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●○○ Industry Insight



Future Timeshare Buyers:
2009 Market Profile

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2009 Market Profile

Prepared by:
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Introduction

Future Timeshare Buyers: 2009 Market Profile is designed to support the growth of the industry by providing timeshare developers and marketers, as well as those considering entry into the industry, with unique insights into the vacation habits, preferences, and intentions of leisure travelers who are interested in purchasing some form of vacation time during the next two years.

The topics covered include target market demography, travel patterns and preferences, desired attributes for a leisure travel experience, destinations of interest for future vacations, and specific preferences related to timesharing. This report also synthesizes the most relevant trends in leisure travel preferences to serve as a basis for more insightful product development and marketing strategy.

Developed exclusively for Interval International, *Future Timeshare Buyers: 2009 Market Profile* was prepared from a nationally representative online consumer panel of respondents who have expressed interest in acquiring some form of timeshare during the next two years. Additional insights appearing in this report were developed from *The Ypartnership/Yankelovich, Inc. 2009 National Leisure Travel MONITORSM*.

The *2009 National Leisure Travel MONITORSM* is a strategic marketing tool for travel and leisure industry product and service suppliers. This widely acclaimed survey of leisure travel habits and preferences is now in its 18th year.

Summary of Key Findings

Prospective Timeshare Purchasers: Who They Are

Among the population of active leisure travelers in the United States, nine out of ten (91%) are familiar with the concept of “timesharing,” of which four percent – or approximately 4.8 million adult consumers – report they are interested in purchasing some form of vacation time in the next two years. Twenty percent of active leisure travelers familiar with the concept and interested in purchasing vacation time currently own timeshare or vacation ownership.

The majority of active leisure travelers interested in purchasing timeshare are married (61%) and white (75%) with an annual household income of \$50,000 or more (88%). Nearly two-thirds are between 30 and 62 years of age, and nearly eight in ten have completed at least four years of collegiate education (78%). Approximately four in ten (35%) reside in the Midwestern region of the United States, while an estimated three in ten live in the Northeast (29%) or West (27%).

● **Timeshare/Vacation Ownership Issues:** Active leisure travelers interested in purchasing vacation time feel that they have a solid understanding of the main features of timesharing (43%) and are likely to stay at a vacation ownership resort (62%). More than three in ten (31%) have a positive opinion toward timeshare and more than half (54%) of the respondent group express a neutral opinion, representing eight in ten who are receptive to the vacation ownership product.

Approximately three-quarters (77%) of active leisure travelers interested in purchasing vacation time are willing to take a two- to three-day mini-vacation to attend a timeshare sales presentation.

● **Leisure Travel Patterns and Preferences:** Active leisure travelers interested in purchasing timeshare have taken an average of seven (7.0) qualifying leisure trips in the past year. Nearly four in ten (38%) state that they are likely to be planning to take more leisure trips during the next 12 months than they took last year. Weekend trips remain most popular, as nearly nine in ten (88%) active leisure travelers have taken one or more leisure trips of one to four nights in duration including a Saturday evening during the past year. A comparable proportion (81%) have taken extended trips, while four in ten (40%) have taken weekday trips.

Other noteworthy travel patterns and preferences include:

Transportation preferences – More than nine in ten (96%) active leisure travelers interested in purchasing timeshare report that they had used scheduled airline services on at least one vacation during the past year. In comparison, nearly two-thirds (64%) drove their personal car, SUV or truck to their vacation destination, while nearly a quarter (23%) rented the use of an automobile.

Hotel accommodation preferences – More than nine in ten (96%) active leisure travelers interested in purchasing vacation time have stayed in a hotel or motel during the past 12 months, while more than half (56%) have vacationed with family or friends. Nearly a third (32%) have stayed in a vacation home or condominium that they owned or rented, and almost one-quarter (22%) enjoyed the use of owned or rented timeshare accommodations.

The majority of these travelers prefer a hotel or motel that is part of a chain (83%), is full-service with a restaurant (83%), has fewer than 300 rooms (66%), offers traditional lodging (61%) (as opposed to an all-suite product), and is moderately priced (55%), although almost four in ten (38%) express a preference for luxury-priced vacation products.

Cruise interest – Fully two-thirds (67%) of active leisure travelers interested in purchasing timeshare are also interested in taking a cruise vacation during the next two years.

Types of leisure trips taken – Approximately eight in ten (77%) active leisure travelers interested in purchasing vacation time have taken a naturalistic trip (especially one featuring a beach or lake), while six in ten (60%) have vacationed principally by visiting friends or relatives during the last 12 months. Nearly four in ten (38%) took a general sightseeing trip, while approximately one-quarter took a trip for the primary purpose of gambling (26%), visiting an all-inclusive resort (25%), or visiting a theme park (24%). One in five (20%) has taken a leisure vacation in the past year with the principal purpose of attending a religious ceremony or event, while approximately one in ten (12%) has taken a leisure trip to support humanitarian causes or to help less fortunate people.

Travel party composition – Among active leisure travelers interested in purchasing timeshare, more than eight in ten (82%) took at least one leisure trip in the past year with their spouse or another adult, but without children. Four in ten (40%) took at least one trip with children (the majority of which were taken with a spouse or another adult), and a slightly greater proportion took at least one leisure trip alone (43%).

● **Future Leisure Travel Patterns and Preferences:** More than nine in ten (92%) active leisure travelers interested in purchasing timeshare express a desire to visit the Western geographic region of the United States within the next two years, while more than eight in ten (84%) are interested in visiting the South. Fully two-thirds (66%) would like to visit the Northeast, and nearly four in ten (37%) express interest in visiting the Midwest.

When asked to list specific states that they would like to visit during the next two years, almost two-thirds of active leisure travelers interested in purchasing timeshare mention California (64%) while fully six in ten express a desire to vacation in Florida (60%). Reflecting their aspiration to vacation in exotic locales, Hawaii is cited by almost six in ten (59%) active leisure travelers and Alaska is mentioned by more than half (54%).

Active leisure travelers interested in purchasing timeshare report the highest interest in visiting exotic, warm-weather, and city vacation destinations such as the Hawaiian Neighbor Islands (84%), the Florida Keys (75%), Honolulu (74%), San Francisco (74%), and New York City (72%). U.S. National Parks (75%) and other notable select destinations of interest include:

- San Diego, California
- Las Vegas, Nevada
- Lake Tahoe (California and Nevada)
- Colorado mountain resorts
- Puerto Rico
- New Orleans
- Florida Gulf Coast
- Chicago, Illinois
- Miami, Florida

Europe continues to be the preferred international destination among active leisure travelers interested in purchasing timeshare, cited by nearly nine in ten (89%). Approximately eight in ten (78%) mention their interest to vacation in the Caribbean during the next two years while nearly six in ten (56%) aspire to visit Australia. More than half are interested in vacationing across Canada (52%) while nearly one-third (30%) are interested in visiting Mexico.

Other notable findings include:

Desirable attributes in a leisure travel experience – Active leisure travelers interested in purchasing timeshare identify the following attributes to be the most desirable in a leisure travel experience:

- Beautiful scenery
- Time to relax and unwind
- Place never visited before
- Hotel/resort security
- Beach
- Internet access from hotel guest room
- Unusual cuisine
- All-inclusive vacation price (one that includes air, food, lodging, transportation, etc.)
- All-inclusive resort price (one that includes accommodations, food, and some recreation)
- Visiting architectural or historical sites
- Nightlife and live entertainment
- Visiting museums
- Hotel with distinctive theme
- Historic hotel or resort on the National Register of Historic Places (NROHP)

Information sources – Active leisure travelers interested in purchasing timeshare are most confident in information obtained from the recommendations of friends or family members when considering travel destinations, but also place confidence in information derived from:

- Travel guidebooks
- Reviews read in an online advisory site such as TripAdvisor.com
- The Web site of an online travel agency such as Expedia, Travelocity, etc.

- Reviews read on a Web log or blog online
- A company or destination Web site
- Articles in newspapers and magazines or programs on TV and radio

Travel-related use of the Internet – Active leisure travelers interested in purchasing timeshare rely heavily upon the use of the Internet to obtain travel information and prices and to make travel reservations. Nearly all active leisure travelers cite their use of the Internet to obtain travel information and prices (98%) and to make travel reservations (99%).

When searching for travel information and prices, Expedia.com remains the Web site of choice for active leisure travelers interested in purchasing timeshare, cited by nearly three-quarters of this consumer group (71%). This is followed by Travelocity.com (70%), Orbitz.com (62%), and Priceline.com (48%).

Leisure Travelers Interested in Purchasing Vacation Time

Among the population of active leisure travelers in the United States, nine out of ten (91%) are familiar with the concept of “timesharing,” of which four percent – or approximately 4.8 million adult consumers – report they are interested in purchasing some form of vacation time during the next two years.

Table 1: Definition of the Targeted Segment**

	2009 Active Leisure Travelers (%)
<i>Interested in Purchasing Timeshare During the Next Two Years*</i>	
Yes	4
No	96

* Among those familiar with the concept of timeshare or vacation ownership.

** Source: 2009 National Leisure Travel MONITORsm

Nearly one in seven (15%) active leisure travelers familiar with the concept and interested in purchasing vacation time currently owns timeshare or vacation ownership.

Table 2: Current Timeshare Ownership**

	2009 Interested in Purchasing Timeshare (%)
<i>Currently Own Timeshare or Vacation Ownership*</i>	15

* Among those familiar with the concept of timeshare or vacation ownership.

** Source: 2009 National Leisure Travel MONITORsm

The majority of active leisure travelers interested in purchasing timeshare are married (61%), white (75%), have an annual household income of \$50,000 or more (88%), and have completed at least four years of college (78%). Nearly two-thirds are between 30 and 62 years of age (Xers, aged between 30 and 43 years, represent 31% of the respondent population, while Boomers, aged between 44 and 62 years, represent 34% of the respondent population). Approximately four in ten (35%) reside in the Midwestern region of the United States, while nearly three in ten live in the Northeast (29%) or West (27%).

Table 3: Demography

	2009 Interested in Purchasing Timeshare (%)
Gender	
Women	52
Men	48
Race	
White	75
Asian	11
African-American	5
Hispanic	5
Other	4
Marital Status	
Married	61
Single	33
Divorced/Separated/Widowed	6
Age*	
Echo-Boomers (29 and younger)	27
Xers (30 - 43)	31
Boomers (44 - 62)	34
Matures (63 and older)	8
Educational Attainment	
Less than 4 years of high school	1
4 years of high school	2
1 - 3 years of college	19
4 years of college	37
1 year of graduate school or more	41
Annual Household Income	
Less than \$30,000	5
\$30,000 - \$49,999	7
\$50,000 or more	88
\$100,000 or more	51
Geographic Origin	
West	27
South	9
Midwest	35
Northeast	29

* *Echo-Boomers = those adult consumers born in 1979 or later.
Xers = those adult consumers born between 1965 and 1978.
Boomers = those adult consumers born between 1946 and 1964.
Matures = those adult consumers born before 1946.*

Timeshare/Vacation Ownership Issues

More than four in ten (43%) active leisure travelers interested in purchasing vacation time feel that they have a solid understanding of the main features of timesharing. More than three in ten (31%) have a positive opinion toward timeshare and more than half (54%) of the respondent group express a neutral opinion, representing eight in ten who are receptive to the vacation ownership product. Furthermore, approximately six in ten (62%) indicate they are likely to stay at a vacation ownership resort.

Table 4: Understanding/Opinion*

	2009 Interested in Purchasing Timeshare (%)
Level of Understanding of the Main Features of Timesharing**	
Good understanding	43
Neutral	40
No understanding	17
Opinion of Timeshare***	
Positive	31
Neutral	54
Negative	15
Likelihood of Staying at a Vacation Ownership Resort****	
Likely	62
Neutral	29
Unlikely	9

* Asked among those who are familiar with timeshare or vacation ownership.

** Based on a scale of one to five where one equals "no understanding" and five equals "expert understanding." Top two, middle, and bottom two box scores are shown.

*** Based on a scale of one to five where one equals "extremely negative" and five equals "extremely positive." Top two, middle, and bottom two box scores are shown.

**** Based on a scale of one to five where one equals "not at all likely" and five equals "definitely would." Top two, middle, and bottom two box scores are shown.

Approximately three-quarters (77%) of active leisure travelers who are interested in purchasing vacation time are also willing to take a two- to three-day mini vacation to attend a timeshare sales presentation.

Table 5: Interest in Timeshare Sales Presentations*

	2009 Interested in Purchasing Timeshare (%)
<i>Interest in Taking a Two- to Three-Day Mini Vacation to Attend a Timeshare Sales Presentation</i>	77

* Asked among leisure travelers who are familiar with timeshare or vacation ownership.

Leisure Travel Patterns and Preferences

Active leisure travelers interested in purchasing timeshare have taken an average of seven (7.0) qualifying leisure trips¹ in the past year. Nearly four in ten (38%) say they are planning to take more leisure trips during the next 12 months than they took last year, while approximately six in ten plan to take the same number of trips. Only one in twenty (5%) plans to take fewer trips than taken in the past year.

Table 6: Trips Taken 75 Miles or More Away From Home in the Past Year

	2009 Interested in Purchasing Timeshare
<i>Mean for all leisure travelers who took one or more trips</i>	7.0

Table 7: Future Overnight Leisure Trips Plan to Take 75 Miles or More Away From Home in the Next 12 Months

	2009 Interested in Purchasing Timeshare (%)
<i>Plan to Take</i>	
More trips	38
The same number of trips	57
I am not planning to take any leisure trips during the next 12 months	-

¹ For a definition of the term "qualifying leisure trips," reference is made to the Methodology Section of this report. See page 36.

Weekend trips remain most popular among active leisure travelers interested in purchasing vacation time. Approximately nine in ten (88%) have taken one or more leisure trips of one to four nights in duration including a Saturday evening during the past year. Four in ten (40%) have taken weekday trips. A comparable proportion (81%) have taken extended trips. On average, these travelers report taking an average of 4.0, 3.3 and 2.7 weekend, weekday, and extended trips per year, respectively.

Table 8: Leisure Trips Taken

	2009 Interested in Purchasing Timeshare (%)
<i>Weekend Trip Incidence*</i>	
One or more	88
None	12
Average number of weekend trips taken**	4.0
% of total trips	50
<i>Weekday Trip Incidence***</i>	
One or more	40
None	60
Average number of weekday trips taken**	3.3
% of total trips	19
<i>Extended Trip (5+ Consecutive Nights) Incidence****</i>	
One or more	81
None	19
Average number of extended trips taken**	2.7
% of total trips	31

* *Weekend trip: A trip of one to four nights that involved a stay over a Saturday night.*

** *Among those who took one or more trips in the category.*

*** *Weekday trip: A trip of one to four nights that did not involve a stay over a Saturday night.*

**** *Extended trip: A trip of five consecutive nights or more.*

More than nine in ten (96%) active leisure travelers interested in purchasing timeshare report that they had used scheduled airline services on at least one leisure vacation during the past year. In comparison, approximately two-thirds (64%) drove their personal car, SUV or truck to their vacation destination, while nearly a quarter (23%) rented the use of an automobile.

Table 9: Transportation

	2009 Interested in Purchasing Timeshare (%)*
<i>Modes Used in the Last 12 Months**</i>	
Scheduled airline	96
Personal automobile	64
Rental automobile	23
Cruise ship	21
Train	8
Bus	3
Private, chartered airline	3
Recreational vehicle (RV)	1
Other	1

* Does not equal 100% due to multiple responses.

** Traveled completely or partially by various modes. Personal automobile does not include trips to and from the airport.

More than nine in ten (96%) active leisure travelers interested in purchasing vacation time stayed in a hotel or motel during the past 12 months, while more than half (56%) vacationed with family or friends. Nearly a third (32%) report staying in a vacation home or condominium that they owned or rented, and almost one-quarter (22%) enjoyed the use of owned or rented timeshare accommodations.

The majority of these travelers prefer a hotel or motel that is part of a chain (83%), is full-service with a restaurant (83%), has fewer than 300 rooms (66%), offers traditional lodging (61%) (as opposed to an all-suite product), and is moderately priced (55%), although almost four in ten (38%) express a preference for luxury-priced vacation products.

Table 10: Hotel Accommodation Preferences

	2009 Interested in Purchasing Timeshare (%)
<i>Stayed in the Last 12 Months*</i>	
In a hotel or motel	96
With friends or relatives	56
In a vacation home or condominium owned or rented	32
In a timeshare owned or rented	22
In a recreational vehicle (RV) or camper owned or rented	6
In other accommodations	13
<i>When Traveling for Leisure, Prefer</i>	
Chain hotels/motels	83
Independent hotels/motels	17
Economy	7
Moderate	55
Luxury	38
Traditional	61
All-suite	39
Full-service hotel with a restaurant	83
Limited-service hotel without a restaurant	17
Small hotel (fewer than 300 rooms)	66
Large hotel (300 or more rooms)	34

* Does not equal 100% due to multiple responses.

Table 10: Hotel Accommodation Preferences (continued)

	2009 Interested in Purchasing Timeshare (%)
<i>Share of All Trips</i>	
In a hotel or motel	57
With friends or relatives	19
In a timeshare owned or rented	10
In a vacation home or condominium owned or rented	8
In a recreational vehicle (RV) or camper owned or rented	4
In other accommodations	2

Fully two-thirds (67%) of active leisure travelers interested in purchasing timeshare are also interested in taking a cruise vacation during the next two years.

Table 11: Cruise Interest During the Next Two Years

		2009 Interested in Purchasing Timeshare (%)
<i>Interest in Taking a Cruise During the Next Two Years*</i>		
Interested		67
Neutral		19
Not interested		14

* Based on a scale of one to five where one equals "not at all interested" and five equals "extremely interested." Top two, middle, and bottom two box scores are shown.

Approximately eight in ten (77%) active leisure travelers interested in purchasing timeshare have taken a naturalistic trip (especially one featuring a beach or lake), while approximately six in ten have vacationed principally to visit friends or relatives (60%) or to seek a city experience (57%) during the last 12 months. Nearly four in ten (38%) took a general sightseeing trip, while approximately one-quarter took a trip for the primary purpose of gambling (26%) or to visit an all-inclusive resort (25%) or theme park (24%).

Table 12: Types of Leisure Trips Taken

	2009 Interested in Purchasing Timeshare (%)*
Primary Purpose of One or More Trips in the Last 12 Months	
Naturalistic (Net)	77
Beach/lake	69
Camping/hiking/climbing	20
Snow skiing/boarding	15
Fishing	9
Adventure/outfitter	8
Visiting friends/relatives	60
City	57
General sightseeing	38
Gambling	26
All-inclusive resort	25
Theme park	24
Cruise	23
Family reunion	19
Sporting event	16
Golf	8
Spa vacation	7
Hunting	2
Religious retreat	2
Other	14

* Does not equal 100% due to multiple responses.

Table 12: Types of Leisure Trips Taken (continued)

		2009 Interested in Purchasing Timeshare (%)
<i>During the Last 12 Months, Have Taken a Leisure Trip to</i>		
Attend a religious ceremony or event		20
Help less fortunate people or support a humanitarian cause		12

Among active leisure travelers interested in purchasing timeshare, more than eight in ten (82%) took at least one leisure trip in the past year with their spouse or another adult without their children, while more than four in ten (43%) traveled alone. A similar proportion (40%) took at least one leisure trip with children – the majority of which were taken with a spouse or another adult.

Table 13: Travel Party Composition

	2009 Interested in Purchasing Timeshare (%)*
<i>Past Trip Composition</i>	
<i>Took One or More Trips in the Last Year</i>	
With spouse or another adult, without children	82
Alone	43
With children, net	40
With a spouse or other adult with children	37
With children only (no spouse or other adult)	9

* Does not equal 100% due to multiple responses.

Future Leisure Travel Patterns and Preferences

More than nine in ten (92%) active leisure travelers interested in purchasing timeshare express a desire to visit the Western geographic region of the United States within the next two years, while more than eight in ten (84%) are interested in visiting the South. Fully two-thirds (66%) would like to visit the Northeast and nearly four in ten (37%) express interest in the Midwest.

Table 14: Desired Domestic Destinations (Within the Next Two Years) – By Region (Aided)

	2009 Interested in Purchasing Timeshare (%)*
Region**	
West	92
South	84
Northeast	66
Midwest	37

* Does not equal 100% due to multiple responses.

** The states have been organized by the U.S. Census' definitions of the regions:

West: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming.

South: Alabama, Arkansas, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia.

Northeast: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont.

Midwest: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

When asked to list specific states that they would like to visit during the next two years, almost two-thirds (64%) of active leisure travelers interested in purchasing timeshare mention California while fully six in ten express a desire to vacation in Florida (60%). Reflecting their aspiration to vacation in exotic locales, Hawaii is cited by almost six in ten (59%) active leisure travelers and Alaska is mentioned by more than half (54%).

**Table 15: Desired Domestic Destinations
(Within the Next Two Years) – By State (Aided)**

State	2009 Interested in Purchasing Timeshare (%)*
California	64
Florida	60
Hawaii	59
Alaska	54
New York	49
Washington, D.C.	46
Colorado	42
Arizona	39
Maine	39
Massachusetts	32
Washington	30
Nevada	30
Texas	27
Louisiana	25
North Carolina	25
Oregon	24
South Carolina	24
Vermont	23
New Mexico	21
Tennessee	19
Utah	18
Georgia	17
Montana	16
Pennsylvania	16
Connecticut	14
Wyoming	14

* Does not equal 100% due to multiple responses.

Active leisure travelers interested in purchasing timeshare express desire for exotic, warm-weather, and city vacation experiences. Along with visits to U.S. National Parks (e.g., Grand Canyon, Yellowstone, etc.), the majority exhibits interest in visiting the following destinations during the next two years:

- Hawaiian Neighbor Islands (i.e., Maui, Kauai, etc.)
- Florida Keys
- Honolulu, Hawaii
- San Francisco, California
- New York City, New York
- San Diego, California
- Las Vegas, Nevada
- Lake Tahoe (California and Nevada)
- Colorado mountain resorts
- Puerto Rico
- New Orleans
- Florida Gulf Coast
- Chicago, Illinois
- Miami, Florida

**Table 16: Desired Domestic Destinations
(Within the Next Two Years) – By City/Area (Aided)**

City/Area*	2009 Interested in Purchasing Timeshare (%)
Hawaiian Neighbor Islands (i.e., Maui, Kauai, etc.)	84
National parks (i.e., Grand Canyon, Yellowstone, etc.)	75
Florida Keys	75
Honolulu, Hawaii	74
San Francisco, California	74
New York City, New York	72
San Diego, California	67
Las Vegas, Nevada	63
Lake Tahoe (California and Nevada)	62
Colorado mountain resorts	61
Puerto Rico	60
New Orleans, Louisiana	56
Florida Gulf Coast	54
Chicago, Illinois	53
Los Angeles, California	51
Miami, Florida	51
Orlando, Florida	50
Phoenix/Scottsdale, Arizona	48
Denver, Colorado	48
Myrtle Beach, South Carolina	48
Outer Banks, North Carolina	47
Niagara Falls (New York)	46
Palm Beach, Florida	46
Ft. Lauderdale, Florida	44
St. Petersburg/Clearwater, Florida	42
Utah mountain resorts	42
Colonial Williamsburg, Virginia	41
Panama City Beach, Florida	35
Florida Panhandle	34
Mississippi Gulf	28
Pocono Mountains, Pennsylvania	27
Dallas, Texas	27
Atlantic City, New Jersey	27
Gatlinburg, Tennessee	24
Branson, Missouri	16

* Top two box score on a scale of one to five, where one equals "not at all interested" and five equals "extremely interested."

Europe continues to be the preferred international destination among active leisure travelers interested in purchasing timeshare, cited by nearly nine in ten (89%). Approximately eight in ten (78%) mention their interest to vacation in the Caribbean during the next two years, while nearly six in ten (56%) would like to visit Australia. More than half are interested in vacationing across Canada (52%), while nearly one-third (30%) expect to visit Mexico.

Table 17: Desired International Destinations (Within the Next Two Years) – By Region (Aided)

<i>Area/Region</i>	2009 Interested in Purchasing Timeshare (%)*
Europe	89
Caribbean	78
Australia	56
South Pacific	53
Canada	52
Asia	44
Africa	31
Mexico	30
South/Central America	17
Middle East	15

* Does not equal 100% due to multiple responses.

The majority of active leisure travelers interested in purchasing timeshare find the following vacation attributes desirable:

- Beautiful scenery
- Time to relax and unwind
- Place never visited before
- Hotel/resort security
- Beach
- Internet access from hotel guest room
- Unusual cuisine
- All-inclusive resort price (one that includes accommodations, food, and some recreation)
- All-inclusive vacation price (one that includes air, food, lodging, transportation, etc.)
- Visiting architectural or historical sites
- Nightlife and live entertainment
- Visiting museums
- Hotel with distinctive theme
- Historic hotel or resort on the National Register of Historic Places (NROHP)

Table 18: Desired Leisure Trip Experiences

	2009 Interested in Purchasing Timeshare (%)*
Experimentation/Fantasy/Ambiance**	
Beautiful scenery	89
Place never visited before	84
Beach	82
Unusual cuisine	72
Nightlife and live entertainment	58
Hotel with distinctive theme	52
Historic hotel or resort on the National Register of Historic Places (NROHP)	51
Amenity spa	49
Boutique hotel	47
Learning new skill	41
Destination spa	40
Theme parks	40
Being able to gamble	33
A resort that offers a nude recreation experience	10
Physical Activities	
Snorkeling, scuba diving	50
Water sports	47
Hiking and outdoor adventure	42
Recreational boating	40
Whitewater rafting	34
Countryside biking	33
Snow skiing/boarding	27
Fishing	22
Golf	21
Mountain biking	20
Playing tennis	10
Hunting	8
Other Activities	
Time to relax and unwind	87
Visiting architectural or historical sites	62
Visiting museums	56
Special kids rates	50
Attending performing arts	48
Shopping	47
Kids club or organized family activities	45
Attending amateur or professional sporting events	34
Familiarity/Control	
Safety	85
Hotel/resort security	83
Internet access from hotel guest room	76
Place visited before	42
Pricing	
All-inclusive resort price (one that includes accommodations, food, and some recreation.)	64
All-inclusive vacation price (one that includes air, food, lodging, transportation, etc.)	62

* Does not equal 100% due to multiple responses.

** Top two box score on a scale of one to five, where one equals "not at all desirable" and five equals "extremely desirable."

The majority of active leisure travelers interested in purchasing timeshare are confident in the following, when considering travel destinations:

- Recommendations of a friend or family member
- Information in travel guidebooks
- Reviews read in an online advisory site such as TripAdvisor.com
- Information on the Web site of an online travel agency such as Expedia, Travelocity, etc.

Table 19: Confidence in Travel Information Sources*

	2009 Interested in Purchasing Timeshare (%)
<i>When Considering Travel Destinations, Extremely/Very Confident in**</i>	
Recommendations of a friend or family member	92
Information in travel guidebooks	70
Reviews you have read in an online advisory site such as TripAdvisor.com, etc.	67
Information on the Web site of an online travel agency such as Expedia, Travelocity, etc.	58
Reviews you have read on a Web log or blog online	54
Information on a company or destination Web site	49
Articles in newspapers and magazines or programs on TV and radio	49
Recommendations of a travel agent	45
Information in travel brochures	36
Information in travel advertising	25

* Does not equal 100% due to multiple responses.

** Top two box score on a scale of one to five, where one equals "no confidence at all" and five equals "a great deal of confidence."

Nearly all active leisure travelers interested in purchasing timeshare cite their use of the Internet to obtain travel information and prices (98%) and to make travel reservations (99%).

Table 20: Use of the Internet

	2009 Interested in Purchasing Timeshare (%)
<i>Used the Internet or an Online Service for a Leisure Trip in the Last Year to</i>	
Obtain travel information and prices	98
Make a travel reservation	99

When searching for travel information and prices, Expedia.com (71%) and Travelocity.com (70%) are the Web sites of choice for active leisure travelers interested in purchasing timeshare, each cited by seven in ten of this consumer group. These are followed by Orbitz.com (62%), Priceline.com (48%), and Hotels.com (48%), speaking to the effectiveness of media and advertising campaigns used by those sites during the past 12 months.

Table 22: Usage of Travel Web Sites

	2009 Interested in Purchasing Timeshare (%)*
Web Sites Used to Obtain Travel Information and Prices**	
Expedia.com	71
Travelocity.com	70
Orbitz.com	62
Priceline.com	48
Hotels.com	48
Hotwire.com	42
TripAdvisor.com	40
Specific hotel brand Web site	39
Specific airline brand Web site	39
Cheaptickets.com	35
Kayak.com	32
AAA.com (Triple A Web site)	29
City, state, or country promotion board specific Web site	28
Specific car rental brand Web site	24
Yahoo Travel	23
TravelZoo.com	23
Americanexpress.com	16
Specific cruise brand Web site	14
Fodors.com	13
Frommers.com	12
SideStep.com	11
LonelyPlanet.com	11
Vacation Rental By Owner (VRBO)	10
Specific tour operator or vacation packager Web site	10
Lastminutetravel.com	9
Trip.com	8
AOL travel	5
SmarterTravel.com	5
Mobissimo.com	3
QIXO.com	1
All others	6

* Does not equal 100% due to multiple responses.

** Asked among leisure travelers who have used the Internet to obtain travel information and prices during the last 12 months.

Methodology

The data for this analysis were obtained from interviews conducted online with a panel of 267 pre-qualified active leisure travelers. All respondents: (i) had taken at least one leisure trip of 75 miles or more from home requiring overnight accommodations during the previous 12 months, (ii) were familiar with the concept of timesharing or vacation ownership, and (iii) expressed interest in acquiring some form of vacation time during the next two years. These individuals are referred to in this report as "active leisure travelers interested in purchasing timeshare."

The survey methodology used to gather the data appearing in this report differs from that used in previous editions of *Future Timeshare Buyers: Market Profile*. Specifically, data for this study were collected through the use of a nationally representative online consumer panel, while in previous years data were collected using a combination of telephone and online panel interviews as part of the annual *Ypartnership/Yankelovich, Inc. National Leisure Travel MONITORsm*. Year-over-year comparisons of selected data points have not been included as a result. When interpreting the results, consideration should also be given to the dramatically different economic environment that prevailed during the dates that respondents were polled (January and February, 2008 versus January and February, 2009 as it relates to the *National Leisure Travel MONITORsm* and June, 2009 as it relates to the nationally representative online consumer panel), and the general effect this environment had on both the demography of those interested in purchasing some form of vacation time (more upscale) and respondents' interest in travel overall.

The error interval of all estimates appearing in this report is +/- 3% at the 95% level of confidence.

"No answers" to demography and remaining questions were excluded from the base used for calculating percentages.