# The St Kilda Esplanade Market
## Attendee Research Presentation 2020

ier

**FOCUSED EVENT THINKING**

ST Kilda
Esplanade
MARKET
• est 1970 •

# Background and Methodology

**RESEARCH OBJECTIVES**

IER set out to measure and assess the following objectives:

- Visitor origins
- Attendee profile
- Previous visitation
- Media consumption
- Awareness of 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 23rd February 2020
> Sunday 1st March 2020

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

# Attendee Research Insights

# Attendee Demographics

## AGE GROUP

| Age | 2020 | 2019 |
|-----|------|------|
| 18-25 | 14.7% | 10.0% |
| 26-35 | 24.1% | 19.5% |
| 36-45 | 15.4% | 17.4% |
| 46-55 | 19.5% | 19.5% |
| 56-65 | 15.9% | 21.5% |
| 66+ | 10.4% | 12.1% |

■ 2020  ■ 2019

## GENDER

| | 2020 | 2019 |
|-----|------|------|
| Female | 61.8% | 61.0% |
| Male | 37.5% | 39.0% |
| Prefer to self-describe | 0.5% | 0.0% |
| Prefer not to say | 0.3% | 0.0% |

■ 2020  ■ 2019

## HOUSEHOLD COMPOSITION

| | 2020 | 2019 |
|-----|------|------|
| Couple - without Dependents | 34.2% | 38.2% |
| Couple - with Dependents | 23.8% | 33.1% |
| Single living alone | 18.2% | 15.4% |
| Shared Household | 11.1% | 6.9% |
| Living with Parent(s) | 6.1% | 3.3% |
| Single Parent - with Dependents | 3.5% | 1.5% |
| Other | 1.3% | 1.0% |
| Prefer not to say | 1.8% | 0.5% |

■ 2020  ■ 2019

- The market was attended by a good representation of age groups with those aged 26 – 35 years the largest (24.1%). There was an increase in younger attendees in 2020 over 2019 (18-25 years by +4.7% and 26-35 years by +4.6%) whilst a decline of -5.6% in those aged 56-65.
- Those attending the market are predominantly females making up 61.8 % of the respondent sample
- There has been a decline in respondents that reside as couples, most significantly 'Couples – with Dependents' (-9.3%) from 2019 to 2020
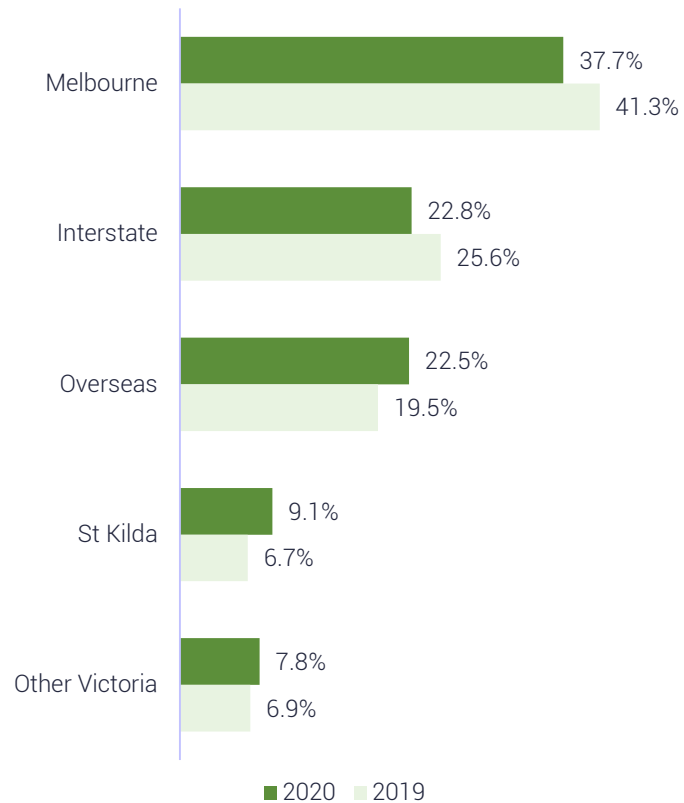
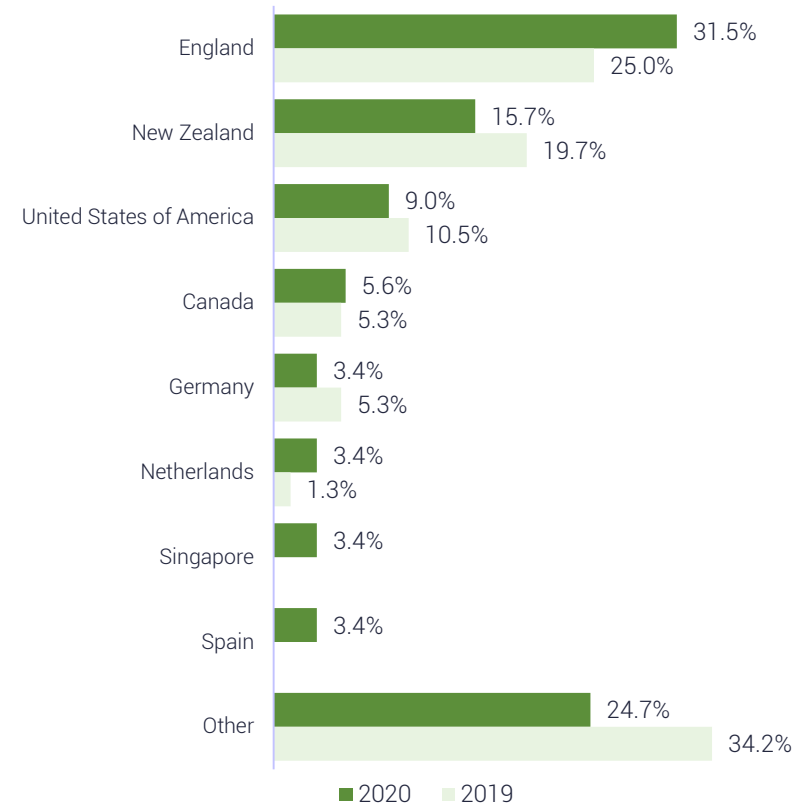Q9.   In what year were you born? (n=395)
Q12. Gender? (n=395)
Q11. Which of the following best describes your household composition? (n=395)

# Attendee Demographics

## VISITOR ORIGIN

| Origin | 2020 | 2019 |
|--------|------|------|
| Melbourne | 37.7% | 41.3% |
| Interstate | 22.8% | 25.6% |
| Overseas | 22.5% | 19.5% |
| St Kilda | 9.1% | 6.7% |
| Other Victoria | 7.8% | 6.9% |

■ 2020 ■ 2019

## OVERSEAS ATTENDEES

| Country | 2020 | 2019 |
|---------|------|------|
| England | 31.5% | 25.0% |
| New Zealand | 15.7% | 19.7% |
| United States of America | 9.0% | 10.5% |
| Canada | 5.6% | 5.3% |
| Germany | 3.4% | 5.3% |
| Netherlands | 3.4% | 1.3% |
| Singapore | 3.4% | |
| Spain | 3.4% | |
| Other | 24.7% | 34.2% |

■ 2020 ■ 2019

- Melbourne residents (other than St Kilda) represent the largest group of attendees at the market (37.7%) with strong attendance from interstate (22.8%) and overseas (22.5%).
- Overseas visitors increased by 3.0% over 2019 with England having the highest number of visitors, followed by New Zealand and the United States of America.
- Other includes a small number of attendees from many countries. See appendiced Data Table for full list of attendees Country of Origin for 2019 and 2020

Q10. Where do you live? (n=395)
Q10b. Where do you live? (n=89)

# Target Segments

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

**FAMILIES**
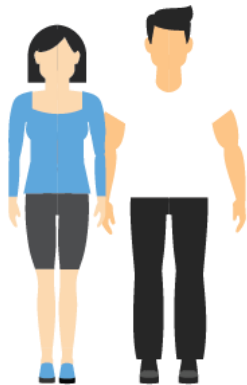
**EMPTY NESTERS**

**COUPLES AND SINGLES**
**NO CHILDREN**
**AGED UNDER 30**

**COUPLES AND SINGLES**
**WITH CHILDREN LIVING AT HOME**
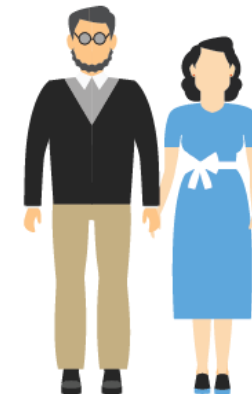
**COUPLES AND SINGLES**
**CHILDREN HAVE LEFT HOME**
**AGED 50+**

| 2020 | 2019 |
|------|------|
| 29.3% | 22.5% |

| 2020 | 2019 |
|------|------|
| 36.0% | 41.5% |

| 2020 | 2019 |
|------|------|
| 34.7% | 36.0% |

- All target segments were evenly represented at the Esplanade Market in 2020 with 'Families' representing 36.0%, 'Empty Nesters' 34.7% and 'Young SINKS & DINKS' 29.3%.
- There was a rise in attendance by 'Young SINKS&DINKS' (6.8%) but an evident decline in 'Families' (-5.5%) and slight decline in 'Empty Nesters' (-1.3%) from 2019 to 2020

Q9.   In what year were you born? (n=395)
Q11. Which of the following best describes your household composition? (n=395)

# Previous Attendance

## PREVIOUSLY ATTENDED ESPLANADE MARKET

**No**
- 53.2% (2020)
- 50.5% (2019)

**Yes**
- 46.8% (2020)
- 49.5% (2019)

■ 2020 ■ 2019

## TIME OF LAST VISIT TO THE ESPLANADE MARKET

**Within the last month**
- 18.9% (2020)
- 22.1% (2019)

**Within the last 6 months**
- 18.4% (2020)
- 16.6% (2019)

**Within the last year**
- 11.4% (2020)
- 12.1% (2019)

**Between 1-5 years ago**
- 25.9% (2020)
- 28.6% (2019)

**Between 6-10 years ago**
- 7.6% (2020)
- 11.6% (2019)

**More than 10 years ago**
- 17.8% (2020)
- 9.0% (2019)

■ 2020 ■ 2019

## LIFECYCLE SEGMENTS PREVIOUS ATTENDANCE AT ESPLANADE MARKET

**YOUNG SINKS & DINKS**
- Previously Attended: 25.0% (2020), 28.8% (2019)
- Attended within last year: 68.2% (2020), 76.2% (2019)

**FAMILIES**
- Previously Attended: 56.5% (2020), 54.8% (2019)
- Attended within last year: 47.5% (2020), 48.6% (2019)

**EMPTY NESTERS**
- Previously Attended: 54.8% (2020), 49.6% (2019)
- Attended within last year: 38.6% (2020), 31.0% (2019)

■ 2020 ■ 2019

- The majority of visitors (53.2%) were attending for the first time.
- Of those that had previously attended most (25.9%) had attended 'between 1–5 years ago'. There was a significant increase (8.8%) of those that attended 'more than 10 years ago'
- 'Families'(56.5%) and 'Empty Nesters' (54.8%) remain most likely to have previously attended the Market Attendance in 2020.

Q1. Have you been to the Esplanade Market before today? (n=395)
Q2. When was your last visit? (n=185)

# Attendance Behaviour

## MAIN REASON FOR ATTENDANCE AT THE ESPLANADE MARKET

| Reason | 2020 | 2019 |
|---|---|---|
| I was in the area | 28.1% | 26.6% |
| As a social activity | 27.6% | 28.1% |
| To enjoy the atmosphere | 14.4% | 7.0% |
| Bringing a visiting friend or family member | 13.4% | 24.9% |
| To look at the vendors and products | 10.1% | 6.0% |
| To buy Australian Made products | 2.3% | 2.5% |
| To support local traders | 2.0% | 2.2% |
| Other | 2.0% | 2.7% |
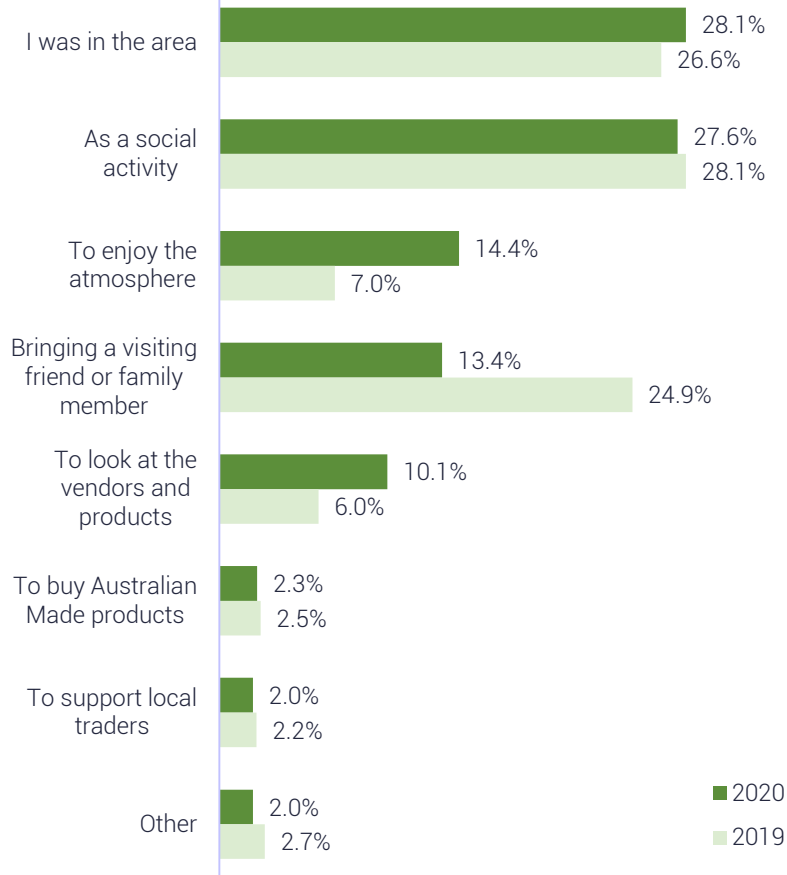
■ 2020  ■ 2019

## AVERAGE TIME PLANNED TO STAY AT THE ESPLANADE MARKET

| 2020 | 2019 |
|---|---|
| 1 hour 23 mins | 1 hour 20 mins |

## LIFECYCLE SEGMENTS ATTENDANCE BEHAVIOUR

**YOUNG SINKS AND DINKS**

| Average time | 1 hr 20 mins |
|---|---|
| Main reason for attendance | I was in the area |

**FAMILIES**

| Average time | 1 hr 40 mins |
|---|---|
| Main reason for attendance | As a social activity |

**EMPTY NESTERS**

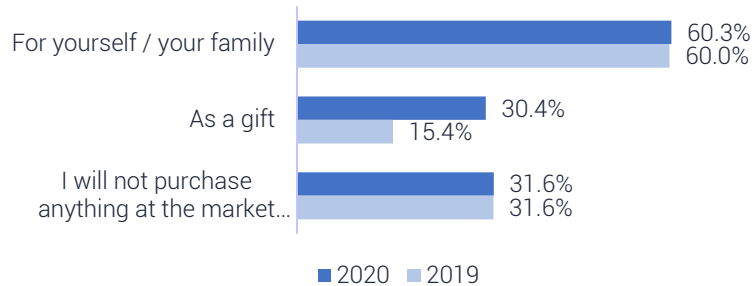| Average time | 1 hr 50 mins |
|---|---|
| Main reason for attendance | As a social activity and I was in the area |

- The main reasons for attending the Market was because 'I was in the area' (28.1%) and 'As a social activity' (27.6%). These are the same Top 2 reasons as 2019.
- 2020 saw an increase (+7.5%) in attendance 'To enjoy the atmosphere' and a decline (-11.5%) in those 'bringing a visiting friend or family member'
- The average planned dwell time at the Market was 1 hour, 23 mins, a similar amount of time to 2019, with 'Empty Nesters' staying for 1hr, 50 mins..

Q3. What was the main reason for your attendance at the Esplanade Market today? (n=395)
Q8A. How long are you planning to stay at the St. Kilda Esplanade Market today? (n=395)
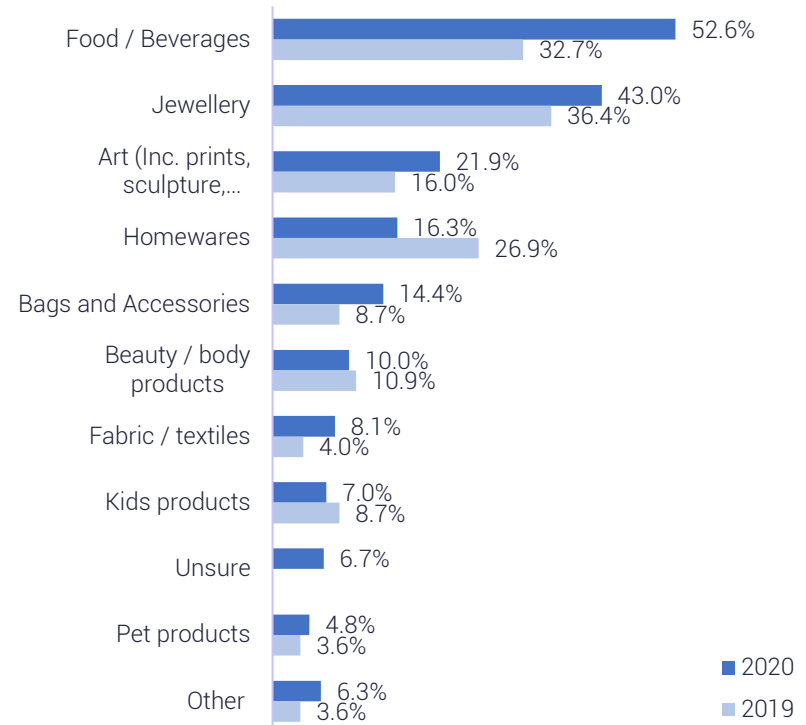
# Purchasing Behaviour

## PURCHASE BEHAVIOUR AT THE ESPLANADE MARKET

| Category | 2020 | 2019 |
|---|---|---|
| For yourself / your family | 60.3% | 60.0% |
| As a gift | 30.4% | 15.4% |
| I will not purchase anything at the market… | 31.6% | 31.6% |

■ 2020  ■ 2019

## AVERAGE SPEND

$58.20 — 2020

$57.74 — 2019

## ITEMS PURCHASED AT THE ESPLANADE MARKET

| Item | 2020 | 2019 |
|---|---|---|
| Food / Beverages | 52.6% | 32.7% |
| Jewellery | 43.0% | 36.4% |
| Art (Inc. prints, sculpture,… | 21.9% | 16.0% |
| Homewares | 16.3% | 26.9% |
| Bags and Accessories | 14.4% | 8.7% |
| Beauty / body products | 10.0% | 10.9% |
| Fabric / textiles | 8.1% | 4.0% |
| Kids products | 7.0% | 8.7% |
| Unsure | 6.7% | |
| Pet products | 4.8% | 3.6% |
| Other | 6.3% | 3.6% |

■ 2020  ■ 2019

- 60.3% of attendees did/would purchase something at the Market for themselves or family.'  Making a purchase 'as a gift' increased by 15% from 2019 to 2020.

- Average spend in 2020 was $58.20 similar to 2019.

- The top three items purchased were Food/beverages (52.6%), Jewellery (43.0%) and Art (21.9%).  The largest increase in  type of item purchased for 2020 was Food/Beverages (19.9%) whilst homewares purchases declined (-10.6%)

Q4. Have you/will you purchase anything at the Esplanade Market today…? (n=395)
Q8b. How much will you personally spend while at The Esplanade Market today? (n=269)
Q5. Which of the following will you/did you buy at the Esplanade Market today? (n=271)

# Purchasing Behaviour

## LIFECYCLE SEGMENTS PURCHASING BEHAVIOUR

**YOUNG SINKS AND DINKS**

| | 2020 | 2019 |
|---|---|---|
| Average Spend | $38.10 | $41.34 |
| Purchase an item | 65% | 64% |
| Item most purchased | Food/Beverages | Food/Beverages |

**FAMILIES**

| | 2020 | 2019 |
|---|---|---|
| Average Spend | $71.68 | $64.00 |
| Purchase an item | 83% | 74% |
| Item most purchased | Food/Beverages | Jewellery |

**EMPTY NESTERS**

| | 2020 | 2019 |
|---|---|---|
| Average Spend | $70.90 | $63.69 |
| Purchase an item | 80% | 66% |
| Item most purchased | Jewellery | Jewellery |

- 'Families' and 'Empty Nesters' both increased their average spend in 2020 and also their purchase or intent to purchase an item.
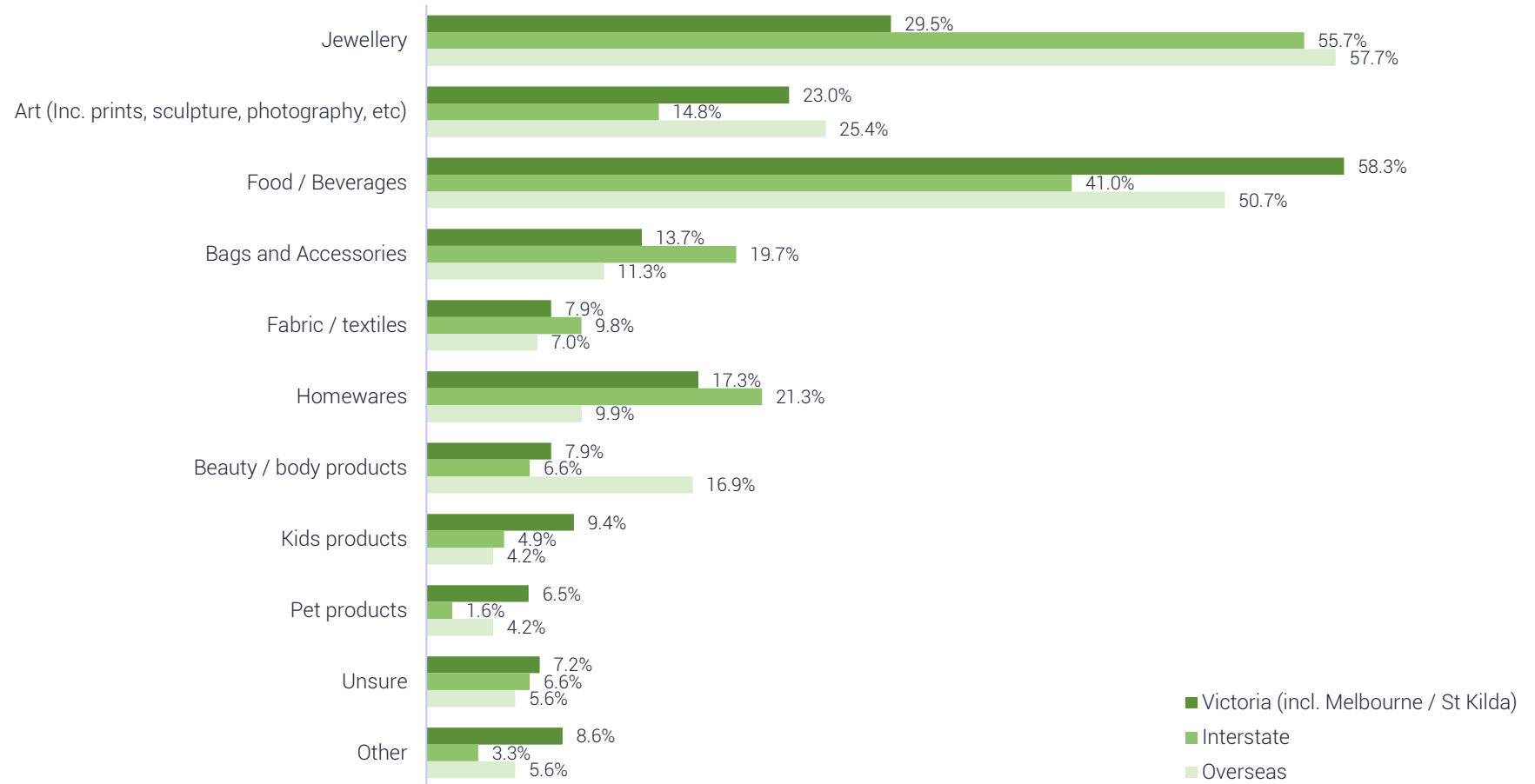
Q4. Have you/will you purchase anything at the Esplanade Market today? (n=395)
Q4a. How much will you personally spend while at The Esplanade Market today? (n=269)
Q5. Which of the following did you buy at the Esplanade Market today? (n=271)

# Purchasing Behaviour

## ITEMS PURCHASED AT THE ESPLANADE MARKET BY VISITOR ORIGIN

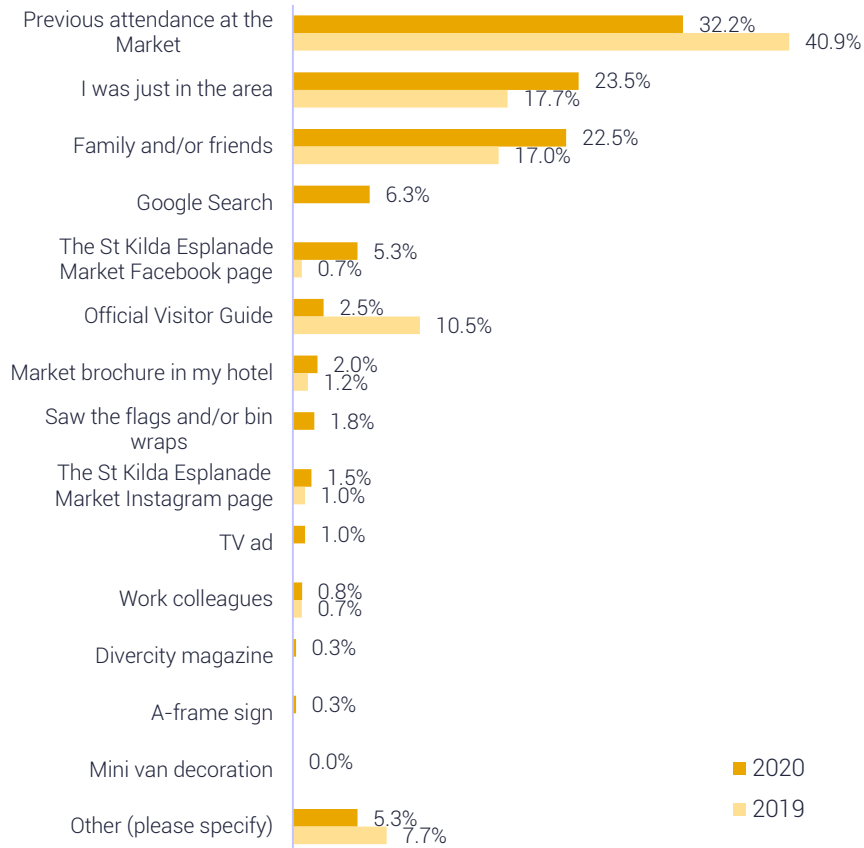| Item | Victoria (incl. Melbourne / St Kilda) | Interstate | Overseas |
|------|------|------|------|
| Jewellery | 29.5% | 55.7% | 57.7% |
| Art (Inc. prints, sculpture, photography, etc) | 23.0% | 14.8% | 25.4% |
| Food / Beverages | 58.3% | 41.0% | 50.7% |
| Bags and Accessories | 13.7% | 19.7% | 11.3% |
| Fabric / textiles | 7.9% | 9.8% | 7.0% |
| Homewares | 17.3% | 21.3% | 9.9% |
| Beauty / body products | 7.9% | 6.6% | 16.9% |
| Kids products | 9.4% | 4.9% | 4.2% |
| Pet products | 6.5% | 1.6% | 4.2% |
| Unsure | 7.2% | 6.6% | 5.6% |
| Other | 8.6% | 3.3% | 5.6% |

- Victorian attendees were more likely to purchase Food/Beverages (58.3%)
- Interstate and overseas visitors were far more likely to purchase Jewellery than Victorians.
- Beauty / body products were also a popular purchase or overseas attendees (16.9%) .
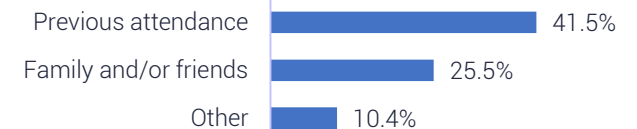
Q5. Which of the following will you/did you buy at the Esplanade Market today? (n=271)

# Channels of Awareness

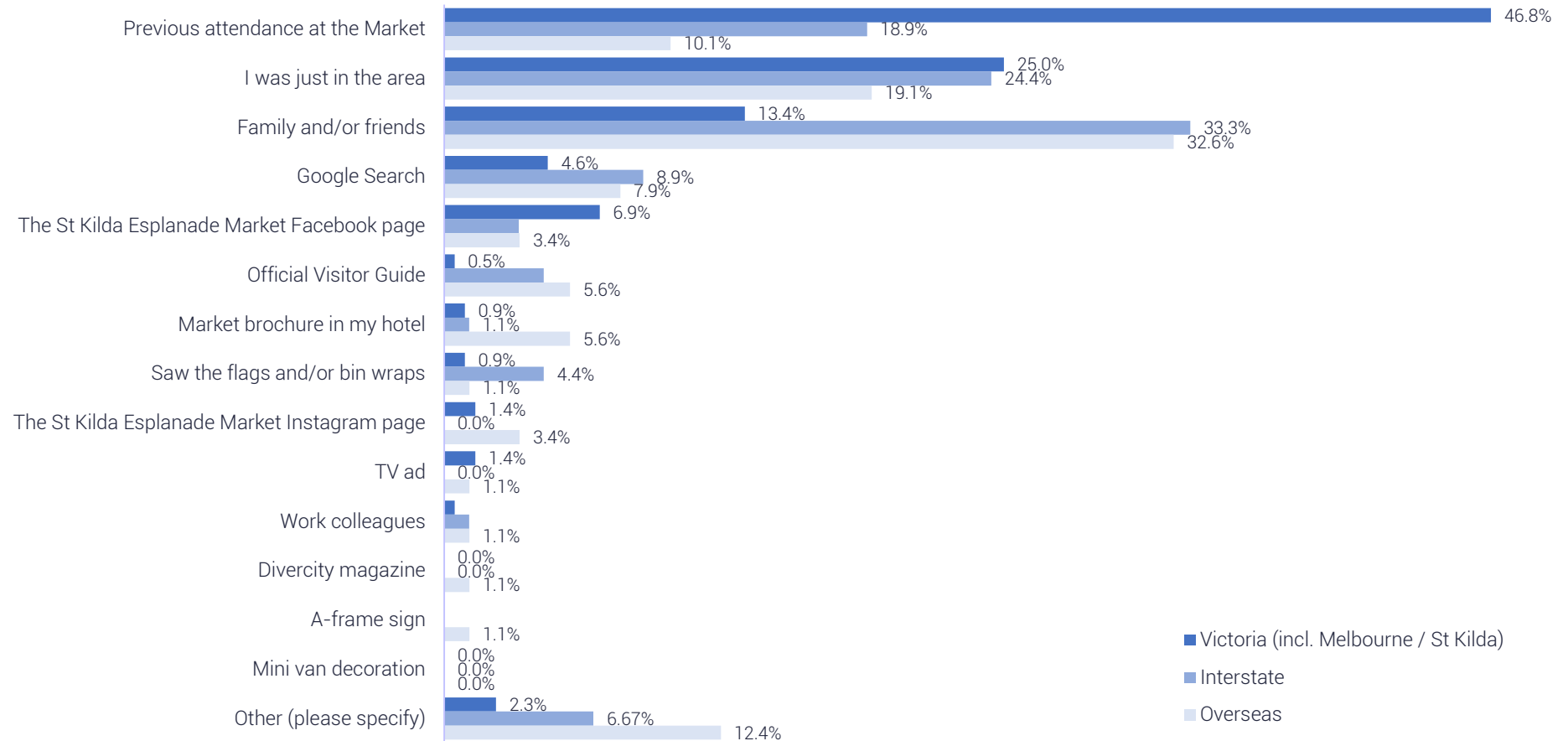## WHERE ATTENDEES RECALL SEEING OR HEARING ABOUT THE ESPLANADE MARKET

| Channel | 2020 | 2019 |
|---|---|---|
| Previous attendance at the Market | 32.2% | 40.9% |
| I was just in the area | 23.5% | 17.7% |
| Family and/or friends | 22.5% | 17.0% |
| Google Search | 6.3% | |
| The St Kilda Esplanade Market Facebook page | 5.3% | 0.7% |
| Official Visitor Guide | 2.5% | 10.5% |
| Market brochure in my hotel | 2.0% | 1.2% |
| Saw the flags and/or bin wraps | 1.8% | |
| The St Kilda Esplanade Market Instagram page | 1.5% | 1.0% |
| TV ad | 1.0% | |
| Work colleagues | 0.8% | 0.7% |
| Divercity magazine | 0.3% | |
| A-frame sign | 0.3% | |
| Mini van decoration | 0.0% | |
| Other (please specify) | 5.3% | 7.7% |

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

**YOUNG SINKS AND DINKS**

| | |
|---|---|
| I was just in the area | 29.2% |
| Family and/or friends | 27.1% |
| Previous attendance | 13.5% |

**FAMILIES**

| | |
|---|---|
| Previous attendance | 36.0% |
| I was just in the area | 21.1% |
| Family and/or friends | 21.1% |

**EMPTY NESTERS**

| | |
|---|---|
| Previous attendance | 41.5% |
| Family and/or friends | 25.5% |
| Other | 10.4% |

- 'Previous attendance at the Market' remains the strongest channel of awareness for attendees (32.2%.) indicating a high level of return by visitors..
- The St Kilda Esplanade Market Facebook page' was significantly more popular as a channel of awareness in 2020 than in 2019 whilst there was a sharp decline in awareness from the 'Official Visitors Guide.'
- Whilst undertaking a 'Google search' was not included in the survey 6.3% of respondents mentioned it in Other therefore it has been included as an option for 2020.
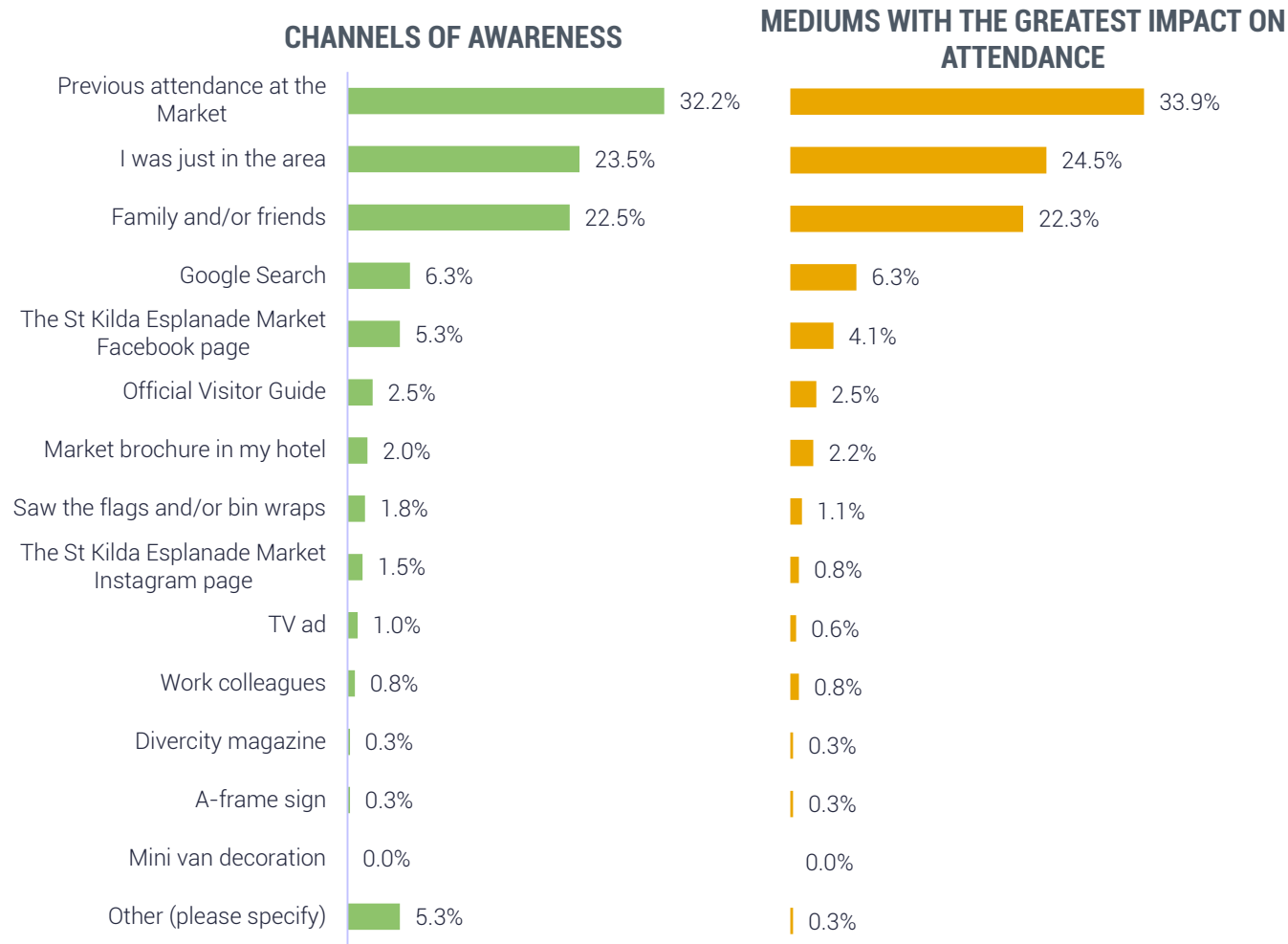
Q6. In which of the following ways did you see or hear about the Esplanade Market? (n=395)

# Channels of Awareness

## WHERE ATTENDEES RECALL SEEING OR HEARING ABOUT THE ESPLANADE MARKET BY VISITOR ORIGIN

| Channel | Victoria (incl. Melbourne / St Kilda) | Interstate | Overseas |
|---|---|---|---|
| Previous attendance at the Market | 46.8% | 18.9% | 10.1% |
| I was just in the area | 25.0% | 24.4% | 19.1% |
| Family and/or friends | 13.4% | 33.3% | 32.6% |
| Google Search | 4.6% | 8.9% | 7.9% |
| The St Kilda Esplanade Market Facebook page | 6.9% | 3.4% | |
| Official Visitor Guide | 0.5% | | 5.6% |
| Market brochure in my hotel | 0.9% | 1.1% | 5.6% |
| Saw the flags and/or bin wraps | 0.9% | 4.4% | 1.1% |
| The St Kilda Esplanade Market Instagram page | 1.4% | 0.0% | 3.4% |
| TV ad | 1.4% | 0.0% | 1.1% |
| Work colleagues | | | 1.1% |
| Divercity magazine | 0.0% | 0.0% | 1.1% |
| A-frame sign | | | 1.1% |
| Mini van decoration | 0.0% | 0.0% | 0.0% |
| Other (please specify) | 2.3% | 6.67% | 12.4% |

**Legend:**
- Victoria (incl. Melbourne / St Kilda)
- Interstate
- Overseas

- 'Previous attendance at the market' was highly significant channel of awareness for Victorians (46.8%) compared to Interstate and Overseas visitors.
- 'Family and/or friends' were the most important channel of awareness for attendees from Interstate (33.3%) and Overseas (32.6%).

Q6. In which of the following ways did you see or hear about the Esplanade Market? (n=395)

# Channels of Awareness Impact

### CHANNELS OF AWARENESS

| Channel | % |
|---|---|
| Previous attendance at the Market | 32.2% |
| I was just in the area | 23.5% |
| Family and/or friends | 22.5% |
| Google Search | 6.3% |
| The St Kilda Esplanade Market Facebook page | 5.3% |
| Official Visitor Guide | 2.5% |
| Market brochure in my hotel | 2.0% |
| Saw the flags and/or bin wraps | 1.8% |
| The St Kilda Esplanade Market Instagram page | 1.5% |
| TV ad | 1.0% |
| Work colleagues | 0.8% |
| Divercity magazine | 0.3% |
| A-frame sign | 0.3% |
| Mini van decoration | 0.0% |
| Other (please specify) | 5.3% |

### MEDIUMS WITH THE GREATEST IMPACT ON ATTENDANCE

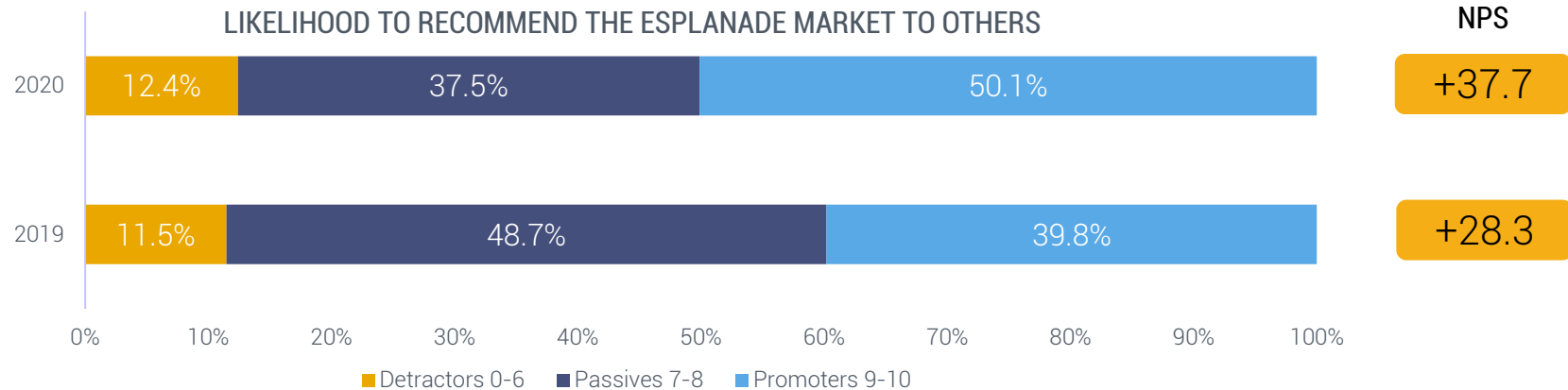| Medium | % |
|---|---|
| Previous attendance at the Market | 33.9% |
| I was just in the area | 24.5% |
| Family and/or friends | 22.3% |
| Google Search | 6.3% |
| The St Kilda Esplanade Market Facebook page | 4.1% |
| Official Visitor Guide | 2.5% |
| Market brochure in my hotel | 2.2% |
| Saw the flags and/or bin wraps | 1.1% |
| The St Kilda Esplanade Market Instagram page | 0.8% |
| TV ad | 0.6% |
| Work colleagues | 0.8% |
| Divercity magazine | 0.3% |
| A-frame sign | 0.3% |
| Mini van decoration | 0.0% |
| Other (please specify) | 0.3% |

- The medium which has the greatest impact follows a similar pattern to the channel of awareness mainly due to the majority of respondents indicating a single channel of awareness.

Q6. In which of the following ways did you see or hear about the Esplanade Market? (n=395)
Q7. Please indicate which of these mediums had the greatest impact on your decision to attend the Esplanade Market. (n=363)

# Advocacy

## LIKELIHOOD TO RECOMMEND THE ESPLANADE MARKET TO OTHERS

NPS

| Year | Detractors 0-6 | Passives 7-8 | Promoters 9-10 | NPS |
|------|---------------|--------------|----------------|-----|
| 2020 | 12.4% | 37.5% | 50.1% | +37.7 |
| 2019 | 11.5% | 48.7% | 39.8% | +28.3 |

0%  10%  20%  30%  40%  50%  60%  70%  80%  90%  100%

■ Detractors 0-6  ■ Passives 7-8  ■ Promoters 9-10

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 Markets 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 significant improvement of the NPS from +28.3 (2019) to +37.7 (2020) as a result of a higher level of Promoters for the Esplanade Market that will talk positively to friends and family about their experience

Q8. How likely would you be to recommend attending the Esplanade Market to a family member, friend or colleague? (n=395)

# Advocacy

## ADVOCACY - LIFECYCLE SEGMENTS

| | YOUNG SINKS AND DINKS | FAMILIES | EMPTY NESTERS |
|---|---|---|---|
| 2020 | +19.3 | +40.3 | +50.0 |
| 2019 | +17.8 | +31.1 | +23.9 |

Net Promoter Score
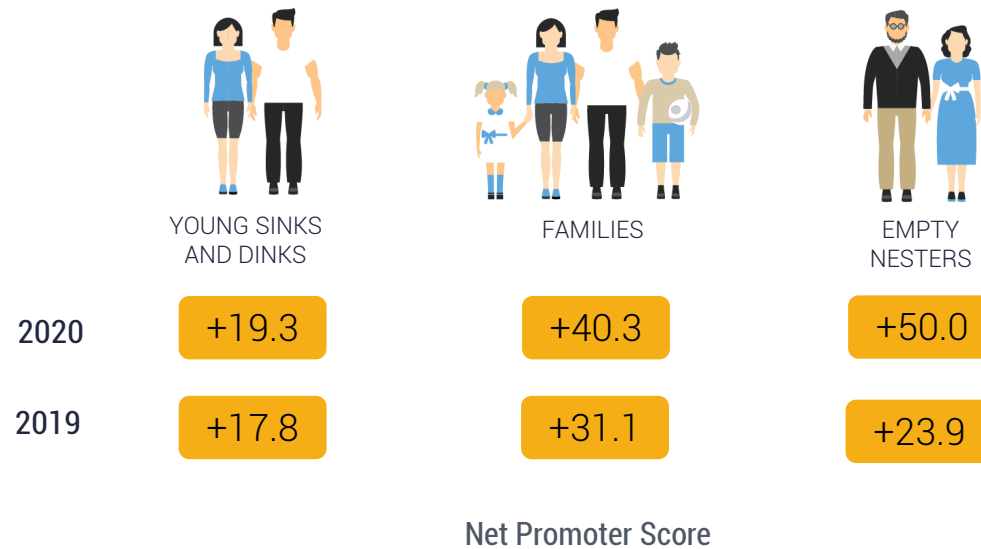
- 'Families' and 'Empty Nesters' continue to be the strongest advocates for the Esplanade Market
- 'Empty Nesters' had a significant increase in NPS from +23.9 in 2019 to +50.0 in 2020

Q8. How likely would you be to recommend attending the Esplanade Market to a family member, friend or colleague? (n=395)

# Suggested Improvements

SOME EXAMPLES OF COMMENTS RELATING TO MOST COMMON SUGGESTED IMPROVEMENT AREAS

## Market Stalls

*"Very good location convenient not sure about variety."*

*"More variety. A lot of stalls. Different variety. You have a lot of soaps and oil. They are very much the same. Jewellery and food are all the same."*

*"Good and big. Maybe less jewellery."*

*"More credit cards acceptance from the stores owners."*

## Music

*"It is clean organised but it needs more music."*

*"It needs more vegan food and needs to have music."*

## Food and Drink Stalls

*"Not many vegan food products.."*

*"It should be more spaced on the grass area instead of running into each other. Have food trucks up closer."*

## Shade for attendees

*"Shaded walkway at least more shaded seating."*

*"Need more shade. it is long and skinny . quite congested. Need more place to stop.."*

*"Shade and seating on hot days."*

## Parking

*"Hard to find parking."*

*"Cost of parking is expensive on a Sunday."*

Q13. Do you have any feedback about the Esplanade Markets? (n=395)

# Crowd Count Analysis

# Crowd Count Analysis

METHODOLOGY

IER was engaged by the City of Port Phillip to undertake an attendance estimate at the St. Kilda Esplanade Markets. IER researchers were deployed to undertake crowd estimates on a half hourly basis on Sunday 23rd February and Sunday 1st March 2020 between 10:00am – 5:00pm. The weather on these days was considerably hot (Sun Feb 23 reached 34°C and Sun 1 March 38 °C) with counting finishing at 4:30pm on Sunday 1st March due to stallholders closing early.

The markets were 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
- Utilise like-crowd times as advised by the City of Port Phillip to duplicate count across the like day and time frame
- Estimate the average number of people at each location by averaging across each day the crowd count figure
- Calculate average minutes spent by respondents in each from the survey
- Divide average minutes spent at each location by the total number of minutes the precinct is in operation - 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 markets

# Crowd Count Analysis

**DAY 1 – SUNDAY 23rd FEBRUARY 2020**

| Time | Zone 1:<br>Polkington St – Victoria St | Zone 2:<br>Victoria St – Alfred Square | Zone 3:<br>Alfred Square | Zone 4:<br>Alfred Square – Robe St | Zone 5:<br>Robe St – Cavell St | Total |
|---|---|---|---|---|---|---|
| | | | **Raw Numbers** | | | |
| 10.00am - 10.30am | 41 | 48 | 44 | 53 | 52 | 238 |
| 10.30am - 11.00am | 93 | 82 | 180 | 122 | 115 | 592 |
| 11.00am - 11.30am | 48 | 86 | 119 | 213 | 164 | 630 |
| 11.30am - 12.00noon | 72 | 79 | 135 | 219 | 159 | 664 |
| 12.00noon - 12.30pm | 62 | 85 | 162 | 273 | 162 | 744 |
| 12.30noon - 1.00pm | 79 | 51 | 164 | 181 | 157 | 632 |
| 1.00pm - 1.30pm | 58 | 52 | 87 | 196 | 107 | 500 |
| 1.30pm - 2.00pm | 76 | 33 | 126 | 183 | 145 | 563 |
| 2.00pm - 2.30pm | 60 | 73 | 64 | 155 | 137 | 489 |
| 2.30pm - 3.00pm | 55 | 47 | 68 | 129 | 146 | 445 |
| 3.00pm - 3.30pm | 50 | 47 | 97 | 155 | 116 | 465 |
| 3.30pm - 4.00pm | 43 | 44 | 84 | 84 | 89 | 344 |
| 4.00pm - 4.30pm | 41 | 49 | 73 | 88 | 66 | 317 |
| 4.30pm - 5.00pm | 29 | 56 | 43 | 62 | 92 | 282 |
| **Total** | **807** | **832** | **1,446** | **2,113** | **1,707** | **6905** |

| | |
|---|---|
| Average Attendance | 493 |
| Average Time Spent at Market | 100.7 |

| | | | |
|---|---|---|---|
| Churn rate | 4.17 | Est. Attend | 2,056 |

- On Sunday 23rd February there were on average 493 attendees at the Esplanade Market every 30 minutes.  Attendees stayed at the Market on average for 1 hour, 40 mins.
- Taking into account the average attendees, minutes spent at the Market (and therefore the churn rate) IER estimates attendees on the day to be 2,056.

# Crowd Count Analysis

**DAY 2 – SUNDAY 1st MARCH 2020**

| Time | Zone 1: Polkington 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 |
|---|---|---|---|---|---|---|
| | | | Raw Numbers | | | |
| 10.00am - 10.30am | 35 | 36 | 81 | 75 | 81 | 308 |
| 10.30am - 11.00am | 36 | 15 | 59 | 121 | 105 | 336 |
| 11.00am - 11.30am | 64 | 47 | 103 | 111 | 116 | 441 |
| 11.30am - 12.00noon | 55 | 30 | 134 | 106 | 87 | 412 |
| 12.00noon - 12.30pm | 74 | 43 | 115 | 135 | 100 | 467 |
| 12.30noon - 1.00pm | 60 | 63 | 96 | 125 | 127 | 471 |
| 1.00pm - 1.30pm | 60 | 55 | 125 | 82 | 82 | 404 |
| 1.30pm - 2.00pm | 39 | 47 | 79 | 98 | 104 | 367 |
| 2.00pm - 2.30pm | 30 | 35 | 104 | 109 | 85 | 363 |
| 2.30pm - 3.00pm | 36 | 36 | 88 | 71 | 68 | 299 |
| 3.00pm - 3.30pm | 44 | 16 | 64 | 67 | 48 | 239 |
| 3.30pm - 4.00pm | 29 | 27 | 52 | 60 | 60 | 228 |
| 4.00pm - 4.30pm | 32 | 30 | 20 | 24 | 21 | 127 |
| 4.30pm - 5.00pm | | | | | | 0 |
| **Total** | **594** | **480** | **1,120** | **1,184** | **1,084** | **4462** |

| | |
|---|---|
| Average Attendance | 343 |
| Average Time Spent at Market | 91.0 |

| | | | |
|---|---|---|---|
| Churn rate | 4.29 | Est. Attend | 1,471 |

- On Sunday 1st March, there were 343 attendees on average at the Esplanade Market, every 30 minutes. On average attendees stayed at the Market for 1 hour, 31 mins. Note this was a day of extreme heat (38 °C) effecting crowd numbers, time spent at the Market and ceasing crowd count at 4:30pm due to the early closure of stall holders.
- 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 1,471

# Data Tables

# Data Table - Country of Origin

| Q10b_1 - In which country do you live? - Country | 2019 | 2020 |
|---|---|---|
| England | 25.0% | 31.5% |
| New Zealand | 19.7% | 15.7% |
| United States of America | 10.5% | 9.0% |
| Canada | 5.3% | 5.6% |
| Germany | 5.3% | 3.4% |
| Netherlands | 1.3% | 3.4% |
| Singapore | 0.0% | 3.4% |
| Spain | 0.0% | 3.4% |
| France | 2.6% | 2.2% |
| Hong Kong | 0.0% | 2.2% |
| Sweden | 0.0% | 2.2% |
| Taiwan | 0.0% | 2.2% |
| Andorra | 0.0% | 1.1% |
| Belgium | 0.0% | 1.1% |
| Chile | 0.0% | 1.1% |
| Denmark | 1.3% | 1.1% |
| East Timor (Timor-Leste) | 1.3% | 1.1% |
| Iceland | 0.0% | 1.1% |
| Indonesia | 0.0% | 1.1% |
| Japan | 1.3% | 1.1% |
| Malaysia | 3.9% | 1.1% |
| Malta | 0.0% | 1.1% |
| Phillipines | 0.0% | 1.1% |
| South Africa | 1.3% | 1.1% |
| Switzerland | 1.3% | 1.1% |
| United Arab Emirates | 0.0% | 1.1% |
| Scotland | 9.2% | 0.0% |
| Wales | 2.6% | 0.0% |
| Algeria | 1.3% | 0.0% |
| China (excludes SARs and Taiwan) | 1.3% | 0.0% |
| Finland | 1.3% | 0.0% |
| Ireland | 1.3% | 0.0% |
| New Caledonia | 1.3% | 0.0% |
| Norway | 1.3% | 0.0% |
| Sweden | 1.3% | 0.0% |

Q10b_1 - In which country do you live? – Country (n=89)