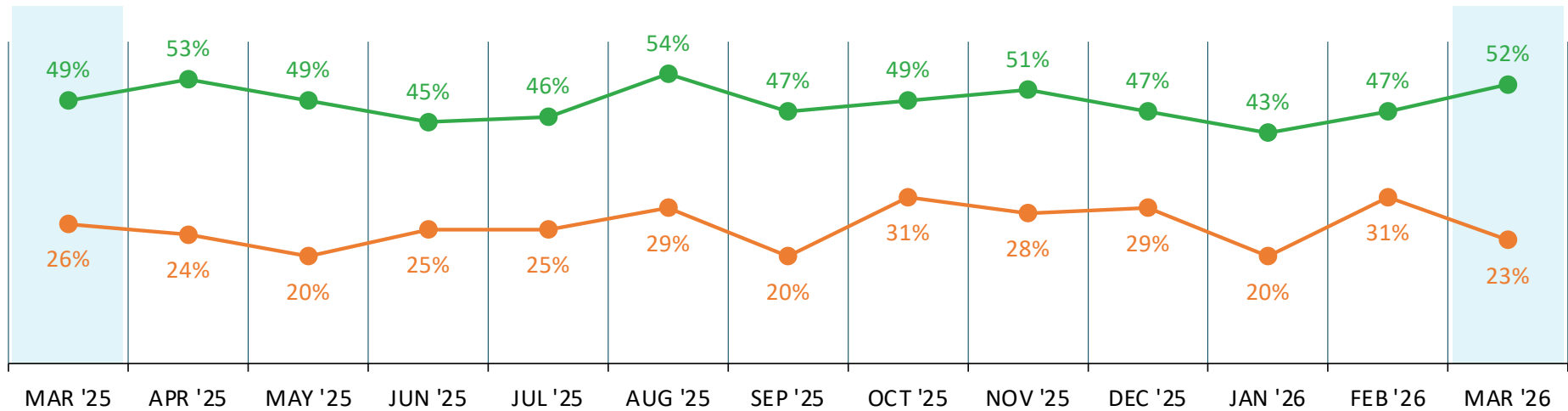
I plan to spend just as much or more money on travel in the next year as I did in the past year



# Spending Expectations Subdued But Stable

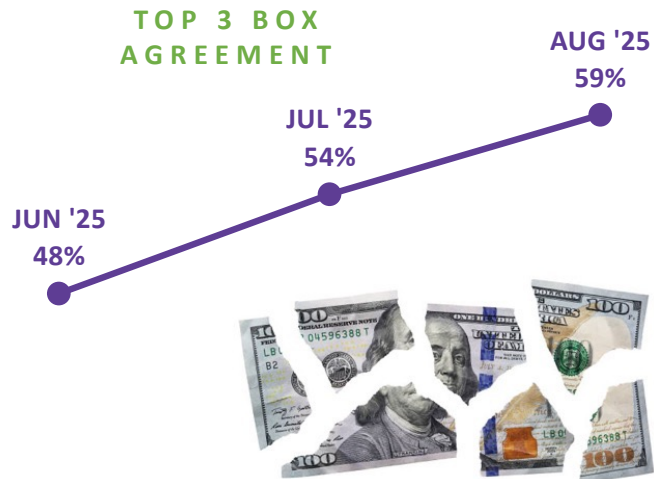
## TOP 3 BOX AGREEMENT

- Today I have to make more difficult decisions about discretionary purchases than I did five years ago.
- If I see something I like, I don't worry about the price.



## Greater Perceived Wealth Gap

*Economic realities are creating a greater gap between the wealthiest and poorest Americans.*



We are Living in a K shaped Economy



*America has increasingly become a society of financial haves and have nots.*

TOP 3 BOX AGREEMENT



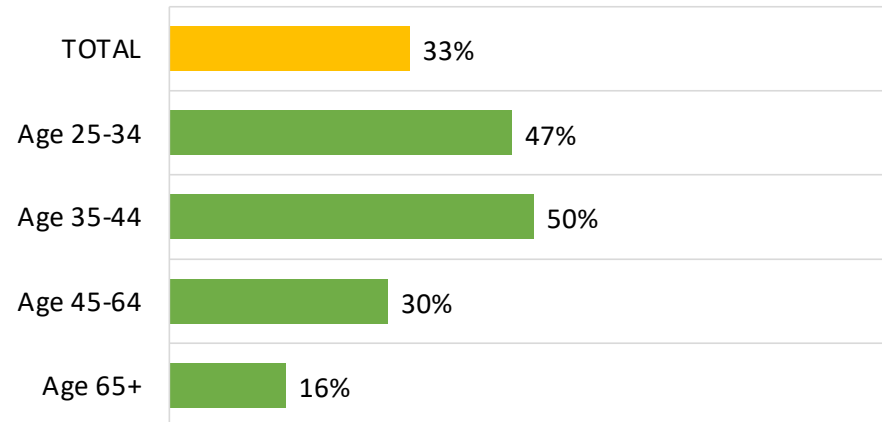
# The Coming Intergenerational Wealth Transfer: Real and Perceived

➔ Estimated **\$106 Trillion** in Wealth Transferred Between Generations by 2048

*I have inherited or expect to inherit a meaningful amount of money in my lifetime.*



TOTAL AGREEMENT



➤ 45% agree that they have been financing their credit card payments, more these days than they did a year ago...up from 33% in February

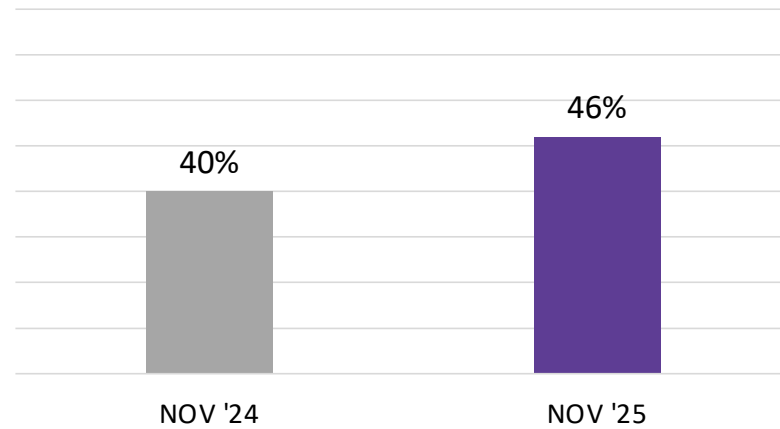
## Leisure is Taking on Greater Prominence in Our Lives

Q. Looking ahead, please indicate how much you agree or disagree with each of the following statements.

***Making time to enjoy leisure activities is more important to me now than it was two years ago.***



TOP 3 BOX AGREEMENT



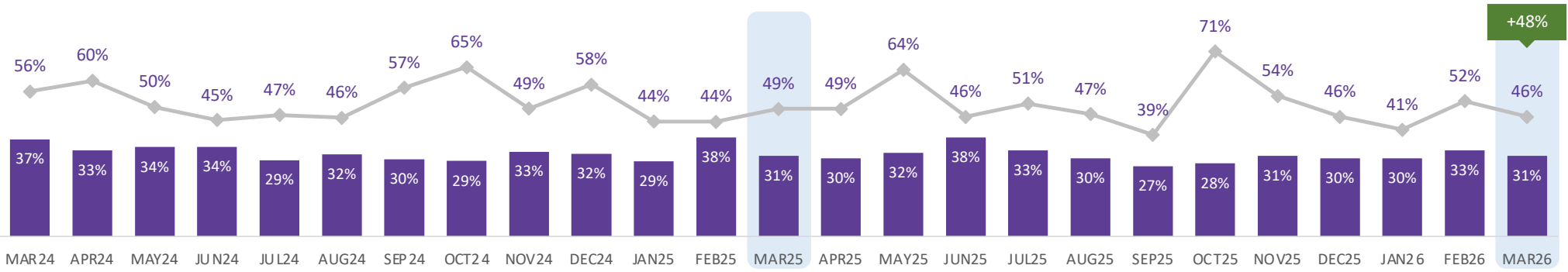
► **65%** expect to devote more time to leisure activities in 2026 than they did last year

## Planning to Spend More Time and Money on Vacation Over the Next Six Months

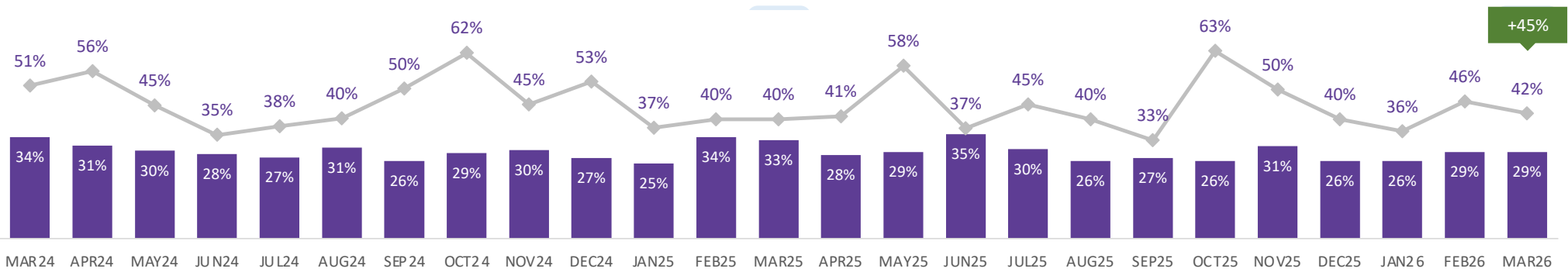
■ Timeshare Owners Vs. ■ Total Travelers

###% =TIMESHARE ADVANTAGE

Plan to spend significantly more **TIME** on vacation over the next six months

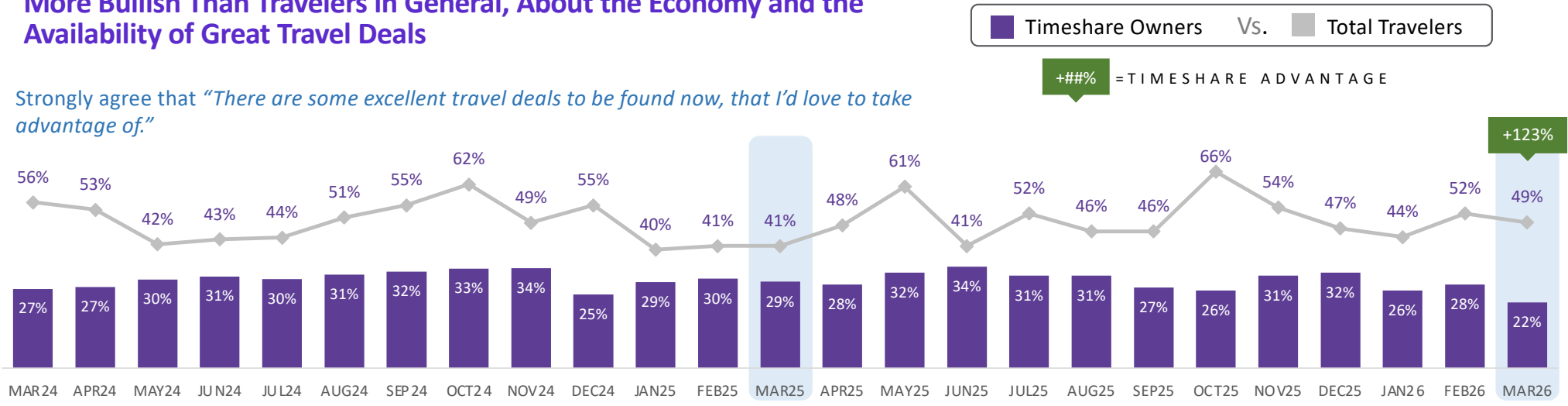


Plan to spend significantly more **MONEY** on vacation over the next six months

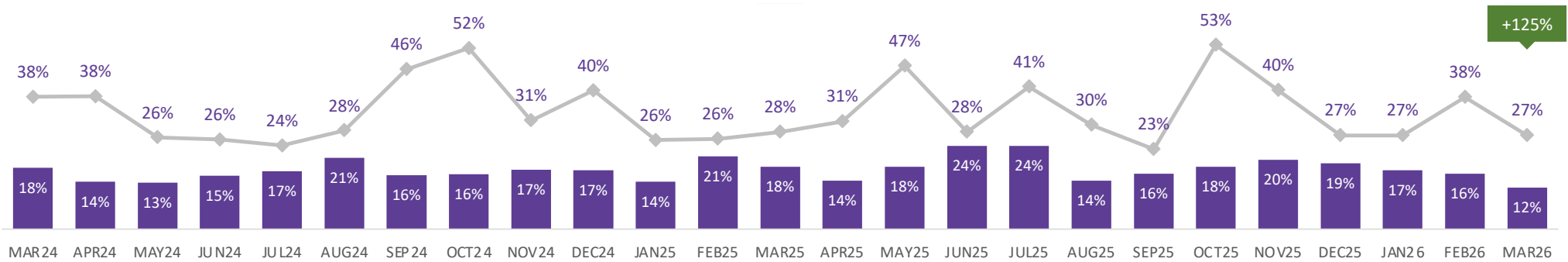


## More Bullish Than Travelers in General, About the Economy and the Availability of Great Travel Deals

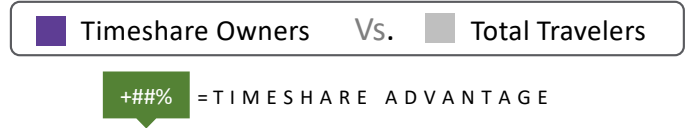
Strongly agree that "There are some excellent travel deals to be found now, that I'd love to take advantage of."



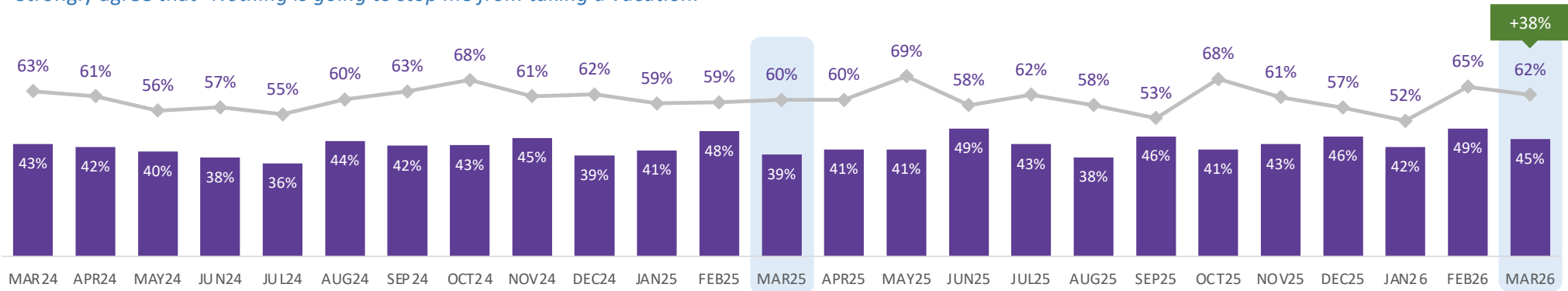
Strongly agree that "Economic conditions in the U.S. are better than they were a month ago."



## More Passionate About Travel



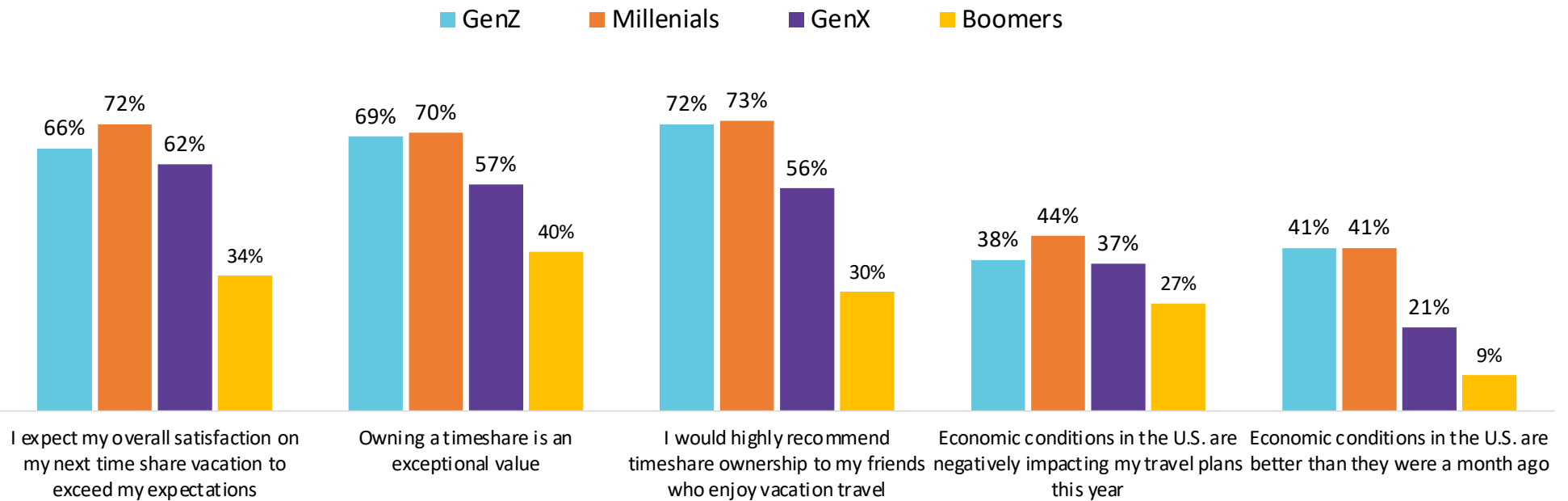
Strongly agree that *"Nothing is going to stop me from taking a vacation."*



## KEY Timeshare Owner Attitudes by Generational Cohort

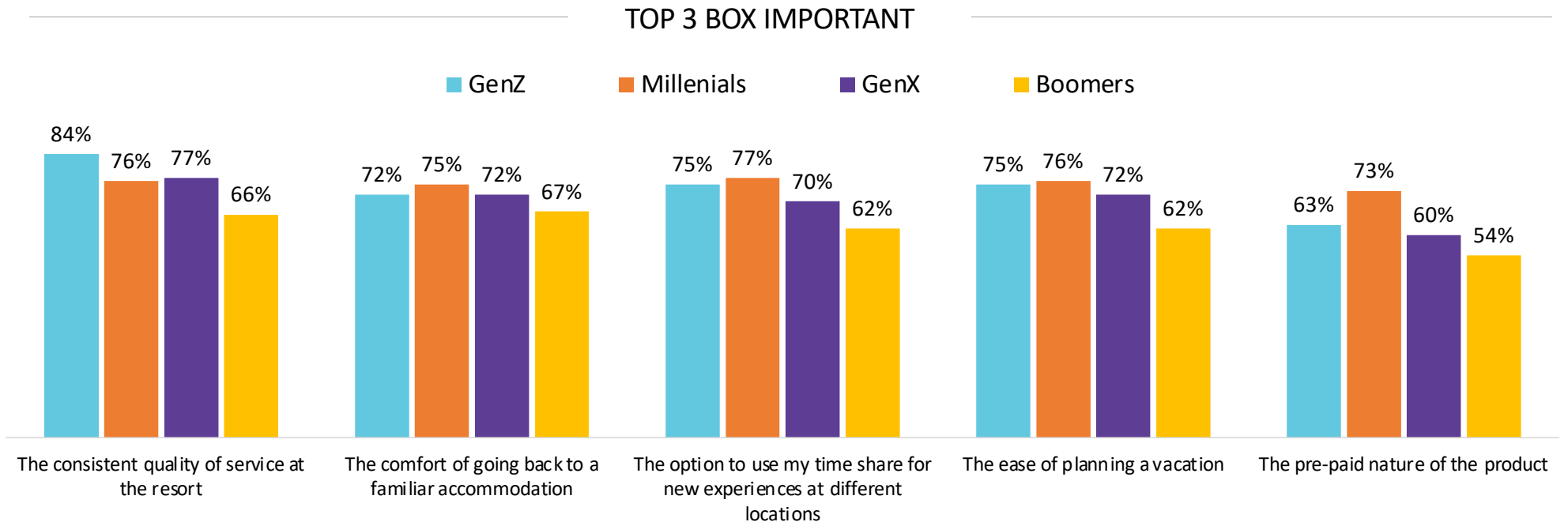
- Younger generations are most bullish on timeshare

### TOP 3 BOX AGREE



## Most Important Element of Timeshare Ownership Points to Consistency and Comfort

Q. Please indicate the importance of each of the following aspects of timeshare ownership to you.



## Younger Generations Value Timeshares

### PRE-OWNERSHIP PERCEPTIONS:

- ▶ Before purchasing, younger generations were more likely than Boomers to believe that timeshares were a good value

### OWNERSHIP PERCEPTIONS:

- ▶ Post-purchase, younger generations are also more likely than Boomers to believe that timeshares are currently a good value
- ▶ Younger owners value the option to use their time share for new experiences at different locations

### TOP MOTIVATIONS FOR GENZ TIMESHARE OWNERSHIP:



#1

Making a vacation a certainty rather than a possibility

#2

Overall Flexibility to use different locations, unit types, times of the year as applicable

## Top Activities Enjoyed on Most Recent Timeshare Vacation

Q. In which types of activities did you and your travel party participate while taking your most recent timeshare vacation?



## A Qualitative Look



### GEN Z ARTICULATES THE BENEFITS OF TIMESHARE:

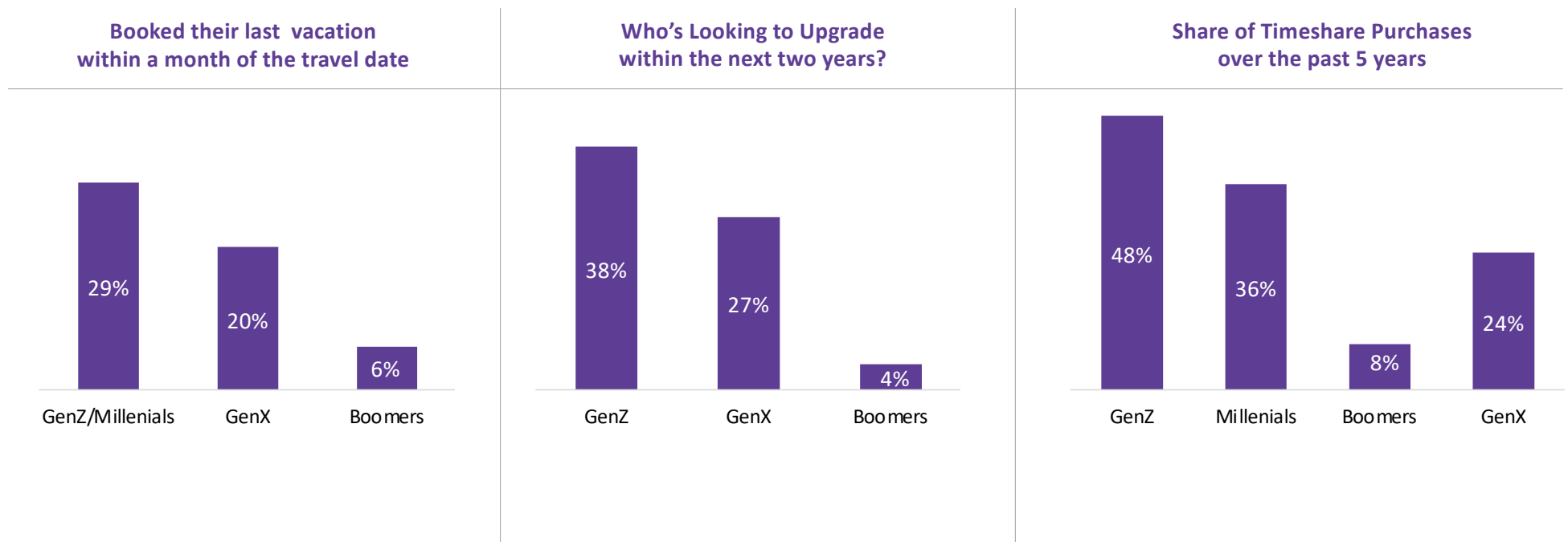
- Value with respect to quality, Reliability and consistency of:
  - Superior Space/Bigger Rooms
  - Amenities
  - Customer service
- Experiential vacations centered on:
  - Family bonding/enriching the lives of young children
  - Active, Memory Creating experiences
  - Health and Wellness
  - Destination specific “two for one” set of experiences like concerts, parks and sporting events

### VACATION RENTALS VS. HOTELS OR TIMESHARES:

- Structured amenities can be reassuring
- Vacation rentals have become pricey and inconsistent

## Select Inter-Generational Insights from the new ARDA Owners' Study

- ▶ Younger owners are significantly more likely to book their vacations closer to the travel date
- ▶ GenZ and Millennials are fueling growth of vacation ownership



## Select Inter-Generational Insights from the new ARDA Owners' Study

Q. There are many reasons why someone chooses to own a timeshare. Please indicate which of these aspects of timeshare ownership are important to you.

|   | BOOMERS | GEN X | MILLENIALS | GENZ |
|---|---------|-------|------------|------|
| Quality of resort accommodations, amenities   | 62%     | 45%   | 42%        | 31%  |
| Location of the resort  | 66%     | 45%   | 36%        | 32%  |
| Overall flexibility: ability to use different locations, unit types, times of year, as applicable | 49%     | 35%   | 36%        | 30%  |
| Making a vacation a certainty rather than a possibility every year                                | 50%     | 37%   | 33%        | 31%  |
| Home-like villa features (kitchen, washer/dryer, etc)   | 58%     | 41%   | 29%        | 22%  |
| Opportunity to own a vacation home at affordable price  | 28%     | 28%   | 30%        | 25%  |
| The ability to pass it on to your children, grandchildren, or other family members                | 34%     | 29%   | 25%        | 25%  |
| The ability to lock in the cost of my vacation at the time of purchase                            | 29%     | 26%   | 26%        | 26%  |
| The ability to travel with larger parties and have spacious accommodations                        | 29%     | 25%   | 25%        | 24%  |
| Credibility of timeshare company  | 27%     | 22%   | 26%        | 25%  |
| Satisfaction with invitation and sales presentation   | 10%     | 16%   | 21%        | 21%  |

## The 4Ps of Marketing



## The 4Es of Marketing



### EMOTIONAL CONNECTION

Just a third strongly prefer to buy things through a digital app than in a store... only **24%** of those over age 45

**Less than Half** strongly prefer making reservations through an app

Just over **1/3 strongly agree** that it's more convenient to handle customer service issues through an app

**47%** of Americans often feel "very lonely" ...**63%** of those age 35-44



### EXPERIENCES

Those who strongly agree that **"It's important for my life to include a number of unique experiences"** has **risen +14** points from December'24 to December'25...to **53%**

Significantly stronger agreement among younger adults



### EAGERNESS

From November'24 to November'25, those strongly agreeing that **"My life philosophy is more about living for today than it is about living for tomorrow"** has gone from **57% to 66%**

**78%** of Americans agree with the statement: **"I need a vacation"**



### ENTITLEMENT

**80%** of Americans agree that they deserve a vacation; **87%** of those under age 45

The incidence of those who feel that they have been passed over for a promotion at work for someone less qualified than they are is **up +10** points in the past year, to **41%**...A Majority of those under age 45

**4/5 believe** that **"People are more in it for themselves than they were twenty years ago."**

**More than 75%** agree that **"People today are more selfish"** than in their parents' generation

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