

# International Shared Ownership Investment Conference (SOIC) - Aruba

## *State of the Industry*

September 26, 2018

**Howard Nusbaum**

*President & CEO*

*American Resort Development Association*

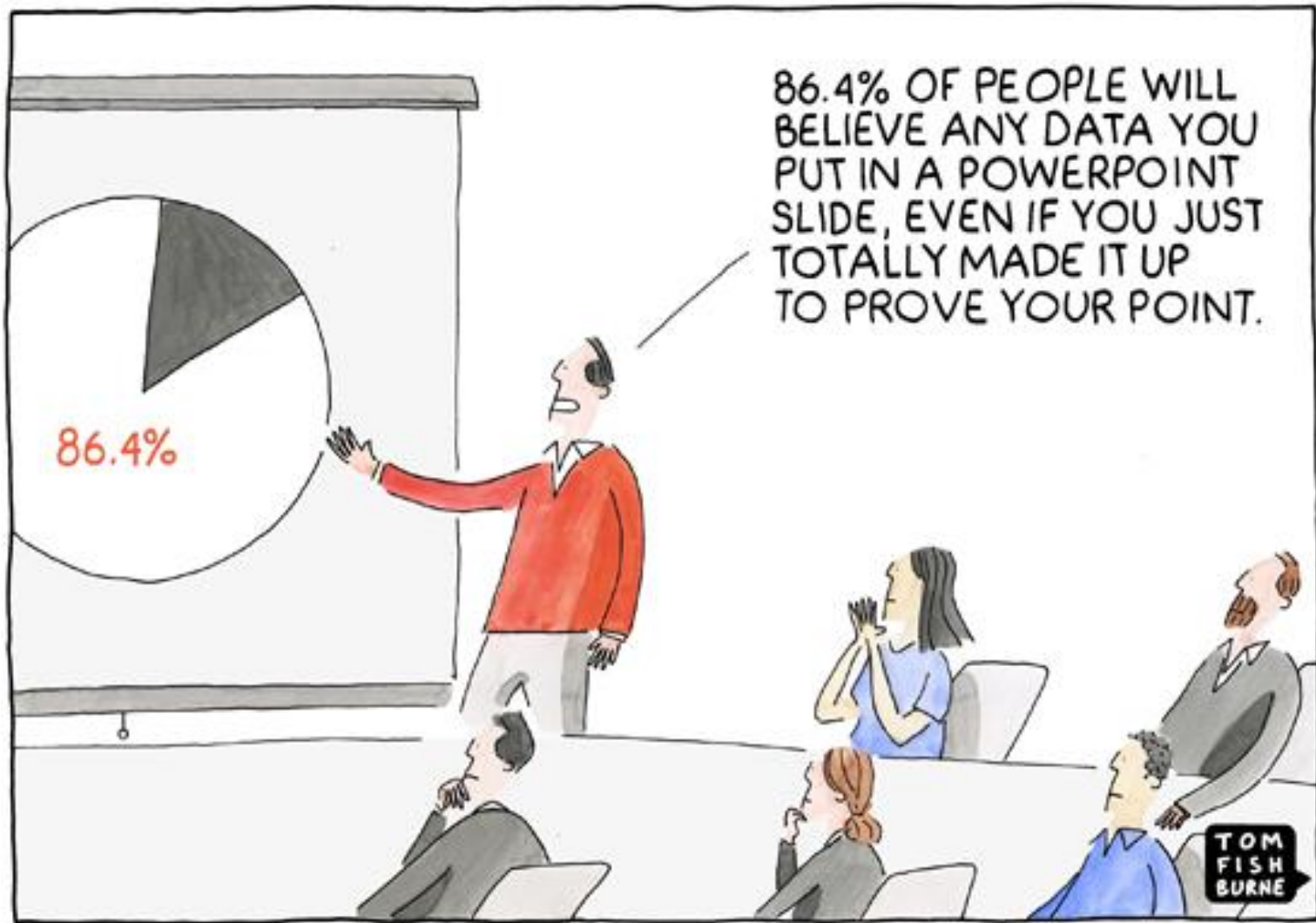


# Integrated Industry Platform



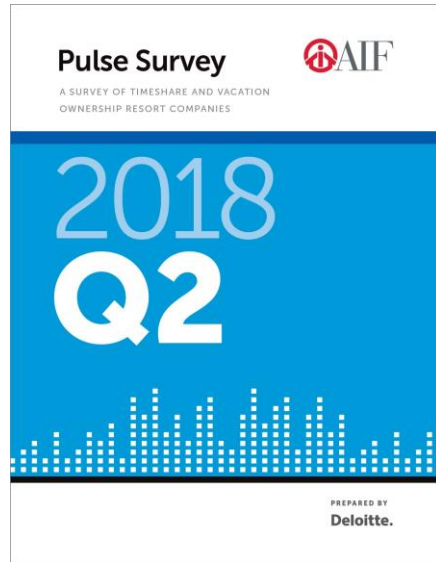
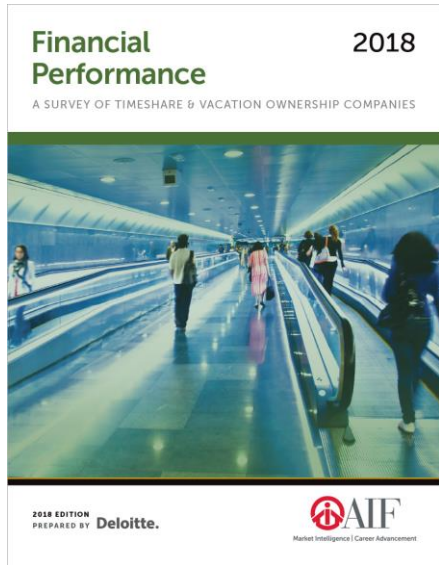
- **Advocacy**
- **Education**
- **Ethics**
- **Market Intelligence/Research**
- **Reputation Management Support**
- **Networking Opportunities**





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# AIF Research





# A Global Snapshot



# Global Key Metrics



	2015 Statistics	2010 Statistics
Resorts	5,357 in 121 countries	5,325 in 108 countries
Sales Volume	\$19.7 Billion	\$14 Billion
Rental Nights/Rate	18.1 M @ \$161	15 M / \$148
Rental Revenue	\$2.9 Billion	\$1.18 Billion
Economic Output (Total)	\$145.9 Billion	\$113.9 Billion



# Sales Volume by Region

**FIGURE 5.1** Total Sales Volume, by Region, 2013-2015 (U.S. \$ Millions)

Region	2013	2014	2015
Asia	\$541	\$581	\$706
Australasia	\$329	\$350	\$373
Caribbean	\$686	\$727	\$825
Central & South America	\$795	\$836	\$947
EMEA	\$2,402	\$2,449	\$2,537
North America	\$12,153	\$12,774	\$14,360
<b>Total, World</b>	<b>\$16,905</b>	<b>\$17,717</b>	<b>\$19,747</b>



# Global Economic Impact

**FIGURE 1.1 Shared Vacation Ownership Economic Impacts** (Direct, Indirect, and Induced)

Region	Output (U.S. \$ Millions)	Employment (Total Jobs)	Income (U.S. \$ Millions)	Taxes (U.S. \$ Millions)
Asia	\$5,260	73,088	\$1,382	\$510
Australasia	\$963	11,175	\$423	\$125
Caribbean	\$2,457	51,953	\$1,097	\$182
Central & South America	\$3,593	66,398	\$1,041	\$310
EMEA <sup>1</sup>	\$24,504	280,448	\$8,622	\$3,211
North America	\$109,213	796,081	\$32,932	\$12,582
<b>Total, World</b>	<b>\$145,990</b>	<b>1,279,144</b>	<b>\$45,497</b>	<b>\$16,920</b>





# Global Industry Size

**FIGURE 4.1** Global Industry Size, by Region

Region	Total Resorts	% of Worldwide Resorts	Total Units	% of Worldwide Units	Average Units per Resort
Asia	550	10%	37,320	7%	68
Australasia	158	3%	6,083	1%	39
Caribbean	254	5%	37,592	7%	148
Central & South America	571	11%	60,526	11%	106
EMEA	1,342	25%	92,238	17%	69
North America	2,482	46%	293,682	56%	118
<b>Total, World</b>	<b>5,357</b>	<b>100%</b>	<b>527,441</b>	<b>100%</b>	<b>98</b>



# Average Maintenance Fees

**FIGURE 5.11** Average 2015 Maintenance Fees per Interval, by Region (U.S. \$)

Region	Studio	1 Bedroom Units	2 Bedroom Units	3+ Bedroom Units	Hotel Room Units	Overall Average
Asia	\$253	\$319	\$305	\$493	\$148	\$356
Australasia	\$483	\$528	\$612	\$652	\$586	\$573
Caribbean	\$589	\$621	\$814	\$1,129	\$578	\$682
Central & South America	\$275	\$384	\$481	\$680	\$235	\$372
EMEA	\$447	\$534	\$607	\$818	\$374	\$542
North America	\$512	\$677	\$891	\$1,146	\$320	\$848
<b>Weighted Average, World</b>	<b>\$465</b>	<b>\$575</b>	<b>\$804</b>	<b>\$961</b>	<b>\$330</b>	<b>\$690</b>



# Average Occupancy Rates

**FIGURE 5.19** Shared Vacation Ownership Occupancy Rates  
2014-2015, by Region

Region	2013	2014	2015
Asia	72.3%	73.1%	75.2%
Australasia	89.8%	84.6%	90.1%
Caribbean	81.3%	81.0%	84.4%
Central & South America	72.4%	73.2%	82.7%
EMEA	74.8%	75.4%	76.4%
North America	77.0%	77.5%	80.0%
<b>Weighted Average, World</b>	<b>76.1%</b>	<b>76.4%</b>	<b>79.4%</b>



# Product Structure

**FIGURE 6.1** Types of Shared Vacation Ownership Products Offered at Properties

Region	Points	Weeks	Biennials	Triennials	Fractionals/Private Residence Clubs
Asia	52%	56%	24%	8%	4%
Australasia	27%	60%	7%	0%	7%
Caribbean	52%	72%	52%	3%	7%
Central & South America	45%	36%	27%	9%	6%
EMEA	55%	71%	15%	0%	11%
North America	58%	94%	47%	2%	15%
<b>Weighted Average, World</b>	<b>54%</b>	<b>76%</b>	<b>33%</b>	<b>3%</b>	<b>12%</b>

*Note: Respondents were allowed to select multiple choices. Weeks include traditional interval weeks (excluding biennials and triennials) and interval weeks through a points system.*



# Content to Promote the Industry

**TIMESHARE**

**SPANNING THE GLOBE**

The worldwide timeshare industry is formidable in size, diverse in makeup and optimistic about its future.

**AN ECONOMIC FORCE**

**~\$1,300,000 JOBS**

**~\$146 Billion ECONOMIC OUTPUT**

**45% DIRECT**

**55% INDIRECT**

**39% DIRECT**

**61% INDIRECT**

Generates **~\$17 Billion** in taxes

**MASSIVE REACH**

**~\$20 BILLION IN SALES** IN 2015

**ARDA**  
American Resort Development Association

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**Timeshare Industry Shows Solid Work**  
**Global Shared Ownership an Economic Force**

WASHINGTON, June 20, 2017 – The newly released **Ownership Report**, conducted by **Oxford Economics** and the **ARDA Foundation (AIF)**, once again reveals the industry is in size, diverse in makeup and ready for future growth.

The shared vacation ownership industry generated **~\$17 billion** in taxes between 2014 and 2015.

**ARDA** American Resort Development Association  
4mo

The numbers are in! With over 5,300 resorts in 121 different countries around the world, the global **#timeshare** industry is an economic force that is diverse and steadily rising in ownership. <http://bit.ly/2tTjYzJ>

**TIMESHARE**

**SPANNING THE GLOBE**

The International Timeshare Industry Has Steady Rising Ownership and a...

arda.org

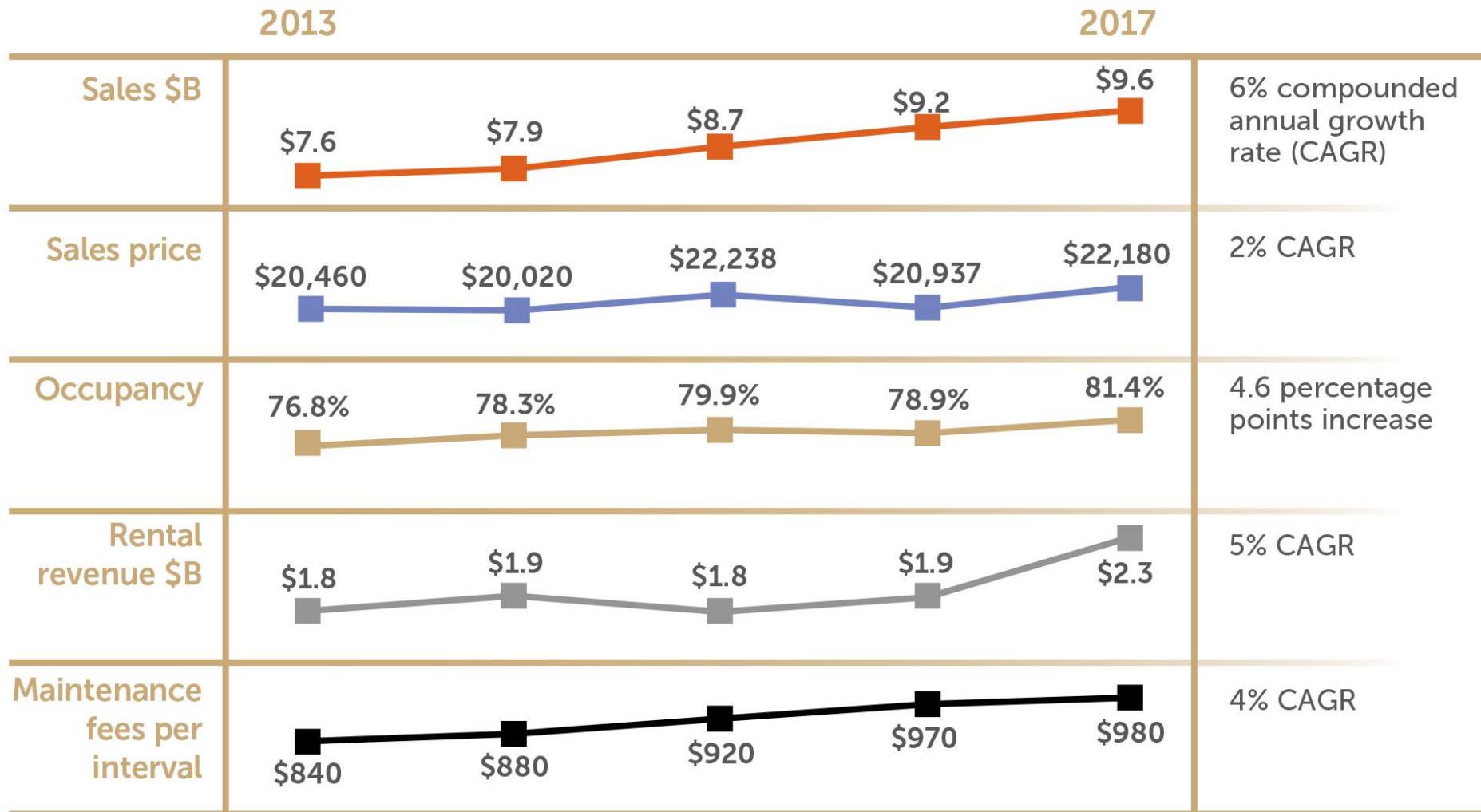
9 Likes





Snapshot of the U.S.

## RECENT PERFORMANCE TRENDS



Source: State of the U.S. Timeshare Industry – 2018 edition prepared by Ernst & Young for AIF



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Thank You...  
And now some time for questions.

