



Harnessing the Power of Traveller Segmentation

April 14, 2026

Welcome & Agenda

1. Introduction to Traveller Segmentation
2. The New Traveller Segmentation
3. TNS Segments
4. Next Steps

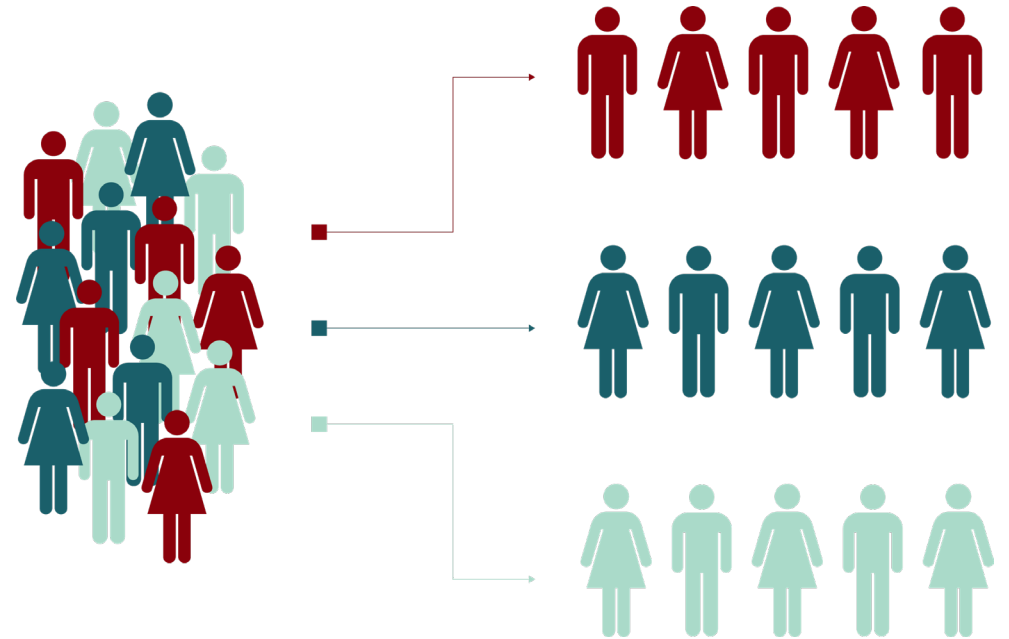
Land Acknowledgement

I want to acknowledge we are all gathered today in the traditional, ancestral lands of the Mi'kmaq, the territory known as Mi'kma'ki.



What is Segmentation

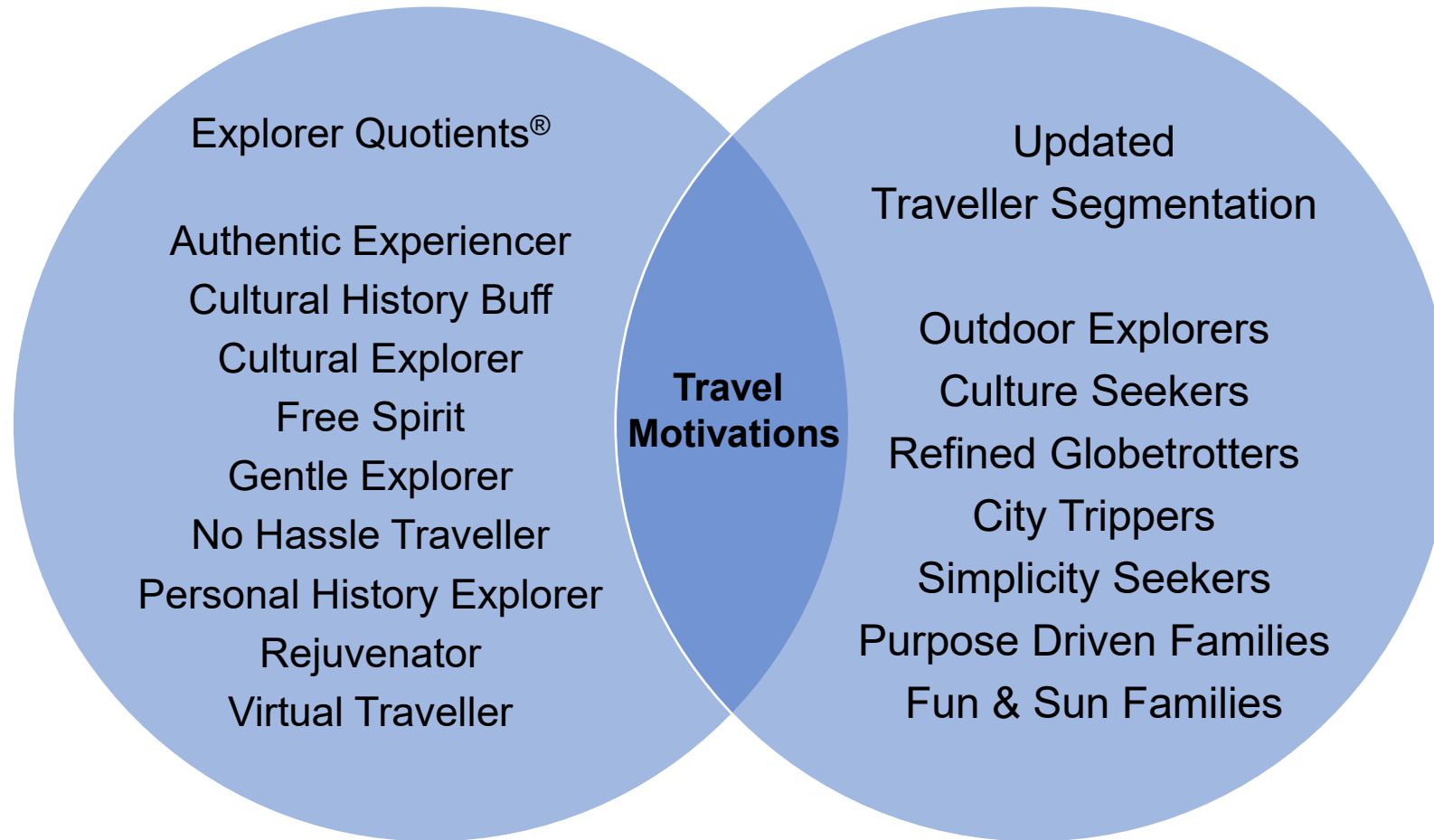
- ✓ Powerful research tool
- ✓ Groups travellers based on:
 - Demographics (age, gender, income, etc.),
 - Location (country of origin)
 - Behaviour (activity participation, spending habits)
 - Psychographics (emotional travel motivations)



Benefits of Using Traveller Segmentation

- ✓ Deepens your understanding of travellers to help you develop your product or service to attract different segment types
- ✓ Understanding what aspects of your product or service appeals to different segment types
- ✓ Makes the best use of available resources by leveraging national and provincial investment dollars
- ✓ Shows your highest markets of opportunity for targeted marketing efforts
- ✓ Gives a common understanding of traveller motivations in the tourism sector
- ✓ Helps to understand the best way to talk to your target segment

Evolving Segmentation



Emotional Travel Motivations

25 Statements

| |
|---|
| To just enjoy myself and have fun |
| To have a fun, social setting |
| To indulge myself and live in the moment |
| To feel connected with new people |
| To create new, or take part in old, traditions |
| To share quality time with others |
| To bond and create lasting memories through shared experiences |
| To let loose and forget about day-to-day life |
| To find much-needed time to relax |
| To escape the demands of everyday life |
| To feel welcomed |
| To feel safe and secure |
| To feel like a local |
| To be familiar with my surroundings |
| To enjoy the simplicity of easy, straight-forward travel |
| To feel confident of no surprises, I'll get exactly what I expected |
| To feel like a travel expert |
| To feel like I'm important |
| To feel like I've accomplished something |
| To push my limits and challenge myself |
| To have authentic experiences |
| To open my mind to new perspectives |
| To explore and discover new things and places |
| To have experiences I am proud to tell others about |
| To feel a sense of adventure |

13 Factors

| |
|-------------------|
| Fun |
| New Connections |
| Traditions |
| Bonding |
| Escape & Relax |
| Welcome & Secure |
| Familiarity |
| Simplicity |
| Expertise |
| Importance |
| Accomplishment |
| Novel & Authentic |
| Adventure |

Functional Benefits of a Destination

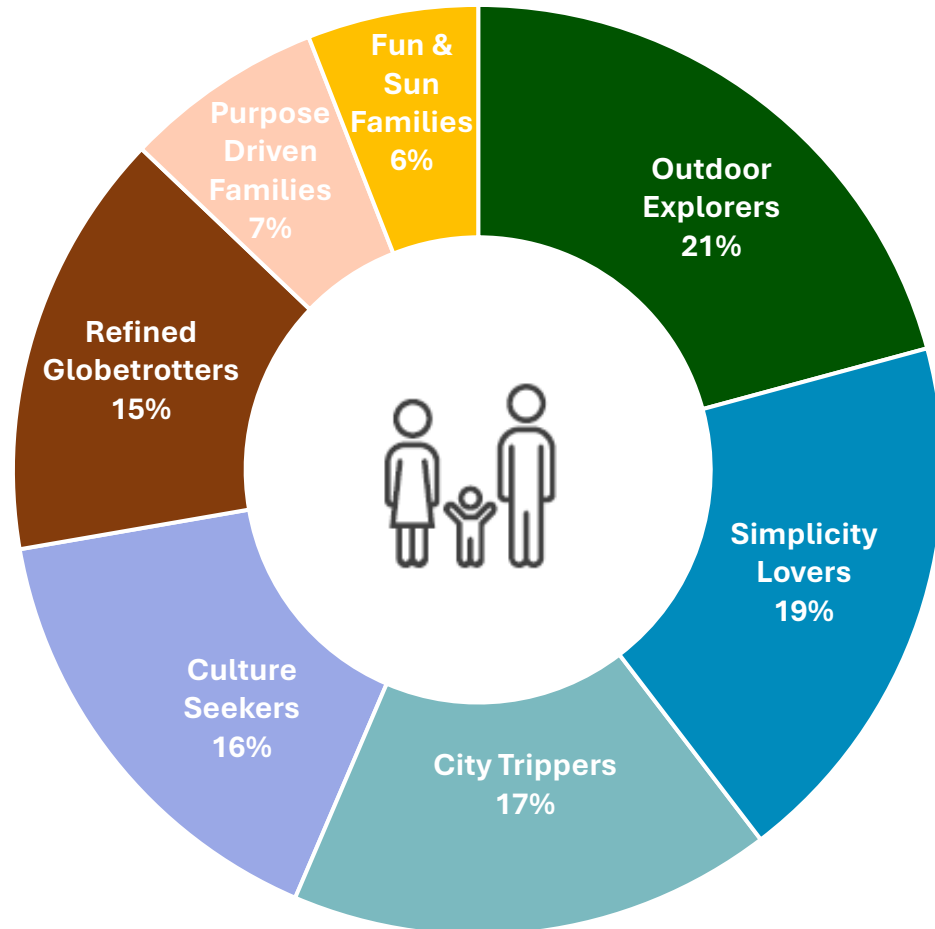
- Ability of the destination attributes and product/service offerings to meet travellers' needs
 - Landscape & scenery
 - Tourism infrastructure
 - Cultural & historic heritage
 - Availability of physical activities and leisure offerings
 - Culinary, food and beverage options
 - Affordability
 - Caters to travellers' needs (eg: family friendly, adult only, etc.)

Market Size - Canada

47M travellers

68%

TRAVELLER SEGMENTS IN CANADA





OUTDOOR EXPLORERS

- Adventurous explorers
- Find unexplored landscapes exciting
- Love challenges – learn new skills; create new traditions
- Energized by physical activities, engaging with locals
- Devoted to positive impact
- Achievement - part of personal growth



OVERALL INSIGHT

- Travel is an important milestone of personal growth, and we prioritize engaging with the unexplored.
- Motivated by adventures that challenge us, we seek a feeling of discovery and accomplishment.
- We prioritize unique, adventurous, free-spirited, and unexplored destinations.

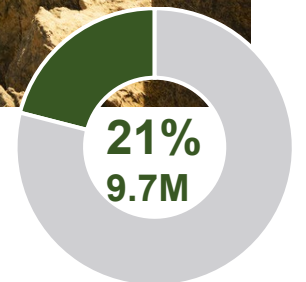
WHAT YOU NEED TO KNOW ABOUT ME

- 1** We love travel and take all types of trips (domestic / international / business / bleisure).
- 2** We are nature enthusiasts driven by a sense of accomplishment from overcoming challenges in the great outdoors.
- 3** Activity and sports help us relax, and it's our version of self-care.
- 4** Like to get off the beaten path, open to visiting places with less infrastructure and more challenging climates.



EMOTIONAL MOTIVATIONS

Adventure
Novel & Authentic Experiences
Accomplishment





OVERALL INSIGHT

- We seek mountains and backcountry, we're not deterred by a challenge.
- Guided tours that provide unique and novel access to nature are attractive.



We're always thinking of our next trip, planning well in advance



TOP DESIRED TRAVEL ACTIVITIES

- Most active of all segments
- Nature experiences
- All sports activities – high and low intensity, all season
- Water exploration, lakes, rivers, waterfalls
- Hiking
- Cultural experiences and attractions

**PRIORITIZE
SUSTAINABLE
TRAVEL**



DESIRED DESTINATION FUNCTIONAL BENEFITS

Provide access to unique natural wonders

Known for stunning natural landscapes

Provides numerous opportunities for outdoor adventures

Provides opportunities to view wildlife in its natural habitat

Offers a range of scenic viewpoints



DEMOGRAPHICS

Age: Young – old

Employment: Employed

Income: Middle/Average

Travel Party: Adults - spouse/partner, adult relatives, solo

Trip Duration: Short getaways or longer holidays



SIMPLICITY LOVERS

- Peaceful, simple, relaxed and familiar
- Easy and affordable
- Small town feel
- Stay within their comfort zone
- Loyal to regular destinations
- Need safety and straightforward travel; no surprises



OVERALL INSIGHT

- We are creatures of habit and seek familiar, temperate destinations.
- Prioritizing simplicity and serenity, we favor understated locales, and don't see the value of posting our travels online.
- Travel is a needed escape. We meander at our own pace, content to leave 'must-see' attractions unchecked.

WHAT YOU NEED TO KNOW ABOUT ME

1

We seek peace, relaxation, and familiarity in our travels, preferring easy, affordable destinations with a small-town feel.

2

We like to take it slow, with low impact activities. We don't prioritize fitting in physical activity during our trips.

3

Loyal to regular destinations, we are creatures of habit who favor simplicity and serenity over glitz, glamour, and cultural immersion.

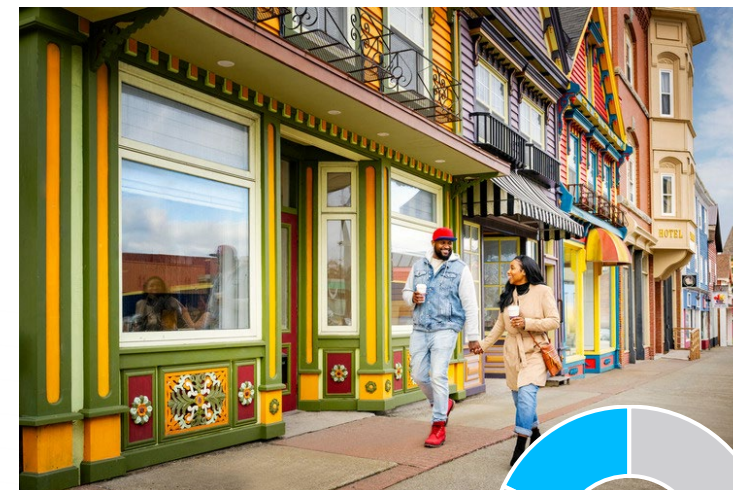
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Hard-to-reach destinations don't attract us, we want ease of access and don't want to worry about how to navigate once we arrive.



EMOTIONAL MOTIVATIONS

Escape & Relax
Security
Simplicity



19%
3.6M



SIMPLICITY LOVERS



While we generally plan, we don't book many items or activities. Often driving distance



OVERALL INSIGHT

- Our activities are low-impact, including sightseeing in nature, dining and shopping.
- We like to get outside for walks and would love to see some wildlife.



TOP DESIRED TRAVEL ACTIVITIES

- Nature experiences
- Shopping
- Local cuisine
- Local restaurants
- Cultural experiences and attractions



DESIRED DESTINATION FUNCTIONAL BENEFITS

Is not too expensive

Isn't too crowded

Provides a sense of personal safety

Has a mild and pleasant climate

Is easy to travel to

Language is not a barrier



DEMOGRAPHICS

Age: Older, 55+

Employment: Retired, less Employed FT

Income: Lower

Travel Party: Spouse/partner, adult relatives

Trip Duration: Short getaways



CITY TRIPPERS

- Independent, sociable, trendy
- Need lots of things to see and do
- Love sharing memorable experiences with friends and loved ones; showcase on social media
- Value safety and ease of travel
- Having fun, indulging, living in the moment
- Vibrant nightlife, cultural experiences



OVERALL INSIGHT

- We select destinations that offer a fun, social setting, allowing us to fully indulge and live in the moment.
- We seek experiences that we can be proud of, and that we look forward to sharing with others.
- Busy destinations with lots to see and provide a welcome atmosphere.

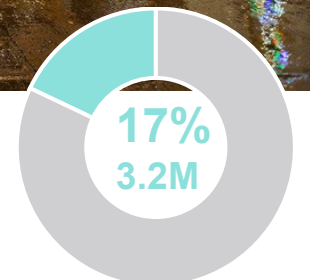
WHAT YOU NEED TO KNOW ABOUT ME

- 1 We prioritize fun and social settings and seek experiences that are worth sharing on social media.
- 2 We like the freedom to explore without an agenda, and disconnect from everyday life.
- 3 We prefer the company of friends during travels to share experiences directly. Our travel group is generally adults only.
- 4 Convenience and easy access to trendy hotspots is important, as we like to see and do as much as possible in busy and vibrant destination.



EMOTIONAL MOTIVATIONS

Fun
Escape & Relax
Bonding





CITY TRIPPERS



We plan transportation a few months in advance, but may leave other items to later



OVERALL INSIGHT

- Festivals, events and shopping are most attractive. Amusement parks and zoos / aquariums could also capture our interest.
- Nightlife, cuisine, and guided tours are also a highlights for us.



TOP DESIRED TRAVEL ACTIVITIES

- Nature experiences
- Local cuisine
- Local restaurants
- Shopping
- Cultural experiences and attractions
- Festivals and events
- Nightlife



DESIRED DESTINATION FUNCTIONAL BENEFITS

Is easy to travel around once there

Is easy to travel to

Renowned for food and drink experiences

Language is not a barrier



DEMOGRAPHICS

Age: Young-Old

Employment: Employed FT

Income: Lower

Travel Party: Spouse/partner, adult relatives, friends

Trip Duration: Short getaways



CULTURE SEEKERS

- Sociable and free-spirited individuals
- Want unique, authentic experiences; Travel is investment in themselves
- Energized by immersing themselves in new cultures
- Love vibrant city life, dynamic arts scenes, culturally rich destinations
- Diversity, inclusion and sustainability are top of mind
- Making connections with locals boosts confidence and energy



OVERALL INSIGHT

- We want to bond and create lasting memories and want to discover new perspectives.
- We feel best on vacation when we are highly active.
- We are dedicated to responsible travel, ensuring we respect the environment and engage with local communities.

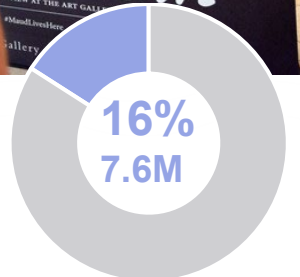
WHAT YOU NEED TO KNOW ABOUT ME

- 1 We prioritize diversity, inclusion, sustainability and supporting the local economy.
- 2 We take pride in facing challenges, and value the feeling of accomplishment when we try something different.
- 3 We try to learn the basics of the language before we travel so we can connect with new people and learn something new.
- 4 We take ownership over feeling welcomed in a destination by ensuring we travel responsibly and engage with communities.



EMOTIONAL MOTIVATIONS

Novel & Authentic Experiences
Connections
Familiarity





CULTURE SEEKERS



We generally plan within 4 months of our trip, using many info resources



OVERALL INSIGHT

- We like exploring popular places and trendy but less-travelled and independent experiences.
- We like to engage with cultural attractions and explore history and heritage.



TOP DESIRED TRAVEL ACTIVITIES

- Cultural experiences and attractions
- Museums
- Local cuisine
- Local restaurants
- Nature experiences
- Festivals and events
- Nightlife

**PRIORITIZE
SUSTAINABLE
TRAVEL**



DESIRED DESTINATION FUNCTIONAL BENEFITS

Has a rich cultural and historical heritage

Is inclusive and tolerant

Has a variety of museums and / or historical sites

Provides a variety of local festivals and events

Has a thriving arts and music scene

Has many hidden gems

Offers an energetic and dynamic cultural scene



DEMOGRAPHICS

Age: Young-Old;

Employment: Employed FT

Income: Middle, Average

Travel Party: Spouse/partner, solo

Trip Duration: Short and long trips



REFINED GLOBETROTTERS

- Experienced travellers; travel is top spending priority
- Indulge in world class destinations, exclusive experiences
- Love authentic charm of new places
- Immerse themselves in history, museums, culture
- All inclusive packages, curated and guided tours are a must
- Travel in style, well developed tourism infrastructure needs



OVERALL INSIGHT

- We seek discovery through experiences, and a sense of accomplishment through our travels.
- We want to experience luxury and indulge in world-class experiences, and tend not to think about budget.
- Joining tours and working with travel agents ensures a smooth, enlightening travel experience.

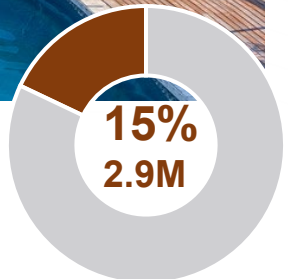
WHAT YOU NEED TO KNOW ABOUT ME

- 1 Travel is our #1 spending priority.
- 2 We have the flexibility to travel at any time of year, as our kids are grown up.
- 3 Planning how we will see the history, museums, and architecture of a destination is paramount.
- 4 We are looking for world-class and curated experiences in all aspects from dining and shopping to accommodation.



EMOTIONAL MOTIVATIONS

Novel & Authentic Experiences
Security
Bonding



REFINED GLOBETROTTERS



OVERALL INSIGHT

- Local cuisine and overall relaxation through wellness experiences are a priority.
- We like to explore historical cities, through guided tours or multiple stops on a cruise.



On average, we book 3 months in advance, even for short distances



TOP DESIRED TRAVEL ACTIVITIES

- Cultural experiences and attractions
- Museums/ Historical & archaeological sites
- Local cuisine
- Local restaurants
- Guided Tours
- City tours
- Nature experiences



DESIRED DESTINATION FUNCTIONAL BENEFITS

Has a rich cultural and historical heritage

Known for stunning natural landscapes

Has a variety of museums and / or historical sites

Has famous attractions

Renowned for food and drink experiences

Offers all-inclusive resort packages

Has luxury dining, shopping, and accommodations

Has well-developed tourism infrastructure



DEMOGRAPHICS

Age: Young-Old

Employment: Employed FT

Income: Middle, Average

Travel Party: Spouse/partner, solo

Trip Duration: Short and long trips



PURPOSE DRIVEN FAMILIES

- Ambitious and conscientious
- Need unique, kid-friendly travels
- Love trendy destinations, hidden gems that support local cultures

- Travel is family shared accomplishment and learning journey for all
- Seek out socially responsible, impressive, new experiences
- Cost and difficulty do not deter



OVERALL INSIGHT

- We value learning, engaging with local cultures, and exploring the history of our destinations.
- We use travel to bond and create memories, and we'll tackle a few challenges to achieve that.
- We are in pursuit of unique destinations that will make our friends say 'wow' when we share photos and stories.



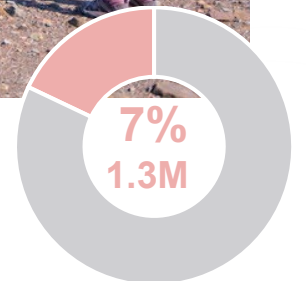
WHAT YOU NEED TO KNOW ABOUT ME

- 1 We take pride in our destination choices, and the effort it takes to reach some destinations.
- 2 Being trendy for us includes being trendsetters in travel choices and behaviours, which includes prioritizing sustainability and responsible travel.
- 3 We value being able to provide these experiences to our children, but we also appreciate how it allows us to demonstrate our success to others.
- 4 Exposure to nature, exploring the outdoors, and immersing in culture are all primary needs.



EMOTIONAL MOTIVATIONS

Bonding
Novel & Authentic Experiences
Connections





PURPOSE DRIVEN FAMILIES



OVERALL INSIGHT

- We like to explore outdoors, finding beaches, lakes, and outdoor sports to try.
- Exposing our kids to local culture, festivals, and events is important.



As busy parents, don't always plan in advance for short trips. Plan a few months out for longer trips.



TOP DESIRED TRAVEL ACTIVITIES

- Family-focused attractions
- Zoos & Aquariums
- Nature experiences
- Water; Beaches, lakes, rivers, waterfalls
- Cultural experiences or attractions
- Local cuisine

**PRIORITIZE
SUSTAINABLE
TRAVEL**



DESIRED DESTINATION FUNCTIONAL BENEFITS

Is kid-friendly

Has a rich cultural and historical heritage

Offers natural landscapes in close proximity to city amenities

Is inclusive and tolerant



DEMOGRAPHICS

Age: Young-Mid

Employment: Employed FT

Income: Middle, Average

Travel Party: Spouse/partner, kids

Trip Duration: Short and long trips



FUN & SUN FAMILIES

- Love getting away and relaxing as a family
- Need affordable, kid-friendly getaways
- Drawn to well known beaches or local spots with good communication standards

- Stay in their comfort zone, though may try a new sport or culture
- Participating in activities guided by our kids' interests
- Driven to create lasting memories together



OVERALL INSIGHT

- We seek comfortable, entertaining destinations to escape everyday demands and enjoy quality time together.
- Prioritizing value, convenience, and relaxation, we choose popular, easily accessible hotspots.
- Our priority is creating memories with our core travel group, though we appreciate and are open to exposure to new and diverse cultures.

WHAT YOU NEED TO KNOW ABOUT ME

1

We prioritize affordable, kid-friendly destinations that offer relaxation and shared family experiences, even if luxury is within reach.

2

Our trips are escapes from everyday life, focusing on creating lasting memories. Often the activities we choose are easy and fun, but sometimes we seek more adventure and excitement through more challenging sports.

3

Plan annual vacations months in advance, relying on review sites, apps, social media, and recommendations.

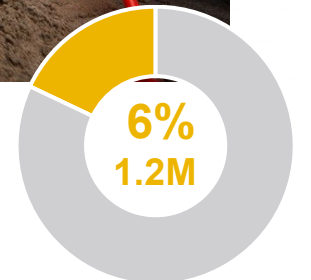
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Mostly travel within Canada, exploring popular destinations in British Columbia and Ontario, with dreams of international trips.



EMOTIONAL MOTIVATIONS

Escape & Relax
Bonding
Fun





FUN & SUN FAMILIES



OVERALL INSIGHT

- o Family-focused attractions are the #1 priority.
- o Much of our outdoor activity is spent in the water, but we also like to explore mountains and nature parks.



Plan annual holidays 4+ months in advance, including accommodations and activities



TOP DESIRED TRAVEL ACTIVITIES

- Family-focused attractions
- Amusement/Theme parks; Zoos; Aquariums
- Science centres
- Shopping
- Water based sports
- Cultural experiences or attractions
- Nature experiences
- Local cuisine



DESIRED DESTINATION FUNCTIONAL BENEFITS

Is kid-friendly

Is not too expensive

Is easy to travel around once there

Provides a sense of personal safety

Is easy to travel to

Good connectivity (Wi-Fi, cell service, etc.)



DEMOGRAPHICS

Age: Middle

Employment: Employed FT

Income: Middle, Average

Travel Party: Spouse/partner, kids, adult relatives

Trip Duration: Short and long trips

TNS Target Segments

- Extensive research by TNS
- Natural alignment with product attributes and core travel motivations.
- Fits current landscape and product offering maximizing marketing spending.
- Alignment with Destination Canada priority segments internationally (US, UK, Germany) which leverages shared resources and overall national sector development.
- Leverages and elevates existing infrastructure opportunities.
- Aligns with strategic pillars

| Primary Segments | Key Market |
|--------------------------------------|---|
| Simplicity Lovers City Trippers | NS Atlantic Canada |
| Outdoor Explorers Culture Seekers | Rest of Canada, NE US, United Kingdom, Germany |

Next Steps

Email Invitation to follow:

Identifying your organization's target segments

- How to Identify Your Best Customer Webinar
- May 13, 2026 - 9:30-11 AM
- RSVP: www.tns@novascotia.ca

Next Steps

- Connect with TNS resources to guide traveller segmentation development activities
 - Research: Amanda Tate – Amanda.Tate@novascotia.ca
 - Business Development: Nick Fry – Nick.Fry@novascotia.ca
 - Experience Development: Jessica Spooner – Jessica.Spooner@novascotia.ca
 - Marketing: Tanya Johnson – Tanya.Johnson@novascotia.ca
 - Travel Trade: Peter Johnson – Peter.Johnson@novascotia.ca
- Apply to Tourism Nova Scotia's Programs



Thank You