

The St Kilda Esplanade Market

Attendee Research Presentation 2021



FOCUSED EVENT THINKING



Background and Methodology

RESEARCH OBJECTIVES

IER set out to measure and assess the following objectives:

- Visitor origins
- Attendee profile
- Previous visitation
- Media consumption
- Advocacy for the Esplanade Market
- Greatest impact on decision to attend the Esplanade Market
- Crowd estimate

METHODOLOGY

IER adopted a face-to-face survey aimed at addressing the overall objectives of the research.

The survey relied on randomly intercepting attendees at the Esplanade Market for the purpose of conducting an interview. IER conducted these interviews at the Esplanade Market when attendees were arriving and consuming the event across two Sundays:

Sunday 28th February 2021

Sunday 7th March 2021

Field staff were asked to randomly intercept attendees during their fieldwork commission. This random approach was implemented as a process of approaching every second person. IER worked closely with the City of Port Phillip to determine the optimum locations at the Market for the development of attendee data samples.

SAMPLE SIZES

In total, IER collected 303 surveys at the Esplanade Market. To ensure the most accurate data capture, IER executed the survey in tablet format (iPads).

Surveying was conducted in an environment of international travel restrictions into Australia due to COVID-19 as well as significantly reduced interstate travel.

Throughout 2020 and early 2021 the Esplanade Market had been non-operational for 27 weeks and when surveying was conducted the market was operating with 40 – 44% less stallholders than the previous year.





Attendee Research Insights

Attendee Demographics

AGE GROUP

	2021	2020	2019
18-25	6.5% ↓	14.7%	10.0%
26-35	21.1% ↓	24.1%	19.5%
36-45	15.6% ↑	15.4%	17.4%
46-55	26.5% ↑	19.5%	19.5%
56-65	19.0% ↑	15.9%	21.5%
66+	11.2% ↑	10.4%	12.1%

GENDER

	2021	2020	2019
Female	59.8% ↓	61.8%	61.0%
Male	39.2% ↑	37.5%	39.0%
Prefer not to say	1.0% ↑	0.3%	0.0%
Prefer to self-describe	0.0% ↓	0.5%	0.0%

- The market was attended by a diversity of age groups with those aged 46-55 years the largest (26.5%). There was a marked decline in younger attendees in 2021 over 2020 (18-25 years by -8.2% and 26-35 years by -3.0%) whilst an increase of 7.0% in those aged 46-55.
- As in the past two years those attending the market in 2021 were predominantly females making up 59.8 % of the respondent sample

Q9. In what year were you born? (n=294)

Q12. Gender? (n=286)

Attendee Demographics

VISITOR ORIGINS

	2021	2020	2019
Melbourne	45.0% ↑	37.7%	41.3%
Victoria	36.1% ↑	7.8%	6.9%
St Kilda	11.7% ↑	9.1%	6.7%
Interstate	6.5% ↓	22.8%	25.6%
Overseas	0.7% ↓	22.5%	19.5%

HOUSEHOLD COMPOSITION

	2021	2020	2019
Couple - without Dependents	39.4% ↑	34.2%	38.2%
Couple - with Dependents	31.8% ↑	23.8%	33.1%
Single living alone	15.2% ↓	18.2%	15.4%
Shared Household	6.6% ↓	11.1%	6.9%
Single Parent - with Dependents	2.4% ↓	3.5%	1.5%
Living with Parent(s)	2.1% ↓	6.1%	3.3%
Prefer not to say	1.4% ↓	1.8%	0.5%
Other	1.0% ↓	1.3%	1.0%

- Travel restrictions due to COVID-19 have severely impacted on the composition of origin of visitors to the Esplanade Market with decline of 16.3% for interstate attendees and 21.8% for overseas attendees. As in previous years the majority of visitors were from Melbourne (45.0%) with a rise in visitors from Victoria (36.1%) as an effect of few interstate and overseas attendees.
- The shift in age demographics is reflected in household composition changes most notably a decline in Singles Living Alone (-3.0%), Shared Household (-4.6%) and Living with Parents (-4.0%) as a result of a decline of those aged 18-25.

Q10. Where do you live? (n=291)

Q11. Which of the following best describes your household composition? (n=289)

Target Segments

YOUNG SINKS (SINGLE INCOME, NO KIDS) & DINKS (DUAL INCOME, NO KIDS)



COUPLES AND SINGLES NO CHILDREN AGED UNDER 30

2021	2020	2019
17.9%	29.3%	22.5%

FAMILIES



COUPLES AND SINGLES WITH CHILDREN LIVING AT HOME

2021	2020	2019
44.2%	36.0%	41.5%

EMPTY NESTERS



COUPLES AND SINGLES CHILDREN HAVE LEFT HOME AGED 50+

2021	2020	2019
37.9%	34.7%	36.0%

- The shift in age demographics has also caused a shift in target segments represented at the Esplanade Market in 2021 with 'Families' representing 44.2%, 'Empty Nesters' 37.9% and 'Young SINKS & DINKS' 17.9% (a decline of 11.4% over 2020).
- It may be that families (particularly young families) are currently more active at seeking leisure opportunities, such as this, after the challenges faced during lockdown and home-schooling in 2020.

Q9. In what year were you born? (n=294)

Q11. Which of the following best describes your household composition? (n=289)

Previous Attendance

PREVIOUSLY ATTENDED

	2021	2020	2019
Yes	 77.6% ↑	46.8%	49.5%
No	 22.4% ↓	53.2%	50.5%

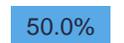
TIME OF LAST VISIT

	2021	2020	2019
Within the last month	 15.3% ↓	18.9%	22.1%
Within the last 6 months	 7.7% ↓	18.4%	16.6%
Within the last year	 9.4% ↓	11.4%	12.1%
Between 1-5 years ago	 39.1% ↑	25.9%	28.6%
Between 6-10 years ago	 7.2% ↓	7.6%	11.6%
More than 10 years ago	 21.3% ↑	17.8%	9.0%

LIFECYCLE SEGMENTS PREVIOUS ATTENDANCE AT ESPLANADE MARKET

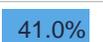


YOUNG SINKS & DINKS

	2021	2020	2019
Previously Attended	 55.0%	25.0%	28.8%
Between 1-5 years ago	 50.0%	13.6%	17.6%



FAMILIES

	2021	2020	2019
Previously Attended	 78.8%	56.5%	54.8%
Between 1-5 years ago	 41.0%	21.3%	32.4%



EMPTY NESTERS

	2021	2020	2019
Previously Attended	 92.9%	54.8%	49.6%
Between 1-5 years ago	 39.2%	33.3%	36.4%

- 2021 saw a 30.7% decline in first-time visitors to the Esplanade Market – most likely a consequence of greatly reduced visitation from interstate and overseas.
- Of those that had previously attended most (39.1%) had attended 'between 1–5 years ago' or 'more than 10 years ago' (21.3%). Visitation within the last 12 months would have been hampered by the shut down of the Market for 27 weeks in 2020 and 2021 due to COVID-19 restrictions.
- 'Empty Nesters' (92.9%) and 'Families' (78.8%) were the target segments most likely to have previously attended the Market.

Q1. Have you been to the Esplanade Market before today? (n=303)

Q2. When was your last visit? (n=235)

Attendance Behaviour

MAIN REASON(S) FOR ATTENDANCE

	2021	2020	2019
As a social activity	25.5% ↓	27.6%	28.1%
To enjoy the atmosphere	24.8% ↑	14.4%	7.0%
I was in the area	21.2% ↓	28.1%	26.6%
To support local traders	7.9% ↑	2.0%	2.2%
To look at the vendors and products	6.3% ↓	10.1%	6.0%
Bringing a visiting friend or family member	4.0% ↓	13.4%	24.9%
To purchase produce from a specific vendor	3.0% ↓	-	-
To buy Australian Made products	0.7% ↓	2.3%	2.5%
Other	6.6% ↑	2.0%	2.7%

AVERAGE TIME PLANNED TO STAY

2021	1 hour, 5 mins
2020	1 hour, 23 mins
2019	1 hour, 20 mins

- The main reasons for attending the Market was because 'As a social activity' (25.5%) and 'To enjoy the atmosphere' (24.8%).
- 2021 saw an increase (+10.4%) in attendance 'To enjoy the atmosphere' and a significant decline (-9.4%) in those 'bringing a visiting friend or family member'
- The impact of the 'coincidental' audience is significant. Normally, more than a quarter of attendees are 'in the area already'. However with lower tourism traffic currently, and possibly portions of the population still searching for confidence to visit crowded areas, this segment was significantly lower (21%)
- It is also notable that 'supporting local traders' experienced a significant rise this year – perhaps evidence of a strong community mindset coming out of the pandemic. Amongst St Kilda residents, 12.4% identified this motivation.
- The average planned dwell time at the Market was 1 hour, 5 mins, a reduction of 18 minutes from 2020 most likely due to less traders holding attendees attention at the Market .

Q3. What was the main reason for your attendance at the Esplanade Market today? (n=302)

Q8A. How long are you planning to stay at the St. Kilda Esplanade Market today? (n=295)

Attendance Behaviour

LIFECYCLE SEGMENTS ATTENDANCE BEHAVIOUR



Average time	52 minutes
Main reason for attendance	I was in the area



Average time	1 hour, 14 minutes
Main reason for attendance	To enjoy the atmosphere



Average time	1 hour, 10 minutes
Main reason for attendance	As a social activity and To enjoy the atmosphere

- 'Families' average planned dwell time of 1 hour, 14 minutes was the longest of the target segments. followed by 'Empty Nesters' staying 1 hour, 10 minutes.
- The primary driver for attendance of 'Families' and 'Empty Nesters' was 'To enjoy the atmosphere' whilst 'Young SINKS & DINKS' were motivated to attend as 'I was in the area'

Q3. What was the main reason for your attendance at the Esplanade Market today? (n=302)

Q8A. How long are you planning to stay at the St. Kilda Esplanade Market today? (n=295)

Purchasing Behaviour

PURCHASE BEHAVIOUR

	2021	2020	2019
For yourself / your family	64.1% ↑	60.3%	60.0%
As a gift	23.9% ↓	30.4%	15.4%
I will not purchase anything at the market today	23.6% ↓	31.6%	31.6%

AVERAGE SPEND



ITEMS PURCHASED

	2021	2020	2019
Food / Beverages	50.4% ↓	52.6%	32.7%
Jewellery	39.5% ↓	43.0%	36.4%
Art (Inc. prints, sculpture, photography, etc)	27.6% ↑	21.9%	16.0%
Beauty / body products	17.1% ↑	10.0%	10.9%
Bags and Accessories	11.8% ↓	14.4%	8.7%
Homewares	11.4% ↓	16.3%	26.9%
Pet products	7.0% ↑	4.8%	3.6%
Fabric / textiles	4.8% ↓	8.1%	4.0%
Unsure	4.8% ↓	6.7%	-
Kids products	4.4% ↓	7.0%	8.7%
Other	3.5% ↓	6.3%	3.6%

- Purchase behaviour was strong with 64.1% of attendees purchasing or intending to purchase something at the Market 'for themselves or family' and 23.9% making a purchase 'as a gift'. Average spend in 2021 was \$55.90, slightly lower than 2020 (\$58.20) and 2019 (\$57.74) – although this is probably to be expected with jobs and wages being impacted by COVID-19
- The top three items purchased were Food/beverages (50.4%), Jewellery (39.5%) and Art (27.6%). The largest increase in type of item purchased for 2021 was Beauty/body products (+7.1%) and Art (+5.8%) whilst homewares purchases declined for the second consecutive year (-4.9%).

Q4. Have you/will you purchase anything at the Esplanade Market today...? (n=301)
 Q4b. How much will you personally spend while at The Esplanade Market today? (n=229)
 Q5. Which of the following will you/did you buy at the Esplanade Market today? (n=228)

Purchasing Behaviour

LIFECYCLE SEGMENTS PURCHASING BEHAVIOUR



	2021	2020	2019
Average Spend	\$43.33 ↑	\$38.10	\$41.34
Purchase an item	85% ↑	65%	64%
Item most purchased	Food / Beverages	Food/Beverages	Food/Beverages



	2021	2020	2019
Average Spend	\$60.95 ↓	\$71.68	\$64.00
Purchase an item	92% ↑	83%	74%
Item most purchased	Food / Beverages	Food/Beverages	Jewellery



	2021	2020	2019
Average Spend	\$58.83 ↓	\$70.90	\$63.69
Purchase an item	79% ↓	80%	66%
Item most purchased	Food / Beverages	Jewellery	Jewellery

- 'Families' remained the highest spending target segment (\$60.95) albeit a decline from a high of \$71.68 in 2020. This was coupled with a high level (92%) of purchase or purchase intent
- 'Young SINKS & DINKS' increased their average spend in 2021 following a sharp drop in 2020 along with a 20% increase in purchase or intent to purchase an item.

Q4. Have you/will you purchase anything at the Esplanade Market today? (n=395)

Q4a. How much will you personally spend while at The Esplanade Market today? (n=269)

Q5. Which of the following did you buy at the Esplanade Market today? (n=271)

Channels of Awareness

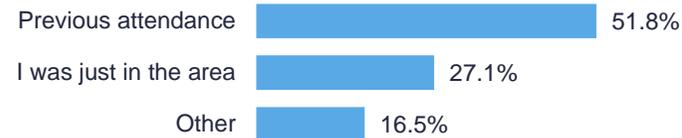
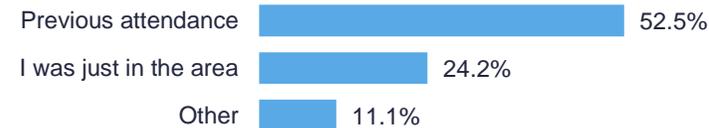
WHERE ATTENDEES RECALL SEEING OR HEARING ABOUT THE ESPLANADE MARKET

	2021	2020	2019
Previous attendance at the Market	42.1%	32.2%	40.9%
I was just in the area	26.9%	23.5%	17.7%
Family and/or friends	13.8%	22.5%	17.0%
Google/search engine	5.4%	6.3%	-
The St Kilda Esplanade Market Facebook page	4.4%	5.3%	0.7%
Official Visitor Guide	1.0%	2.5%	10.5%
The St Kilda Esplanade Market Instagram page	1.0%	1.5%	1.0%
Bin wraps	0.7%	1.8%	-
The St Kilda Esplanade Market website	0.7%	-	-
A-frame sign	0.3%	0.3%	-
TV ad	0.0%	1.0%	-
Work colleagues	0.0%	0.8%	0.7%
Mini van decoration	0.0%	0.0%	-
Radio commercial	0.0%	-	-
Other (please specify)	13.1%	5.3%	7.7%

- 'Previous attendance at the Market' remains the strongest channel of awareness for attendees (42.1%), followed by 'I was just in the area' (26.9%).
- 13.9% of attendees stating 'Other' in describing where they recalled seeing or hearing about the Esplanade Market. Many of the responses commented that 'They already knew about it.' It may be beneficial to include this as a response in future surveying.
- The high level of respondents that had previously attended The Esplanade Market in 2021 indicates passive visitors not so reliant on paid advertising or promotion to encourage attendance.

Channels of Awareness

LIFECYCLE SEGMENTS TOP 3 SOURCES RECALLED SEEING OR HEARING ABOUT THE ESPLANADE MARKET

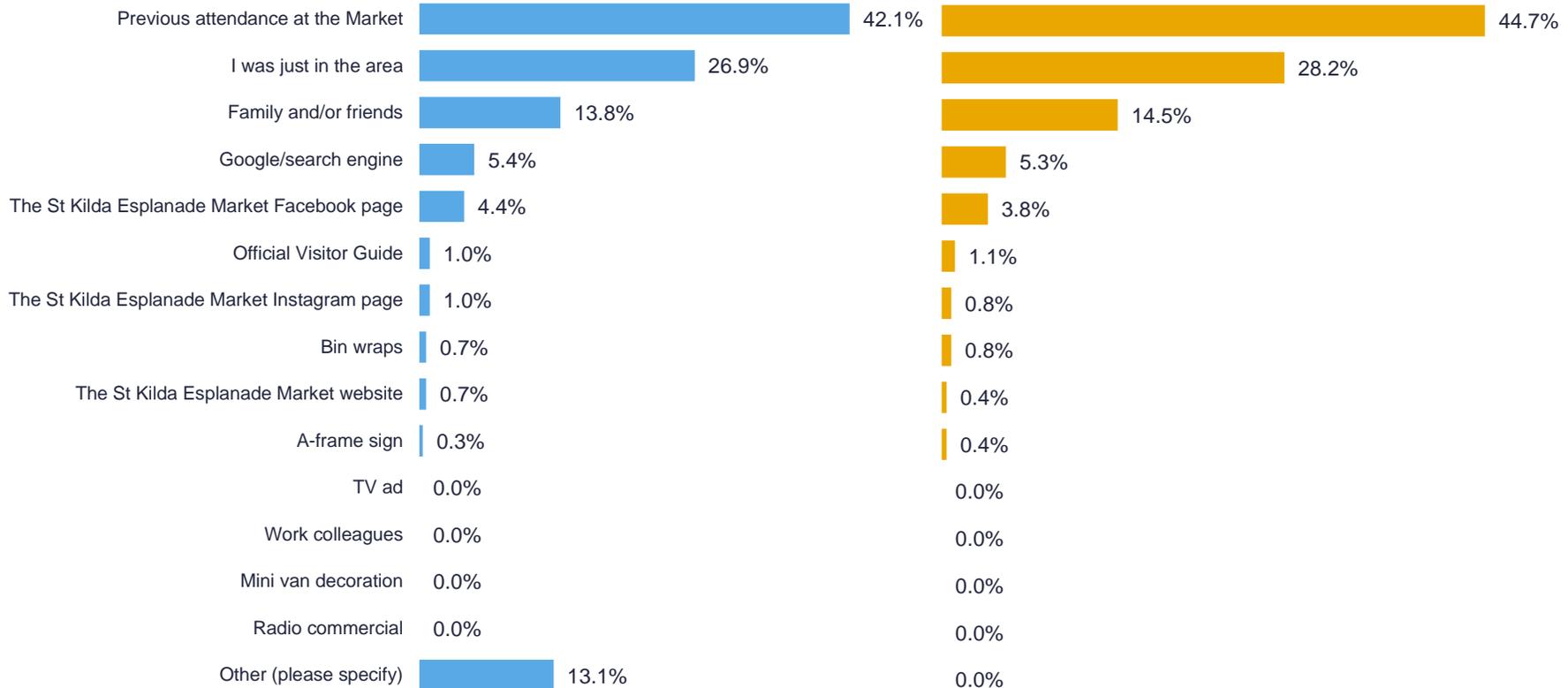


- All target segments were consistent in their recall of knowing about The Esplanade Market with either 'Previous attendance', 'I was just in the area' or 'Other' the strongest drivers. Those stating 'Other' typically responded that 'they just knew about it'.
- 'Young SINKS & DINKS' were influenced by Family and/or friends

Channels of Awareness Impact

CHANNELS OF AWARENESS

MEDIUMS WITH THE GREATEST IMPACT ON ATTENDANCE

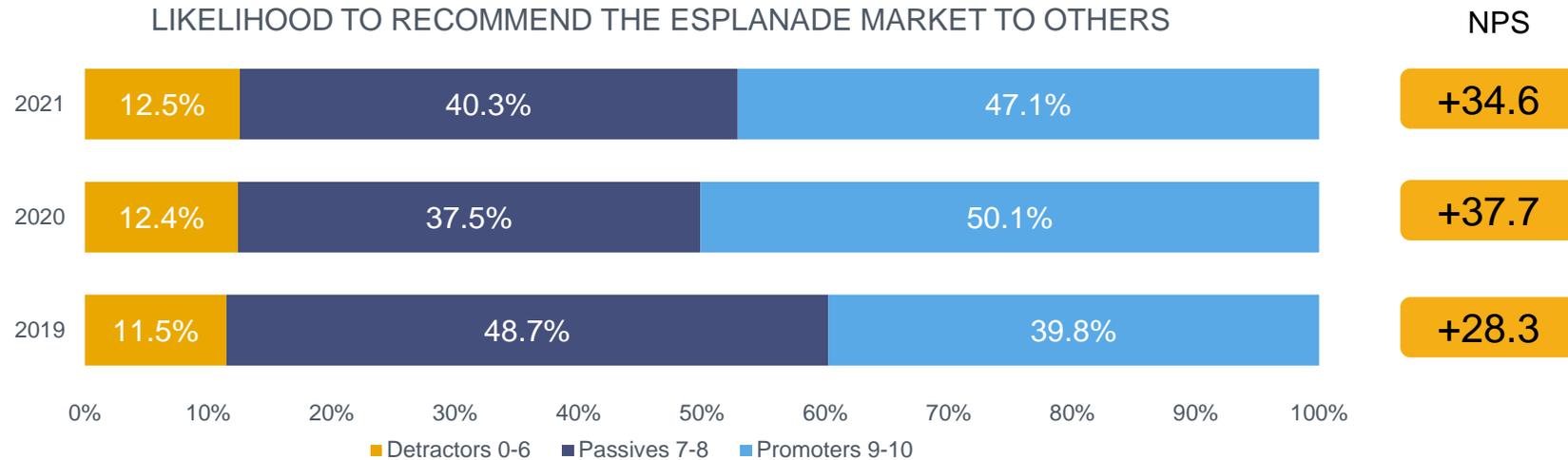


- The majority of attendees identified a single source of awareness (with previous attendance being most prevalent)
- When asked to identify the channel that had the greatest impact on their decision to attend, the responses followed pretty closely to the channels of awareness.

Q6. In which of the following ways did you see or hear about the Esplanade Market? (n=297)

Q7. Please indicate which of these mediums had the greatest impact on your decision to attend the Esplanade Market. (n=262)

Advocacy



IER measures advocacy through the use of a methodology termed 'Net Promoter Score' (NPS). The NPS allows for the measurement of an event's performance through the eyes of its attendees. It is based on the view that all attendees can be segmented into one of three categories:

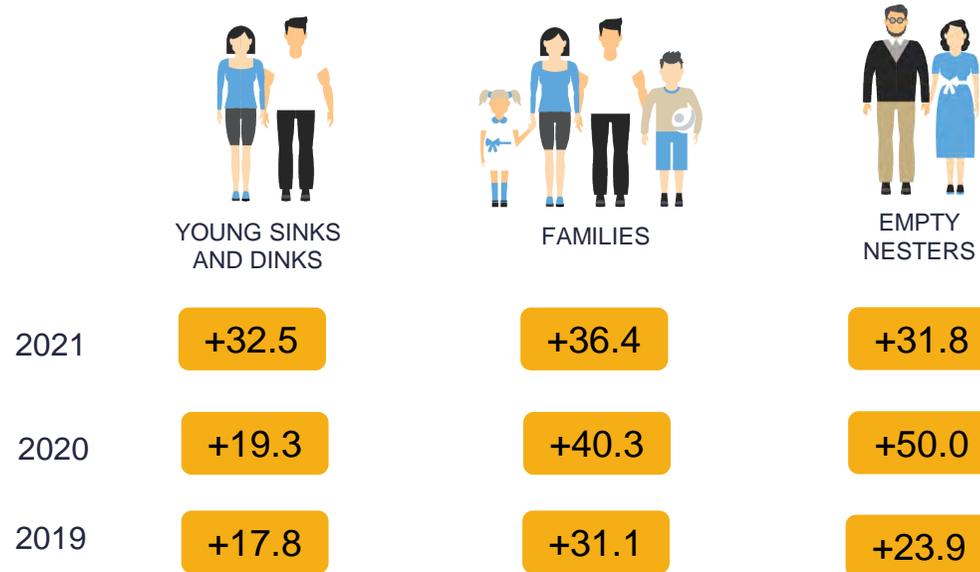
- **Promoters** (rating score 9-10) are classified as loyal enthusiasts who will keep attending and refer others, fueling growth.
 - **Passives** (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- **Detractors** (score 0-6) are unhappy consumers who can damage the Esplanade Market's brand and hinder growth through negative word-of-mouth.

The NPS is calculated by subtracting the percentage of Detractors from the percentage of Promoters.
The difference between the two is the NPS.

- There was a slight decline of the NPS from +37.7 (2020) to +34.6 (2021) although higher than +28.3 recorded in 2019. There remains a significant proportion of Passives for The Esplanade Market who are not solid supporters and may be vulnerable to not returning in the future due to alternative offerings. However nearly half (47%) are promoters and are likely to positively advocate the market to others

Advocacy

LIFECYCLE SEGMENTS ADVOCACY



NET PROMOTER SCORE

- Advocacy in 2021 was consistent amongst the target segments with 'Families' the strongest advocates for the Esplanade Market
- Positively, 'Young SINKS & DINKS' had a significant increase in NPS from +19.3 in 2020 to +32.5 in 2021
- The Empty Nester segment has recorded results that have varied quite significantly. It is important to note that this segment is often less likely to generally advocate to others (as a rule or personality trait). Those who provided reasons felt that the market needs some fresh stalls.

Suggested Improvements

SOME EXAMPLES OF COMMENTS RELATING TO MOST COMMON SUGGESTED IMPROVEMENT AREAS

Market Stalls

“Sad that it's so quiet, and not so many stalls.”

“It looks quite empty.”

“It hasn't changed. Should be more up to date. More variety and natural products. More environmentally sound products.”

“More fresh products. More stalls. Fancy breads.”

Music

“More live music.”

“Lovely. More food stalls. More entertaining, MUSIC .”

“Music would be good..”

Food and Drink Stalls

“Need more foodvans.”

“Like to have more beverages and food in varieties in both ends.”

“More food stalls. Different food variety.”

Crowds

“Need more visitors.”

“It's quieter than previously.”

Parking

“Parking too expensive.”

“It would be better to offer free car parking for families.”



Crowd Count

Crowd Count Analysis

METHODOLOGY

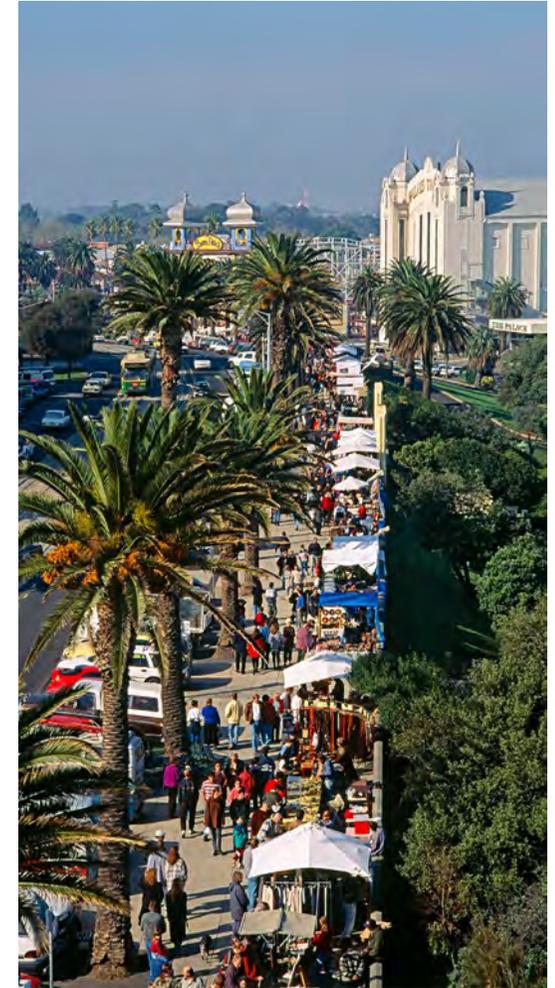
IER was engaged by the City of Port Phillip to undertake an attendance estimate at the St. Kilda Esplanade Market. An IER researcher was deployed to undertake crowd estimates on a half hourly basis on Sunday 28th February and Sunday 7th March 2021 between 10:00am – 5:00pm.

The Market was divided into five key zones.

- Zone 1 – Pollington Street – Victoria Street
- Zone 2 – Victoria Street – Alfred Square
- Zone 3 – Alfred Square
- Zone 4 – Alfred Square – Robe Street
- Zone 5 – Rove Street – Cavell Street

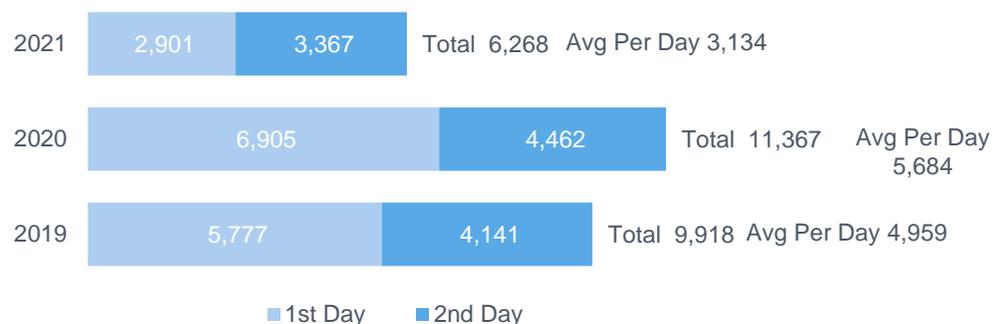
IER adopted this method with crowd counters and a registration sheet to note estimated attendances and photograph each crowd count area. IER undertook the crowd count utilising the following methodology for the attendance estimate:

- Record the number of people at each of the five areas per half hour from the counts undertaken
- Photograph each area after each count to support crowd count figures
- Estimate the average number of people at each location by averaging across each day the crowd count figure
- Calculate average minutes spent by respondents from the survey
- Total number of minutes the precinct is in operation divided by the average minutes spent at each location - this gives you the churn rate
- Multiply the average number of people by the calculated churn rate to provide an estimated number of attendees for each day of the Market



Crowd Count Analysis

CROWD COUNT 2019 - 2021

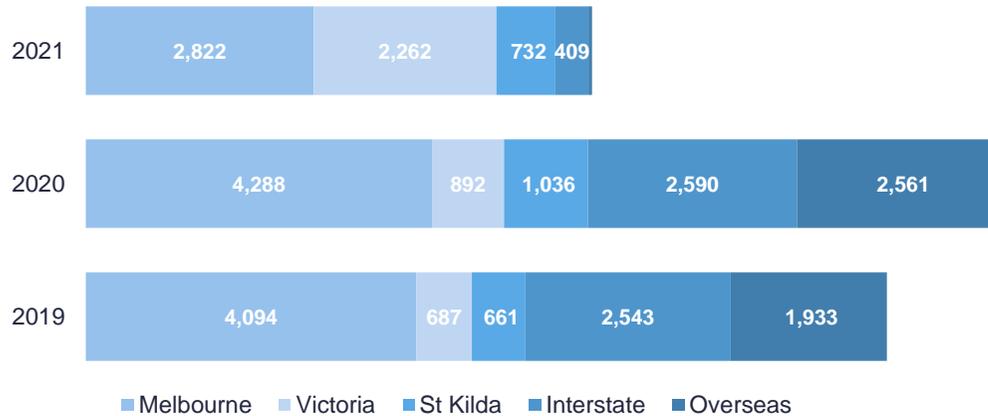


	Day 1	Day 2
2021	Feb 28 26.7 °C	March 7 28.5 °C
2020	23 Feb 34.0 °C	March 1 38.0 °C * ceased at 4.30pm due to heat
2019	24 Feb 32.9 °C	March 10 23.7 °C * ceased at 3.00 pm due to storm

- Across the two days of surveying in 2021 (Feb 28th and March 7th) it is estimated there were a total of 6,268 attendees at The Esplanade Market. This represents an average annual decline of 15.1% over the three years of surveying. 2021 has been impacted by the interstate and international travel restrictions due to COVID-19.

Crowd Count Analysis

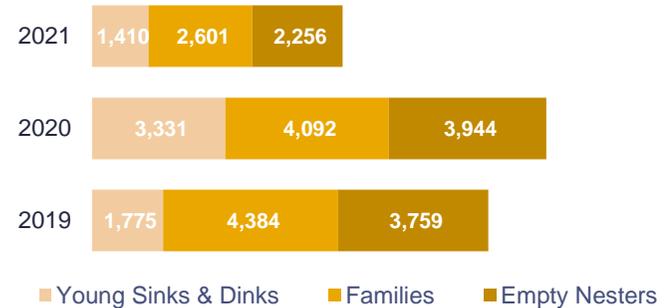
VISITOR ORIGIN
Actual Numbers



PREVIOUS ATTENDANCE
Actual Numbers



TARGET SEGMENTS
Actual Numbers



- Utilising the crowd count actual numbers can be produced for visitor origin, previous attendance and target segments which gives a clearer insight especially with the reduced attendance in the current environment.
- This clearly shows the decline in interstate and overseas visitors in 2021 and the strong rise of Victorian attendees (892 in 2020 to 2,262 in 2021).
- Those who had attended the Esplanade previously whilst declining against 2020 results (4,861 from 5,324) is steady against 2019 (4,910).

Q10. Where do you live? (n=291)
 Q2. When was your last visit? (n=235)
 Q9. In what year were you born? (n=294)
 Q11. Which of the following best describes your household composition? (n=289)

Crowd Count Analysis

DAY 1 – SUNDAY 28th FEBRUARY 2021

Raw Numbers						
Time	Zone 1: Pollington St – Victoria St	Zone 2: Victoria St – Alfred Square	Zone 3: Alfred Square	Zone 4: Alfred Square – Robe St	Zone 5: Robe St – Cavell St	Total
10.00am - 10.30am	11	13	32	30	15	101
10.30am - 11.00am	4	18	44	41	45	152
11.00am - 11.30am	24	29	69	75	34	231
11.30am - 12.00noon	38	32	108	56	48	282
12.00noon - 12.30pm	25	34	137	49	34	279
12.30noon - 1.00pm	40	21	73	52	57	243
1.00pm - 1.30pm	31	28	72	70	27	228
1.30pm - 2.00pm	29	31	105	83	50	298
2.00pm - 2.30pm	26	39	96	69	32	262
2.30pm - 3.00pm	35	41	49	79	45	249
3.00pm - 3.30pm	22	30	78	51	45	226
3.30pm - 4.00pm	15	8	69	57	30	179
4.00pm - 4.30pm	16	5	39	24	29	113
4.30pm - 5.00pm	13	4	28	6	7	58
Total	329	333	999	742	498	2901

Average Attendance	207
Average Time Spent at Market	58.4

Churn rate	7.19	Est. Attend	1,490
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- On Sunday 28th February there were on average 207 attendees at the Esplanade Market every 30 minutes. Attendees stayed at the Market on average for 58 minutes.
- Taking into account the average attendees, minutes spent at the Market (and therefore the churn rate) IER estimates attendees on the day to be 1,490.

Crowd Count Analysis

DAY 2 – SUNDAY 7th MARCH 2021

Raw Numbers						
Time	Zone 1: Pollington St – Victoria St	Zone 2: Victoria St – Alfred Square	Zone 3: Alfred Square	Zone 4: Alfred Square – Robe St	Zone 5: Robe St – Cavell St	Total
10.00am - 10.30am	11	14	9	13	17	64
10.30am - 11.00am	29	25	55	51	31	191
11.00am - 11.30am	36	22	73	69	60	260
11.30am - 12.00noon	23	65	125	99	63	375
12.00noon - 12.30pm	29	37	102	89	54	311
12.30noon - 1.00pm	57	40	122	91	37	347
1.00pm - 1.30pm	66	42	85	78	45	316
1.30pm - 2.00pm	65	17	103	66	37	288
2.00pm - 2.30pm	57	35	83	79	54	308
2.30pm - 3.00pm	43	26	68	78	43	258
3.00pm - 3.30pm	49	23	66	73	46	257
3.30pm - 4.00pm	53	15	63	35	33	199
4.00pm - 4.30pm	15	14	36	34	35	134
4.30pm - 5.00pm	9	12	14	13	11	59
Total	542	387	1,004	868	566	3367

Average Attendance	259
Average Time Spent at Market	71.8

Churn rate	5.85	Est. Attend	1,515
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- On Sunday 7th March, there were 259 attendees on average at the Esplanade Market, every 30 minutes. On average attendees stayed at the Market for 1 hour, 11 mins.
- Overall taking into consideration the average attendees, minutes spent at the Esplanade Market (and therefore the churn rate), IER estimates attendance on the day to be 1,515