Travel Lifestyle Segmentation 5 (TLS5) Characteristics and Applications of Each Type

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株式会社 JTB総合研究所
JTB Tourism Research & Consulting Co.

Travel Lifestyle Segmentation 5 Renewed Based on Travel Values and Behavior

1

Empathetic Curator
Pursuing what they love, while making the most of both their aspirations and their time



2

My Standard
Valuing personal favorites and living a healthy, comfortable life



3

Explorer
Enjoying encounters with the unknown and turning discoveries into learning



4

Smart Consumer
Managing everyday life efficiently and responsibly for the people who matter most



5

Authentic Connector
Being true to oneself while expanding connections with people and local communities



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What Is Travel Lifestyle Segmentation 5 (TLS5)?

Values that demographics alone cannot capture

- Travel and lifestyles change with age, life stage, and other attributes.
- Yet even people with similar attributes live and travel differently.
- These differences reflect individual values, priorities, and ways of thinking.

Understand values and clarify target audiences

- As values and behavior diversify, products designed for everyone can lose their distinctiveness and end up appealing to no one in particular.
- Visualize values and purchasing preferences to clarify what to offer and to whom.
- Use these insights to develop products, services, and initiatives for each set of values and needs.

Understand travelers through their values and travel styles, not demographics alone.

Our proprietary traveler classification and analysis framework
Travel Lifestyle Segmentation 5 (TLS5), Renewed

- ✓ Reconfigured into five types by incorporating emerging values and changes in the travel environment.
- ✓ TLS5-specific questions classify survey respondents into five types. Combining the results with demographic, travel, and purchasing data helps define target profiles and relevant initiatives.

Empathetic Curator



My Standard



Explorer



Smart Consumer



Authentic Connector



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TLS5 | Value Factors by Traveler Type

Share of main-survey respondents	**Empathetic Curator** 18.2%	**My Standard** 16.1%	**Explorer** 16.4%	**Smart Consumer** 18.3%	**Authentic Connector** 31.0%
A: Efficiency	○	○	–	◎	▼
B: Social contribution	▽	–	○	▼	▽
C: Adventure	○	▽	◎	▼	–
D: Digital orientation	○	▼	–	○	○
E: Security and empathy	◎	–	▼	▼	○
F: Discerning consumption	▽	◎	–	–	–
G: Authenticity	▼	–	▼	○	◎
H: Conformity	▽	○	▽	○	–
	 ▪ Relatively high share of younger women ▪ Find fulfillment in achieving dreams and goals ▪ Want to turn interests into work and pursue multiple careers ▪ Research reviews carefully to avoid disappointment ▪ Prefer to avoid unexpected events ▪ Enjoy sharing popular local products with family and friends	 ▪ Somewhat older age profile and higher share of women ▪ Want to preserve Japanese traditions and culture ▪ Prefer familiar brands ▪ Care about food origins and safety ▪ Highly interested in sightseeing and relaxing at hotels or ryokan inns ▪ Seek authentic items such as traditional crafts	 ▪ Somewhat older age profile and near-even gender split ▪ See meaning in seemingly unproductive time ▪ View failure as an opportunity to learn ▪ Prefer pursuing personal interests ▪ Find fulfillment in learning and discovery ▪ Seek surprise, discovery, extraordinary experiences, and solo travel	 ▪ Mid-range age profile and near-even gender split ▪ Prefer to complete tasks quickly ▪ Find fulfillment in helping family ▪ Prioritize job stability ▪ See neighborhood ties as useful for avoiding trouble ▪ Food is central to travel ▪ Prefer support from AI or people for trip planning	 ▪ Relatively high share of younger men ▪ Consider brand recognition and environmental practices ▪ Avoid wasting time and use speed controls or skipping ▪ Spend time and money on beauty and training ▪ Want to interact with locals and pursue hobbies while traveling ▪ Buy traditional crafts to feel connected to destinations

Contribution to value factors

◎ 0.5 or higher
○ 0.2 or higher
– -0.2 to under 0.2
▽ -0.2 or lower
▼ -0.5 or lower

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Application 1 | Targeting Strategy

Q **When seeking to attract visitors to a destination, who should be the primary target and what approach should be taken?**

A **TLS5 helps identify highly compatible target audiences and develop initiatives aligned with their values.**

*The following is an illustrative example of how TLS5 can be used.

STEP 1

Compare Visit Intention by TLS5 Type

- People interested in the target destination include a higher share of Authentic Connectors than those interested in competing destinations.
- Authentic Connectors are therefore selected as the primary target.

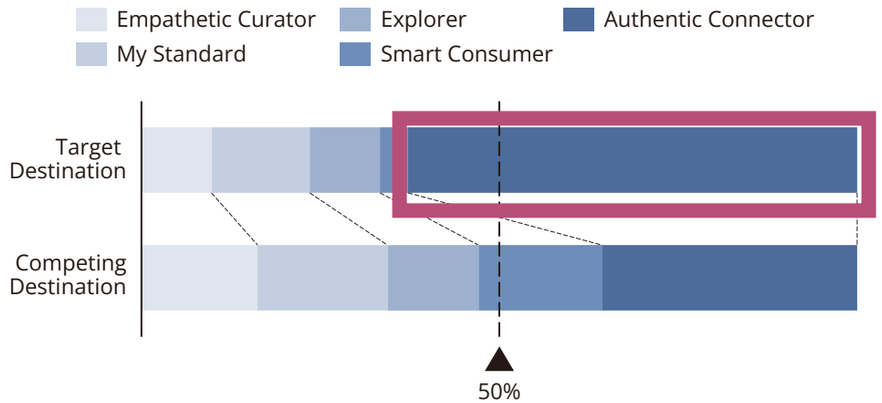


Figure: TLS5 composition among people interested in visiting the target and competing destinations

Set the Target

Authentic Connector



STEP 2

Review Values and Develop Initiatives

- Authentic Connectors tend to seek opportunities to expand their networks and contribute to destinations.
- **Connections with local people and industries**, volunteering, environmentally responsible products and services, and crowdfunding can strengthen attachment and encourage ongoing engagement.

	Empathetic Curator	My Standard	Explorer	Smart Consumer	Authentic Connector	**Average**
To savor local culinary specialties	70.1 (+ 13.5)	67.5 (+ 11.0)	66.9 (+ 10.4)	59.8 (+ 3.3)	35.4 (- 21.1)	56.5
To spend quality time with family and friends	56.2 (+ 15.1)	46.4 (+ 5.3)	42.0 (+ 0.9)	38.6 (- 2.4)	30.4 (- 10.7)	41.1
To experience the "extraordinary" through novel landscapes and distinct cultures	43.9 (+ 4.2)	48.8 (+ 9.2)	58.0 (+ 18.4)	34.4 (- 5.2)	25.7 (- 13.9)	39.6
To engage with local history and heritage	28.9 (+ 2.4)	36.1 (+ 9.6)	39.1 (+ 12.5)	18.5 (- 8.0)	18.2 (- 8.3)	26.5
To provide educational and enriching experiences for children	19.8 (+ 2.6)	14.5 (- 2.7)	14.8 (- 2.4)	20.6 (+ 3.4)	16.3 (- 0.9)	17.2
To leverage travel experiences for career growth and professional networking	2.1 (- 3.0)	2.4 (- 2.7)	3.0 (- 2.2)	0.5 (- 4.6)	12.2 (+ 7.1)	5.1
To contribute meaningfully to the destination	1.6 (- 2.2)	1.2 (- 2.6)	0.6 (- 3.2)	0.5 (- 3.3)	10.0 (+ 6.2)	3.8

Figures represent the percentage of responses for each segment; numbers in parentheses indicate the difference from the overall average (pt). Some items are excerpted.

Figure: What travelers seek from travel, by TLS5 type

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Application 2 | Reviewing Target Overlap and Coverage Across Product and Service Brands

Q **When offering multiple products and services, how should the intended audience for each be organized?**

A **Combining TLS5 with life stage visualizes each brand's target audience, including overlaps and gaps.**

*Illustrative example of how TLS5 can be used.

Process for Organizing and Reviewing Targets

1 **Map**

Map each brand's target by TLS5 type and life stage

2 **Review**

Brands G and H target the same life stage and TLS5 type, creating an overlap.

At the same time, some areas have no brand coverage.

3 **Reassess**

Define priority and non-priority areas, then review each brand's role, positioning, and portfolio.

	Empathetic Curator	My Standard	Explorer	Smart Consumer	Authentic Connector
Single	Brand A				Brand E
DINKS		Brand B			
Family				Brand D	
Empty Nester			Brand C		
Senior		Brand F	Brand G Brand H		

Are all necessary targets covered?

Do targets overlap?

Figure: Product and service brand positioning by life stage and TLS5 type

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Characteristics of the 5 Types

Profiles viewed through values, lifestyle, spending priorities, and travel style

Empathetic Curator



My Standard



Explorer



Smart Consumer



Authentic Connector



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Empathetic Curator | Pursuing what they love, while making the most of both their aspirations and their time



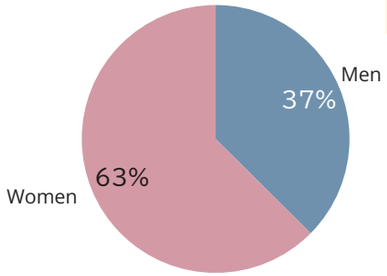
Key Characteristics

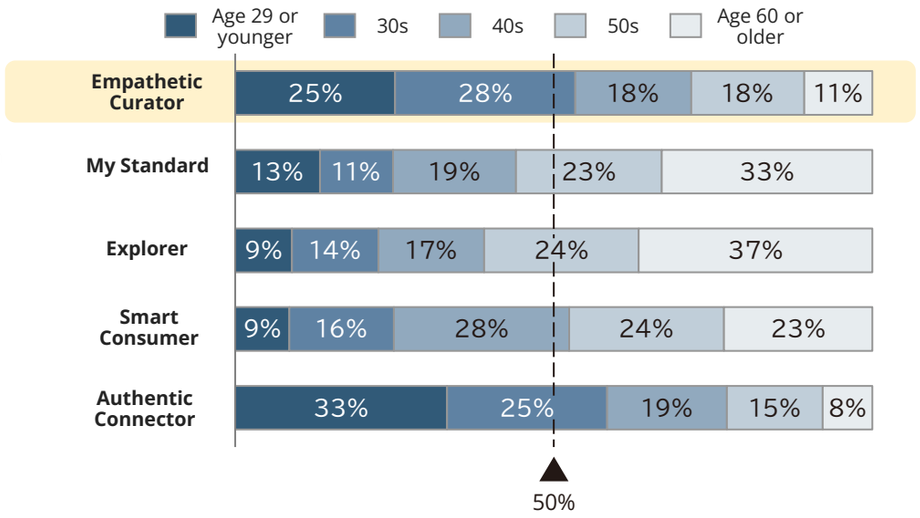
- Relatively high share of people in their late 20s and 30s
- Find fulfillment in achieving personal dreams and goals
- Want to turn what they love into work and pursue multiple careers
- Check reviews carefully and prefer to plan and book trip details in advance
- Want memorable or popular items from destinations
- Use corporate and user-generated social media posts as information sources

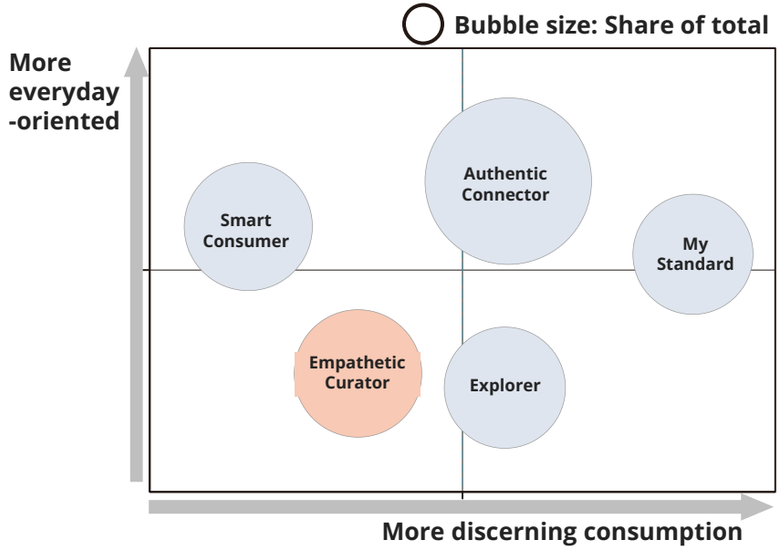


Basic Profile

- Higher share of women and a relatively younger age profile
- Relatively low everyday orientation and selective consumption, with fewer fixed conventions







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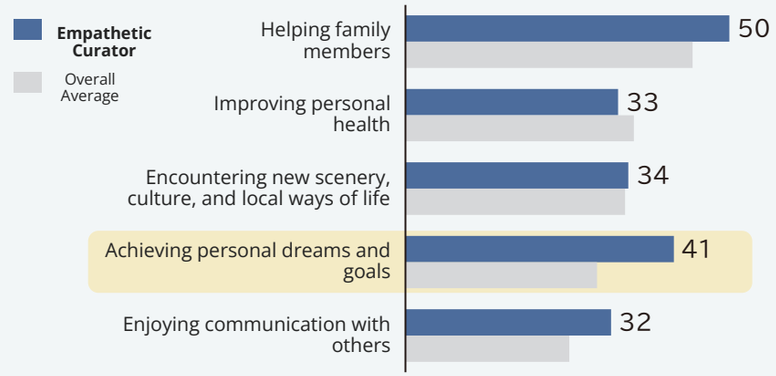
Empathetic Curator | Values, Consumption, and Travel Style
Pursuing what they love, while making the most of both their aspirations and their time

Lifestyle

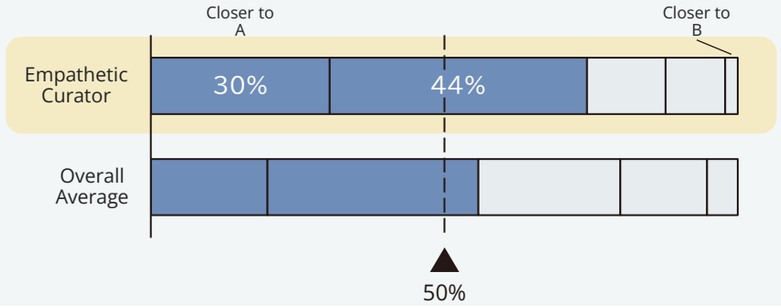
Living and working authentically and efficiently
Many find fulfillment in achieving personal dreams and goals.
Many want to turn what they love into work and are open to multiple careers, including side jobs.
They often multitask, such as doing another activity while watching videos.

Sources of Fulfillment (multiple responses)

(%), top five overall items



A: Often multitasks / B: Rarely multitasks

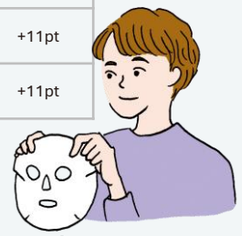


Spending Priorities

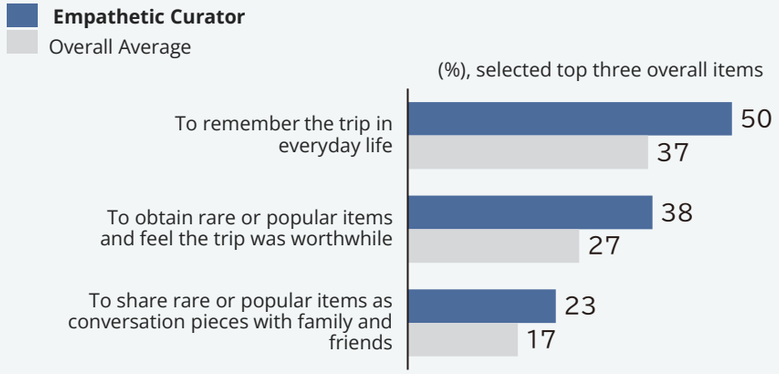
Investing in what they love, from hobbies to beauty
Spend selectively on hobby equipment, collections, beauty products, clothing, and fashion.
Design is the top consideration when choosing fashion.
At destinations, they buy memorable or popular items for themselves.

Areas of Selective Spending (multiple responses)

	Empathetic Curator	Overall Average	Difference
Hobby equipment and collections	35%	23%	+12pt
Beauty and cosmetics	29%	18%	+11pt
Clothing and fashion	30%	19%	+11pt



Reasons for Buying Souvenirs (multiple responses)



Travel Style

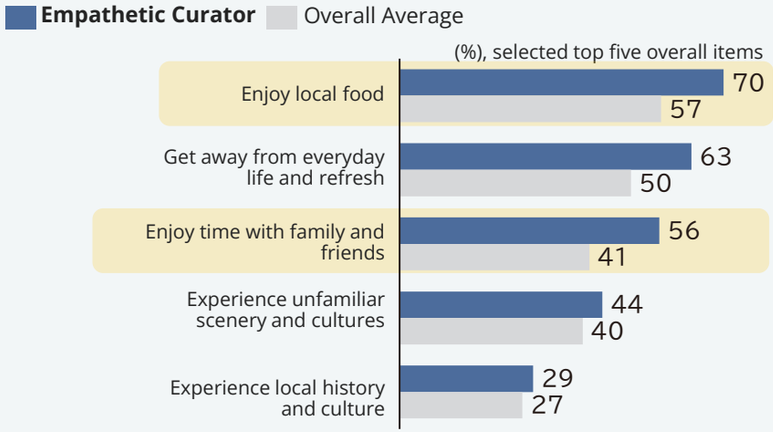
Plan carefully and enjoy travel with loved ones
Prefer to plan and book trip details in advance.
Enjoy food-focused trips and visits to famous attractions.
Seek quality time with family and friends and opportunities to enjoy local cuisine.



Attitudes toward Travel

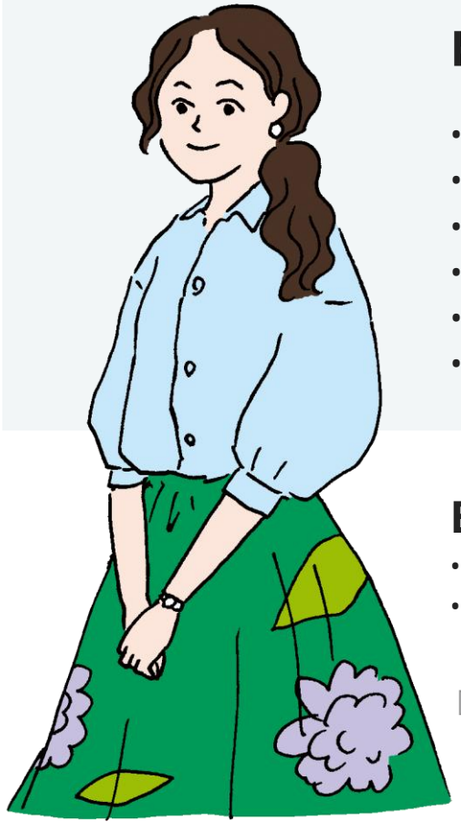
- Avoid crowds and queues whenever possible
- Plan and book details in advance
- Feel unsettled when plans change
- Use review sites and social media for important decisions

What Travelers Seek from Travel (multiple responses)



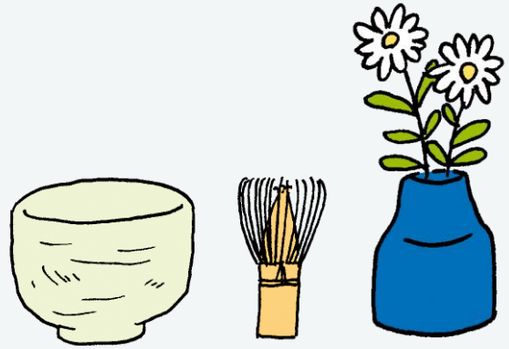
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My Standard | Valuing personal favorites and living a healthy, comfortable life



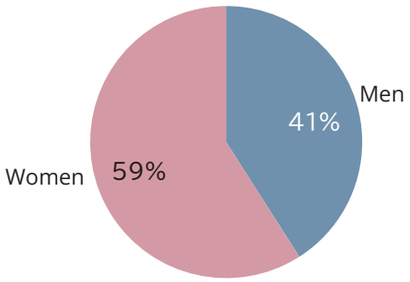
Key Characteristics

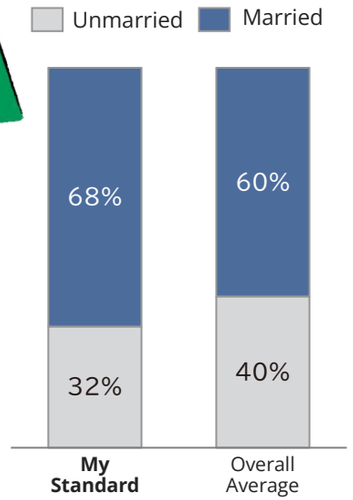
- Many are age 50 or older, with high shares married and with children
- Want to preserve Japanese traditions and culture for future generations
- Find fulfillment in improving personal health
- Value ingredients and safety and prefer home-cooked meals
- Highly interested in sightseeing and relaxing at hotels or ryokan inns
- Want to enjoy special, luxurious cuisine while traveling

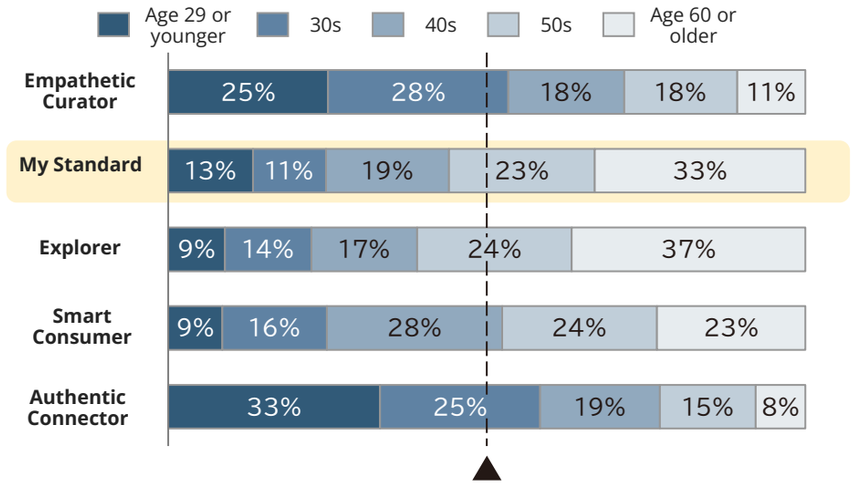


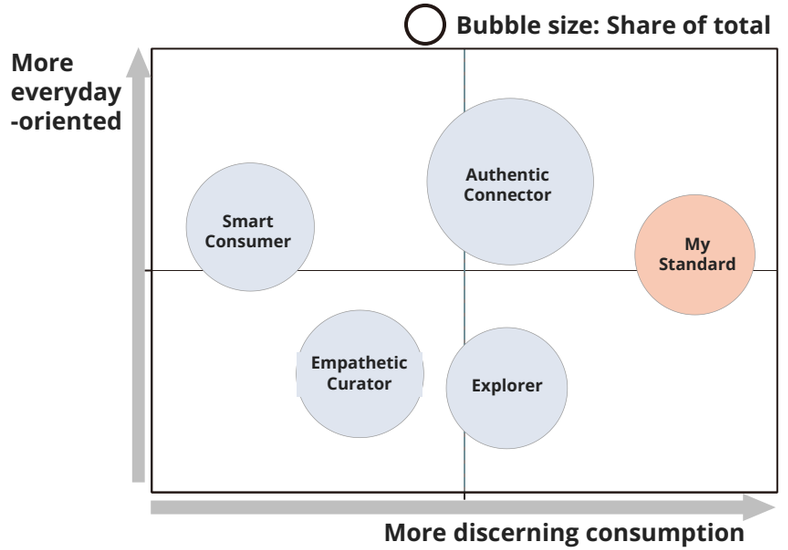
Basic Profile

- Many are age 50 or older; this type has the highest shares married and with children
- Both everyday orientation and discerning consumption are relatively high, reflecting a preference for familiar standards









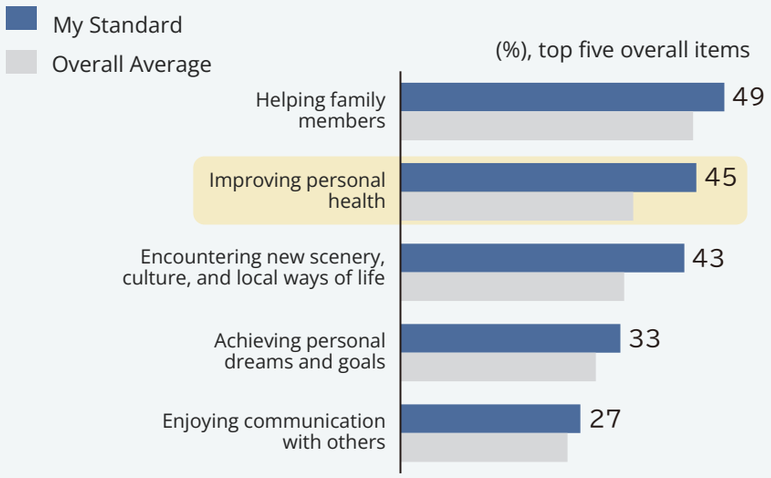
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My Standard | Values, Consumption, and Travel Style
Valuing personal favorites and living a healthy, comfortable life

Lifestyle

Comfort in familiar, trusted choices
Find fulfillment in improving personal health.
Prefer home-cooked meals with close attention to ingredients and safety.
Often obtain information from TV news and family or friends, and place particular trust in TV news.

Sources of Fulfillment (multiple responses)



Information Sources Consulted (multiple responses)

	My Standard	Overall Average	Difference
TV news	62%	48%	+14pt
Family and friends	60%	50%	+10pt



Spending Priorities

Home meals day to day, generous spending on travel
Prioritize travel spending, and many have splurged on a trip in the past three months.
Most usually eat at home and dine out for dinner only once every few months.

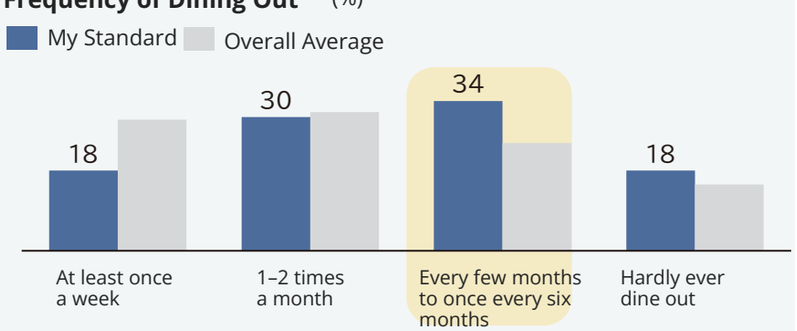
Areas of Selective Spending (multiple responses)

	My Standard	Overall Average	Difference
Travel	65%	51%	+15pt
Dining out	31%	29%	+2pt
Everyday meals and ingredients	27%	24%	+2pt

Attitudes toward Meals

- Prefer home cooking to control ingredients and safety
- Cook at home to eat what they like, not simply to save money
- When dining out, prefer higher-priced, high-quality food

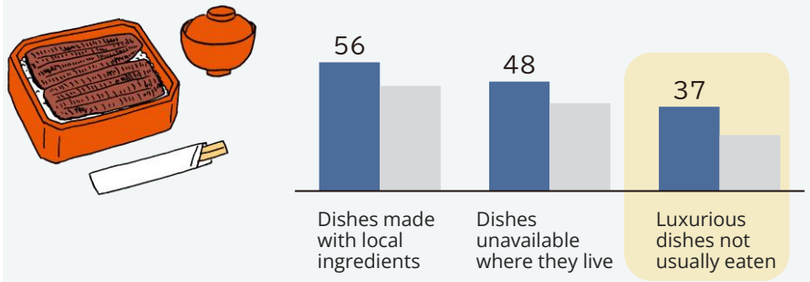
Frequency of Dining Out (%)



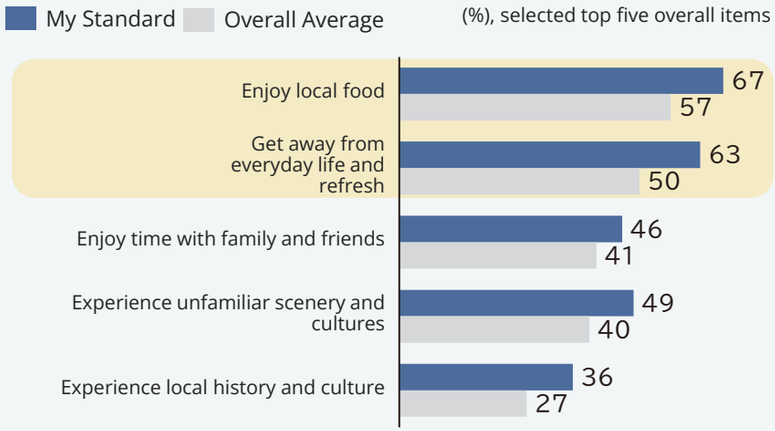
Travel Style

Leisurely, indulgent trips to classic destinations
See travel as enjoyment and relaxation.
Prefer famous attractions and leisurely stays at hotels and ryokan inns.
Want to enjoy special, luxurious cuisine while traveling.

Food Choices While Traveling (multiple responses) (%)



What Travelers Seek from Travel (multiple responses)



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Explorer | Enjoying encounters with the unknown and turning discoveries into learning



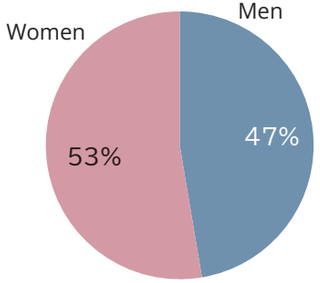
Key Characteristics

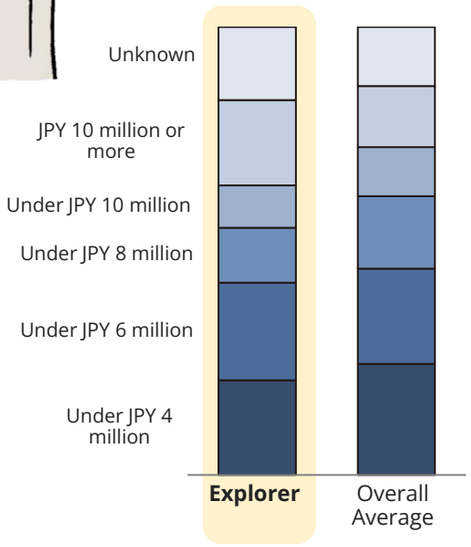
- Older age profile and higher household income; near-even gender split and relatively high share living alone
- See meaning even in time that may appear unproductive
- View failure as an opportunity for future learning
- Prefer pursuing personal interests and continuing to learn throughout adult life
- Find fulfillment in discovering new scenery and cultures and learning about new fields
- Seek extraordinary scenery and cross-cultural experiences and also enjoy solo travel

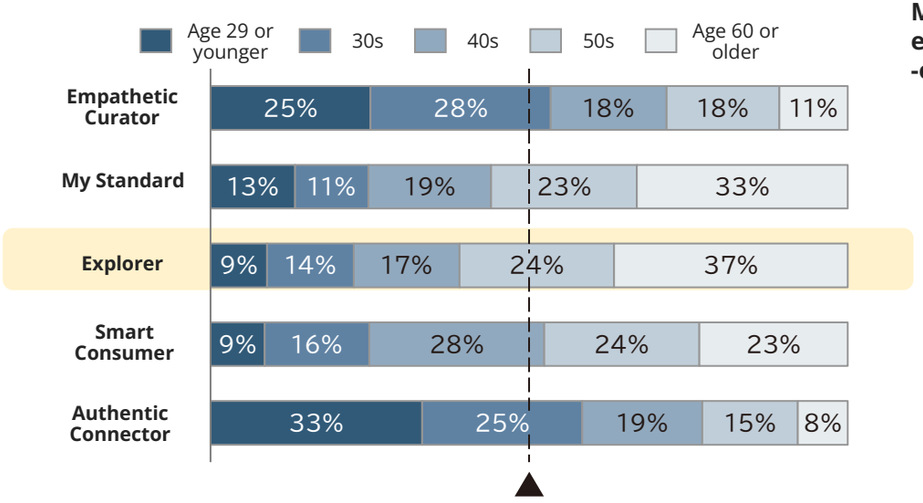


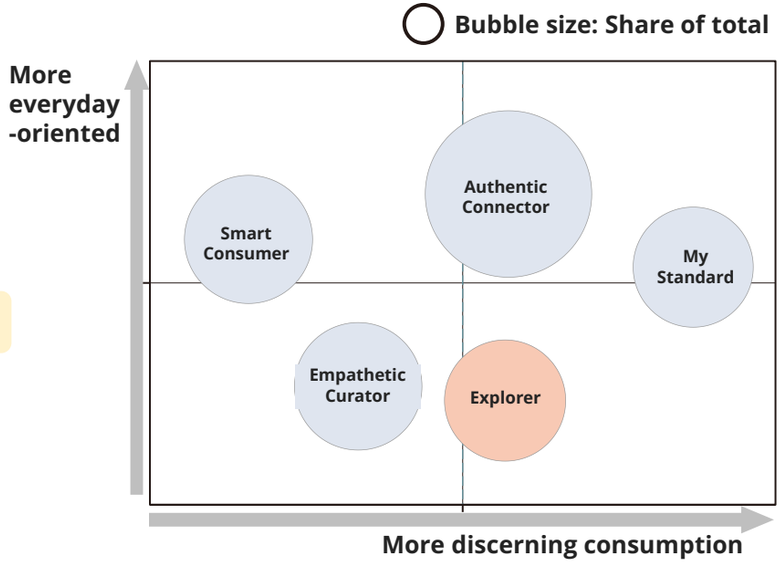
Basic Profile

- Near-even gender split, with an older age profile and higher household income
- Everyday orientation is relatively low and discerning consumption is moderate, reflecting a preference for experiences beyond daily routines









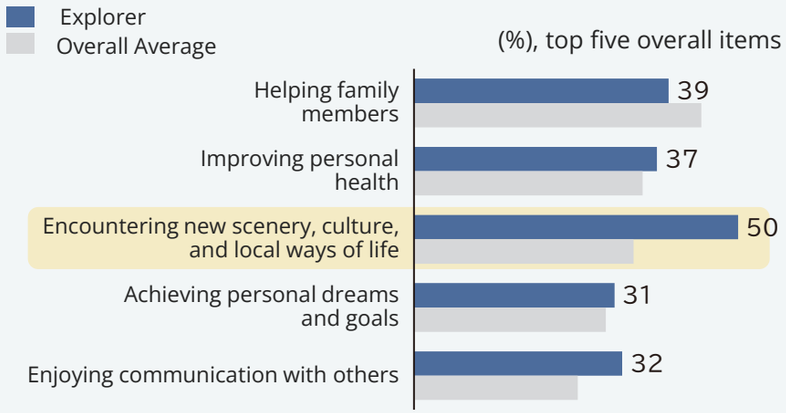
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Explorer | Values, Consumption, and Travel Style
Enjoying encounters with the unknown and turning discoveries into learning

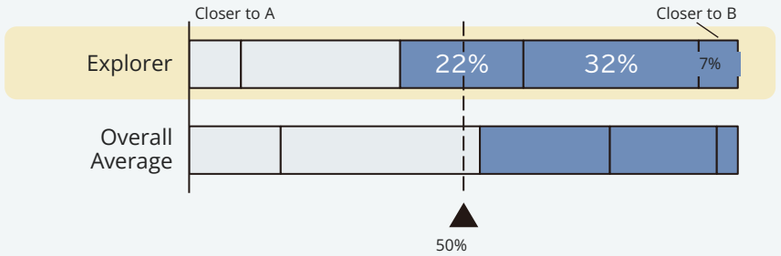
Lifestyle

Turning unstructured time into discovery and learning
Find fulfillment in encountering new scenery and cultures and learning about new fields.
See meaning in seemingly unproductive time and value time beyond pure efficiency.
View failure as an opportunity for learning.

Sources of Fulfillment (multiple responses)



A: Do not want to spend time on unproductive activities
B: See meaning even in seemingly unproductive time



Spending Priorities

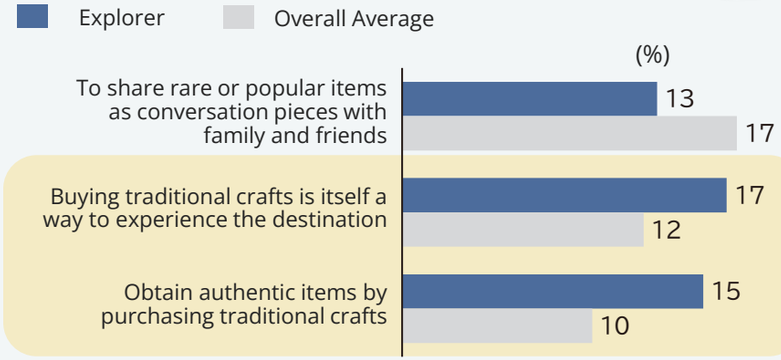
Investing freely in moving experiences
More often have at least JPY 50,000 in monthly discretionary funds.
Consider design, functionality, country of origin, and materials when buying fashion.
Seek authentic crafts and local experiences while traveling.

Priorities When Buying Fashion Items (multiple responses)

	Explorer	Overall Average	Difference
Preferred design	68%	58%	+10pt
Superior functionality	39%	33%	+6pt
Country of origin and ingredients clearly stated	11%	8%	+3pt



Reasons for Buying Souvenirs (multiple responses)



Travel Style

Travel to encounter unfamiliar scenery and cultures
Seek extraordinary scenery, different cultures, and local history.
Enjoy exploring unknown places, can adapt when plans change, and regard minor problems as part of the appeal of travel.

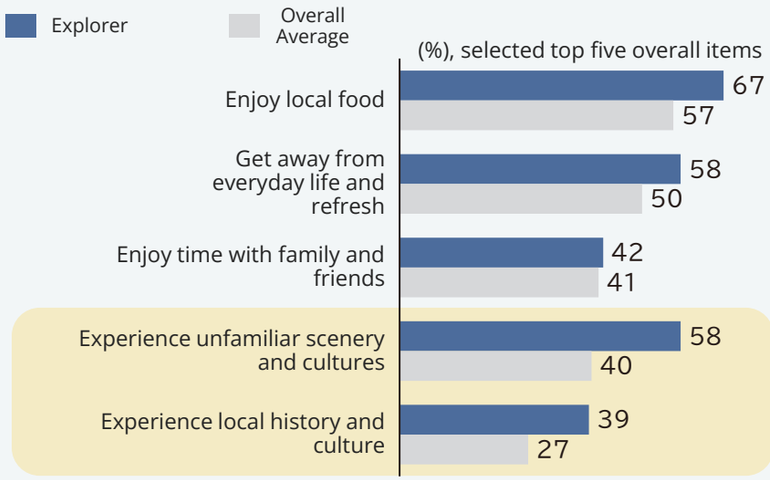
Attitudes toward Travel

◎ • Enjoy simply exploring unfamiliar places

• See minor problems as part of the appeal of travel
• Can calmly recover after getting lost
• Feel that different values broaden their perspective



What Travelers Seek from Travel (multiple responses)



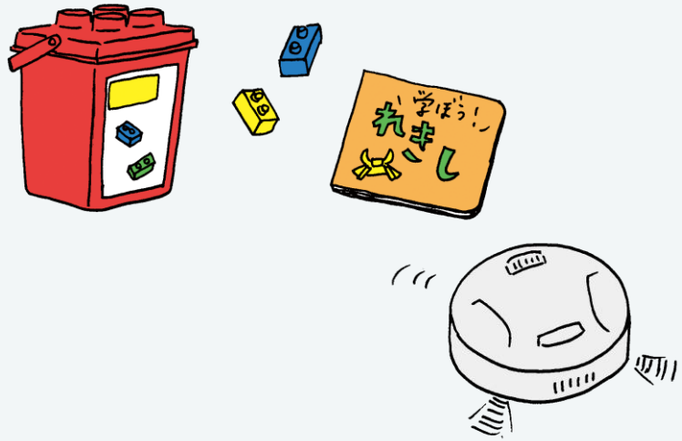
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Smart Consumer | Managing everyday life efficiently and responsibly for the people who matter most



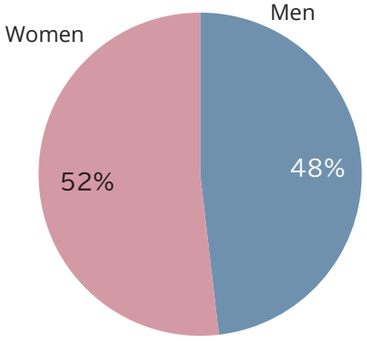
Key Characteristics

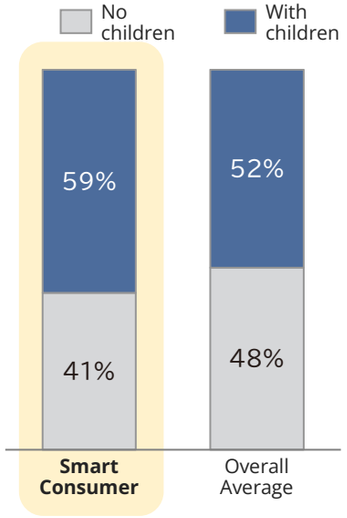
- Mainly in their 40s and 50s,
  with a near-even gender split and high shares married with children
- Prefer to complete tasks as quickly as possible
- Many find fulfillment in helping their families
- Prioritize stability when choosing work
- Choose where to live with childcare and education in mind
- Food is an essential part of travel
- Prefer fewer choices while traveling and try to avoid unexpected events

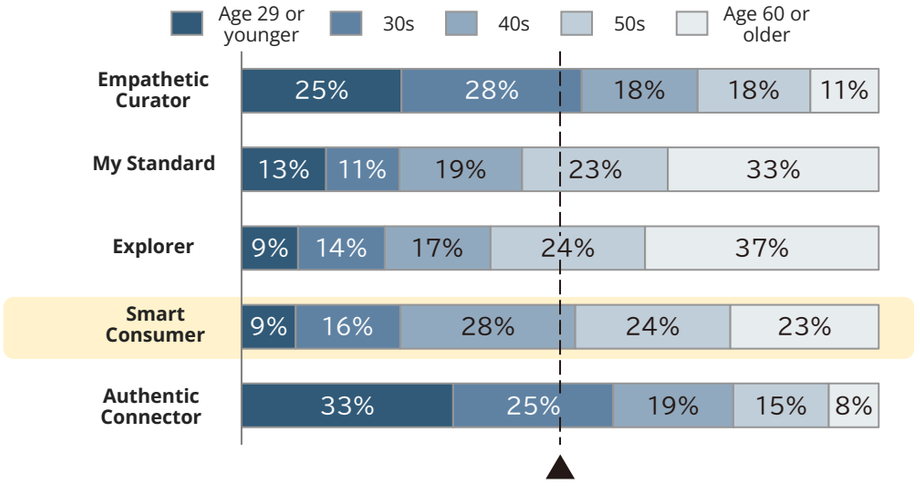


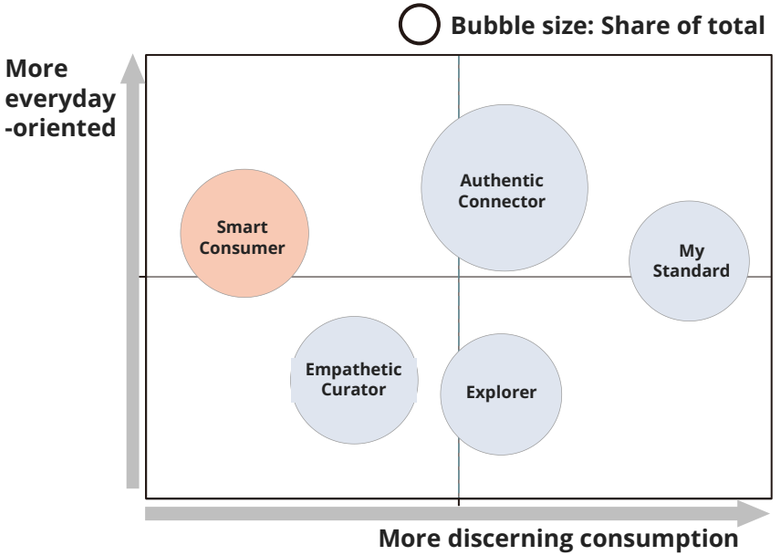
Basic Profile

- Mainly in their 40s and 50s, with a near-even gender split and high shares married with children
- Everyday orientation is relatively high and discerning consumption is lower, reflecting a rational approach to daily life









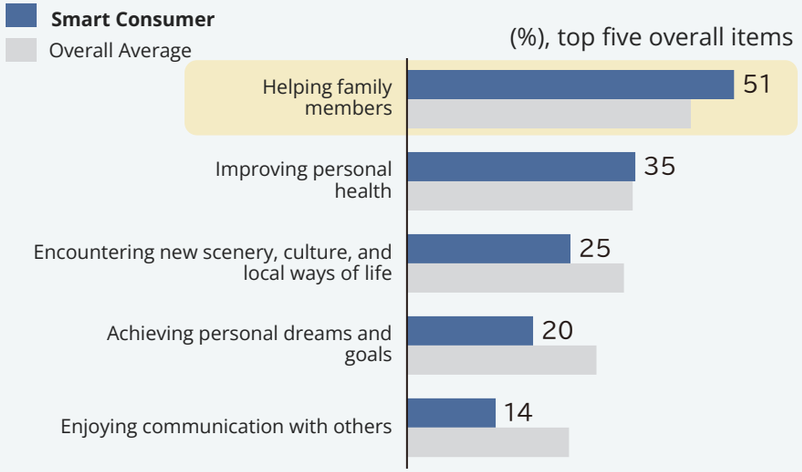
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Smart Consumer | Values, Consumption, and Travel Style
Managing everyday life efficiently and responsibly for the people who matter most

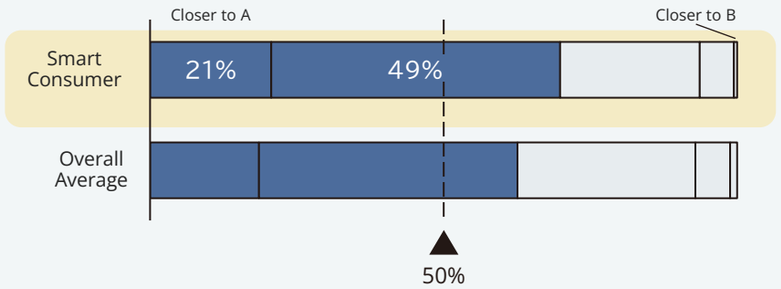
Lifestyle

Keeping daily life efficient and organized
Find fulfillment in helping people who matter to them.
Prefer to complete both household and work tasks efficiently and quickly.
Prioritize stability when choosing work.

Sources of Fulfillment (multiple responses)



A: Complete tasks efficiently and quickly / B: Take time and care over tasks



Spending Priorities

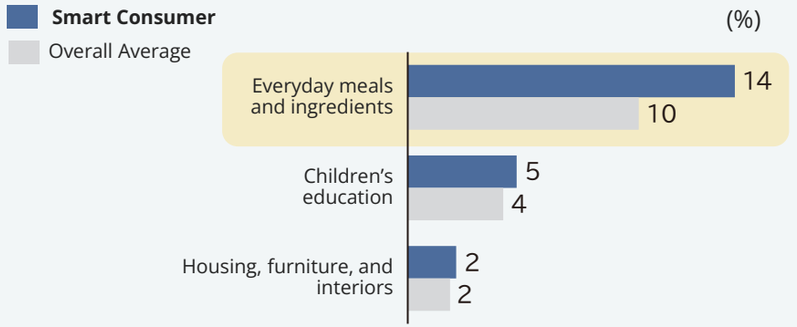
Smart everyday choices led by price
Price is the leading consideration for fashion.
Choose by personal standards rather than luxury or brand names.
Everyday meals and ingredients are also common recent splurge items.

Priorities When Buying Fashion Items (multiple responses)

	Smart Consumer	Overall Average	Difference
Low price	53%	37%	+16pt
Superior functionality	36%	33%	+3pt
Preferred design	61%	58%	+3pt



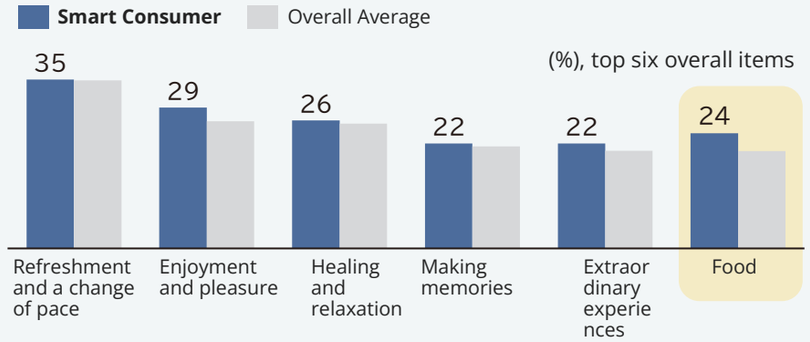
Items Splurged on in the Past Three Months (multiple responses)



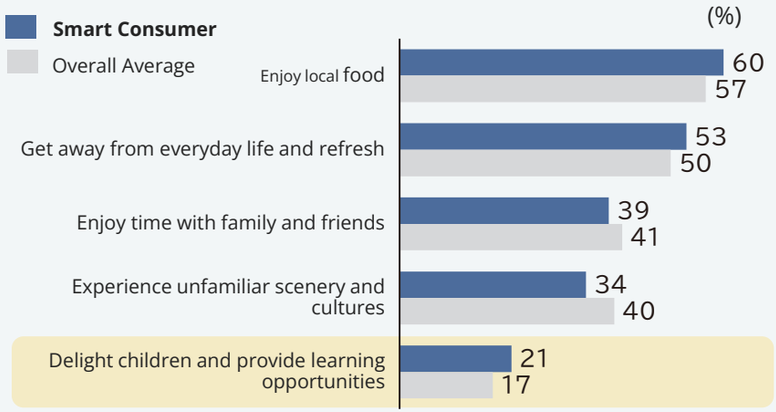
Travel Style

Easy, enjoyable travel with good food and fewer decisions
Food is central to travel.
Prefer fewer choices and want to avoid unexpected events.
Seek travel experiences that delight children and support learning.

Travel in One Word (multiple responses)



What Travelers Seek from Travel (multiple responses)



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Authentic Connector | Being true to oneself while expanding connections with people and local communities

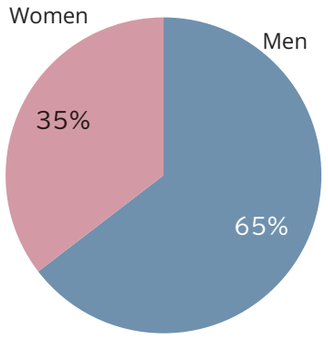


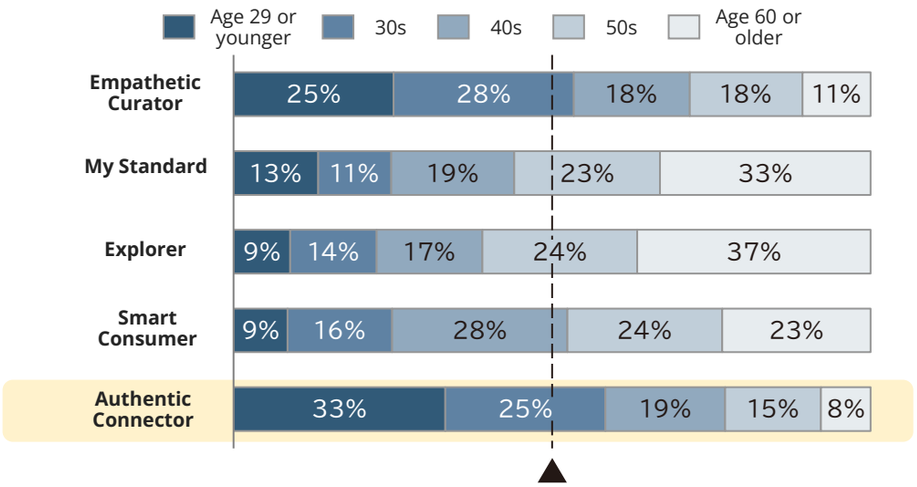
Key Characteristics

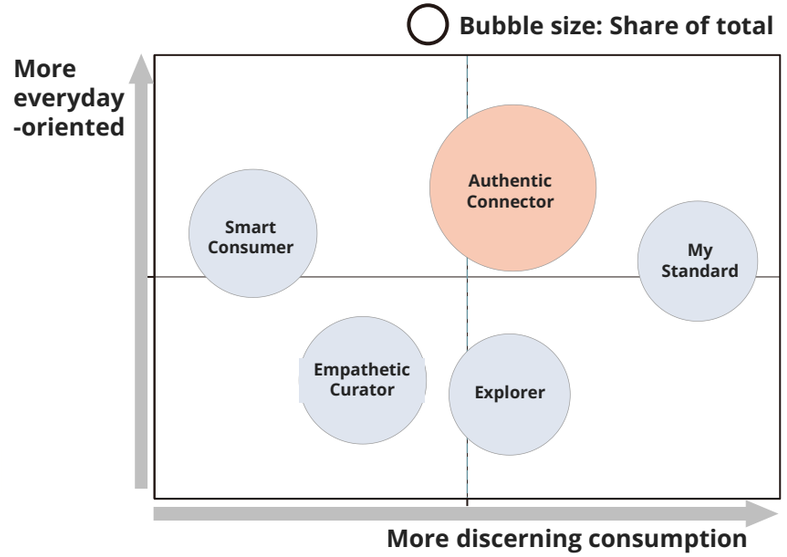
- Relatively many pursue additional income through side jobs, social media content, or property investment
- Value well-known fashion brands; some also consider environmental and human-rights practices
- Avoid wasting time and watch videos at higher speed or by skipping sections
- Choose where to live based on work, compatibility with the local community, and hobbies
- Want to meet local people, share experiences, and expand personal and professional networks
- Want to support local economies and feel connected by purchasing traditional crafts and other local products

Basic Profile

- Relatively high share of people in their 20s and 30s; highest unmarried share among the five types
- Everyday orientation is relatively high and discerning consumption is moderate, with an emphasis on authentic daily living







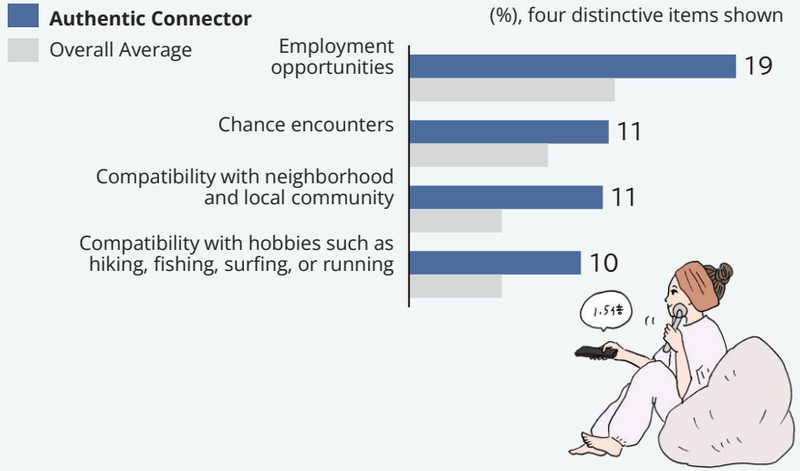
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Authentic Connector | Values, Consumption, and Travel Style
Being true to oneself while expanding connections with people and local communities

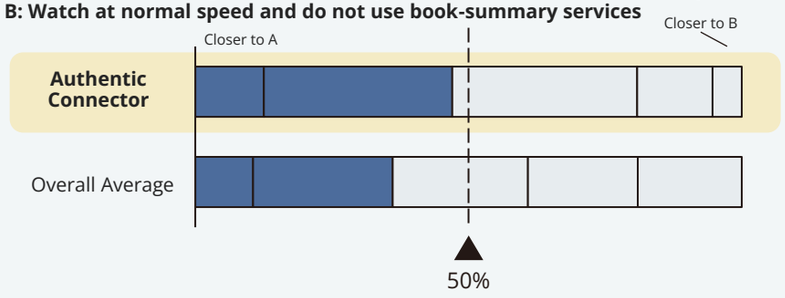
Lifestyle

Valuing connections with local communities
Choose where to live based on employment, compatibility with the local community, and hobbies.
Use speed controls and skipping to save time.
Interest in local events exists, although time and participation methods can be barriers.

Reasons for Choosing Where to Live (multiple responses)



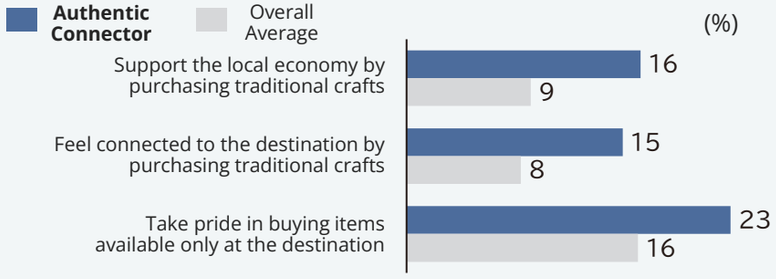
A: Watch videos at higher speed or skip sections and use book-summary services
B: Watch at normal speed and do not use book-summary services



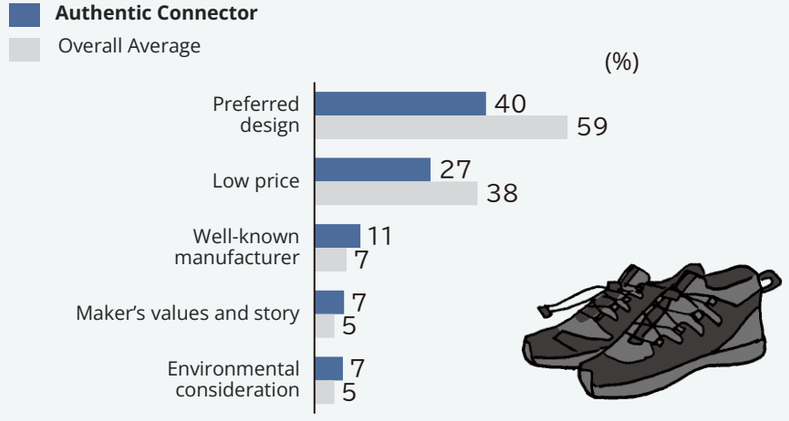
Spending Priorities

Choosing options that also benefit communities and society
Want purchases such as traditional crafts to support local economies and create a sense of connection.
Some also consider environmental and human-rights practices and the maker's values.

Reasons for Buying Souvenirs (multiple responses)



Priorities When Buying Fashion Items (multiple responses)



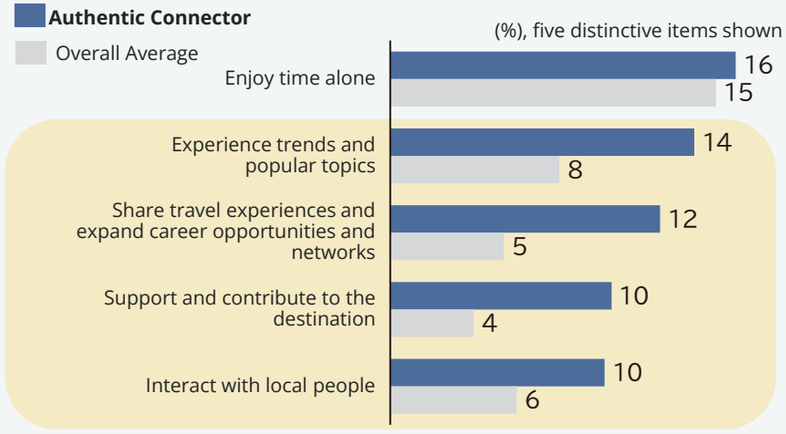
Travel Style

Connecting with and supporting communities through travel
See travel as a chance to connect with people and places and gain new experiences.
Enjoy interacting with locals, visiting photogenic places, and guided trips.
Crowds and queues at popular places are less of a concern.

Attitudes toward Travel (multiple responses)

	Authentic Connector	Overall Average	Difference
Avoid crowds and queues whenever possible	28%	51%	-24pt
Prefer to avoid unexpected events	15%	26%	-11pt

What Travelers Seek from Travel (multiple responses)



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Survey Overview

The renewed TLS5 was developed using data from the 2026 Survey on Lifestyle and Travel.

2026 Survey on Lifestyle and Travel | Survey Overview

Method	Online survey
Survey Period	February 6–12, 2026
Respondents	Screening survey: 10,000 people aged 18–79 residing throughout Japan Main survey: 1,030 screening respondents who had taken a leisure trip, including a day trip, within the previous year *Business trips and trips to return home were excluded. Day trips lasted at least half a day.

**Figures in the survey results have been rounded; totals or differences may therefore not exactly match calculated values.*

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JTB Tourism Research & Consulting supports clients from TLS5-based survey design and analysis through targeting and marketing strategy development. Please contact us for details.

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