

# DESTINATION CANADA TRAVELLER SEGMENTATION

NANAIMO FIT ANALYSIS

*PREPARED FOR TOURISM NANAIMO STAKEHOLDERS*



# HOW WE'RE POSITIONING NANAIMO

Nanaimo's strategy leans into being a quirky, come-as-you-are arts and culture hub with unmatched access to nature right from downtown. Three distinct islands sit within a few minutes' boat ride of the harbour, each with its own character: Saysutshun, with deep Snuneymuxw cultural significance; Gabriola Island, known as an arts hub; and Protection Island, with its quirky, pirate-themed personality. Add strong hiking, waterfalls, lakes, and greenspace within city limits, and Nanaimo offers a nature-and-culture combination that's rare this close to a downtown core.

Nanaimo is competing for market space with better-known Vancouver Island destinations like Victoria and Tofino, both of which have global acclaim for their luxury offerings. Nanaimo does not yet have true luxury accommodation or dining, but what it does offer is very good, and its value for price is likely the strongest on the Island. This framing runs through the fit analysis below, particularly for segments where Nanaimo's rough-around-the-edges approach or niche brand recognition would otherwise read as a simple gap rather than a point of view.



# OUTDOOR EXPLORERS

## Segment Size:

- 3.4M

## Most Common Trip Duration:

- 1–2 days (37%)
- 3–5 days (22%)

## Average Spend:

- \$1,750–\$2,530 (Mid range)

## Planning Lead Time:

- 4 months
  - *research begins; accommodation booked around 2 months out*

## Top Travel Activities:

- Nature Experiences
- Water Sports
- High-Intensity Sports

## Emotional Travel Motivations:

- Adventure
- Novel & Authentic
- Accomplishment

## Opportunities & Strengths

- The largest segment in Canada, and a genuine match: Nanaimo's volume of nature-based product (waterfalls, mountain trails, lakes, and waterfront activity within city limits) lines up directly with this segment's core motivations of adventure and accomplishment.
- Outdoor Explorers and Culture Seekers take the most long-haul trips of any segment, and a high share stay at mid-priced hotels, the bulk of Nanaimo's accommodation base. Accommodations offering kayak or bike storage are a natural fit for this segment's independent sport activities.
- A large share of this group is double-income/no-kids, a demographic that already responds well to Nanaimo's marketing activities.
- 79% of this segment states that they like to explore places that are off the beaten path and less explored. This is Nanaimo's clearest opening; as an underrated alternative to higher-profile outdoor destinations, it can lean into being the place people haven't discovered yet, rather than competing head-on with established outdoor brands.
- 32% of the segment is travelling within Canada, drawn in particular to BC/AB.
- Quick boat access to three distinct islands (Saysutshun, Gabriola, and Protection) gives this segment an easy way to add novelty and a sense of discovery to a Nanaimo-based trip.
- Direct access via seaplane/helicopter/ferry from downtown Vancouver adds a genuinely novel arrival experience, and the local craft beverage scene offers an authentic way to unwind after a day outdoors.
- Positioning Nanaimo as the basecamp for the island; most things within a few hours drive. Why pick one part of the island to explore when you can set your home base in Nanaimo and see everything while also saving a little money on accommodation.

# OUTDOOR EXPLORERS

## Risks & Weaknesses

- Market saturation is a real risk, as many BC destinations target this segment directly.
- Notoriety competition: nearby destinations with stronger outdoor brand recognition (Tofino, Ucluelet, Squamish) may overshadow Nanaimo's offering unless it's positioned distinctly.

## Fit for Nanaimo:

### MEDIUM – HIGH

Nanaimo has the outdoor product and geography to build itineraries that closely match this segment's motivations. This segment already has BC in mind, spends well, and takes longer trips than most others. Because they're actively seeking off-the-beaten-path travel, Nanaimo's underrated status can work in its favour, positioning it as a discovery rather than a competitor to better-known outdoor brands. Framing Nanaimo as an easy-to-reach basecamp, not a remote destination, helps counter the saturation risk.



## KEY PRODUCTS & EXPERIENCES IN NANAIMO

- Independent waterfront activity: kayaking, canoeing, paddleboarding, snorkelling, diving, fishing
- Guided waterfront activities: Vancouver Island Whale Watch, Island Romer Adventures, Coastal Expression)
- Hiking and biking: Mount Benson, Ammonite Falls, etc
- A network of lakes for swimming and paddling (Long Lake, Westwood, Nanaimo Lakes)
- City parks offering land-based whale watching
- Island-hopping to Satsisutshun, Protection, and Gabriola
- WildPlay Elements part for higher-adrenaline activity
- Mid-priced, waterfront-adjacent accommodations with kayak or bike storage
- Local craft breweries and cideries
- Direct seaplane service from downtown Vancouver



# CULTURE SEEKERS

## Segment Size:

- 3.2M

## Most Common Trip Duration:

- 1–2 days (32%)
- 3–5 days (20%)

## Average Spend:

- \$2,700 (Mid range to Premium)

## Planning Lead Time:

- 3.7 months
  - research begins; booking begins around 2.2 months out

## Top Travel Activities:

- Cultural Experiences & Attractions
- Festivals & Events
- Cuisine

## Emotional Travel Motivations:

- Novel & Authentic
- Connections
- Familiarity

## Opportunities & Strengths

- Second-largest and highly travel-driven segment in Canada; Nanaimo already markets itself as an arts and culture hub, which aligns directly with what this segment is looking for.
- This segment prioritizes diversity and inclusion, which fits well with Nanaimo's "Come As You Are" positioning.
- Local cuisine matters greatly to this group. Nanaimo's independent, locally-owned restaurant scene, from heritage-home fine dining to international cuisine, is a direct match.
- Higher-income, higher-spend group that's also more likely to shop and dine locally, a strong fit for supporting Nanaimo's small businesses.
- Historically travels across Canada, with BC among their top destinations alongside Ontario, Quebec, Nova Scotia, and New Brunswick.
- Three islands within minutes of downtown, each with a different character (Saysutshun's cultural significance, Gabriola's arts-hub identity, Protection Island's quirky personality), give this segment an unusually rich, compact cultural itinerary.
- Breadth of cultural activity, festivals, music events, Gallery and Museum refreshed give this segment the novel, cultural experience they are seeking.

# CULTURE SEEKERS

## Risks & Weaknesses

- Market saturation: larger, well-known cities offer bigger-scale arts and culture events than Nanaimo can match.
- This segment is generally drawn to bustling cities; Nanaimo is a smaller, more relaxed urban centre, so the experience needs to be positioned as intentionally different, not as a smaller version of what's available elsewhere.

## Fit for Nanaimo:

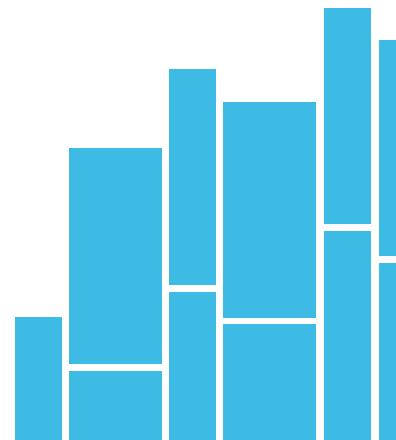
### HIGH

This segment is driven by cultural immersion and by supporting the local economy. Nanaimo's arts, culture, and culinary offering is deep enough to build year-round itineraries around. Its "quirky, come as you are" identity, reinforced by three culturally distinct islands minutes from downtown, is a genuine point of difference rather than a smaller-scale copy of what Victoria or Vancouver offer, which helps offset the risk of being overlooked in favour of bigger cultural hubs.



## KEY PRODUCTS & EXPERIENCES IN NANAIMO

- Museums and Galleries: Nanaimo Museum, Vancouver Island Military Museum, and Nanaimo Art Gallery, Bainzy Art Gallery
- Port Theatre performances
- Festivals: Snunéymuxw Days, Pride, Luminous Paths, Fringe Festival, Blues Festival
- Culinary: The Nanaimo Bar Trail, Dine About Mid Island, strong roster of locally owned restaurants.
- A regular downtown night market and other community events
- Island-hopping to Saysutshun, Gabriola, and Protection





# REFINED GLOBETROTTERS

## Segment Size:

- 2.9M

## Most Common Trip Duration:

- 1–2 days (35%)
- 3–5 days (19%)

## Average Spend:

- \$4,890 (Premium to High-End Luxury)

## Planning Lead Time:

- 4.8 months
  - *research begins; accommodation booked around 3.5 months out*

## Top Travel Activities:

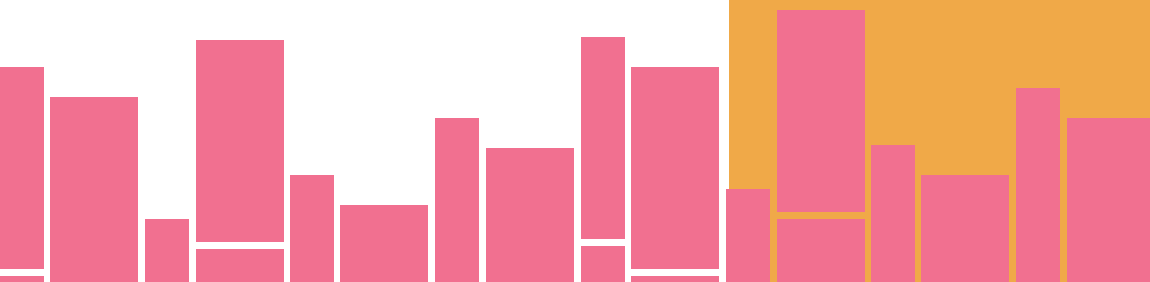
- Cultural Experiences & Attractions
- Cuisine
- Guided Tours

## Emotional Travel Motivations:

- Novel & Authentic
- Security
- Bonding

## Opportunities & Strengths

- 41% of this segment still choose mid-priced hotels despite budget not being a driver, a sign that price isn't the primary lever needed to win this group over.
- Nanaimo's culinary scene is a genuine surprise for a destination this size, which plays directly into this segment's "novel and authentic" motivation.
- Travel is this segment's top spending priority, and their flexibility to travel any time of year (their children are grown) means Nanaimo isn't limited to competing for them in peak season only.
- Their likely next Canadian destinations, BC, Nova Scotia, and Quebec, already include this region.
- Fast, low-hassle downtown-to-downtown transportation by seaplane or helicopter suits this segment's preference for convenience and predictability, even without a dedicated luxury resort to anchor the visit.



# REFINED GLOBETROTTERS

## Risks & Weaknesses

- Nanaimo doesn't yet have true luxury accommodation or dining, which this segment may be seeking. That's not a reason to write the segment off; Nanaimo's quality and value for price are genuinely strong, but it does mean Nanaimo can't yet compete head-on with destinations built around luxury.
- This segment tends to gravitate toward well-known, developed destinations with curated experiences, closer to Europe, cruises, and tropical destinations than to a hidden-gem approach, and they're not particularly driven by culture or supporting the local economy, so Nanaimo's strongest selling points may not be the ones that move this group.

## Fit for Nanaimo:

**LOW**

This segment has real spending power and flexibility, but their pull toward established, curated, luxury travel doesn't match where Nanaimo's product currently stands. Nanaimo's value-for-price advantage is genuine, but for a segment where budget isn't the constraint, value alone is unlikely to be the deciding factor.

## KEY PRODUCTS & EXPERIENCES IN NANAIMO

- Guided wildlife and whale-watching tours
- Tours through the Nanaimo Museum, Vancouver Island Military Museum, and Nanaimo Art Gallery
- A genuinely good, if not yet luxury-tier, dining scene
- Fast, direct seaplane or helicopter service from Vancouver



# PURPOSE DRIVEN FAMILIES

## Segment Size:

- 2.9M

## Most Common Trip Duration:

- 1–2 days (35%)
- 3–5 days (19%)

## Average Spend:

- \$4,890 (Premium to High-End Luxury)

## Planning Lead Time:

- 4.8 months
  - *research begins; accommodation booked around 3.5 months out*

## Top Travel Activities:

- Cultural Experiences & Attractions
- Cuisine
- Guided Tours

## Emotional Travel Motivations:

- Novel & Authentic
- Security
- Bonding

## Opportunities & Strengths

- Nature, the outdoors, and cultural immersion are this segment's primary needs, a close match for what Nanaimo already offers, without sacrificing comfortable amenities.
- This group is partially budget-driven but willing to spend on experiences that matter to them. An itinerary built around a few key experiences plus outdoor time plays to Nanaimo's strengths.
- This segment uses official tourism websites for planning, which allows us to impact their decision making directly and early on.
- They look specifically for kid-friendly access to nature and culture, both readily available in Nanaimo's parks, museums, and family programming.
- They travel domestically within Canada often, giving Nanaimo more opportunities to catch their attention and draw them in
- Family-friendly accommodation with pools and increasingly family-friendly brewery patios support comfortable, multi-day stays close to downtown attractions.



# PURPOSE DRIVEN FAMILIES

## Risks & Weaknesses

- Nanaimo currently has limited large-scale, resort-style family accommodation compared to nearby Parksville and Qualicum Beach, which may pull this segment's longer week-long stays toward those destinations instead.
- Timing constraints for travel; both a strength and a weakness. This segment's travel patterns depend highly on holidays. They travel throughout the year on these dates, supporting some dispersion over fall and winter break, however they will primarily be travelling during high density periods.



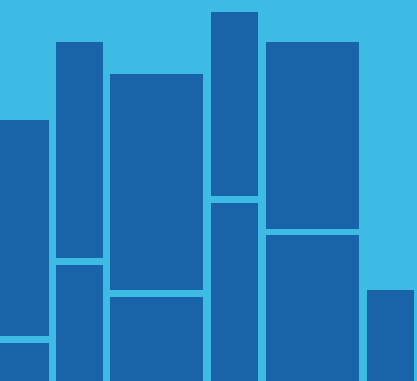
## Fit for Nanaimo:

### MEDIUM - HIGH

Nanaimo's affordable, accessible mix of outdoor and family-oriented cultural attractions matches this segment's motivations of bonding, novelty, and connection well, and its use of official tourism resources for planning plays to Tourism Nanaimo's strengths as a trusted source.

## KEY PRODUCTS & EXPERIENCES IN NANAIMO

- Watersport activities: Swimming, paddleboarding, kayaking, and biking (including e-bikes) along the waterfront
- Beaches
- WildPlay Elements Park
- Hands-on programming at the Nanaimo Museum and Nanaimo Art Gallery
- Festivals and community events
- A short boat trip to Saysutshun
- Pool-equipped, family-friendly accommodation
- Kid-welcoming brewery patios



# CITY TRIPPERS

## Segment Size:

- 3.2M

## Most Common Trip Duration:

- 1–2 days (36%)
- 3–5 days (20%)

## Average Spend:

- \$1,510–\$2,060 (Mid range)

## Planning Lead Time:

- 4.7 months
  - *research begins; accommodation booked around 3.2 months out*

## Top Travel Activities:

- Shopping
- Cuisine
- Festivals & Events

## Emotional Travel Motivations:

- Fun
- Escape & Relax
- Bonding

## Opportunities & Strengths

- This segment values the freedom to explore without a fixed agenda, a good match for Nanaimo's walkable, self-guided downtown.
- Shopping, cuisine, and festivals are this segment's top draws; Nanaimo's downtown shopping district and food scene give them something to do, even at a smaller scale than they may be used to.
- Most of their trips focus on exploring new cities or towns, and their Canadian travel already spans Ontario, Quebec, the Prairies, and BC.
- Anecdotal stakeholder feedback states that city travellers find Nanaimo's shopping competitively priced.
- Nanaimo has a thriving vintage and thrifting scene, which supports a fun, self-guided "treasure hunt" approach to shopping that aligns with this segment.



# CITY TRIPPERS



## Risks & Weaknesses

- Nanaimo's nightlife exists but is smaller in scale than the after-dark scene this segment typically seeks in bigger cities.
- This segment is generally drawn to busy, high-stimulation destinations and doesn't tend to prioritize local or eco-conscious travel choices, both somewhat at odds with Nanaimo's more relaxed, island-paced identity.
- They tend to stick to popular, well-trafficked areas, which favours larger centres over a smaller destination like Nanaimo.

## Fit for Nanaimo:

### **MEDIUM - LOW**

Nanaimo's walkable downtown, shopping, and festival calendar give City Trippers something to do on a self-guided visit, but this segment is generally drawn to bigger, busier destinations with more nightlife and retail scale than Nanaimo currently offers. Nanaimo is more likely to work for this segment as a day trip or short add-on than as a primary city-break destination.

## KEY PRODUCTS & EXPERIENCES IN NANAIMO

- Downtown shopping district
- Food and culinary trail
- Festivals and night markets
- Larger retail centres outside downtown



# SIMPLICITY LOVERS

## Segment Size:

- 3.6M

## Most Common Trip Duration:

- 1–2 days (33%)
- 3–5 days (15%)

## Average Spend:

- \$1,290–\$2,390 (Mid range)

## Planning Lead Time:

- 4.7 months
  - *research begins; accommodation booked around 3.6 months out*

## Top Travel Activities:

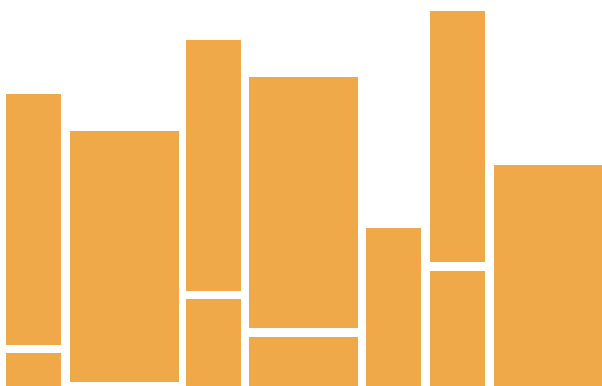
- Nature Experiences
- Shopping
- Casual Sports

## Emotional Travel Motivations:

- Escape & Relax
- Security
- Simplicity

## Opportunities & Strengths

- This segment favours destinations with comfortable weather and quiet, low-key experiences over luxury, a genuine fit with Nanaimo's parks, waterfront, and small-town pace.
- They tend to return to the same destination repeatedly, which makes them a strong long-term target if a first visit lands well.
- Small-city and small-town itineraries resonate with this segment, and they prefer nearby, easy-to-reach, uncrowded destinations, all consistent with what Nanaimo offers.
- They favour travelling within Canada because it feels predictable and safe, and Nanaimo's mix of recognized hotel chains supports exactly that “no surprises” expectation.
- Considering Ontario, BC, Alberta, or the East Coast for their next Canadian trip.



# SIMPLICITY LOVERS

## Risks & Weaknesses

- This segment avoids destinations that feel hard to reach, and being on an island can create a perception of difficulty for Nanaimo, even though direct, fast options (seaplane and passenger ferry service) make it a genuinely easy trip. Leading with ease-of-access messaging can directly counter this misconception.
- This is a conservative-budget segment, and travel isn't their top financial priority; savings and investments come first, so Nanaimo's affordability needs to be a headline message, not an assumed advantage.

## Fit for Nanaimo:

### MEDIUM

This segment's preference for quiet, uncrowded, reasonably priced destinations lines up well with Nanaimo's product, and familiar hotel brands support the predictability they're looking for. Because travel isn't their top spending priority, Nanaimo needs to lead clearly with value and ease-of-access messaging, directly addressing the misconception that Vancouver Island is hard to reach, to convert interest into bookings.

## KEY PRODUCTS & EXPERIENCES IN NANAIMO

- Low-intensity walking trails, marshland, and lakeside greenspace: Morell Nature Sanctuary, Waterfront Walkway, Bowen Park, Westwood Lake
- A downtown and Old City Quarter that's easy to browse without crowds
- Recognized hotel chains
- Public golf courses



# FUN & SUN FAMILIES

## Segment Size:

- 1.2M

## Most Common Trip Duration:

- 1–2 days (36%)
- 3–5 days (13%)

## Average Spend:

- \$3,520 (Mid range to Premium)

## Planning Lead Time:

- 4.3 months
  - research begins; booking begins around 3.3 months out

## Top Travel Activities:

- Family-Focused Attractions
- Shopping
- Water Sports

## Emotional Travel Motivations:

- Escape & Relax
- Bonding
- Fun

## Opportunities & Strengths

- This segment prioritizes affordable, kid-friendly, relaxing destinations over luxury, even when luxury is within reach, a good match for Nanaimo's value positioning.
- Mostly travels within Canada, especially BC and Ontario, with international trips as a longer-term goal.
- Prioritizes value, convenience, and relaxation above all else.
- Shows a shoulder-season travel pattern (spring and fall breaks, plus summer), which is an opportunity for Nanaimo to capture visits outside peak season.
- Spends most outdoor time in the water, but also enjoys mountains and nature parks.
- Pool-equipped, family-friendly accommodation supports this segment's beach and water-based itineraries.

# FUN & SUN FAMILIES

## Risks & Weaknesses

- This segment avoids destinations that feel hard to reach, so Nanaimo needs to actively counter the perception that Vancouver Island is difficult to get to.
- Their trips typically centre on beaches and destinations known specifically for family attractions; Nanaimo has genuine beach product but isn't the best-known family-beach destination on the Island, which puts it in competition with Victoria and Parksville, where more resort-style family accommodation already exists.

## Fit for Nanaimo:

### **MEDIUM - LOW**

Nanaimo has real beach and water-based family product at a strong price point, but Parksville and Qualicum Beach are more established in this segment's mind as Vancouver Island's family-beach destinations. Nanaimo is likely a stronger fit as an affordable alternative or add-on stop for this segment than as the primary beach destination, especially if shoulder-season value is part of the message.



## KEY PRODUCTS & EXPERIENCES IN NANAIMO

- Beaches
- Self-guided kayaking and paddleboarding
- WildPlay Elements Park
- Guided wildlife tours; Vancouver Island Whale Watch, Island Romer Adventures, Coastal Expression
- Parks and trails around the harbour
- Pool-equipped, family-friendly accommodation