

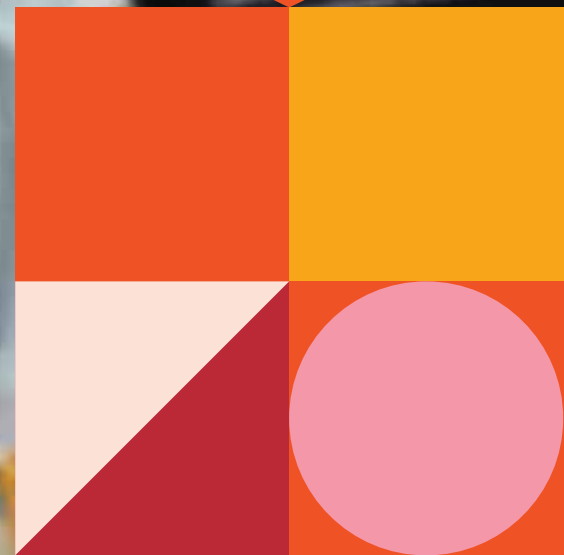
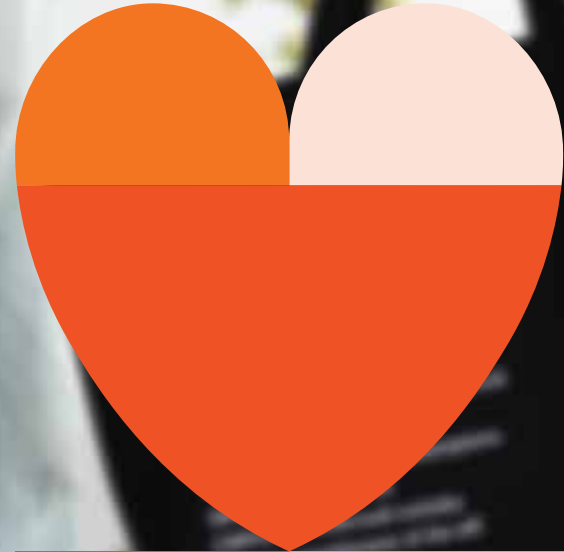
City Centre Consumer Segmentation Report

2022/2023



ACT
Government

**CITY
RENEWAL
AUTHORITY**





Segmenting the Canberra market

How we arrived at these segments

The segmentation analysis went through numerous iterations, looking at different combinations of attitudinal and behavioural variables grounded in values and demographic variables

The strongest inputs to create Canberra segments came from a mix of respondent needs

We landed on one solution that maximised differences between segments and similarities within segments



The strongest inputs to create Canberra market segments came from a mix of respondent needs

These statements pulled apart Canberrans in a way that maximised differences between segments and similarities within segments



Demographics

- Lifestage
- Age
- Home type



Behaviours

- Number of behaviours
- Main areas of interest
- \$ Spend

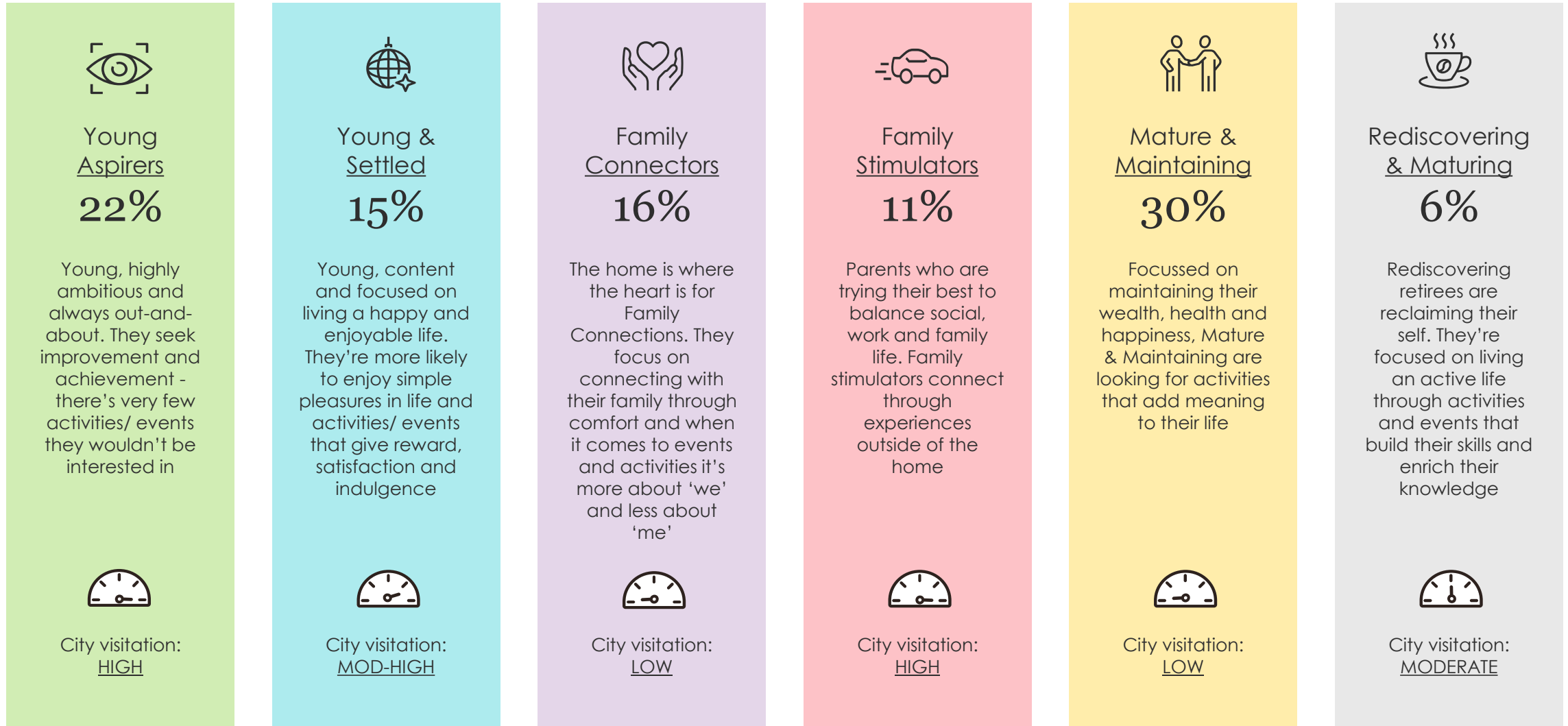


Attitudes and values

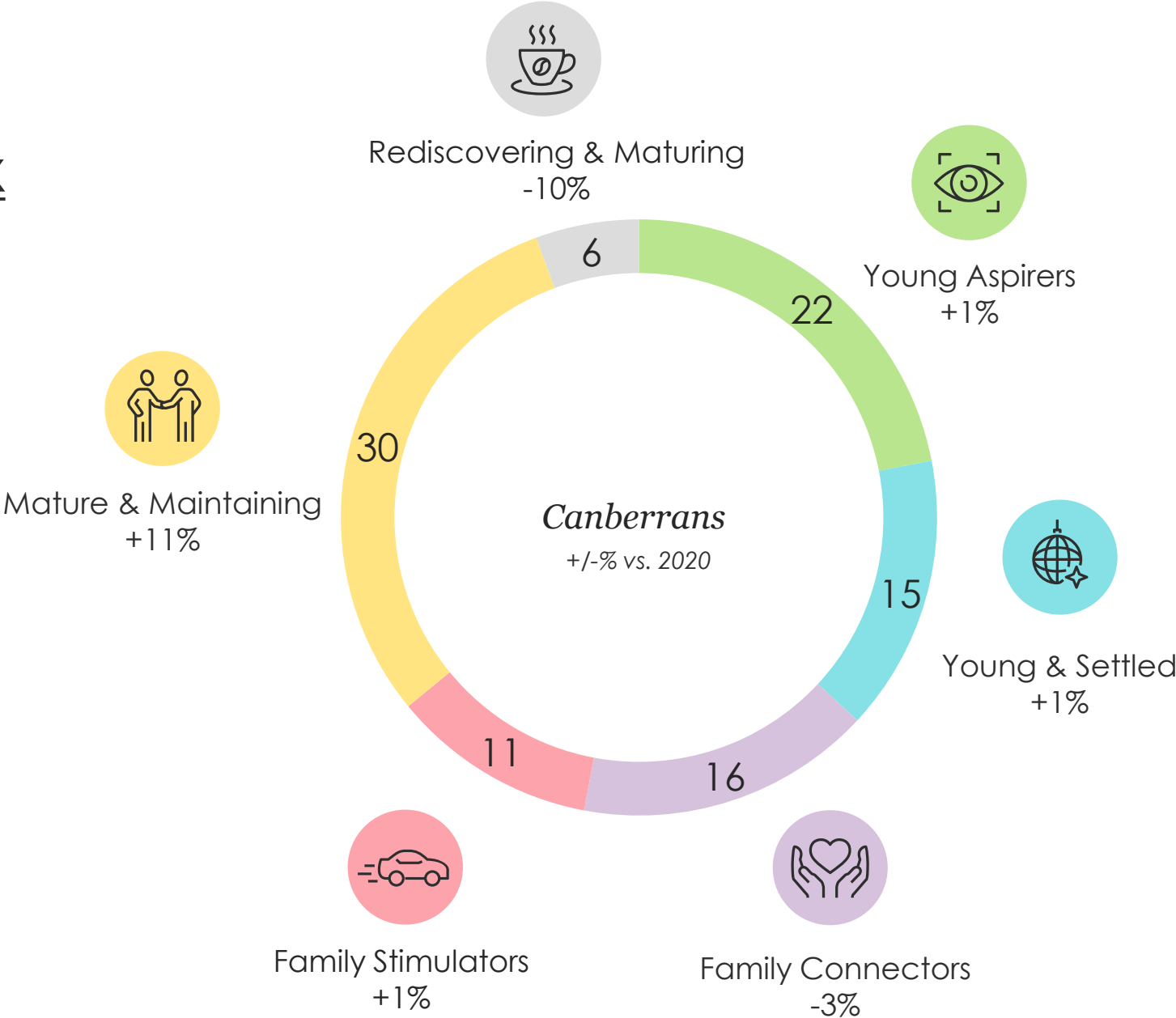
- Type of lifestyle led
- Ambition attitude
- Social life
- Personal values

Segments on 1 page:

Two primary discriminators across the segments are lifestage and city visitation

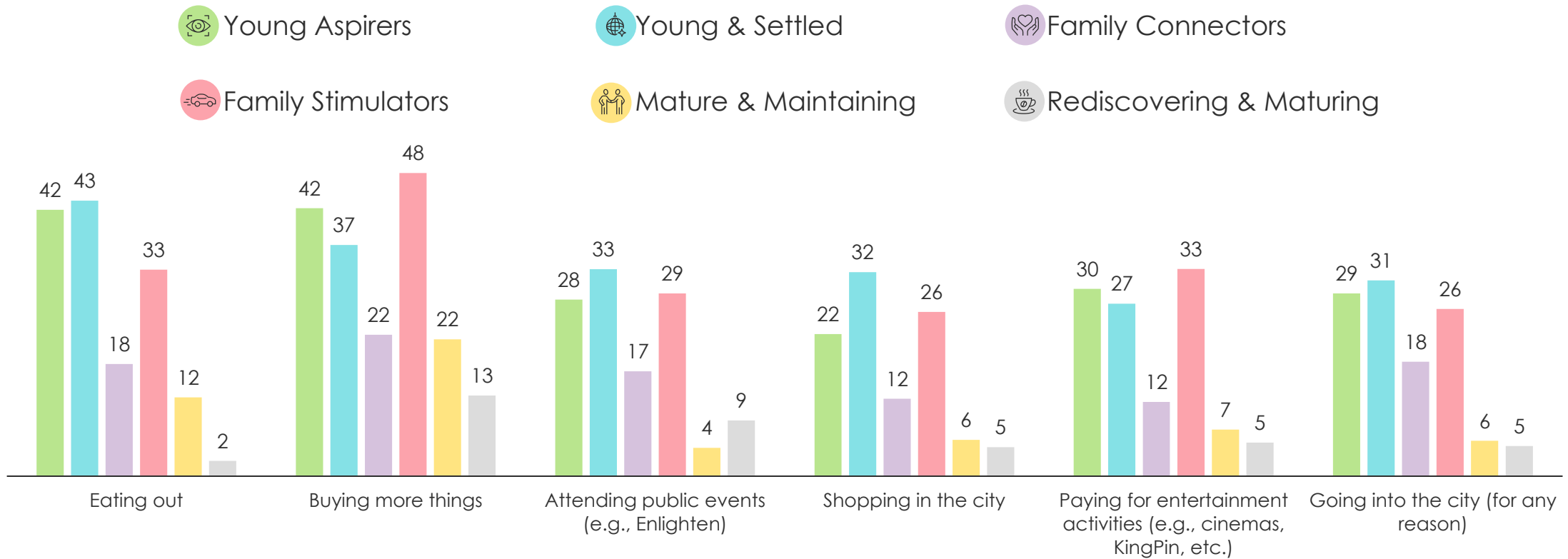


Canberrans can be divided in to six distinct segments



Young Aspirers, Young & Settled and Family Stimulators are getting out and buying more things than 2 years ago

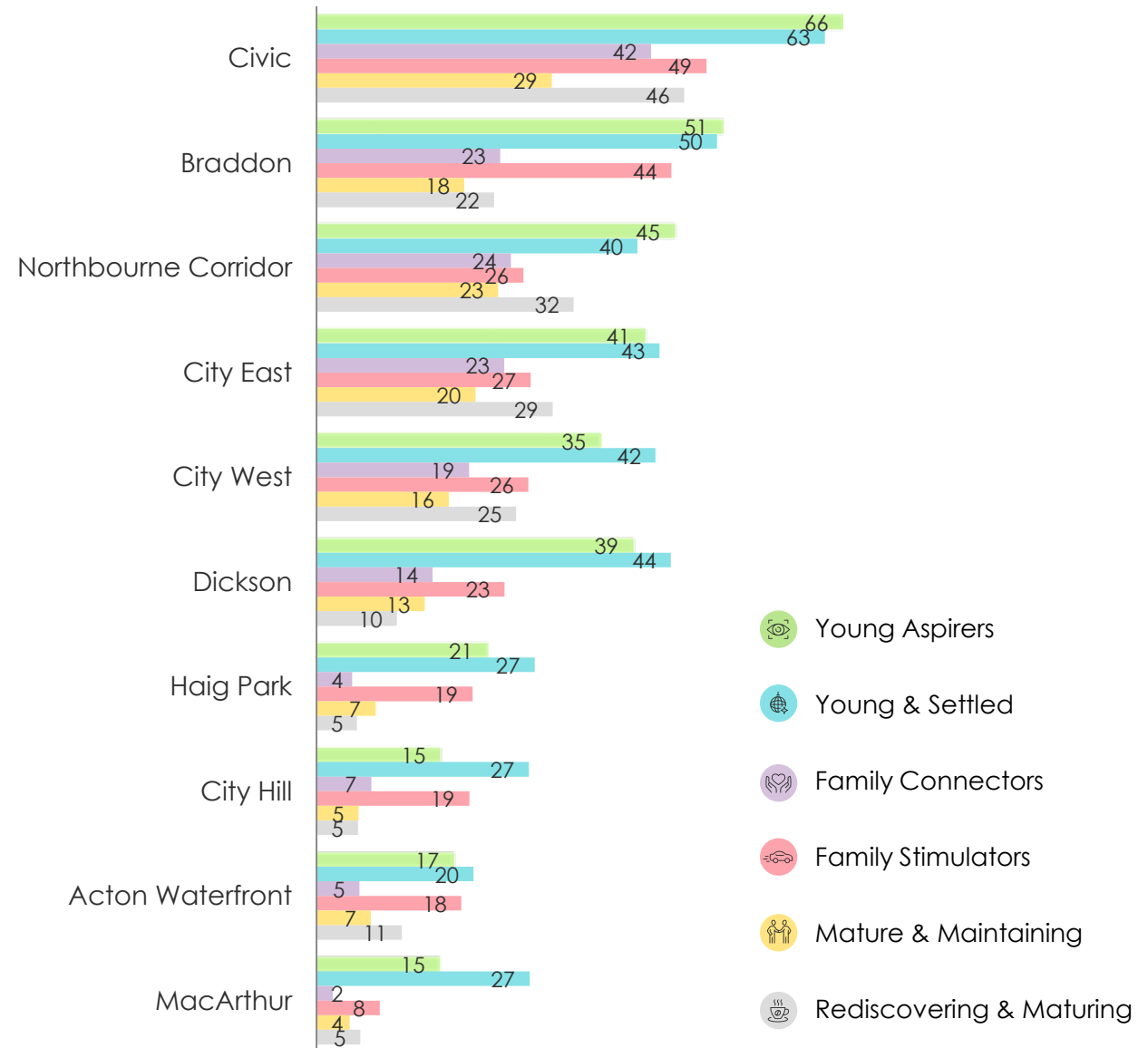
Behaviours across segments – doing more (%)




Young Aspirers and Young & Settled are significantly more likely to be out and about than any other segment

While a small segment, the Rediscovering and Maturing are frequently visiting Civic

Precinct visitation – a couple times a month or more (%)



C3 - How often would you normally visit the locations below
n=148/93/94/69/206/38



Deep Dive into Segment profiling



Young Aspirers

Market
Size:



City
Visitation:



Young, highly ambitious and always out-and-about. They seek improvement and achievement & there's very few activities/ events they wouldn't be interested in

Life Values

Self-direction, benevolence, achievement

Who are they?

Externally driven, out and about, prioritise career/building skills

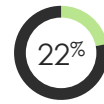
Young busy and active people who are externally driven, tend to spend more time doing activities or going to events outside the house. They have ambitious goals and are fuelled by a desire to learn, build and improve their skills. This desire is reflected in the activities and events they do in their spare time. They are one of the segments who is likely to spend more time working, playing and living in the Canberra City Centre.





Young Aspirers

Market Size:

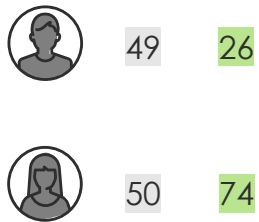


Young Aspirers ■ Canberran ■

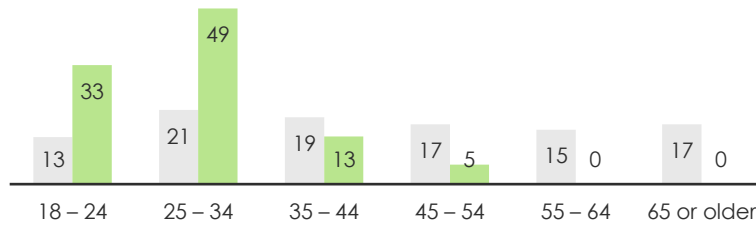
City Visitation: HIGH

Young, highly ambitious and always out-and-about. They seek improvement and achievement & there's very few activities/ events they wouldn't be interested in

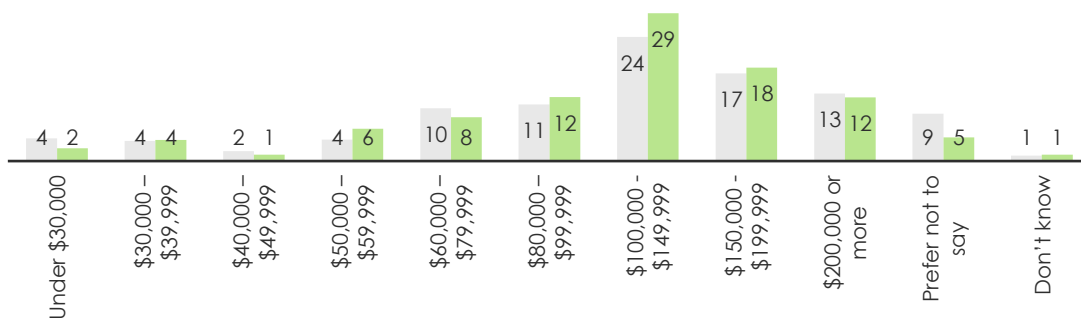
Gender



Age

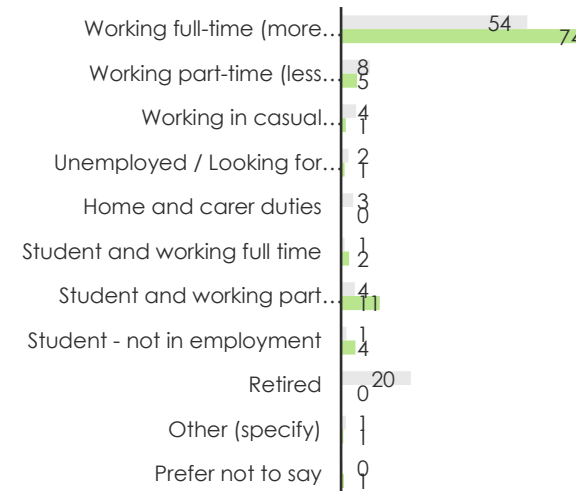


Income

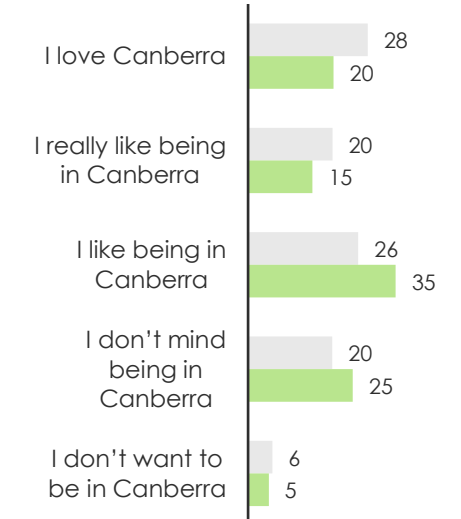


Sample n=148

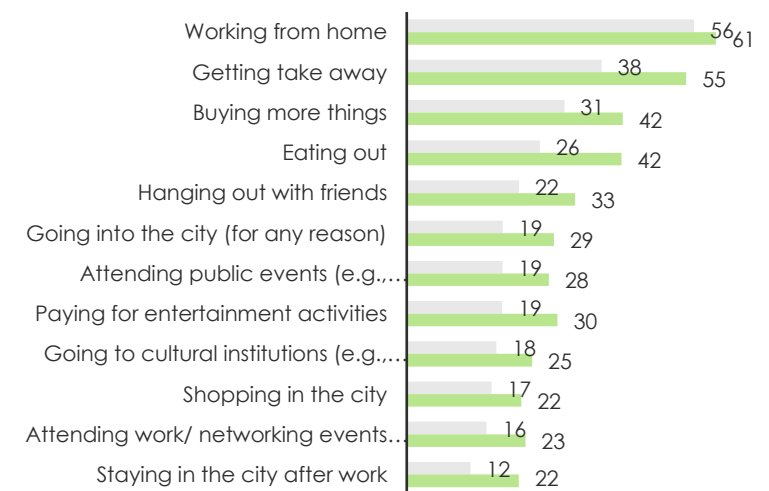
Work status



Attitudes to Canberra



Behaviour change* in the last 2 years

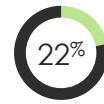


*Net more

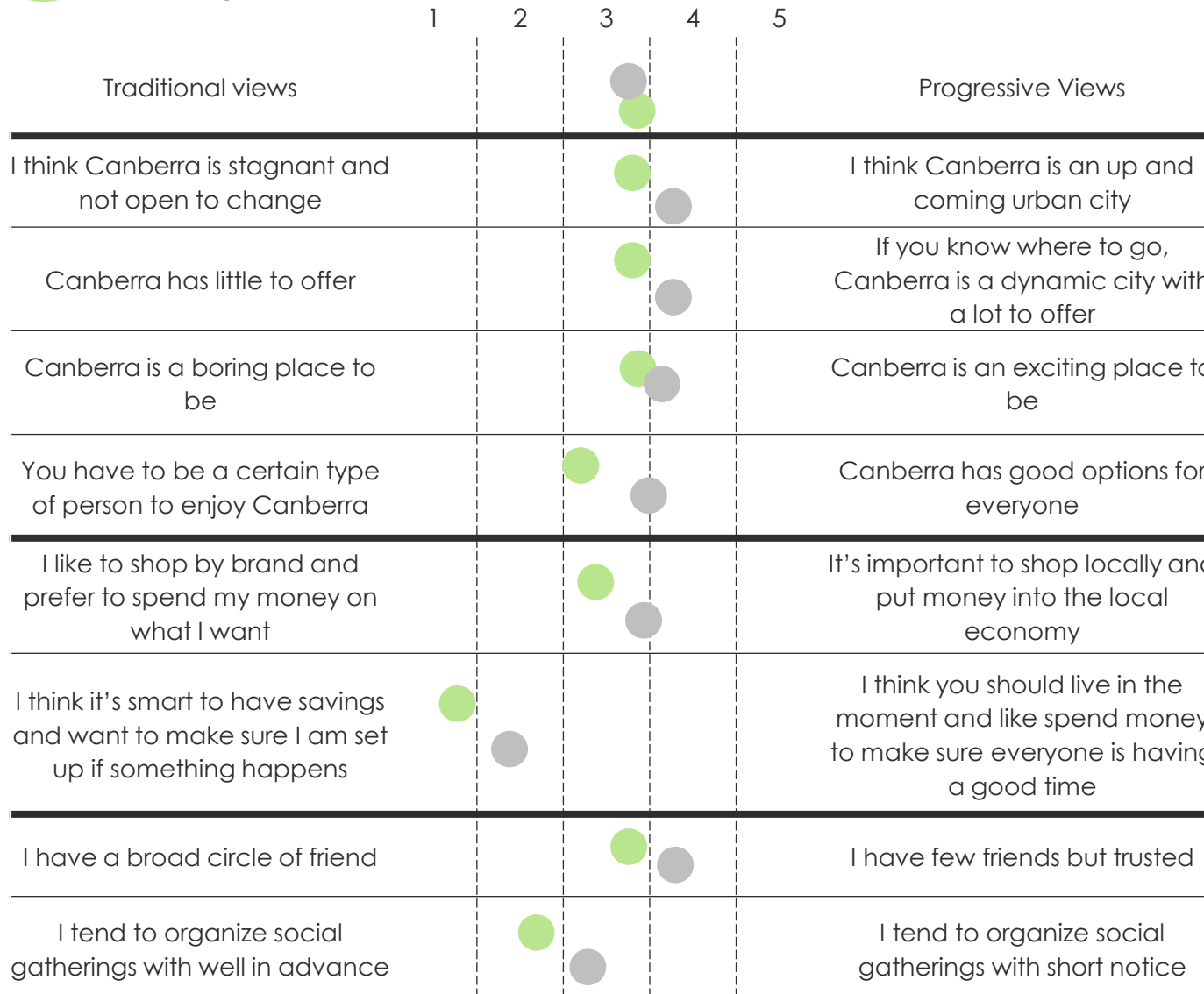


Young Aspirers

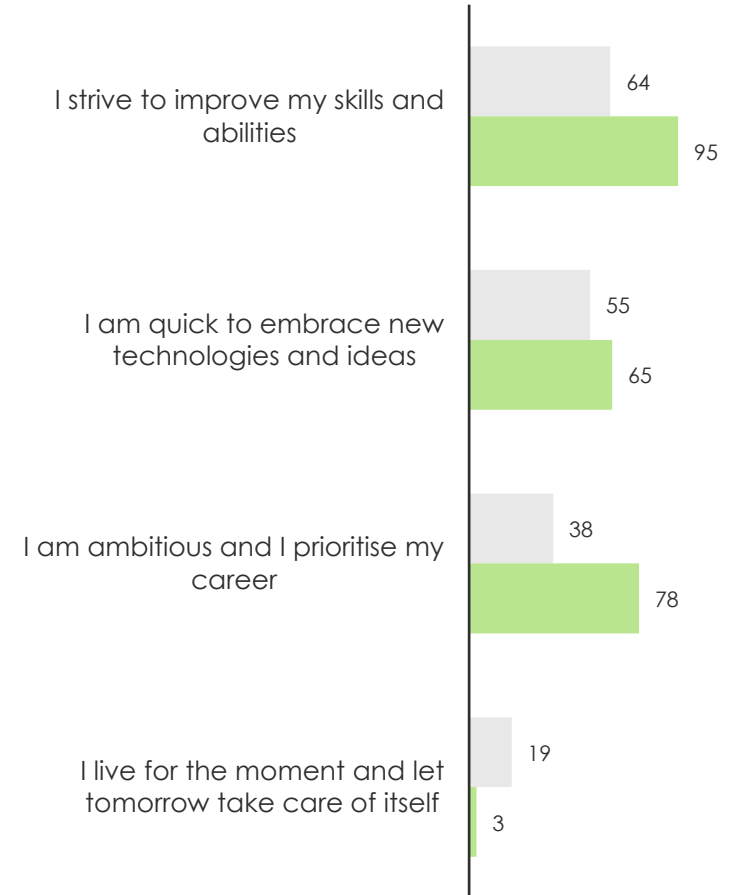
Market Size:



City Visitation:



Identity

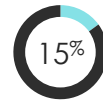


B1 - Where do you sit on the following scales? B3 - Thinking about your role in your family and social circle, where do you sit on the following scale? B4 - Thinking about your views and outlook on the world, where do you sit on the following scale? B2 - The following statements are on a range of topics. For each statement, please indicate how much you agree or disagree. n=148



Young & Settled

Market
Size:



City
Visitation:



MOD
-HIGH

Young, content and focused on living a happy and enjoyable life. They're more likely to enjoy simple pleasures in life and activities/events that give reward, satisfaction and indulgence

Life Values

Self direction, security, universalism

Who are they?

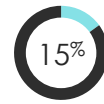
Internally driven – home bodies – prioritise pleasure/enjoyment - Civic

Young SINK/DINKS who while probably active, are at heart homebodies and tend to spend more time doing or hosting activities at home. When it comes to activities and events, they are more likely to be driven by pure pleasure and enjoyment. Their thinking tends to be more short-term. They are less likely to find meaning or engage with the Canberra City Centre



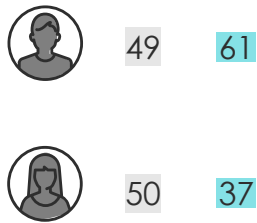
Young & Settled

Market Size:

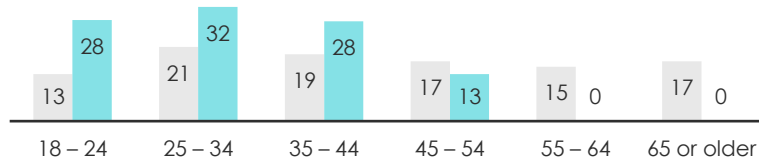


Young, content and focused on living a happy and enjoyable life. They're more likely to enjoy simple pleasures in life and activities/events that give reward, satisfaction and indulgence

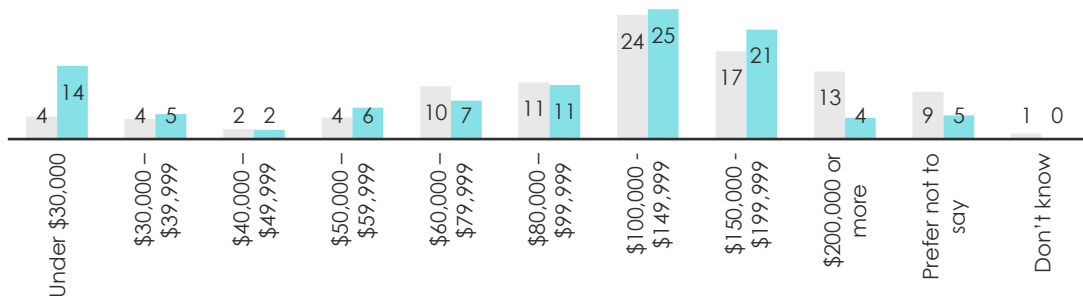
Gender



Age



Income



Sample n=93

Young & Settled

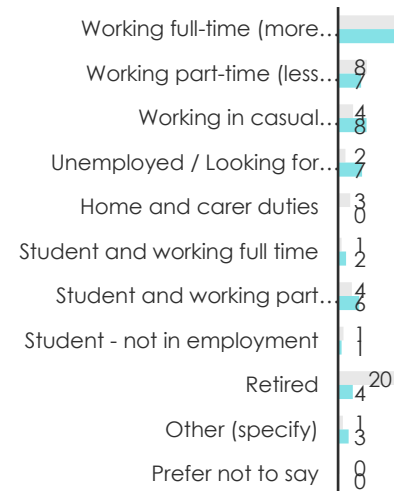
Canberra

City Visitation:

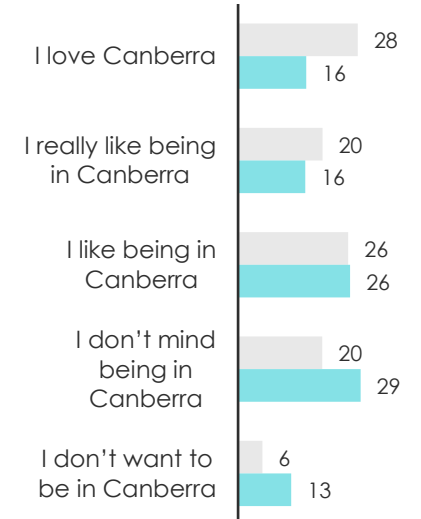


MOD
-HIGH

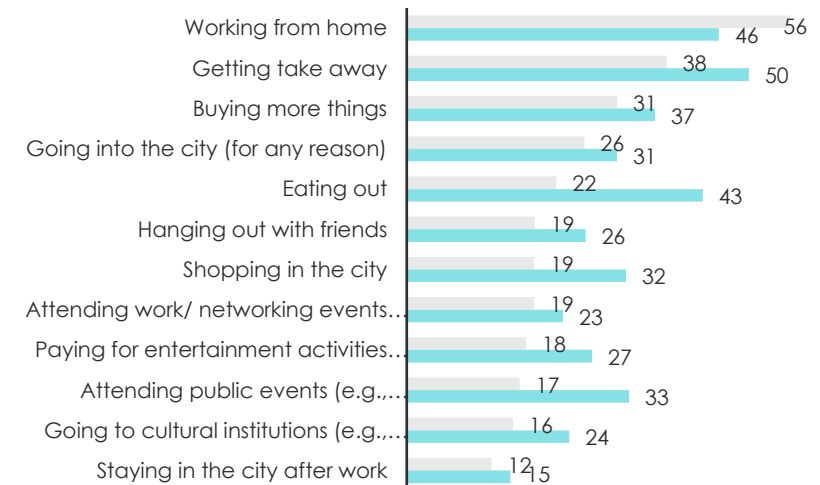
Work status



Attitudes to Canberra



Behaviour change* in the last 2 years



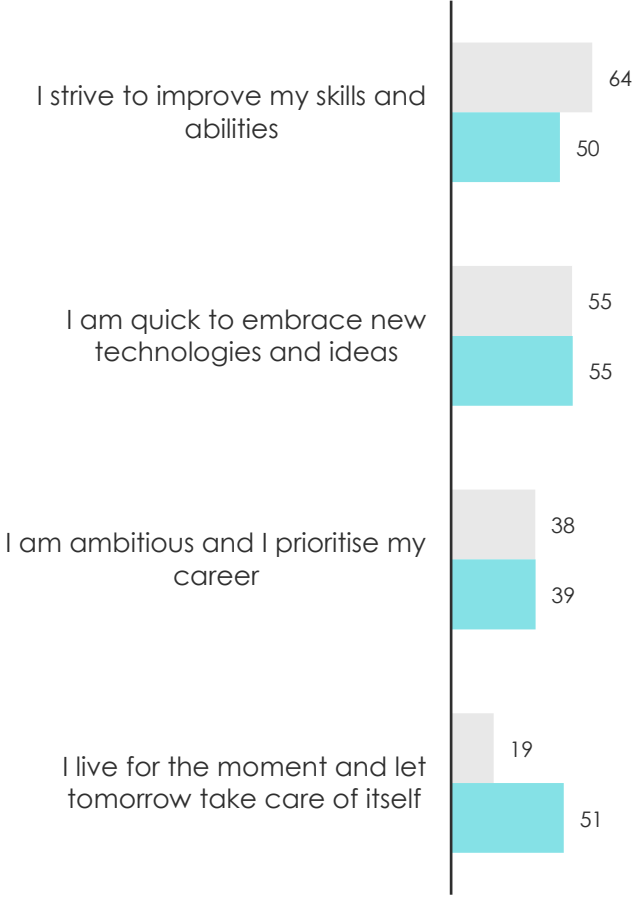
*Net more



Young & Settled



Identity



B1 - Where do you sit on the following scales? B3 - Thinking about your role in your family and social circle, where do you sit on the following scale? B4 - Thinking about your views and outlook on the world, where do you sit on the following scale? B2 - The following statements are on a range of topics. For each statement, please indicate how much you agree or disagree. n=93



Family Connectors

*Market
Size:*



*City
Visitation:*



The home is where the heart is. They focus on connecting with their family through comfort and when it comes to events and activities it's more about 'we' and less about 'me'

Life Values

Security, benevolence, self direction

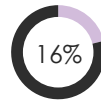
Who are they?

Internally driven – home bodies – prioritise fostering relationship with family – prioritises indulgence/enjoyment – Civic/Braddon Parents whose lives and goals revolve around their children. They're more homebodies and their spare time is most likely spent with their family or friends as opposed to being out and about. They are less likely to regularly visit the Canberra City Centre their activities are more likely to be driven by indulgence, celebration, socialising, be entertained or wanting to feel special



Family Connectors

Market Size:



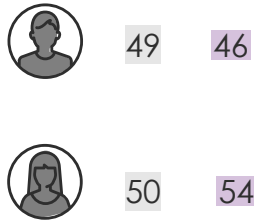
City Visitation:



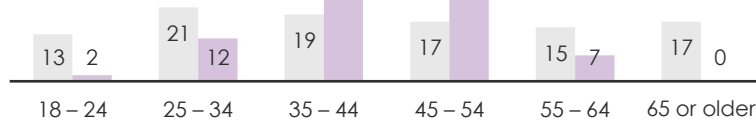
Family Connectors ■ Canberra ■

Focused on reclaiming their self, living an active life through activities and events that build their skills and enrich their knowledge

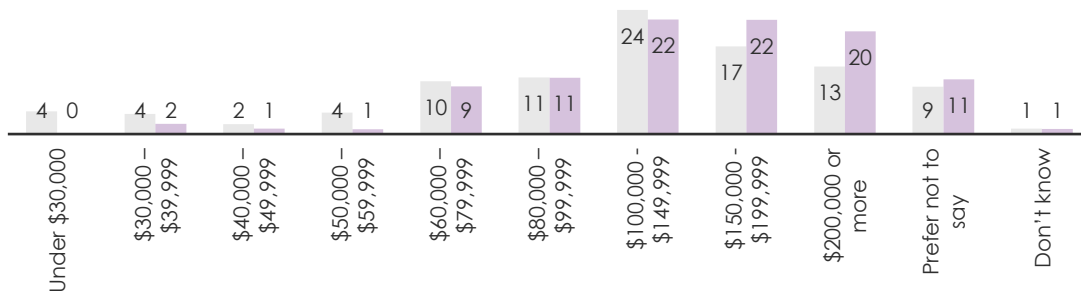
Gender



Age

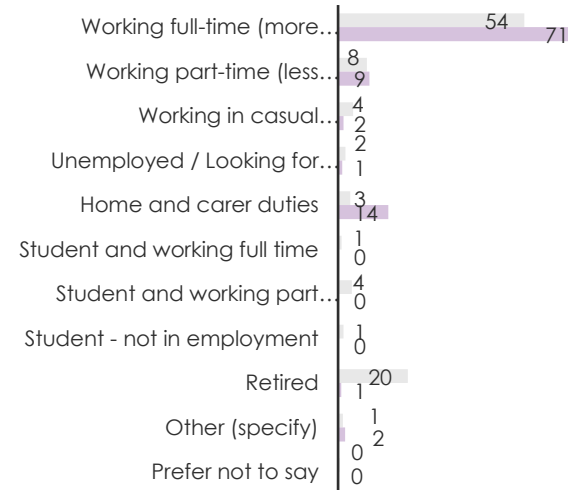


Income

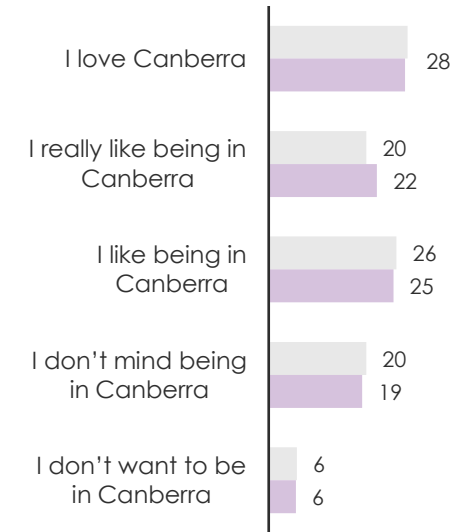


Sample n=94

Work status



Attitudes to Canberra



Behaviour change* in the last 2 years



*Net more

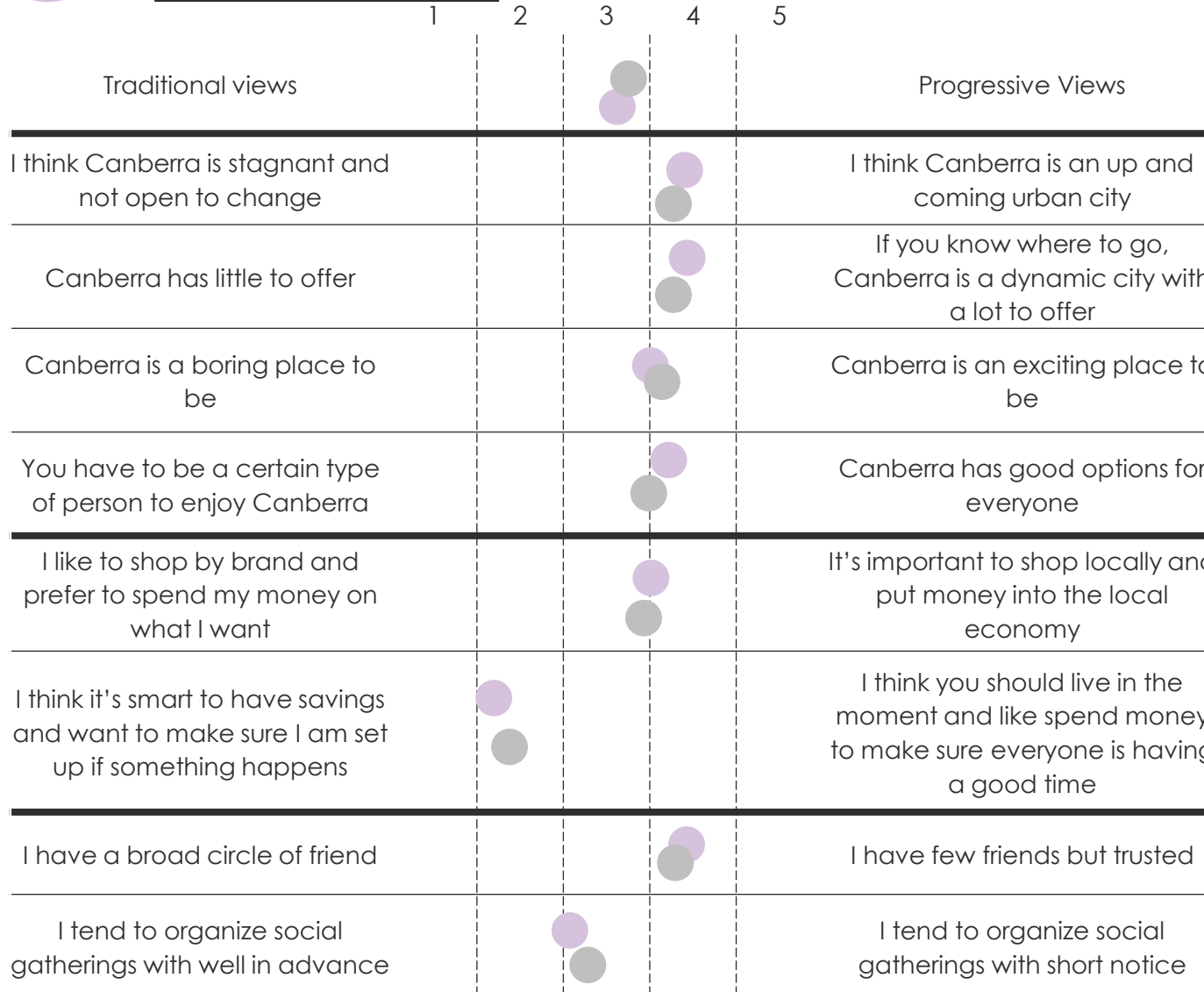


Family Connectors

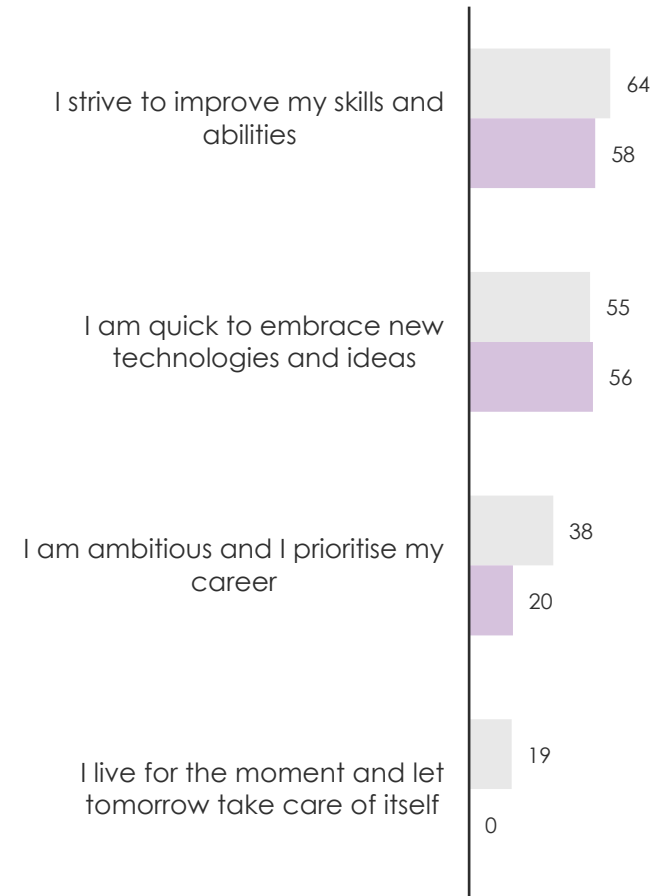
Market Size: 16%

City Visitation: LOW

Family Connectors ■ Canberra ■



Identity

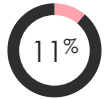


B1 - Where do you sit on the following scales? B3 - Thinking about your role in your family and social circle, where do you sit on the following scale? B4 - Thinking about your views and outlook on the world, where do you sit on the following scale? B2 - The following statements are on a range of topics. For each statement, please indicate how much you agree or disagree. n= 94



Family Stimulators

Market Size:



City Visitation:



Parents who are trying their best to balance social, work and family life. Family stimulators connect through experiences outside of the home

Life Values

Benevolence, security, self direction

Who are they?

Externally driven, out and about, prioritise career

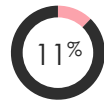
Active and busy parents. Being externally driven, they tend to spend more time doing activities and attending events that are outside of the house. They have ambitious goals and are fuelled by a desire to learn, build and improve their skills – this desire is reflected in the activities not only the choose to do – but also the activities they choose to bond with their kids/families over. They are one of the segments who is more likely to spend time working, playing and living in Canberra City Centre





Family Stimulators

Market Size:



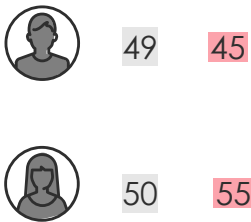
City Visitation:



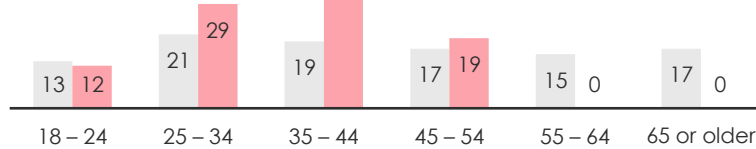
Family Stimulators ■ Total market ■

Focused on reclaiming their self, living an active life through activities and events that build their skills and enrich their knowledge

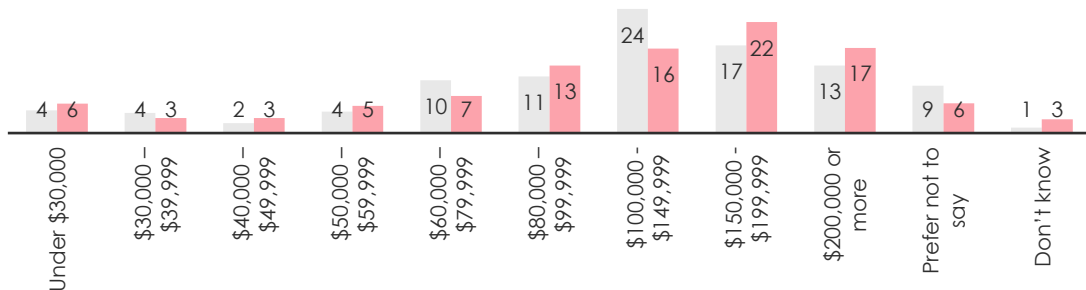
Gender



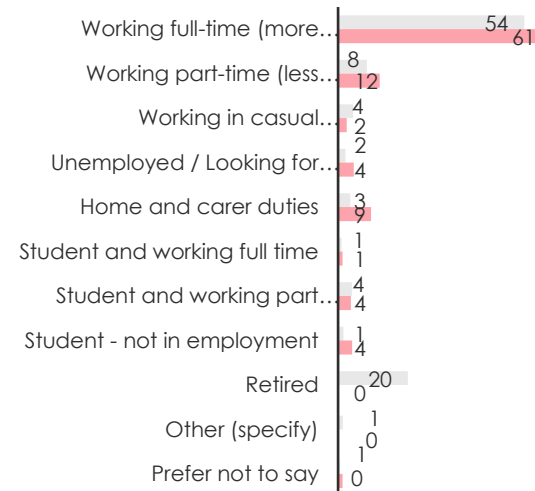
Age



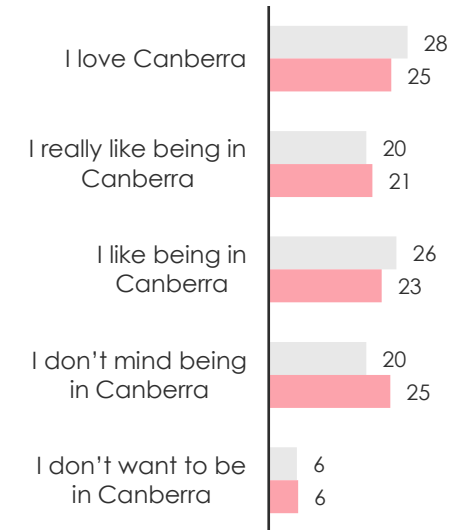
Income



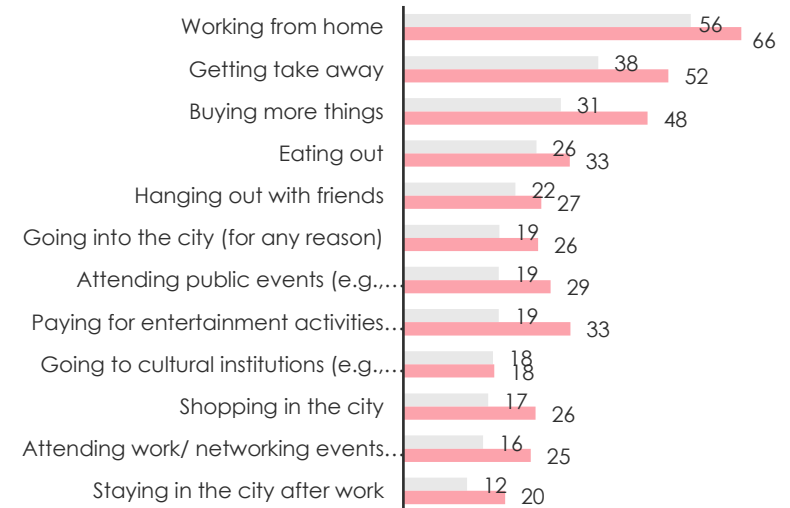
Work status



Attitudes to Canberra



Behaviour change* in the last 2 years

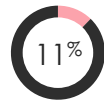


*Net more



Family Stimulators

Market Size:



City Visitation:



1 2 3 4 5

Traditional views

Progressive Views

I think Canberra is stagnant and not open to change

I think Canberra is an up and coming urban city

Canberra has little to offer

If you know where to go, Canberra is a dynamic city with a lot to offer

Canberra is a boring place to be

Canberra is an exciting place to be

You have to be a certain type of person to enjoy Canberra

Canberra has good options for everyone

I like to shop by brand and prefer to spend my money on what I want

It's important to shop locally and put money into the local economy

I think it's smart to have savings and want to make sure I am set up if something happens

I think you should live in the moment and like spend money to make sure everyone is having a good time

I have a broad circle of friend

I have few friends but trusted

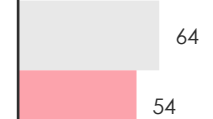
I tend to organize social gatherings with well in advance

I tend to organize social gatherings with short notice

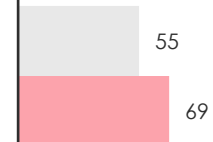
Family Stimulators ■ Total market ■

Identity

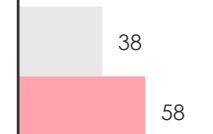
I strive to improve my skills and abilities



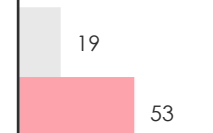
I am quick to embrace new technologies and ideas



I am ambitious and I prioritise my career



I live for the moment and let tomorrow take care of itself

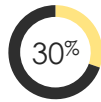


B1 - Where do you sit on the following scales? B3 - Thinking about your role in your family and social circle, where do you sit on the following scale? B4 - Thinking about your views and outlook on the world, where do you sit on the following scale? B2 - The following statements are on a range of topics. For each statement, please indicate how much you agree or disagree. n= 68



Mature & Maintaining

*Market
Size:*



*City
Visitation:*



Focused on maintaining their wealth, health and happiness, Mature & Maintaining are looking for activities that add meaning to their life

Life Values

Security, self direction, universalism

Who are they?

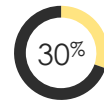
Internally driven – home body – prioritises health and wellbeing – won't often find in the city...

Mature reconnectors are homebodies who are unlikely to regularly visit the City Centre. If they do, it's for activities that are centred driven by enjoyment and pleasure



Mature & Maintaining

Market Size:

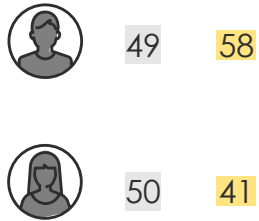


Mature & Maintaining ■ ■ Canberra

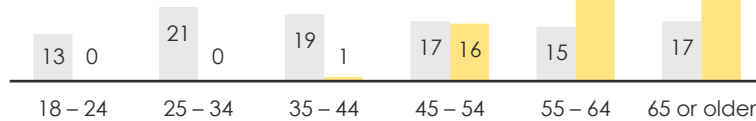
City Visitation: LOW

Parents who are trying their best to balance social, work and family life. Family stimulators connect through experiences outside of the home

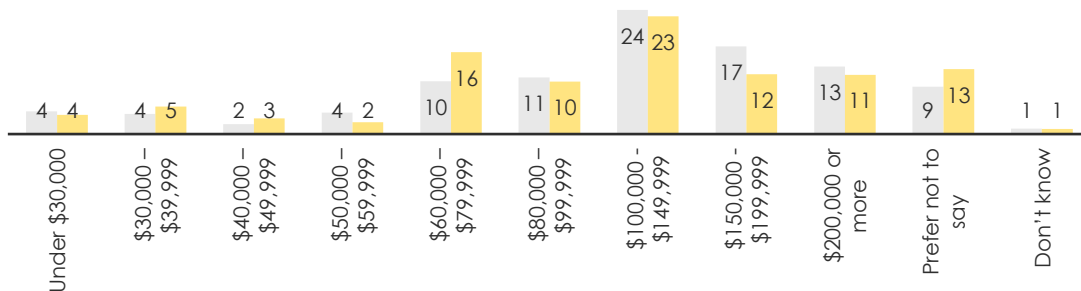
Gender



Age

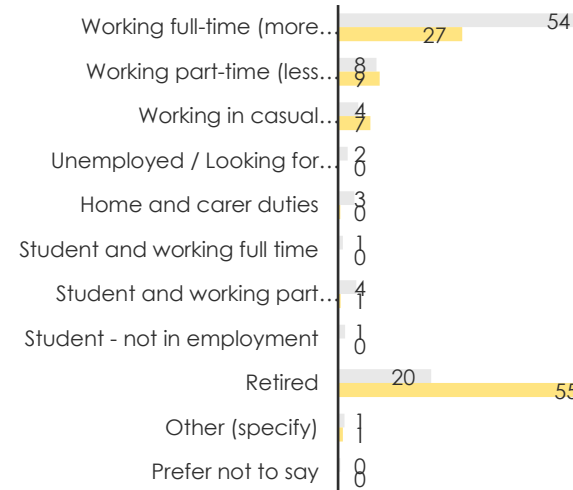


Income

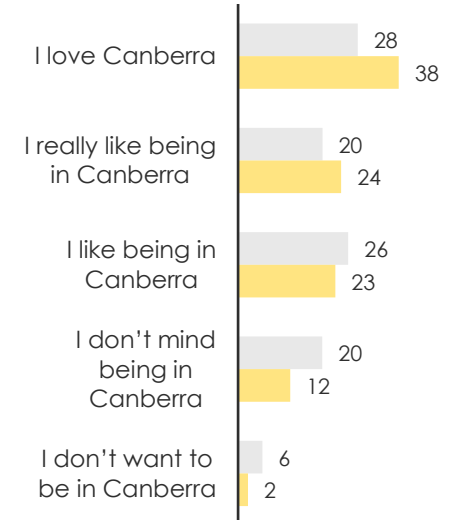


Sample n=206

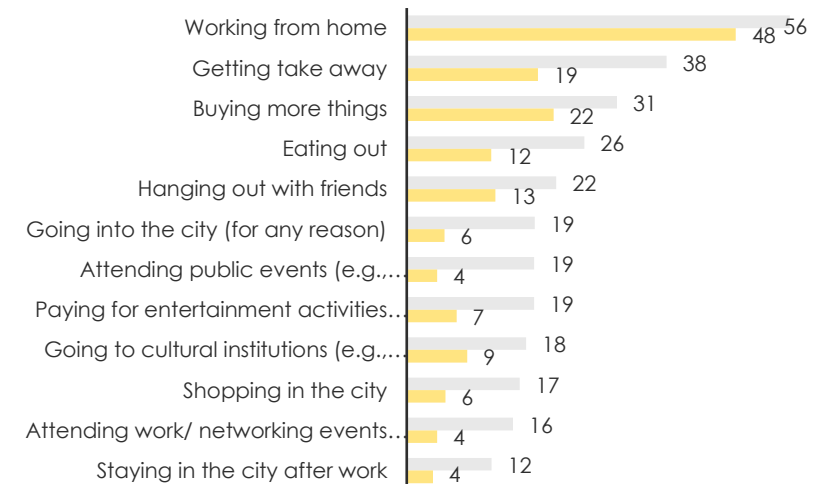
Work status



Attitudes to Canberra



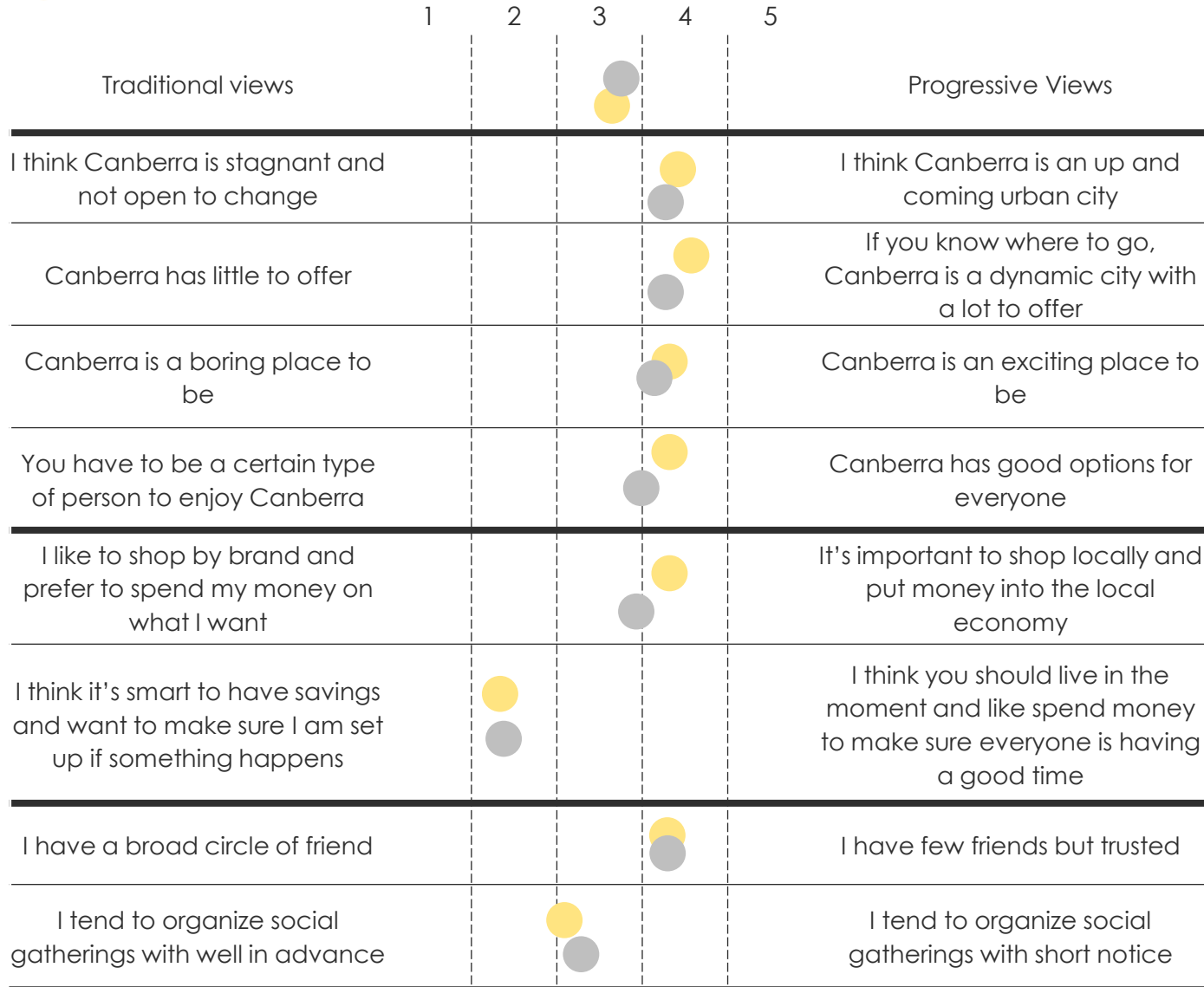
Behaviour change* in the last 2 years



*Net more



Mature & Maintaining



Identity



B1 - Where do you sit on the following scales? B3 - Thinking about your role in your family and social circle, where do you sit on the following scale? B4 - Thinking about your views and outlook on the world, where do you sit on the following scale? B2 - The following statements are on a range of topics. For each statement, please indicate how much you agree or disagree. n=206



Rediscovering & Maturing

Market
Size:



City
Visitation:



Focused on reclaiming their self, living an active life through activities and events that build their skills and enrich their knowledge

Life Values

Security, self direction, universalism, benevolence

Who are they?

Externally driven, out and about, prioritise improving skills

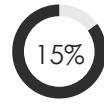
Rediscovering & Maturing live an active life. They tend to spend more time doing activities that allow them to learn, build or improve skills. You are more likely to find them regularly visiting the City Centre and in particular City Hill





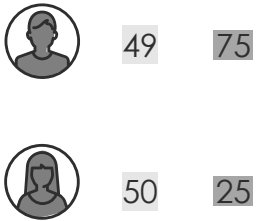
Rediscovering & Maturing

Market Size:

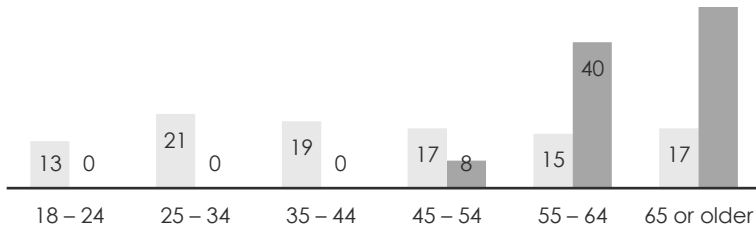


Focused on reclaiming their self, living an active life through activities and events that build their skills and enrich their knowledge

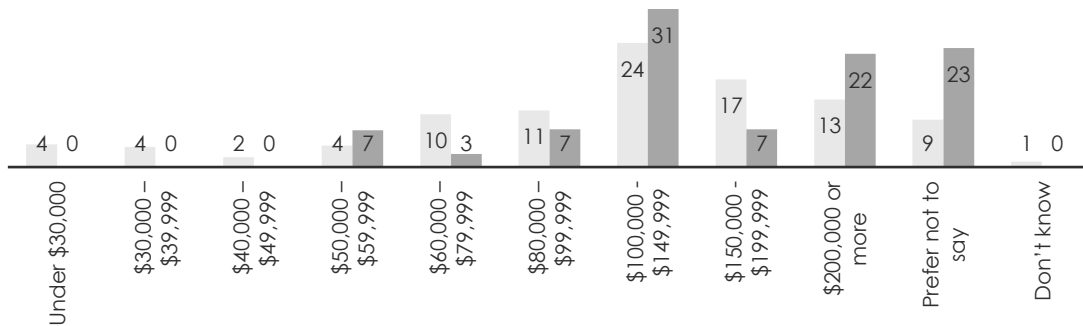
Gender



Age



Income



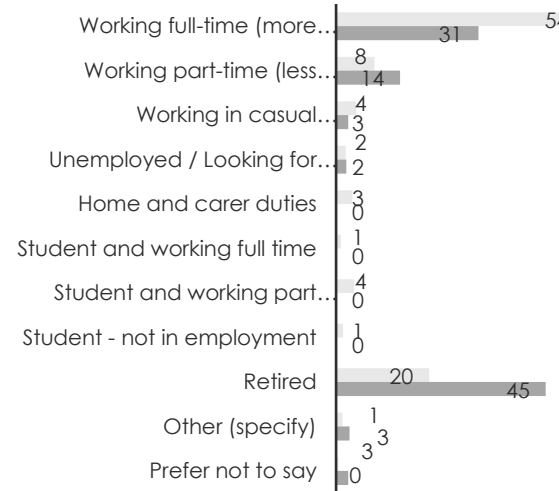
Sample n=38

City Visitation:

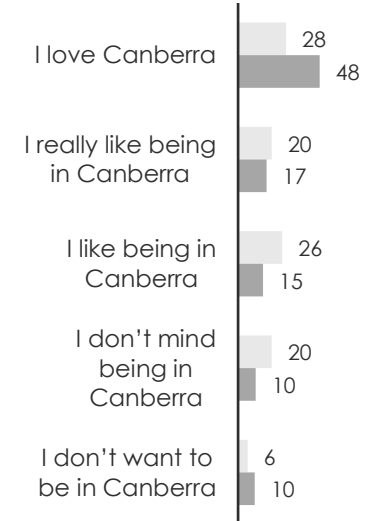


Rediscovering & Maturing ■ Canberra ■

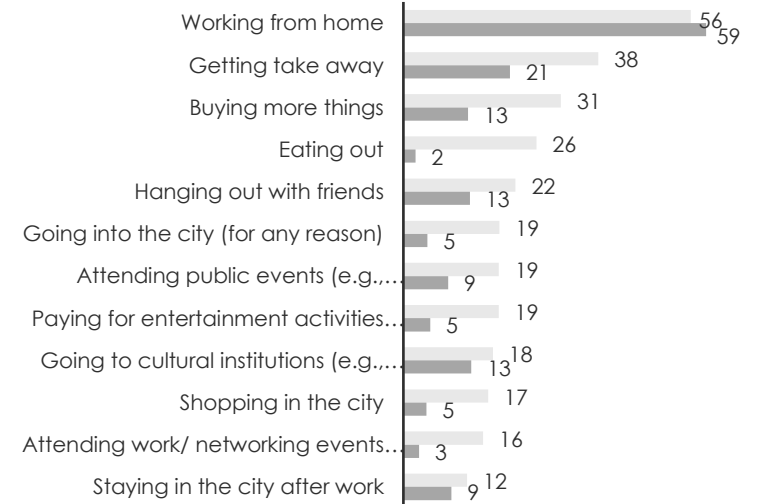
Work status



Attitudes to Canberra



Behaviour change* in the last 2 years



*Net more



Rediscovering & Maturing

Market Size:



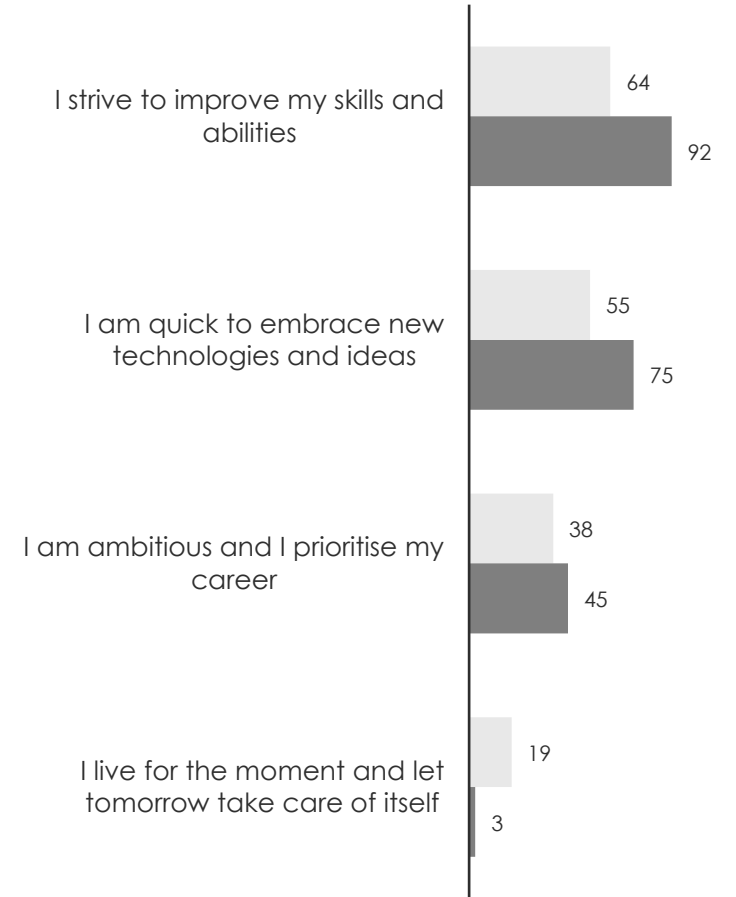
City Visitation:



Rediscovering & Maturing ■ Canberran ■



Identity



B1 - Where do you sit on the following scales? B3 - Thinking about your role in your family and social circle, where do you sit on the following scale? B4 - Thinking about your views and outlook on the world, where do you sit on the following scale? B2 - The following statements are on a range of topics. For each statement, please indicate how much you agree or disagree. n=38

Thank you

Pollinate

Sydney: Level 5, 60 Reservoir Street, Surry Hills NSW

Melbourne: The Commons, 3 Albert Coates Lane, Melbourne VIC

Canberra: Hub Civic Quarter, 68 Northbourne Ave, Canberra, ACT

www.pollinate.com.au

Compliance @ Pollinate

Pollinate is ISO 20252 certified, the international quality operating standard for market research agencies. We are members of The Research Society, abiding by the Professional Standards as outlined on www.researchsociety.com.au including the "Code of Professional Behaviour". We also adhere to all state and federal legislation regarding privacy protection & data management when it comes to managing our projects

Now we have debriefed your project, there are a couple of things we'd like to let you know...

Third parties involved

If applicable, Pollinate engaged with third parties to deliver sample for this project e.g for either the Quantitative or Qualitative component...

Quantitative

Supplier: Take2Research
Sample size: 647
M/Y of fieldwork: May 2022

What you should have

As part of the project, you will have on file the final version of the following documents...

1. Our proposal, outlining our approach, sample size and costings
2. The Discussion Guide outlining the discussion flow of the research (if applicable)
3. The Questionnaire (Quantitative) or Recruitment Schedule & Screener (Qualitative), with the questions used to qualify participants and if relevant, a schedule with incentive amounts, research dates and times of the fieldwork
4. Our debrief, the final presentation with our findings from this project

If there's anything you don't have, or would like to make sure you've got the most recent version of, please let us know and we'll get this to you ASAP

Other info upon request

This varies project to project, and not all is applicable to this one, however if required we can provide other info on how fieldwork was managed...

Quantitative

- The fieldwork method (e.g. in-person, door-to-door, CAPI, CATI etc)
- Sampling details
- Number of fieldworkers
- Fieldwork validation methods
- Questionnaires and other visual exhibits or data collection documents
- Weighing procedures
- Estimating and imputation methods
- Number of cases used in subgroup analysis
- Reliability of the findings

Qualitative

- The fieldwork method (e.g. in-person, telephone or online, individual or group interviews etc)
- Recruitment method or methods
- Number of fieldworkers or moderators
- Fieldworker or moderator validation methods
- Documents, materials or products used in the research
- Interview or discussion guide
- A statement that the results of qualitative research cannot be projected onto the overall population

Closing your project

As the project is now complete, we'll start our process of closing it, which involves the following...

1. De-identifying all respondent information and if applicable deleting any lists/sample sent to us by you or one of your partners
2. Collating all project materials, keeping only those we deem relevant and archiving for a period of 12 months
3. If applicable, we will retain video output related to this project for a period of 2 years from the date of this debrief. After this time, we will delete any project related video that's not included as part of the final debrief document
4. Please let us know within 4 weeks of the debrief date if you would like any project materials or video retained longer than outlined above