

Quantum
Market
Research

City of Ballarat Tourism Audience Segmentation

Presentation Version | February 2022

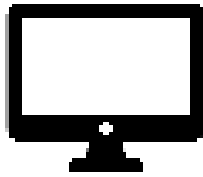


About the research



Understanding the target audience will be a guiding principle for tourism planning

Victorians who travel to Regional Victoria for leisure



1,000 x 15-minute surveys

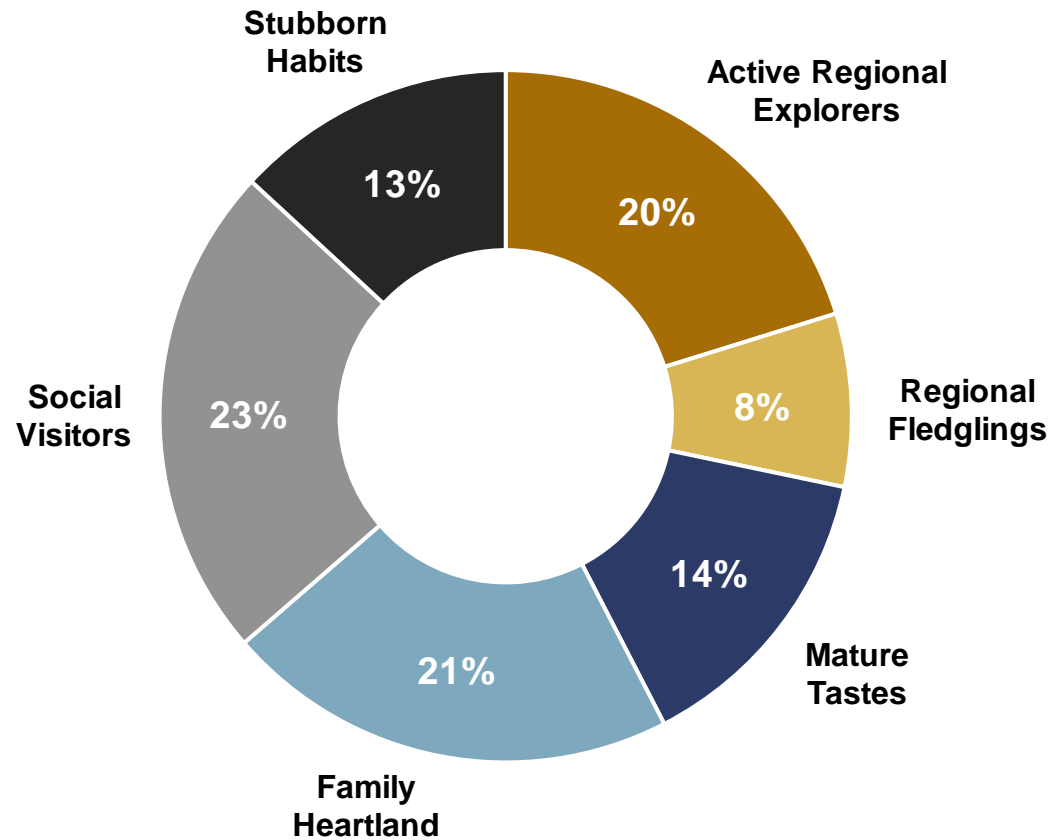


12 x in-depth interviews

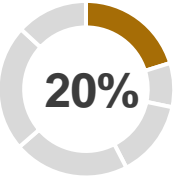
Six types of potential visitor

Regional Victorian tourist segments for City of Ballarat

Size of segments (%)



Active Regional Explorers



Travelling in regional Victoria is a regular part of our life.



Who are they?

- Skew younger, often at family lifestage.
- Metro Melbourne suburbs.
- Educated, curious and enthusiastic.

What defines them?

- Engaged across channels, travel extensively and widely, participate in a broad range of activities.
- Seek out enriching experiences; aspire to more than just 'relaxation'.
- Don't conform to one trip 'type', they arrange different itineraries to suit different needs.

VISITATION HABITS: Take weekend and extended trips, typically touring to cover more than one activity. Above average spend, prioritise recreation in their household budget. Can include VF/VR spend. Engage in one or more outdoor pursuits, often cycling, fishing, or getting into National Parks.

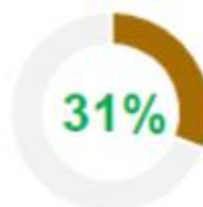
ENGAGED BY: Constant lookout via. all channels for what's new or different in regional Victoria. More likely to engage with art, culture and history. And to attend structured paid / ticketed attractions. Opportunities to broaden kids' horizons and re-connect away from screen.

IMPLICATION FOR BALLARAT: Stitch up a varied itinerary and address perceived lack of something new / intriguing / happening right now.

Active Regional Explorers



Travelling in regional Victoria is a regular part of our life.



Very familiar with Ballarat

BEST REPRESENTED BY



Male 53% / Female 47%



Younger, 18-29 years (33%)



Middle income earners \$50-150K (58%)



Travel with partner/spouse (69%) friends (44%), children (43%)



Skew heavily towards metro Melbourne / urban areas (91%)

MOST COMMON ACTIVITIES WHEN TRAVELLING IN REGIONAL VICTORIA

- 70% Parks and gardens
- 61% Farmers market
- 59% Shopping / browsing stores / boutiques
- 59% National Parks
- 50% Museum / historic site or homestead
- 48% Shorter walks (less than half day)
- 47% Winery
- 47% Another type of paid attraction (i.e. that requires a ticket to enter)
- 45% Historic / picturesque townships
- 37% Art gallery / exhibition
- 36% Hiking / bushwalking (half day or more)
- 35% Spa / retreat
- 23% Fishing
- 17% Mountain biking
- 16% Road cycling
- 8% Other types of cycling (e.g. on rail trails)
- 6% Golf

TRAVEL BEHAVIOURS IN REGIONAL VICTORIA



3.6

avg. nights spent away from home, when thinking of overnight trips in Regional Vic



\$113

avg. spend on dining out (per day)



\$199

avg. spend on accommodation (per night)



\$101

avg. spend on other daily expenses (per day)

Active Regional Explorers



Travelling in regional Victoria is a regular part of our life.



SELF-IDENTIFICATION (% STRONGLY AGREE) – TOP 5

- 56% I am a 'foodie'
- 46% I'm always on the look out for what's on / new things to visit
- 40% I'm very open-minded and often try new and unusual things
- 38% I'm an outdoors person
- 28% I'm more interested than average in the history and heritage of Victoria

ATTITUDES TOWARDS TRAVEL IN REGIONAL VICTORIA

Sit back, relax and do nothing – mostly just take it easy



Active / on the go – focussed on activities and experiences

I travel very narrowly – tend to go back to the same places



I travel very widely – visit lots of places across regional Vic

Travel in regional Victoria is a very minor part of my life

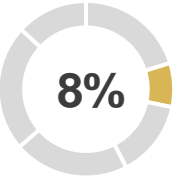


Travel in regional Victoria is a very significant part of my life

MOST IMPORTANT FACTORS IN DETERMINING WHERE TO TRAVEL (% VERY IMPORTANT)



Regional Fledglings



We can find cool things to do by leaving the city and getting out there.



Who are they?

- Young singles and couples, may travel as groups of friends.
- Metro-based and urbanised tastes.
- Following emerging trends, not their parents' example.

What defines them?

- Explore through visitor-oriented producers, events / festivals, local operators, etc.
- Food and wine focus and have the budget to support it.
- Lighter-touch in the outdoors, may camp or bushwalk but it's principally a social endeavour.

VISITATION HABITS: Travel often, but typically on short weekend breaks or daytrips.

Emphasis on AirBNB-type accommodation.

Trips commonly based around a half-day hike / bushwalk.

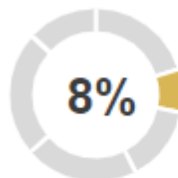
ENGAGED BY: Social media, review sites, and official tourism / destination sites.

Modern dining, wineries, craft beer, music events / festivals, novelty and intrigue.

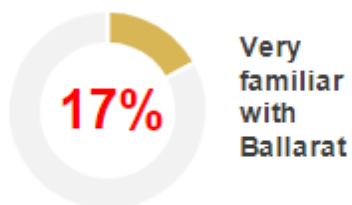
IMPLICATION FOR BALLARAT: Highly flexible, and engaged by online destination resources

Natural audience for Made of Ballarat, but not dependably high taste-level when it comes to art and culture.

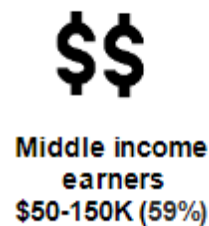
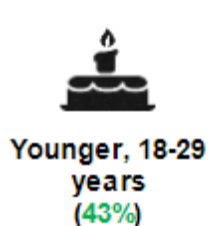
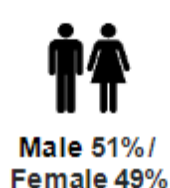
Regional Fledglings



We can find cool things to do by leaving the city and getting out there.



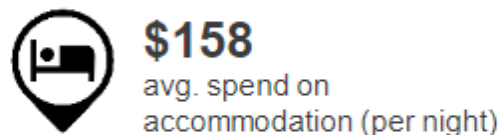
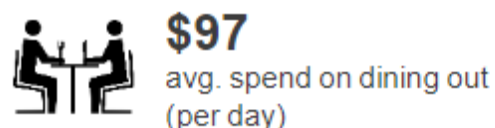
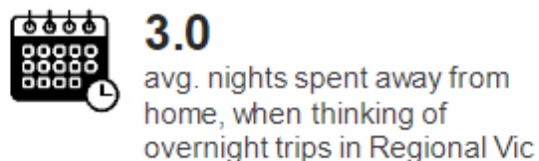
BEST REPRESENTED BY



MOST COMMON ACTIVITIES WHEN TRAVELLING IN REGIONAL VICTORIA

- 70% National Parks
- 66% Shorter walks (less than half day)
- 62% Shopping / browsing stores / boutiques
- 60% Parks and gardens
- 56% Farmers market
- 52% Winery
- 46% Historic / picturesque townships
- 46% Hiking / bushwalking (half day or more)
- 41% Another type of paid attraction (i.e. that requires a ticket to enter)
- 38% Museum / historic site or homestead
- 33% Spa / retreat
- 22% Art gallery / exhibition
- 14% Fishing
- 10% Mountain biking
- 10% Other types of cycling (e.g. on rail trails)
- 8% Road cycling
- 8% Golf

TRAVEL BEHAVIOURS IN REGIONAL VICTORIA



Regional Fledglings

8%

We can find cool things to do by leaving the city and getting out there.



SELF-IDENTIFICATION (% STRONGLY AGREE) – TOP 5

- 72% I am a 'foodie'
- 45% I'm very open-minded and often try new and unusual things
- 44% I'm always on the look out for what's on / new things to visit
- 32% I'm an outdoors person
- 24% Self-improvement / learning is more important to me than just having fun

ATTITUDES TOWARDS TRAVEL IN REGIONAL VICTORIA

Sit back, relax and do nothing – mostly just take it easy



Active / on the go – focussed on activities and experiences

I travel very narrowly – tend to go back to the same places



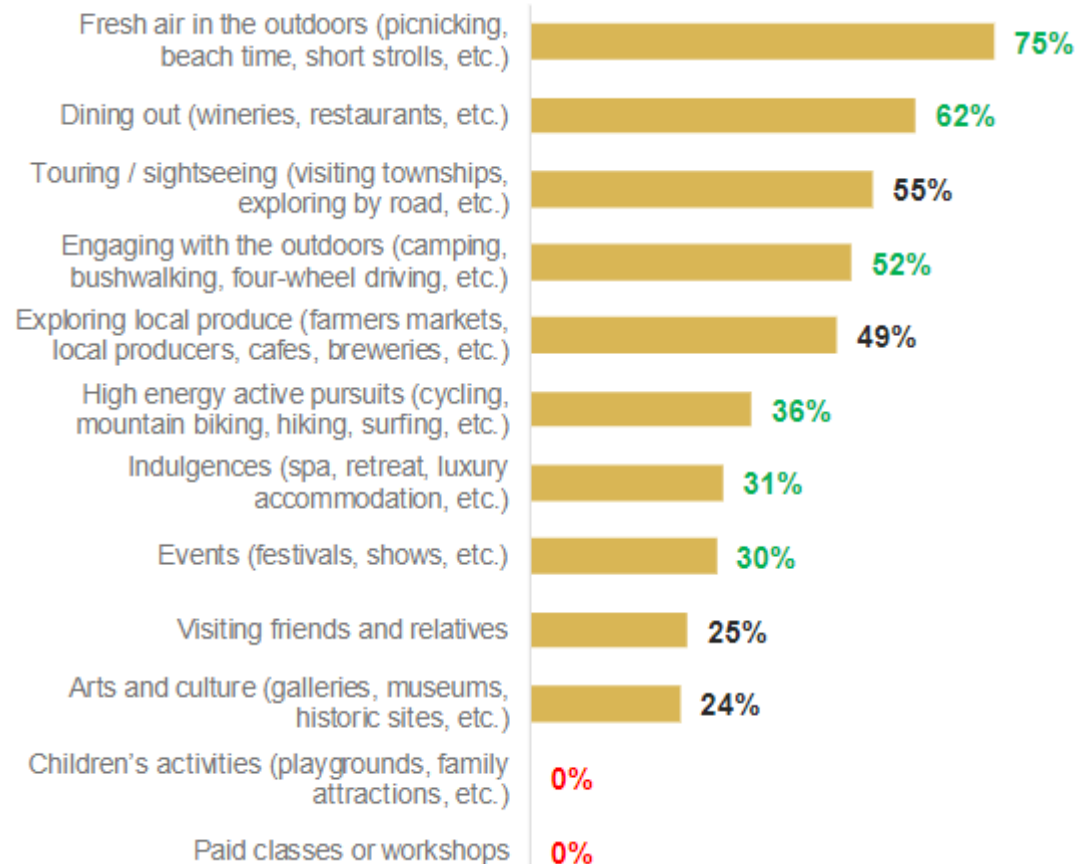
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Travel in regional Victoria is a very significant part of my life

MOST IMPORTANT FACTORS IN DETERMINING WHERE TO TRAVEL (% VERY IMPORTANT)



Other segments to consider

Mature Tastes



Family Heartland



Social Visitors



Stubborn Habits



Promoting Ballarat as a destination

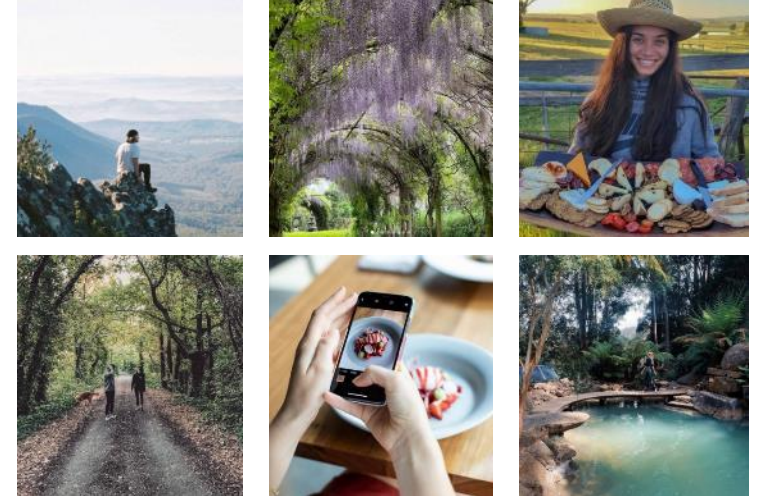
Planning often spirals outward from a ‘hero image’

Regional Fledglings are highly engaged social media users. For this group, Instagram is a common trigger of initial visitation intention.

Sharing of images or links to simple sites / descriptions (e.g. of a hike, exhibition, or restaurant) is often the start-point for planning.

“I post a hike or campspot and maybe someone will say they’re in. I post something with wine, cheese, bench seats and a nice view, and there’s interest straight away!”

Regional Fledgling



Ballarat needs to generate shareable, picturesque moments which act as triggers to look more closely at what the city has to offer.

Audiences continuously engage in search



Audiences are 'always on' to word of mouth, which may come peer-to-peer or via another channel which captures their attention.



Broadsheet, Time Out, Weekend Notes, One Hour Out, Urbanlist, etc. are all prolific.

Note: Recalling what they've seen in the past, audiences judge that Ballarat is absent from these inspirational online spaces (or at least drowned out).

Like any hobby or interest, the information seeking is not purely functional.

This audience tend to find review sites (TripAdvisor) bland / negative, and limit use to answering questions in-region (e.g. which café is well rated).

The most effective official information sources are those which facilitate browsing / creativity and mimic this recipe for success.

In general, travel commitments are made on short turnaround with parts of the trip left unplanned

“We’ve booked a house in Mornington Peninsula over Christmas... We know it’s got beaches, cafes, activities for the kids etc. without planning exactly what we’ll do. We’ll get up each day, feel out the weather and what each other wants to do. The only thing we pre-booked is a winery lunch.”

Active Regional Explorer

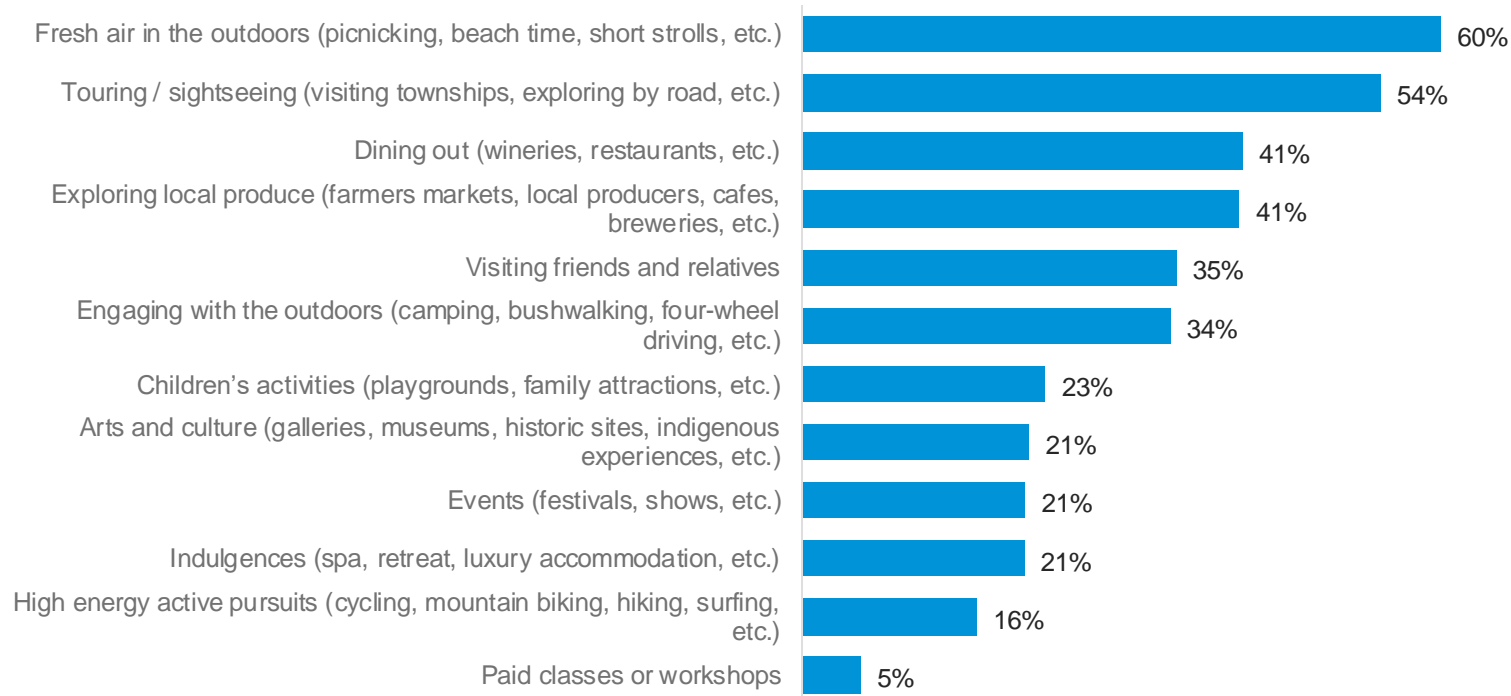
Implications of this ‘flexible’ style of travel planning:

- Destinations are committed to on the promise / assurance that they have the assets to satisfy needs from a trip – audiences need to have this implicit belief in advance.
- Itineraries, signed trails, choice-edits, etc. all resonate with this audience (i.e. as a vehicle to convey opportunity).

Time in the outdoors is central to the majority of trip planning

What's important when choosing where to go (% VERY important)

Base: All respondents (n=1,067)



The vast majority of visitors rate spending time in the outdoors as important. This is especially true of those who are metro-based and seeking a getaway.

Ballarat may be an urbanised, city destination, but it is a major limiter if it does not also satisfy the need to spend time in natural surrounds.

Q12. When you choose where to go within regional Victoria, how important are each of the following?

Put bluntly, Ballarat is perceived to be ‘a big, characterless, regional town’

Within their broad consideration set, it's common for Active Regional Explorers and Regional Fledglings to classify Ballarat as ‘a potential option’ (not ruling anything out), but not a priority and not favourable compared to other opportunities.

Asked to clarify ‘why?’, contrast emerges. Whereas other areas have an established identity, e.g. for their natural assets, wine / food assets, etc., Ballarat has limited / uninspiring associations.

Without prompt, these segments will not pin down a compelling reason to commit to a visit to Ballarat.

“It’s a big town and the whole point is I want to get out of town... If I said to my friends “hey let’s do a weekend in Ballarat”, they’d be like “why!?!”!”

Regional Fledgling

There are two gaps limiting conversion to visitation

Ballarat doesn't feel like a getaway.

"To me, it's just a regional city. When we go to Mornington Peninsula, even if its just overnight, you feel like you're on holiday. You don't get that in Ballarat – it feels like a place people live, rather than a holiday destination. Maybe even an extension of Melbourne."

Active Regional Explorer

Ballarat doesn't have any surprises in store.

"I don't know what I'd do there. What IS there to do? When I think of Ballarat, I think of old buildings... and not much else. Maybe its got some quirky cafes, but you can get that in almost any regional town. I guess don't think of it as a 'place with stuff to do?'"

Regional Fledgling

Heritage and contemporary arts are a vehicle to communicate 'culture'

In their own right, contemporary arts activations are attractive to around one in five overall (although more consistently attractive to Active Regional Explorers).

Thus it is limiting to present them as an independent reason to visit.

Implications:

- Heritage and contemporary arts can be the emotional bedrock which underpin the value of other assets. Perceptions of sightseeing, markets, producers, cafés, etc. are all elevated by this positioning.
- Expression of these assets is a vehicle to address barriers by communicating diversity, vibrancy, character, freshness, intrigue and that 'things are going on', different from Melbourne. In other words, it directly challenges misconceptions that Ballarat lacks character.
- Pitching to the mainstream, culture should be accessible and communicate the emotion (e.g. you'll feel inspired) rather than static appreciation.

Active Regional Explorers, and some more mature Regional Fledglings, express great intrigue about local producers

That Ballarat boasts established wineries, breweries, distilleries, producers, etc. is intuitively credible to potential audiences.

These offerings are felt to sit comfortably alongside, and add value to Ballarat's broader heritage, arts and culture proposition.

Active Regional Explorer families in particular lament that other areas, well known for their offering in this space (Mornington Peninsula, Yarra Valley, Daylesford & Surrounds, etc.), have become busy and over-commercialised.

Such elevated fare does not suit every occasion. A down-to-earth, authentic Regional Victorian experience is harder to come-by within short driving distance of Melbourne.



Recommendations to increase primary target audience visitation

1

Promote shareable, picturesque moments which convey a getaway

2

Promise breadth of opportunity

3

Pitch Ballarat's heritage, contemporary art, etc. as an emotional bedrock, not just as assets in their own right

4

Promote Ballarat's established scene of authentic and down-to-earth producers

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