

---

Published  
November 2022

---

# **SOUTH WHARF/ NORTH WHARF HERITAGE POSITIONING & MARKETING EVALUATION REPORT**

Roger Grant, Jeremy Johnson & Garry Burns

For the purpose of

Examining and evaluating the current market  
positioning of South Wharf and North  
Wharf as a maritime heritage/ cultural tourism  
product for Melbourne.

# CONTENTS

---

- EXECUTIVE SUMMARY **3**
- KEY FINDINGS **4-5**
- PATHWAYS FORWARD **6**
- KEY RECOMMENDATIONS TO SUSTAIN THE MARTIME HERITAGE BRAND **7**
- COMMENTS & RECOMMENDATIONS **8-16**
- PROJECT BRIEF **17**
- OUR APPROACH **18**
- A REVIEW OF GLOBAL MARITIME HERITAGE PRECINCTS **19 -21**
- THE VISITOR TRAVEL CYCLE **22**
- INSIGHTS FROM SECONDARY DATA PROFILING VISITORS TO MELBOURNE. **23- 25**
- SURVEY RESULTS WITH KEY STAKEHOLDER. **26 - 46**
- SURVEY RESULTS WITH SWA MEMBERS **47 -63**
- CONSUMER RESEARCH STUDY **64-81**
- PROFILE CONSULTANTS **82**

---

**Produced by The Gaibo Agency for the Yarra  
River Business Association Inc.**

Published November 2022

Yarra River Business Association is supported by  
the City of Melbourne  
Enquiries: [exoff@yarrariver.melbourne](mailto:exoff@yarrariver.melbourne)

# EXECUTIVE SUMMARY

---

In pre-colonial times, the Yarra River and its environs were a critical resource for the traditional owners. Colonisation came quickly followed by the fabulous Gold Rushes of the 19th century. Melbourne was the "centre of the universe" and generated an economic and migration boom that was unprecedented in world history. Its port and river were central to this story.

There is evidence through the existence of significant maritime heritage objects, stories, themes and built infrastructure within the South / North Wharf precinct to rightly claim the destination has a genuine maritime heritage strength compared to other precincts located along the Yarra River.

However in its current presentation, extension and formation, the maritime heritage product offer within the precinct can't justify, sustain nor support a dedicated and active Maritime Heritage brand.

This review and report provides recommendations, comment and direction to further strengthen the product offer, visitor experience and positioning towards the creation and development of a sustainable Maritime Heritage brand in the longer term.



# KEY FINDINGS

---

- The maritime heritage product currently in place (South Wharf) and soon to be in place (North Wharf) imbues the area with a maritime 'theme', with potential to become a 'brand', but only after extensive product development and interpretation is undertaken, capable of delivering a quality, sustainable visitor experience.
- The current and imminent assets of North and South Wharves gives it stronger claim to a maritime heritage brand than does either Docklands or Southbank,
- However, there is currently no sense of arrival or welcome, and there is little/ no interpretation of the heritage significance.
- The product mass is not sufficiently developed at this stage to sustain an immediate brand. Any greater maritime brand promise at this stage would be weakened by the current on-ground offer.
- The current presentation acts more as an interesting backdrop to the event, food and beverage offering.
- The presentation and effective operation of the Polly Woodside is central to the area's maritime heritage theming. The National Trust has confirmed the continuing operation of the Polly Woodside, although not necessarily in its current format.
- External authorities recognise the area's maritime heritage, but do not see it as sufficiently worthy at this stage to promote as a key pillar of Melbourne's tourism offering.
- While there is low/ no awareness of the area's maritime heritage, some visitors are aware of the maritime theme, although it's not the key driver that attracts them to the area. The key drivers are shopping and food/beverage.
- There is an expressed desire by the public to have the significance of the area interpreted for them and many say that it would enhance the site/ experience for them.
- A high proportion of South Wharf traders believe that the maritime heritage theme is the most appropriate for the area and say that it is well received by visitors. However, less than 25% actually use the maritime heritage brand and almost all think it is of little commercial benefit to their business.
- All South Wharf traders support the concept of a maritime heritage trail, appropriate art installations, themed directional signage, as well as brand related events and activations.

# KEY FINDINGS

---

- The City of Melbourne and Visit Victoria recognise the maritime significance of the area, but believe that considerable product development and appropriate activation, in line with national and international standards, needs to be undertaken before it can be promoted as a key strength of Melbourne. This would include signage and wayfinding to overcome its disconnect from the CBD.
- The designated 'maritime sector' of the Council's Greenline plan for Northbank offers the best opportunity in the medium term to communicate the maritime heritage of the area.
- Authorities state that the maritime theming should include connection to Indigenous history and stories.
- Development of appropriate theming will require the cooperation and coordination of various authorities and the private sector, including the State Government, City of Melbourne, the National Trust, Riverlee and Vicinity Properties. It requires custodianship and would require strong ongoing management to ensure brand proprietorship and integrity.



# PATHWAYS FORWARD

---

- 1.** Develop an MOU between key public and private stakeholders to cooperate in the development of a masterplan to coordinate the maritime heritage assets (their presentation and interpretation) of the South and North Wharves, in order to create a cohesive and cogent visitor experience.
- 2.** Secure an agreement from the City of Melbourne to embrace both the North and South wharves - linked by the Seafarers Bridge - into the designated 'maritime' section of the Greenline project,
- 3.** When scoping the maritime section of the Greenline project, City of Melbourne should work closely with a coordination committee created out of step 1 of this process,
- 4.** The combined coordination committee develops a masterplan for the maritime sector of Greenline, embracing the assets of North and South Wharves,
- 5.** The masterplan should include wayfinding and interpretative signing – including addressing sense of arrival,
- 6.** Following the development of assets and supporting infrastructure, a visual brand to strongly identify and promote the sector as a well differentiated recreation and tourism experience should be developed. Ongoing management of the brand should be determined and costed as part of the masterplan,
- 7.** Secure agreement from relevant authorities, organisations and businesses for management of the brand, to ensure compliance and its continuing integrity,
- 8.** When the maritime heritage product and brand is sufficiently developed, key marketing agencies should be encouraged to embrace and promote it as a key pillar of the Melbourne tourism experience.



# COMMENTS & RECOMMENDATIONS

---

## Introduction

The following comments and recommendations are based on the scope of the brief, the methodology as outlined in this report and the feedback received from stakeholders, partners and the consumer surveys with potential and actual visitors to the precinct.

Additionally, the consultants also used their professional judgement, based on longstanding experience in executive leadership roles in the management of heritage attractions, domestic and international marketing and leading and developing the visitor economy.

The scope of the brief sought to determine the merits of positioning and marketing the South / North Wharf precinct as a Maritime Heritage branded destination and to consider if this brand was logical, viable, credible, sustainable, and supported by stakeholders and businesses within the precinct.

Further to this was to test the Maritime Heritage brand appeal with visitors and locals and to assess if the brand matched or exceeded the actual visitor experience on offer now and into the future.



# KEY RECOMMENDATIONS TO SUSTAIN THE MARITIME HERITAGE BRAND

---

The following priority actions will progress the journey to have the depth of product to support and sustain the Maritime Heritage brand for the precinct.

## Actions

- 1 Focus and prioritize effort and resources on the recommendations relating to product development that will strengthen the maritime heritage offer within the precinct.
- 2 Establish strategic partnerships with key operators, The City of Melbourne, The National Trust, business operators, MCEC and State Government and develop and present a costed prioritized projects plan to maximize funding opportunities in the budget process.
- 3 Enhance the precinct's maritime heritage profile through the production of 'hero images' and stories and distribute to partners and stakeholders to promote the maritime heritage strengths of the precinct to visitors and locals.
- 4 Actively engage with major precinct developers, including the City of Melbourne 'Green Line' project, to align marketing and development opportunities and to actively lobby for the maritime heritage precinct.
- 5 Explore the opportunities to include the stories of the use of the site by the traditional owners, and with appropriate approval, incorporate these stories and information into proposed interpretation, heritage, and art trails.
- 6 Undertake further consumer research to gain a deeper understanding and insights into proposed maritime heritage brand appeal and test brand mark/ design concepts.





# COMMENTS & RECOMMENDATIONS

---

## **BRAND LOGIC / CREDENTIALS:**

### **Comments**

Brand logic is when brand is legitimately supported by products and services offered to the visitor. It is when the brand is matched or exceeds the promoted and promised visitor experience.

Brand credentials are created when the visitor experience and the precinct heritage products are of the quality and legitimacy to honor what is promised to the visitor through the brand.

### **Recommendations / findings**

A Maritime Heritage brand for the North and South Wharves precinct has underlying strengths through the existence of relevant assets, both physical and intangible. By enhancing these existing physical assets, drawing out more of the intangible ones and adding new product experiences, this brand logic can be further developed.

Currently the Maritime Heritage product within the precinct should be collectively considered as 'precinct strengths', with the potential to become a brand following more extensive product development.

## **BRAND AWARENESS:**

### **Comments**

Brand awareness is the extent to which visitors and stakeholders are familiar with products and experiences on offer within the precinct.

### **Recommendations / findings**

Based on the feedback from stakeholders and that from the consumer interviews, the precinct's present Maritime Heritage brand status has low to non-existent brand awareness. This is not surprising, as a clear brand for the precinct has yet to be adopted, developed and executed.

The profile of this precinct can be boosted through imagery, storytelling, and the addition of critical infrastructure, such as the Seafarers project, Seafarers Rest Park and the potential of the Green Line project for the North Bank and a more intense focus around the upgrading opportunities associated with the Polly Woodside's presentation.

# COMMENTS & RECOMMENDATIONS

---

## BRAND USE / LOYALTY

### Comments

Brand loyalty is the commitment stakeholders and partners have to using the brand in their own marketing and business activities. It is also the capacity to generate repeat visitation to the site, rather than visitors and locals going to competing destinations.

### Recommendations / findings

At present, there is minimal brand usage by stakeholders and businesses within this precinct based on the survey data as received. Consequently, there is little evidence of brand loyalty and there is no brand champion.

In development of a Maritime Heritage brand, there needs to be full consideration given to the diversity and range of businesses operating within this precinct and also a clear understanding as to how each could effectively incorporate and use a Maritime Heritage brand within their marketing.

## BRAND COMPETITION / DISTINCTIVENESS

### Comments

Brand competition is the competition between locations and destinations that offer similar visitor experiences to the same target markets

### Recommendations / findings

There is considerable competition within Australia and internationally for uniquely branded Maritime Heritage precincts which have a critical mass of product offering, supported by strong marketing and brand usage by their stakeholders.

The underlying distinctiveness of Melbourne as a Maritime Heritage branded experience is primarily based on the impetus generated by the Gold Rush period and its subsequent influence on development of the City and its Port.

The precinct has strong spatial and experiential relationships with both South Bank and Docklands. By comparison to these two latter precincts, the North and South Wharves precinct has a stronger claim to a Maritime Heritage brand through the existence of product, Port infrastructure and the link to Melbourne's seafaring history.

# COMMENTS & RECOMMENDATIONS

---

## BRAND APPEAL

### Comments

Brand appeal is the power of the brand to attract, please, stimulate and interest both prospective and regular visitors to the precinct.

### Recommendations / findings

Interstate and international examples indicate that there is demonstrated and considerable realized strength for brand appeal associated with Maritime Heritage.

The present lack of product offer within this precinct however limits the appeal it has in its existing structure and presentation.

## BRAND SUPPORT / MANAGEMENT

### Comments

Brand support is the distribution of printed and digital materials and guidelines that direct and assist stakeholders and partners to present and use the brand in an appropriate, uniform, and accurate way, thus maintaining its integrity.

Brand management is the critical role of actively supervising, supporting, and monitoring the use of the brand by stakeholders and partners. It is also monitoring the visitor experience to ensure it fulfills the brand promise.

Therefore, Brand custodianship in managing the adopted brand is a critical element in driving its success. It requires a significant and dedicated budget and resources to deliver the desired outcome.

### Recommendations / findings

In successfully creating and developing a Maritime Heritage brand for the North and South Wharves precinct, there will need to be a focus on how it is to be managed and resourced by the Yarra River Business Association in partnership with Governments and key stakeholders within the precinct.

Brand proprietorship by YRBA will be crucial to its ultimate delivery and success.

# COMMENTS & RECOMMENDATIONS

---

## BRAND PROMISE

### Comments

Brand promise is the experience visitors can anticipate and expect when they visit the precinct and engage with pre visit marketing material. If the experience exceeds what the visitor expects and anticipates then the brand is reinforced and strengthened.

However, if the experience fails to meet or exceed visitor expectations, the brand is weakened. Every point of contact is a moment of truth that either reinforces /enhances or diminishes the brand.

Failure to meet the brand promise results in a rapid loss of marketplace relevance and a loss of faith with precinct visitors who will amplify their displeasure through word of mouth and social/ digital media.

Brand promise is a critical consideration and one of the most important considerations in this review.

### Recommendations / findings

Just as form follows function as a base principle of good design, so too brand follows product as the base principle of sustained marketing and success.

Any precinct cannot be successfully marketed in attempting to sell a product or experience which it doesn't have, or which does not meet visitor expectations.

While Maritime Heritage is a strength of the precinct, the product mass is not sufficiently developed or enhanced in its present form to sustain an immediate branding. Therefore, the primary focus moving forward should be on product development and enhancement to match national and international examples, thereby meeting or exceeding such expectations.



# COMMENTS & RECOMMENDATIONS

---

## VISITOR EXPERIENCE

### Comments

Visitor experience is the physical and emotional reaction the visitor has to the products/ attractions on offer within the branded precinct.

The visitor experience includes all that is offered (products, storytelling and services) in which the visitor invests money and/or time. As such, it includes each stage of the travel cycle including pre-visit contact.

The precinct contains numerous distinctly identifiable products such as the Dry Docks, Pump House, heritage buildings, the Polly Woodside, restaurants and bars, shopping, and exhibitions.

The visitor experience is the cognitive, emotional, and physical process that happens within each visitor entering the precinct.

Products facilitate visitor experiences. If products and services are delivered in a way to match or exceed visitor expectations as promised by the brand, a positive visitor experience is the likely outcome.





# COMMENTS & RECOMMENDATIONS

---

## VISITOR EXPERIENCE

### Recommendations / findings

The critical elements of an enhanced visitor experience will be driven by several key product development opportunities:

#### (i) **Polly Woodside and Maritime Exhibits:**

The National Trust Australia (Victoria) has given a clear statement of its intention that this maritime exhibit will continue in situ as an accredited museum.

Subject to future funding support, critical elements, such as rigging and masting, are proposed to be restored in accordance with its adopted heritage management plan for this exhibit.

Its operational hours are expanding post-Covid but need to be extended to better fulfill potential visitor growth and thereby reinforce the potential of a Maritime Heritage brand.

YRBA should support Budget bids to further progress these infrastructure restoration works and to explore the Dry Dock presentation that the Trust has proposed for the Polly Woodside.

The precinct area near Polly Woodside could be enhanced by acquisition and presentation of relevant Maritime Heritage exhibits, combined with better interpretation of the existing collection items there, supporting a Maritime Heritage trail.



# COMMENTS & RECOMMENDATIONS

---

## **(i) Pump House at MCEC:**

The existing presentation of this asset fails to make any worthwhile contribution to the visitor experience or to strengthening the precinct's Maritime Heritage positioning.

It is an underutilized asset that could be better incorporated and interpreted by formal connection to the Polly Woodside Museum exhibit as part of the planned Dry Dock project.

## **(ii) Cargo Sheds:**

The Cargo Sheds on South Wharf are currently utilized by the restaurants, cafes and retail establishments without any connection or presentation linking them to the precinct's maritime history.

These buildings could be better interpreted with imagery as part of an associated technology-activated Maritime Heritage trail.

## **(iii) Gateways and Public Art Works:**

The precinct requires iconic gateways at both of its eastern approaches, aligned with the Maritime Heritage theme. These may be by placement of key public art works that draw the visitor's attention and attract movement to the area.

## **(iv) Indigenous Maritime Heritage:**

The opportunity exists to incorporate the First Nation's maritime heritage and stories of its pre- and post-colonial settlement occupation of the precinct. The Green Line project being proposed by Council needs to be further explored as a relevant driver for this aspect of the precinct.

## **(v) Seafarers' Bridge:**

This relatively new piece of infrastructure is a critical link between the North and South Wharves. It has the potential to incorporate more Maritime Heritage history through imagery like that incorporated into the nearby Sandridge Bridge example.

# COMMENTS & RECOMMENDATIONS

---

## **(vi) Melbourne Convention & Exhibition Centre:**

In recognition of the significant number of convention and conference delegates and visitors to exhibitions, an outstanding opportunity exists to incorporate into the MCEC interior the visual linkage presented through to the precinct by adding historic and Maritime Heritage imagery and interpretation.

## **(vii) Mission to Seafarers Building/Seafarers' Rest Park:**

This historic building and the associated park site are the most significant Maritime heritage assets in the North Wharf part of this precinct. They add outstanding depth and historic richness. The Seafarers' Bridge links both precincts directly and the heritage dock crane adds immediate visual strength to the maritime story within the precinct.

The potential restoration of the Mission to Seafarers building is a critical capital redevelopment that would significantly enhance the North Wharf sub-precinct and the YRBA should therefore support Budget bids to realize this project.

The Seafarers' Park will add major public open space and provide a further opportunity for Maritime Heritage themed public art works and interpretation, incorporating both objects and personalized stories connecting to its history. This Seafarers component will be a key element within the City's Green Line proposal.

## **(viii) Visual Maritime Heritage imagery and interpretation:**

All businesses operating within the precinct should be encouraged and supported through access to Maritime Heritage imagery, stories, and interpretation. Technology incorporating lighting and soundscapes could support the overall presentation of the precinct and support its proposed branding.

The extended Maritime Heritage Trail can also link these businesses to a themed narrative that connects the present to the past.

## **(ix) Wayfinding and Signage:**

Wayfinding and signage are critical elements to support a quality visitor experience. These need to be based on the adopted code and policies of the City of Melbourne and the Council is the responsible authority that will implement these strategies.

Early engagement with Council is therefore encouraged. This will explore the improved directional signage to and within the precinct.

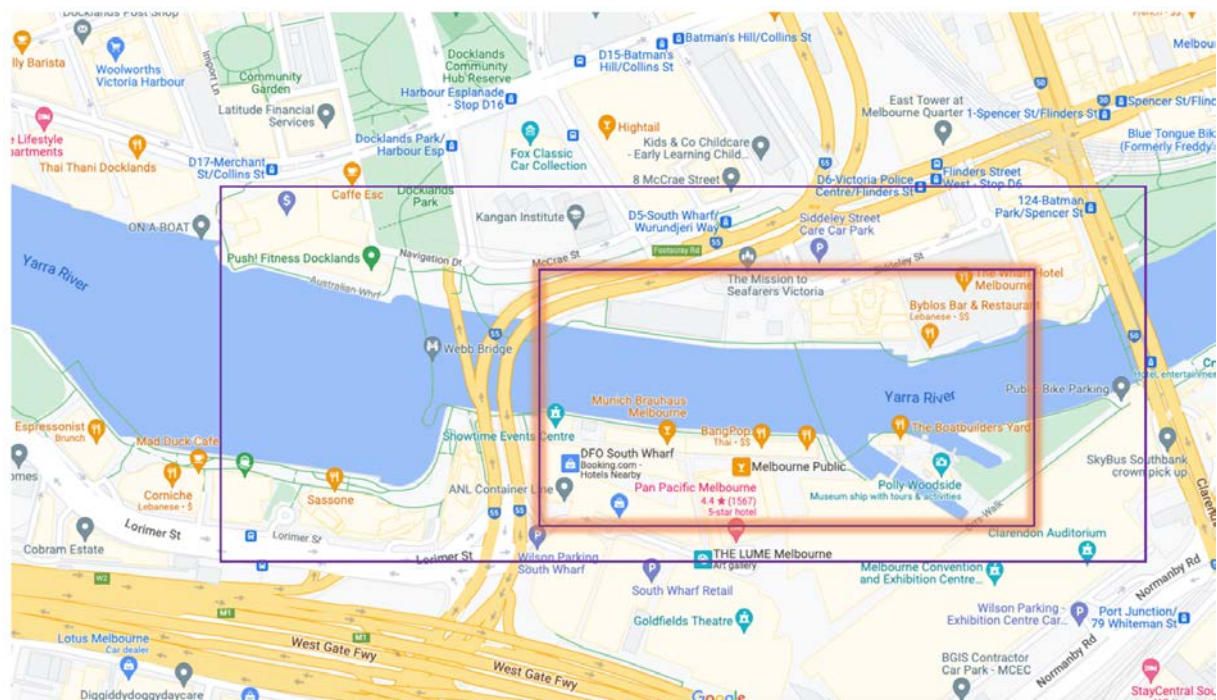
# THE PROJECT BRIEF

This Positioning & Marketing Evaluation has been commissioned by the Yarra River Business Association (YRBA) which, in conjunction with the City of Melbourne, wishes to examine and evaluate the current, but nascent, marketing position of South Wharf and North Wharf as a maritime heritage/cultural tourism product for Melbourne. Fundamentally, this piece of research seeks to answer the question:

“Is it worth pursuing a maritime heritage theme for the Western end of the Yarra River precinct? If so, what would be required to ensure its success, i.e., infrastructure, communication, signage, activation, installations? If not, what would be an alternative product position and a marketing theme to differentiate the sub-precinct?”

The area is Melbourne City’s most authentic maritime heritage sub-precinct, featuring the tall ship Polly Woodside and an array of cargo sheds that were restored and opened in 2011 as venues for cafes, restaurants and bars.

There is considerable commercial development taking place on the North Wharf area and the potential refurbishment of the Mission to Seafarers building is a fundamental driver of the precinct’s maritime heritage story, together with the rich story of the Polly Woodside and the industrial heritage of the wharves themselves.



# OUR APPROACH

---

**The methodology undertaken to compile this review incorporated the following tasks:**

- Reviewing existing brand strategies, related documentation and any available tourism and recreational data and specialist research on the topic
- Reviewing existing branding throughout the travel cycle.
- Undertaking a 'Walk the brand 'of the precinct (i.e., a 3-hour site visit of the current offerings), experiencing and capturing images that reinforce the brand or detract from the brand.
- Undertaking a survey of key stakeholders on the Maritime Heritage brand .
- Conducting one on one and small group meetings with selected stakeholders (including Visit Victoria, City of Melbourne, Victorian Tourism Industry Council, Yarra River Business Association, South Wharf Association and Melbourne's Maritime Heritage Network) and operators to discuss and capture brand executions, challenges and opportunities.
- Conducting consumer research onsite to better understand brand appeal and the visitor experience.
- Conducting desktop research on the current offering and test the Maritime Heritage theming. Review existing maritime heritage sites, such as Salamanca Place, Hobart, The Rocks, Sydney, Greenwich (Thames, London), Boston Freedom Trail (USA), San Francisco Pier 39 (USA) and Gamla Stan, Stockholm (Sweden).
- Exploring specific elements of brand equity and provide recommendations on level of brand awareness, brand appeal, brand association and the brand loyalty of operators, stakeholders and visitors to the precinct. The characteristics of successful brands are Logic & Credentials, Awareness, Use & Loyalty, Competition & Distinctiveness, Appeal, Support & Management and Promise. Each of these critical success factors were considered and examined.
- Conducting a 'brand audit 'of the dreaming, planning, experiencing, sharing and remembering phase of the travel cycle.
- Presenting draft findings and recommendations to selected operators and stakeholders.
- Finalising Report to Yarra River Business Association and South Wharf Association.



# A REVIEW OF GLOBAL MARITIME HERITAGE PRECINCTS

## INSIGHTS FROM REVIEW OF HIGH-PROFILE GLOBAL MARITIME HERITAGE PRECINCTS

- The following common attributes are readily identifiable in successful, branded maritime heritage precincts, exhibiting best practice, in various locations around the world:
- There is a critical mass of significant and iconic maritime related infrastructure and artifacts within the precinct to legitimize the brand and enhance the visitor experience – heritage buildings and objects are central features within the landscape.
- They have great story telling elements and put visitors into unique settings and situations, embracing rich histories from all aspects of their past occupation and usage.
- They are readily accessible and aren't overly restrictive – pedestrian use takes precedence over vehicular use, but nearby car parking is reasonably available.
- They have embraced technology to increase engagement and expand the depth of interpretation.
- The precincts have well defined boundaries and visitors know when they are in or out of the precinct – the points of entry and exit are clearly identifiable “gateways”.



# A REVIEW OF GLOBAL MARITIME HERITAGE PRECINCTS

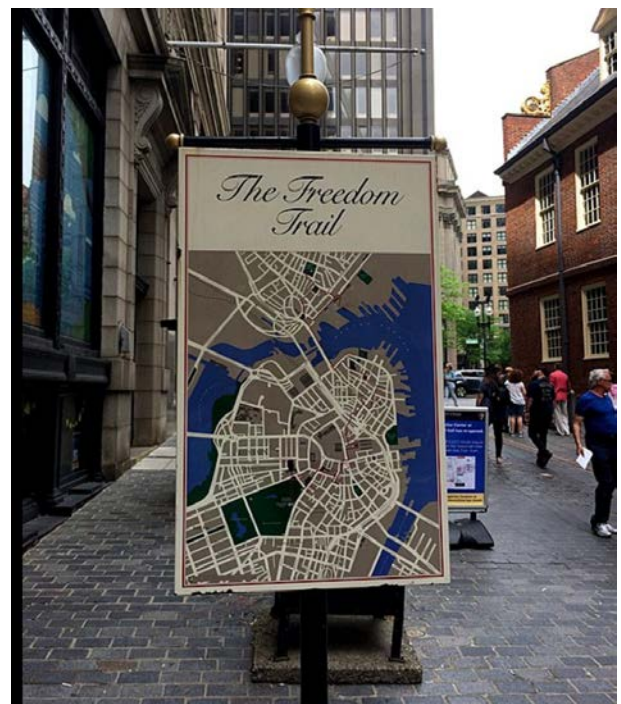
---

- Precincts have a maritime related brandmark and colour scheme that unifies their marketing materials (print, digital and social).
- There is extensive use of the authorized brandmark/logo/ colour scheme by all businesses located within the precinct.
- Precincts have a unique 'vibe' generated through maritime themed artwork, installations, urban furniture, signage, information, interpretation, lighting, soundscapes, and activations.
- Great precincts focus on culture, architecture, gastronomy, themed infrastructure, landscapes, events, and shopping. They embrace water transport experiences as central activities and incorporate ferry stops and terminals. Restaurants and food experiences feature local seafood and produce and incorporate famous local dishes and recipes in their menus.
- There are a broad range of activities and varied experiences to retain visitors within the precinct for several hours and visitors are given reasons to come back.
- Precincts have curated locations and infrastructure to encourage and support the sharing of images.
- The precincts have unique branded gifts and souvenirs strongly based on their maritime heritage theme.
- Wayfinding and themed signage direct people to the precinct and critically placed infrastructure draws people into the precinct.
- Wayfinding and signage supports the movement of people within the precinct to experience major attractions and locations in a logical and efficient way. They make it easy for visitors to figure things out.
- The precinct is the focus of a number of significant major events, regular markets and festivals that support and reinforce the brand and maritime positioning.
- The precincts are recognized by Governments and tourism organizations and are promoted and supported.

# A REVIEW OF GLOBAL MARITIME HERITAGE PRECINCTS

---

- They successfully occupy a niche in the market over the long term.
- The sites are inclusive with a high level of local use and relevance rather than being only the preserve of tourists and presented and perceived as a tourist attraction.
- Potential and actual visitors to the precinct (both local and tourists) are engaged and assisted at every stage of the travel cycle as follows:





# THE VISITOR TRAVEL CYCLE

THE VISITOR’S ‘MOMENTS OF TRUTH’ ARE HONOURED, AND THE VISITOR EXPERIENCE IS MATCHED OR EXCEEDS EXPECTATION.

THE BRAND PROMISE IS KEPT.... EVERYTIME.

Pre-Visit:	Dream ....	Imagery and stories
Pre-Visit:	Plan .....	Maps, Transport, Operational Information
Pre-Visit:	Book .....	Accommodation, Parking, Attractions & Events
Visit:	Experience...	Parking, Visitor comfort, Access, Safety,Events
Visit	Share.....	WIFI Hotspots, Curated Photo Ops, TripAdvisor
Post Visit	Remember ...	Unique Branded Gifts and Post Visit Contact

# INSIGHTS FROM SECONDARY DATA PROFILING VISITORS TO MELBOURNE

---

This key data set is extracted from the latest domestic visitation data to Melbourne for the year ending March 2022.

There were:

## KEY VISITATION DATA Y/E MARCH 2022

- 18.3m domestic visitors - up 30% Year on Year (Y/Y), but down 42% compared to pre-Covid data for the year ending March 2019.
- 13.7m domestic day trips.
- 4.6m domestic overnight visitors.
- Total Melbourne domestic expenditure \$5.5bn.

Source: Visit Victoria

- Cultural experiences are one of Melbourne's primary visitor strengths, with 15% of all visitors listing participation in cultural experiences (visiting museums, art galleries, heritage building sites and monuments). In year the pre-Covid year ending December 2019, this represented 11.9 million visitors.
- Global research (UNESCO 2019) found that 70% of all visitors to destinations rated visiting cultural heritage sites and buildings as being "of interest/very interested".
- Other Melbourne visitor experience strengths that relate to South/North Wharf precinct include -Food and Beverage experiences, Shopping experiences and Event experiences. There is also a strong generation of visitation from convention attendance at MCEC.
- It should be noted that branding could add value to the total visitor experience, regardless of primary purpose of visit, by enhancing the general appeal of the precinct and generating a sense of place and a point of difference to other locations also offering similar visitor experiences.



# INSIGHTS FROM SECONDARY DATA PROFILING VISITORS TO MELBOURNE

---

## **Motivators for travel to South/ North Wharf Precinct:**

- Family and Friends are a central motivator. People go to great lengths to reconnect with their family and friends.
- For domestic and international visitors alike, the main reason for travel to a destination is not necessarily associated with place, but rather it is about people-to-people connections.
- Melbourne is a global, multicultural city with a significant amount of net immigration from a wide range of international source countries. Visiting Friends and Relatives (VFR) could therefore drive further numbers of international and domestic travellers to the precinct.
- Specific events and activations could therefore be developed that target VFR so as to boost visitation and generate critical mass of visitors to the precinct.

## **Preference for Capital City visitation**

- This data shows that 90% of domestic and international travelers in the year ending 2019 (pre-Covid) preferred visiting capital cities, rather than other regional destinations within Australia.
- The primary reasons stated for driving this preference were the shopping and dining experiences available, as well as the ease of access.
- The most popular reason for international travelers was that Melbourne offered a great variety of things to do and see within an internationally acclaimed "must see" destination.

## **Lack of awareness of what is on offer**

- The constraints of time, money and lack of awareness remain key factors in limiting travel to specific destinations. Destination (Brand) awareness, value for money and time spent to get to the destination continue to be critical considerations in determining travel patterns.

# INSIGHTS FROM SECONDARY DATA PROFILING VISITORS TO MELBOURNE

---

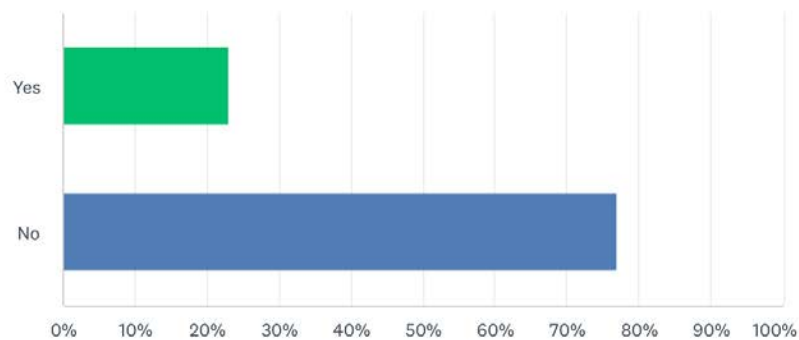
## **Visitors seek unique, braggable and shareable settings and experiences**

- In an ever-increasing, homogeneous world, visitors are seeking settings and experiences that are different and memorable and from which they gain an insight into themselves and the wider world in which they live.
- The visitor experience must therefore be central in the thinking behind the planning and development of any destination and by definition, its brand.
- Branding can be an important and critical element in establishing, reinforcing, and enhancing a destination's "sense of place "and in generating a point of difference from competitors.
- Through storytelling, interpretation, and the installation of significant relevant artworks visitors can gain understanding, knowledge and insights and locals can honour and celebrate their history.

# STAKEHOLDER SURVEY

A survey was distributed to key stakeholders to gain a better understanding of the potential for Maritime Heritage branding of the South and North Wharves precinct of the Yarra River as its own unique destination along the riverside.

Are you aware of the maritime brand being used for the South and North Wharves' Precinct?



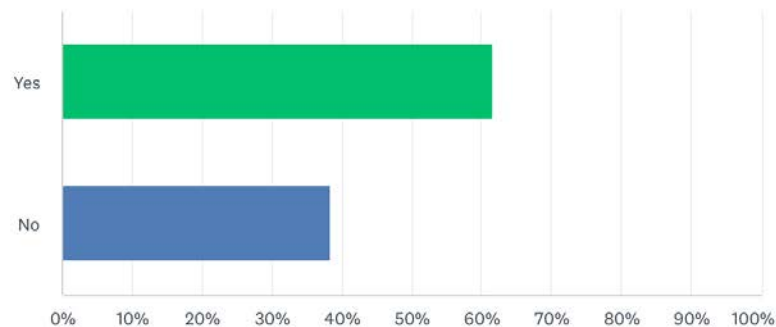
*Over 75% of respondents were not aware of the maritime brand being used for the South and North Wharves precinct.*

## Survey comments

- 
- ☐ Discussed with Trust team - not aware of any overarching maritime branding as such  
12/10/2022 02:41 pm
  - ☐ Am I aware that the area uses the waterway as a key theme? Yes. But I don't think it's branded like China Town as an example.  
28/9/2022 04:08 pm
  - ☐ Not until now.  
26/9/2022 03:16 pm
  - ☐ A reminder that I Chair the Melbourne Maritime Heritage Network which has been strongly advocating that the CoM and Southbank in particular should proactively optimise and capture the cultural and economic \$value of its rich maritime heritage. It is THE 'differnetiating' element in Southbank.  
22/9/2022 09:38 am
-

# STAKEHOLDER SURVEY

Do you believe that the maritime heritage brand is a credible positioning for the South and North Wharves precinct?



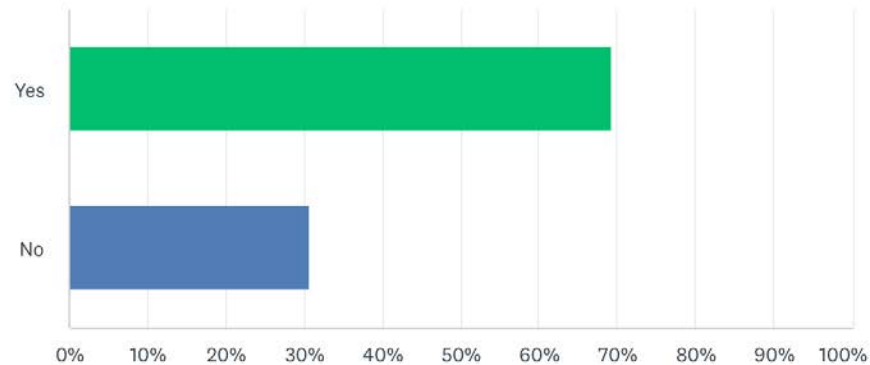
*61.5% of stakeholders thought that the maritime heritage brand was a credible positioning for South and North Wharves precincts.*

## Survey comments

- ☐ Maybe but currently has no brand or historical identity (other than Polly Woodside) and what are the advantages or success look like, will it drive visitation, tenancies, community engagement, differentiate south and north wharves from southbank and crown?? Would be good to understand goals and vision for the precinct.  
25/10/2022 11:34 am
- ☐ I am not sure I have a strong indication that visitors would be compelled to visit the precinct based on this branding. Feel like maritime should be the icons within a broader proposition for visitors  
28/9/2022 04:11 pm
- ☐ Are we talking about maritime or maritime heritage? Maritime - YES connected v seaborne trade, naval matters or living near the sea. This has great interest eg. beach at the Boat builders, On at Boat at WTC, Polly Woodside (although a bit sad at the moment) Maritime heritage on its own - No eg Historic shipwrecks, archival documents, museums
- ☐ Do you have any evidence that a maritime heritage brand would increase visitation. It might be worth doing a few case studies of other cities who have a similar offer. eg Hobart, Sydney, Liverpool (UK)  
26/9/2022 03:16 pm
- ☐ Not completely sure what is meant by 'maritime' - is this the history /heritage angle - with Polly woodside and Mission to Seafarers? If so I don't think maritime is a enough of a 'hook' to drive visitation. Visitors are interested in the events at MCEC and the great dining offers many of which have a great waterside view.  
26/9/2022 02:14 pm
- ☐ I've answered yes - but only in part given there are historical references to the maritime heritage in the area (MHM) however I don't think Sth & Nth public realm areas should be positioned in maritime themes. The diversity and history of this area should be further explored to understand alternative positioning and marketing themes in order to engage the community and visitors  
26/9/2022 11:43 am

## STAKEHOLDER SURVEY

Do you believe there are tangible assets within the precinct that make the maritime heritage a sound and logical brand position?



*Over 69% of respondents believed there were tangible assets within the precinct that will make the maritime heritage a sound and logical brand position.*

### Survey comments

- ☐ I really don't know enough about the maritime heritage assets except for the Polly Woodside.  
25/10/2022 11:34 am
- ☐ There are several assets with the precinct - eg Polly Woodside, Mission to Seafarers, repurposed cargo sheds, river - then and now which could be linked by an overarching maritime narrative.  
12/10/2022 02:41 pm
- ☐ Polly Woodside is probably the key one but even the heritage of the wharves relates quite heavily and provides the right context  
5/10/2022 12:44 pm
- ☐ Pollywoodside Boat Builders Yard Mission to Seafarers Seafarers Bridge Restored Malcom Moore Electric Wharf Crane Yarra River Goods Shed No5 (under restoration)  
3/10/2022 04:21 pm



# STAKEHOLDER SURVEY

## Survey comments (continued)

☐

Maritime museum, pollywoodside, the alma dopel, Mission to Seafarers

28/9/2022 04:11 pm

☐

Not at the moment. The Polly Woodside is in a sad state and should be more accessible. Small static museums are not attractive. If this could be incorporated with a F&B or retail offer and the fences taken down would be way more attractive.

28/9/2022 04:08 pm

☐

I only know of Polly Woodside and Mission to Seafarers. How many attractions does Melbourne have in the area that are considered Maritime Heritage.

26/9/2022 03:16 pm

☐

Maritime Heritage Museum is the most obvious asset...however that requires a great deal of work.

26/9/2022 11:43 am

☐

The most obvious of these is the heritage-listed vessel Polly Woodside sitting within heritage-listed Duke and Orrs Dry Dock - including of course its intact engine room. Notably also - the adjacent wet dock( no signage) , shabby installation of buoys and anchors, proximity to the Mission to Seafarers across the Seafarers bridge and to the soon to be finished Seafarers Rest Park, heritage-listed electric crane and soon to be remodelled No.5 Goods Shed. There are other assets but this its an indication for you.

22/9/2022 09:38 am

☐

Structures, history, maritime artifacts, river

21/9/2022 08:01 pm

# STAKEHOLDER SURVEY

What do you believe are the current signature experiences within the precinct that reflect the maritime heritage?

## Survey comments

- ☐ On a boat, Polly Woodside  
25/10/2022 11:34 am
- ☐ Polly Woodside and adjacent precinct with artefacts, cargo sheds, M to S and associated park, Duke & Orrs Dry Dock and Pump Room, Merchant Navy Memorial nearby,  
12/10/2022 02:41 pm
- ☐ Alma Doepel, The Wattle, Mission to seafarers, Enterprize  
7/10/2022 05:42 pm
- ☐ The wharves and Polly Woodside and the history of the site itself. While it looks different now the connection to the story of how it got to now is a great opportunity for the precinct  
5/10/2022 12:44 pm
- ☐ Pollywoodside Mission to Seafarers  
3/10/2022 04:21 pm
- ☐ The above as well as walking tours, bike tours along thee water  
28/9/2022 04:11 pm
- ☐ None  
28/9/2022 04:08 pm
- ☐ Polly Woodside, Seafarers  
26/9/2022 03:21 pm
- ☐ Polly Woodside and Mission to Seafarers.

# STAKEHOLDER SURVEY

*Survey comments continued.*

☐ Our audience (What's On) responds most strongly to the events on at MCEC and the waterside dining offerings. Maritime heritage is an added bonus but probably not the primary drawcard.

26/9/2022 02:14 pm

☐ Probably the Polly Woodside, MHM and old sheds

26/9/2022 11:43 am

☐ See above

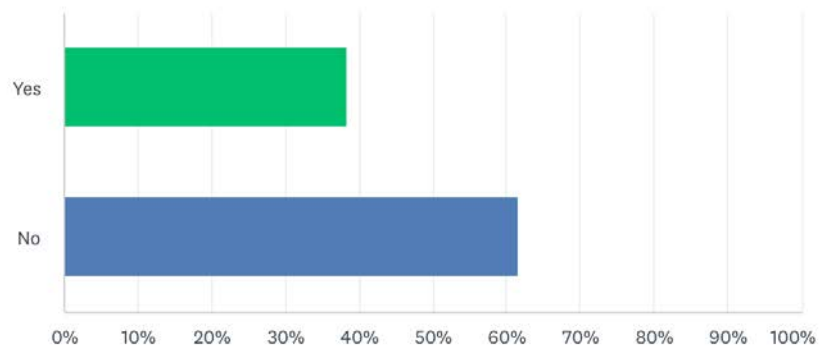
22/9/2022 09:38 am

☐ Polly Woodside, some signage to read, just walking through the area

21/9/2022 08:01 pm

## STAKEHOLDER SURVEY

Does your business / organisation use the maritime heritage branding in any way?



*Over 61% of respondents do not use the maritime heritage branding.*

### Survey comments

☐

It has no broad public awareness

25/10/2022 11:34 am

☐

The current existing scenario - not regarded as a strength or experience identifier or enhancer.

12/10/2022 02:41 pm

☐

Parks Victoria has a simple brand that covers a wide variety of parks, reserves and waterways. Due to the complexity of what we manage we keep it pretty simple.

5/10/2022 12:44 pm

☐

I am sure What's On would use it to an extent, but not necessarily the branding

28/9/2022 04:11 pm

☐

We run Yarra's Edge Marina and use the marina time these all the time. The marina is a great facility for those arriving via the water.

28/9/2022 04:08 pm

☐

Not that I'm currently aware of, I'm not entirely sure if Visit Victoria are across the branding.

26/9/2022 03:21 pm

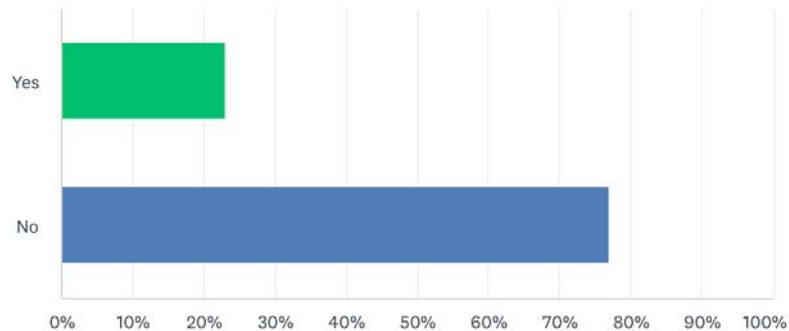
☐

Not that I'm aware of. I believe there is a Melbourne Waterfront walk/map being made that is produced by City of Melbourne (Experience Melbourne Branch).

26/9/2022 03:16 pm

## STAKEHOLDER SURVEY

Does the maritime heritage brand enhance the marketing and branding of your individual business?



*Over 76% of respondents thought the maritime heritage branding did not enhance the marketing and branding of their individual businesses.*

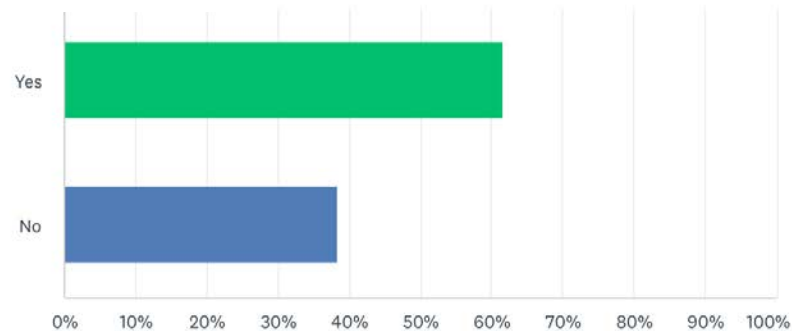
### Survey comments

- ☐ Not currently but strong precinct branding could drive visitation to the area and serve as a connecting narrative, activation and point of difference for the dispersed maritime assets and this area of Melbourne.  
12/10/2022 02:41 pm
- ☐ We are a maritime precinct and museum  
7/10/2022 05:42 pm
- ☐ We don't really brand our management of Yarra River outside of our corporate brand.  
5/10/2022 12:44 pm
- ☐ It underpins our whole Project Branding Strategy and the regeneration of maritime heritage assets is a key feature of our development.  
3/10/2022 04:21 pm
- ☐ Brand success is reliant genuine connection. Southbank clearly has a maritime heritage as a basis for branding differentiation from other CoM precincts.  
22/9/2022 09:38 am
- ☐ NA, we're an organisation not a business



## STAKEHOLDER SURVEY

Do you think a maritime theme/ narrative is the most appropriate brand story to be used to promote and develop the precinct?



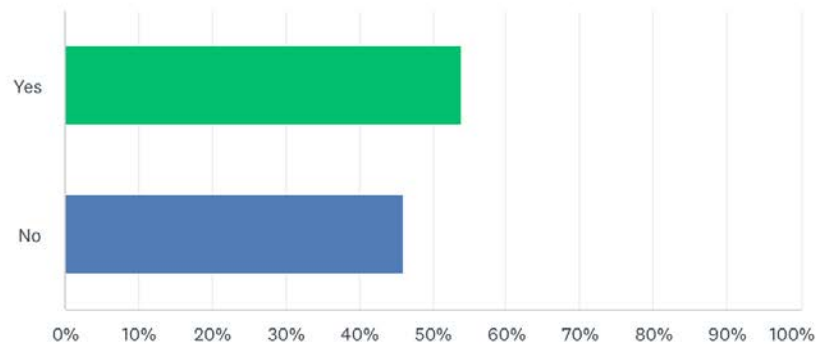
*Over 61% of respondents thought the maritime theme/narrative was the most appropriate brand story to be used to promote and develop the precinct.*

### Survey comments

- ☐ Given the current tangible assets - yes. However NTV is looking to incorporate the Traditional Custodians use of the waterways and river craft into the narrative at Polly Woodside. The intangible stories and evidence of change are equally important to the narrative. NTV also looking at developing holistic, day out experiences to increase visitation and enhance engagement. Lost trades, maritime skills, links to literature, crafts, language and music.  
12/10/2022 02:41 pm
- ☐ It's what sets it apart from other parts of Melbourne/the river and will help give the precinct a clearer sense of identity.  
5/10/2022 12:44 pm
- ☐ Its the clear and obvious choice for precinct branding - it is authentic and will be enduring  
3/10/2022 04:21 pm
- ☐ Maritime - Yes. As above
- ☐ I'm a little 50/50 on this question as it feels like the area has grown so much and to anchor it down with one particular theme could potentially limit the way it's spoken about. From a tourism perspective there's so much happening in the precinct from a visitation point of view it would be hard to tie in business events, shopping, dining and history under one narrative.  
26/9/2022 03:21 pm
- ☐ If a maritime theme is created it might be worth discussing with Aboriginal Melbourne team (City of Melbourne), to make sure the brand story is appropriate.  
26/9/2022 03:16 pm
- ☐ It is part of the story - but there are more significant (and important) stories to be told explored  
26/9/2022 11:43 am
- ☐ Melbourne Yarra has an extraordinarily rich maritime heritage which - despite i=this being central to our economic prosperity has been ignored by successive governments.

## STAKEHOLDER SURVEY

Do you think “Maritime Heritage” is the strongest brand to reflect the maritime theme of this precinct?



*Just over 53% of respondents thought the maritime heritage was the strongest brand to reflect the maritime theme of the precinct.*

### Survey comments

- ☐ Yes, however it needs to be considered through a contemporary lens and activated accordingly.  
12/10/2022 02:41 pm
- ☐ It will need a modern interpretation as the precinct looks very modern compared to peoples perceptions of a traditional or typical heritage brand/destination  
5/10/2022 12:44 pm
- ☐ Maritime should be a strong part of a branding, the Heritage angle can be part of the underlying story but not necessarily part of the brand name  
3/10/2022 04:21 pm
- ☐ As above, the historical significance of First Nations people in this area is more compelling and should be further explored in order to educate, engage the community and visitors  
26/9/2022 11:43 am
- ☐ No doubt about this - self evident.  
22/9/2022 09:38 am

## STAKEHOLDER SURVEY

What other brand(s) or theming might reflect the maritime positioning better?

*Survey comments*

☐

Seafarers

3/10/2022 04:35 pm

☐

Connection with the water, not just an old boat.

28/9/2022 04:40 pm

☐

Not sure

28/9/2022 04:15 pm

☐

Outdoor dining, waterside dining, major event precinct

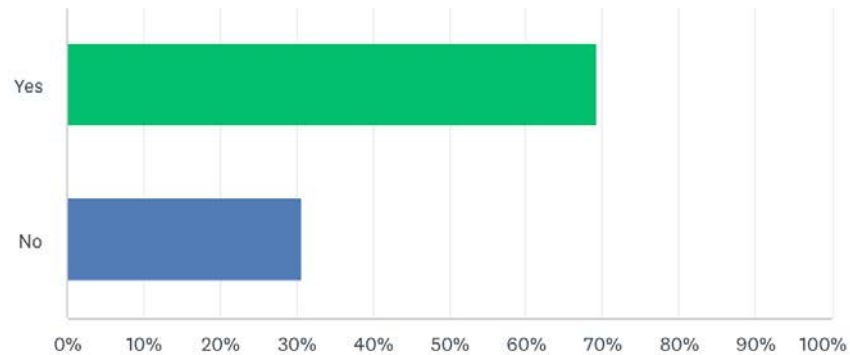
26/9/2022 02:18 pm

☐

First Nations Wurundjeri people significance of this area

## STAKEHOLDER SURVEY

Do you think a maritime heritage brand could be well received by your customers and other visitors to the precinct?



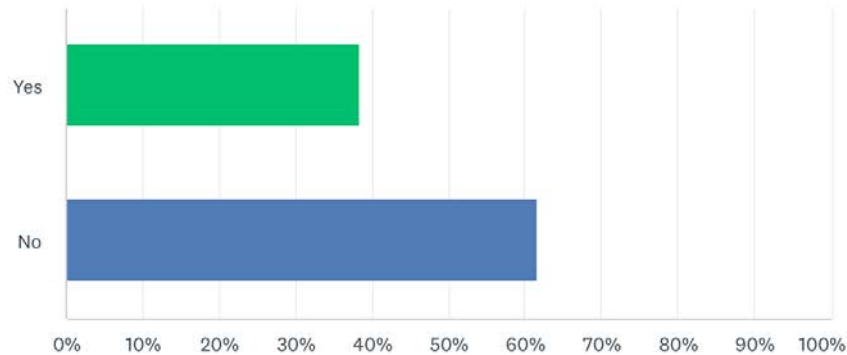
*Nearly 70% of respondents thought the maritime heritage brand could be well received by visitors to the precinct.*

### Survey comments

- ☐ If it has a contemporary lens and is strongly identified as an overarching narrative unifying elements  
12/10/2022 02:50 pm
- ☐ Melbourne is a port city and we currently don't celebrate that. Melbourne seems to have turned its back on the water  
7/10/2022 05:45 pm
- ☐ Yes - although it would have to be delivered by other businesses/organisations as Parks Victoria doesn't have too many options to use or implement an alternative brand except through interpretive signage.  
5/10/2022 12:57 pm
- ☐ Yes, if presented strongly, but I am not sure if that is achievable with everyone else going on in that area  
28/9/2022 04:15 pm
- ☐ I'm not entirely sure of this, I would require more information about the brand to make an informed decision.  
26/9/2022 03:25 pm
- ☐ Yes, by some but maybe no all people. A survey should be setup to ask visitors to Melbourne whether they would want it.  
26/9/2022 03:23 pm
- ☐ Not understating the significance of maritime heritage however this is a fairly niche product  
26/9/2022 11:49 am

## STAKEHOLDER SURVEY

Are there other destinations and precincts in Melbourne that have a stronger claim to use the maritime heritage positioning and brand?



*61.5% of respondents indicated that the precinct has a stonger claim to the maritime heritage positioning.*

### Survey comments

☐ Showing 9 responses

☐ Not that I can think of within Melbourne CBD

25/10/2022 11:38 am

☐ Williamstown - sorry we are based in Williamstown

7/10/2022 05:45 pm

☐ While there's a much broader maritime heritage story across Melbourne much of the heritage story has been lost or significantly altered and having Polly Woodside helps set this precinct apart.

5/10/2022 12:57 pm

☐ Williamstown or Queenscliff. What they don't have is Yarra Birrarung

28/9/2022 04:40 pm



# STAKEHOLDER SURVEY

*Survey comments continued.*

☐

Not that I'm aware of. maybe Docklands/Fisherman's Bend.

26/9/2022 03:23 pm

☐

Docklands (around centre pier) has a much stronger maritime focus with the marina and the ferry.

26/9/2022 02:18 pm

☐

Williamstown & Station Pier

26/9/2022 11:49 am

☐

Both sides off the Yarra and Victoria Harbour share a maritime heritage 'timeline. Understand the history and you will better understand this. Maritime heritage evolved over time in various waterside locations

22/9/2022 09:49 am

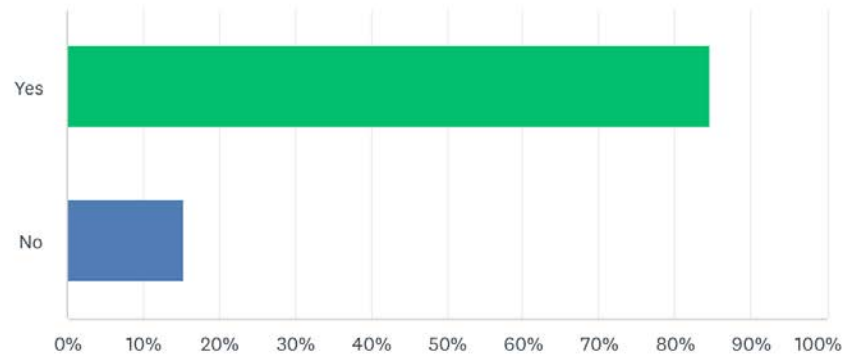
☐

Williamstown

21/9/2022 08:02 pm

## STAKEHOLDER SURVEY

Do you think that a single brand can be effectively used for both North and South Wharves?



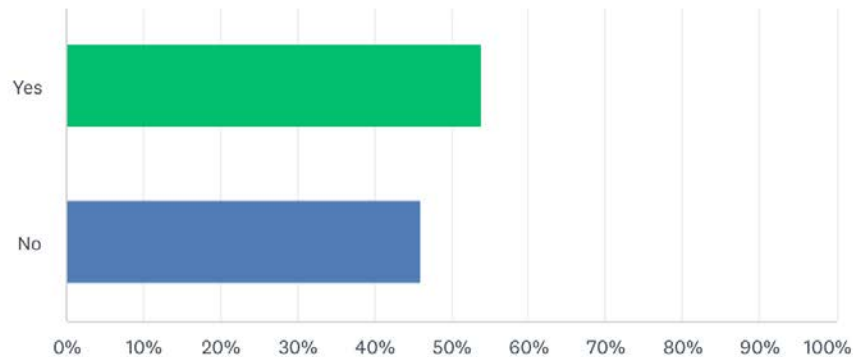
*Over 84% of respondents thought that a single brand can be used effectively for both North and South Wharves.*

### Survey comments

- ☐ Yes, if it clearly defines what is encompassed.  
12/10/2022 02:50 pm
- ☐ Multiple brands dilutes their effectiveness especially with limited resources. Unified precincts will be more effective. Keep it simple. If there is a need to distinguish between the two, a subtle colour change would be all I'd suggest.  
5/10/2022 12:57 pm
- ☐ Possibly, we would be open to discuss how these two precincts can work together under one 'umbrella' brand despite being on opposite sides of the river?  
3/10/2022 04:35 pm
- ☐ Requires investment, consistency, pick up from local traders, longevity  
28/9/2022 04:15 pm
- ☐ I think it may get confusing to know which side you're supposed to be on, perhaps it could be under one brand but their split into precincts. I'm not entirely sure.  
26/9/2022 03:25 pm

## STAKEHOLDER SURVEY

Would you use maritime heritage branding guidelines, brand mark and branding support materials in your business/ organisation?



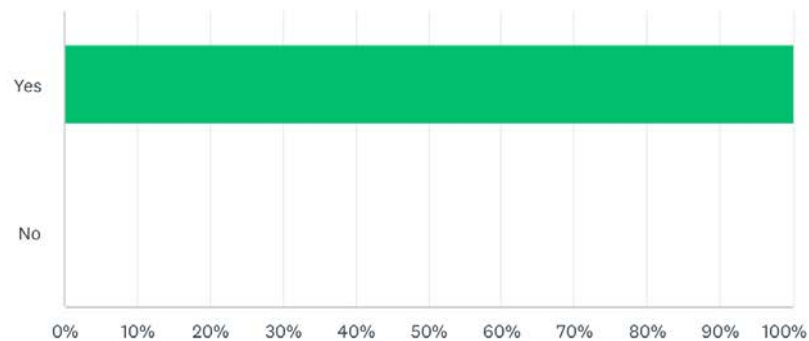
*53% of respondents would use the maritime heritage branding guidelines and support material.*

### Survey comments

- ☐ Yes, if we deemed them to be an asset. They could be used in support with NTV branding  
12/10/2022 02:50 pm
- ☐ There may be some minor opportunities for Parks Victoria to do this however our corporate branding is set and not prominent in the precinct.  
5/10/2022 12:57 pm
- ☐ So long as its accretive to our current branding and business objectives  
3/10/2022 04:35 pm
- ☐ This would be great for Yarra Edge Marina  
28/9/2022 04:40 pm
- ☐ It would really depend on the context of it's use, from a Visit Victoria perspective it may in some cases (e.g. website) and may not in others (e.g. social media)  
26/9/2022 03:25 pm
- ☐ Yes, if it was supported by Council.  
26/9/2022 03:23 pm
- ☐ We always create our own content, as this is what engages our audience, rather than using supplied assets.

## STAKEHOLDER SURVEY

Do you support the creation and installation of a precinct trail to celebrate and inform visitors of this precinct's maritime heritage?



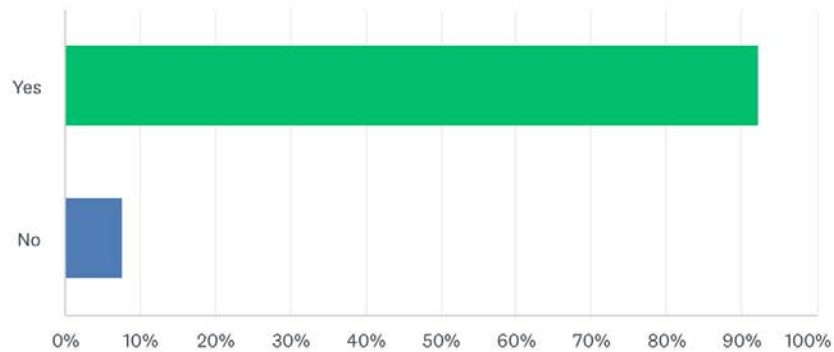
*There was overwhelming support for the creation and installation of a precinct trail to celebrate and inform visitors of the precinct's maritime heritage.*

### Survey comments

- ☐ Good idea - particularly given changing demographic of Docklands area. Local and wider tourism opportunities.  
12/10/2022 02:50 pm
- ☐ Telling the story of the precinct will be important to help people understand why it's significant and to form connections with the precinct  
5/10/2022 12:57 pm
- ☐ Yes a maritime heritage (including Aboriginal history) trail could be a value add.  
28/9/2022 04:40 pm
- ☐ Experiences are key for visitors. Free experiences too  
28/9/2022 04:15 pm
- ☐ A trail would be a good idea. This needs to be tested with visitors.  
26/9/2022 03:23 pm
- ☐ A trail could be a nice experience for visitors.  
26/9/2022 02:18 pm
- ☐ Wayfinding signage - or information portals could be an appropriate way to inform visitors of the precinct's maritime heritage  
26/9/2022 11:49 am
- ☐ MMHN has proposed this. It should cost over the bridge and link with Greenline trail . MMHN has proposed the necessity of commissioning an historian to accurately detail Soubanks as MMHN has done for North bank( now provided two CoM got ensure accuracy in Greenline signage

## STAKEHOLDER SURVEY

Do you support maritime related/ inspired art installations within the precinct?



*Respondents also overwhelming support art installations within the precinct.*

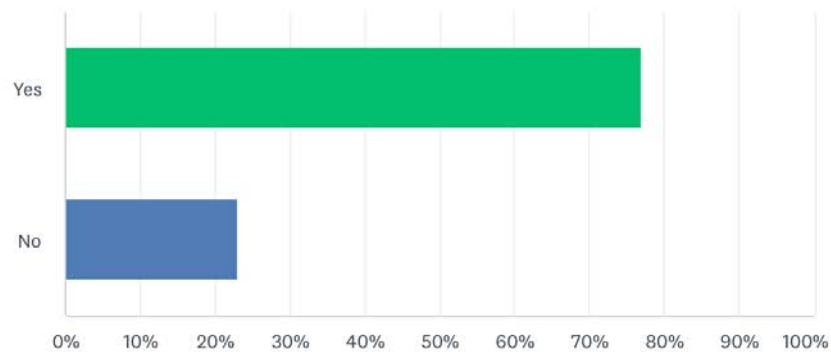
### Survey comments

- ☐ Will help build both atmosphere and connection to the story of the precinct  
5/10/2022 12:57 pm
- ☐ We are already incorporating maritime heritage elements in the design of Seafarers Rest Park  
3/10/2022 04:35 pm
- ☐ Unsure - depends on what this would look this - what they depict - where they are placed etc  
26/9/2022 11:49 am
- ☐ There are installations which exist already but need refurbishment - buoys and and anchirs etc and an large Merchant Seafarers Flag Pole( the current version is disrespectful)  
22/9/2022 09:49 am



## STAKEHOLDER SURVEY

Do you support maritime themed directional signage and way finding within the precinct?



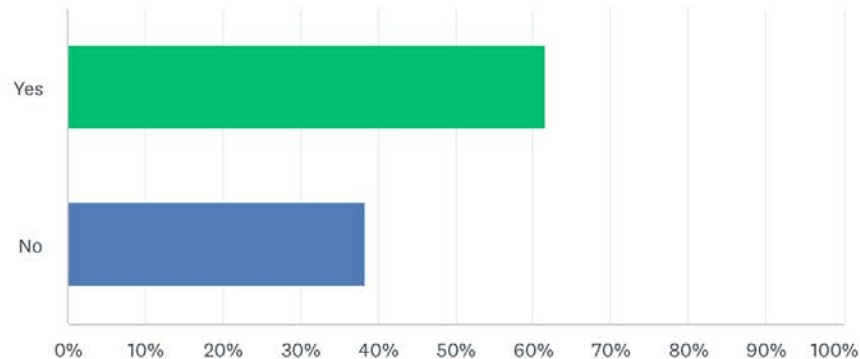
*Over 76% of respondents supported themed directional signage and way finding within the precinct.*

### Survey comments

- ☐ Assuming it will be connected to and in line with other City of Melbourne signage in the broader area  
5/10/2022 12:57 pm
- ☐ Our street Addresses at Seafarers have been approved and gazetted as Maritime Place  
3/10/2022 04:35 pm
- ☐ Wayfinding should be consistent across the entire municipality otherwise it causes confusion to visitors. Not to mention minimum standards required for accessibility  
28/9/2022 04:15 pm
- ☐ City of Melbourne's wayfinding signage could be updated to promote more maritime related attractions, but I do not believe that maritime themed signs should be installed.  
26/9/2022 03:23 pm
- ☐ I can't really say yes or no without knowing more so I'm just going to say no.  
26/9/2022 02:18 pm
- ☐ See above -  
26/9/2022 11:49 am
- ☐ See above I also note that there is no signage on Clarendon St directing people to the Polly Woodside  
22/9/2022 09:49 am

## STAKEHOLDER SURVEY

Do you support featuring and linking your digital assets (web and social) to a precinct wide digital footprint branded in the maritime heritage theme?



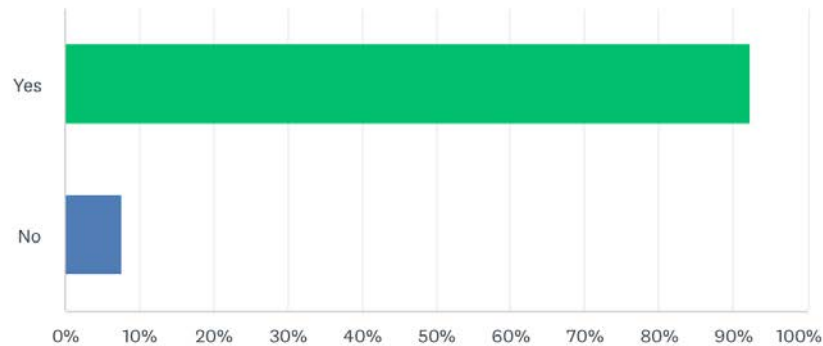
*61.4% of respondents would support linking digital assets to a precinct wide digital footprint branded in the maritime heritage theme.*

### Survey comments

- ☐ Yes, if we deemed them to be an asset. They could be used in support with NTV branding  
12/10/2022 02:50 pm
- ☐ Parks Victoria has limited opportunities for this due to the complexity and volume of what we manage. It would be absolutely appropriate for other organisations though  
5/10/2022 12:57 pm
- ☐ Yes if appropriate, for further discussion  
3/10/2022 04:35 pm
- ☐ I can't say on behalf of our web and social media team.  
26/9/2022 03:25 pm
- ☐ In theory yes.  
26/9/2022 03:23 pm
- ☐ As above, What's On Melbourne uses it's own content.  
26/9/2022 02:18 pm
- ☐ Not sure  
26/9/2022 11:49 am
- ☐ See MMHN work above  
22/9/2022 09:49 am

## STAKEHOLDER SURVEY

Do you support the creation and delivery of brand related events and activations within the precinct?



*Over 90% of respondents would support the creation and delivery of brand related events and activations.*

### Survey comments

- ☐ Yes in theory but depends on own existing business initiatives and assessment of additional commitments required - funding, resourcing, etc

12/10/2022 02:50 pm

- ☐ This will help with activation of the area in addition to what is already occurring.

5/10/2022 12:57 pm

- ☐ Seafarers Bridge has already been utilised successfully for community events

3/10/2022 04:35 pm

- ☐ In theory yes.

26/9/2022 03:23 pm

- ☐ don't know enough about possible concepts to be able to give informed answer, so I'm just going to say no.

26/9/2022 02:18 pm

- ☐ Depends on what these are - must be culturally sensitive

26/9/2022 11:49 am

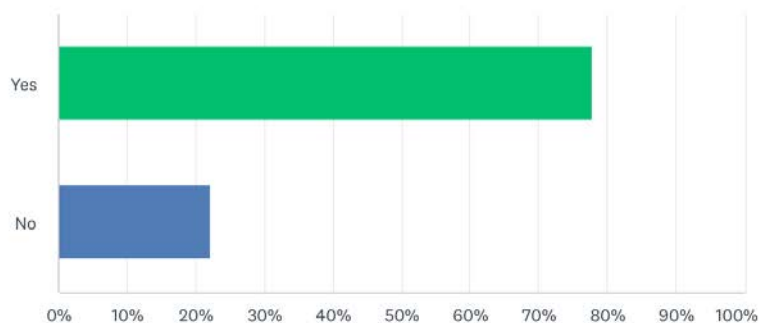
- ☐ See above - we already do this via theMMHN Update

22/9/2022 09:49 am

# SWA MEMBERS SURVEY

A survey was also distributed to SWA Members to gain their insights and understanding of the potential for Maritime Heritage branding of the South and North Wharves precinct of the Yarra River as its own unique destination along the riverside.

Are you aware of the maritime brand being used for the South and North Wharves' Precinct?



*Over 77% of SWA Members were aware of the maritime brand being used but as outlined in the comments it seems it was mainly through the South Wharf Association.*

## Survey comments

☐ I am only really aware of this through the south wharf association.

7/10/2022 01:52 pm

☐ I have noticed subtle landmarks along the Yarra River.

5/10/2022 06:54 pm

☐ Not aware of the brand currently being used in the precinct however aware of the desire to breath life back into precinct under the Maritime banner.

27/9/2022 10:30 am

☐ Only through the South Wharf association

27/9/2022 08:57 am

☐ Through the few signage pieces around the precinct

26/9/2022 02:04 pm

☐ I have not seen much reference to the maritime 'brand' as such, from a public perspective. We do make reference to the maritime theme when conducting site inspections of the hotel, as the hotel's (Pan Pacific Melbourne) architecture is inspired by the history of the area.

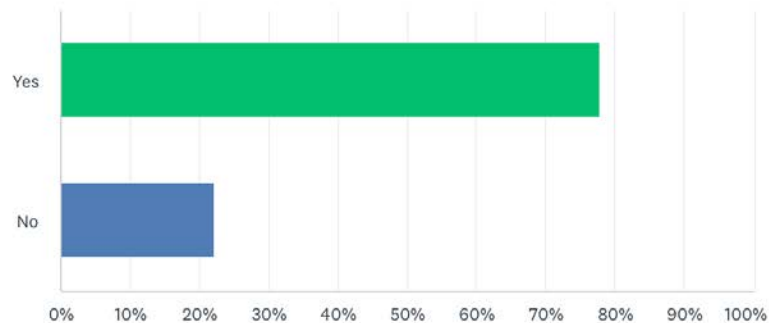
26/9/2022 11:55 am

☐ Only aware from the SWA meetings otherwise I would have no idea.

23/9/2022 05:47 pm

## SWA MEMBERS SURVEY

Do you believe that the maritime heritage brand is a credible positioning for the South and North Wharves precinct?



*Over 77% of SWA Members thought the maritime heritage brand was a credible position for the South and North Wharves Precinct.*

### Survey comments

- ☐ As it currently stands there doesn't appear to be much that represents this and it isn't. Only older people seem to be interested in this. The surrounding businesses also don't seem to care. We want to bring the whole Melbourne experience to them without them getting to see it all.

7/10/2022 01:52 pm

- ☐ Yes - I believe there would be a lot of history to drawn upon.

5/10/2022 06:54 pm

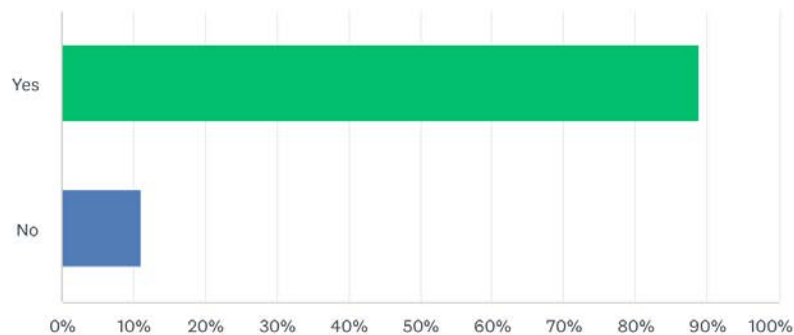
- ☐ The only reason I say 'no' is because so far I don't believe its having an impact and as this is not a field of my interest I'm not sure my opinion is of much validity.

23/9/2022 05:47 pm



## SWA MEMBERS SURVEY

Do you believe there are tangible assets within the precinct that make the maritime heritage a sound and logical brand position?



*89% of SWA Members believed that there were tangible assets within the precinct.*

### Survey comments

- ☐ But only the Polly Woodside really, which now has very restricted trading hours. There are also all the sheds but unless you know the history of the area you are probably not aware of their significance.  
26/9/2022 02:04 pm
- ☐ The dry dock area, Poly Woodside, the coal-powered pump house and the South Wharf Promenade are all part of the area's heritage but it is easily missed. I believe this would need to be accentuated if trying to leverage as a brand.  
26/9/2022 11:55 am
- ☐ Yes but there are far too few. There's Showtime which is only events, Polly Woodside which is barely even events but is at least quite eye catching when you walk past & Boat Builders Yard which barring a tin roof.  
23/9/2022 05:47 pm
- ☐ This one is a yes and no. There are but not enough.
- ☐ The river and polly woodside  
7/10/2022 01:52 pm
- ☐ I believe the foundation is already established, with the river, the path along the river, the Poly Woodside etc.  
5/10/2022 06:54 pm
- ☐ Polly Woodside Shed 2 at Polly Woodside which has some maritime Heritage displays Renovated goods sheds along South Wharf Seafarers Mission at North Wharf River frontage Pump house at MCEC Various jettys and floating pontoons  
5/10/2022 09:27 am
- ☐ The sheds along the promenade, the museum on the north side of Seafarers and Polly Woodside. It would be great to understand what history will be woven into the new Seafarers development to further promote the Maritime rich history. Additional maritime buildings or meaningful items would need to be re-introduced into the area to provide a fuller historical look and feel to the precinct to provide real relevance and stature.

# SWA MEMBERS SURVEY

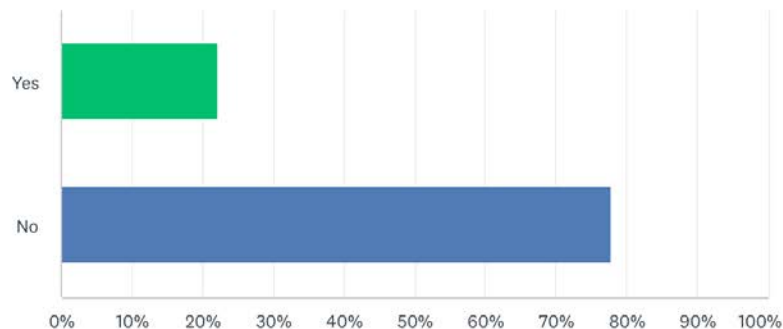
What do you believe are the current signature experiences within the precinct that reflect the maritime heritage?

## Survey comments

- ☐ Polly woodside  
7/10/2022 01:52 pm
- ☐ Poly Woodside is definitely a standout monument.  
5/10/2022 06:54 pm
- ☐ Waterfront dining Polly Woodside tours  
5/10/2022 09:27 am
- ☐ Aside from the museum, not really.  
27/9/2022 10:30 am
- ☐ Currently only the Polly Woodside and perhaps North Wharf
- ☐ I don't believe there are any at the moment.  
26/9/2022 02:04 pm
- ☐ Only Polly Woodside.  
26/9/2022 11:55 am
- ☐ People might take photos in front of Boat Builders or Polly Woodside but other than that I can't think of any. If I were to describe South Wharf as an area to someone that didn't know where it was or hadn't been before maritime heritage wouldn't be in my description. I'd mention DFO, MCEC, the Yarra and the fact we're within a km West of the casino.  
23/9/2022 05:47 pm
- ☐ The Polly woodside The north wharf Docking yard  
21/9/2022 05:55 pm

## SWA MEMBERS SURVEY

Does your business / organisation use the maritime heritage branding in any way?



*Less than 23% of SWA members use the maritime heritage branding.*

### Survey comments

- ☐ As above in Q 3. There are some architectural features that reflect the yarra etc but we don't lean into that branding. Our branding consists of being the home of the unconventional.

7/10/2022 01:52 pm

- ☐ Same corporate branding with all DFO's.

5/10/2022 06:54 pm

- ☐ Insufficient physical ties

5/10/2022 09:27 am

- ☐ We promote the DFO branding not the maritime heritage history however we would support the promenade retailers and our wider marketing if this project was to take off.

27/9/2022 10:30 am

- ☐ It has no relevance to what we do as a business

27/9/2022 08:57 am

- ☐ Only in the name of The Boatbuilders Yard venue.

26/9/2022 02:04 pm

- ☐ Yes, as above - on site inspections.

26/9/2022 11:55 am

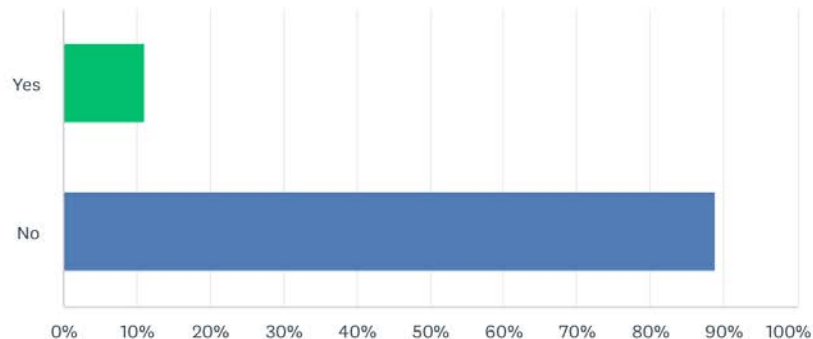
- ☐ We are not situated on the river side of the area we are connected to DFO. Tessie Pearl before it was Tessie Pearl wasn't marketed toward or lent into the branding of the maritime theme, on a pure assumption as to why, I'd say because of our geographic location on the wharf and the fact there is little to no maritime branding around it would look like we were very tackily exploiting a sinking ship so to say. I'm unsure if Tessie Pearl would suit a permanent tie to the maritime theme as things are or if it was better conveyed to the general public however I see a possibility in events.

- ☐ It is not relevant to the business branding other than the area we are in.

21/9/2022 05:55 pm

## SWA MEMBERS SURVEY

Does the maritime heritage brand enhance the marketing and branding of your individual business?



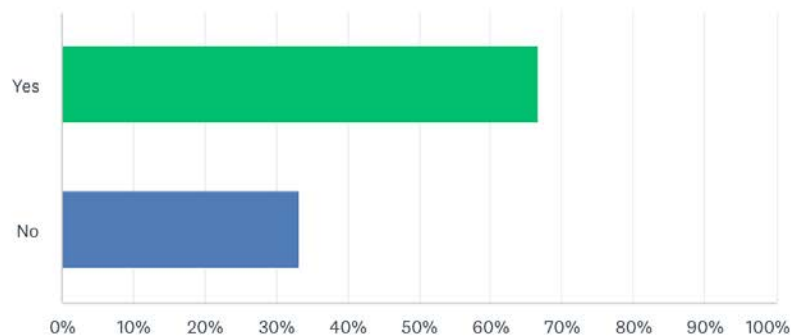
*Over 88% of SWA members surveyed did not believe the maritime heritage brand enhanced the marketing and branding of their businesses.*

### Survey comments

- ☐ It is not really aligned. However further discussions could be had with our Brand Manager.  
7/10/2022 01:52 pm
- ☐ N/A  
5/10/2022 09:27 am
- ☐ If it brings more people to the area of course it does.  
27/9/2022 08:57 am
- ☐ Not currently  
26/9/2022 02:04 pm
- ☐ Most clientele are here for other purposes - shopping at DFO, attending events at MCEC, corporate clients, or staycations. It is not the driving influence for people to stay.  
26/9/2022 11:55 am
- ☐ If it was to drastically increase foot traffic we might see a small benefit as again we are not situated on the water front otherwise see points above.  
23/9/2022 05:47 pm
- ☐ Although waterfront is a draw card and that is maritime I wouldn't class it as Heritage  
21/9/2022 05:55 pm

## SWA MEMBERS SURVEY

Do you think a maritime theme/ narrative is the most appropriate brand story to be used to promote and develop the precinct?



*Just over 66% of SWA members thought the maritime theme/narrative was an appropriate brand story to be used to promote and develop the precinct.*

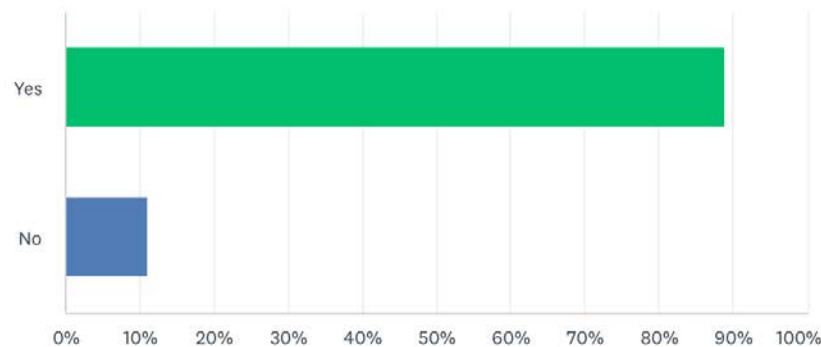
### Survey comments

- ☐ I honestly am not sure what it would be if we didn't use that branding though  
7/10/2022 01:52 pm
- ☐ As long as there is supporting tangible assets, signage, visitor engagement etc  
5/10/2022 09:27 am
- ☐ it seems like the most logical and probably the only one  
27/9/2022 08:57 am
- ☐ It has the history behind it so there is authenticity and credibly, which would be hard to craft for another narrative.  
26/9/2022 02:04 pm
- ☐ There are no other unifying themes that come to mind.
- ☐ The only reason I say no to this is I'm not sure there's a tangible benefit to Tessie Pearl and I am under qualified to otherwise comment on the maritime theme. I was unaware of its heritage until my first SWA meeting after working on the wharf for nearly 5 years. This may be due to my disinterest or lack of conveyance to the general public or even likelier still a combination of both.  
23/9/2022 05:47 pm
- ☐ While encapsulating the area as maritime I think is a key aspect there is more to the space than this. I think that this particular moniker or narrative is good as background but the focus should be on food, drink and shopping experiences.  
21/9/2022 05:55 pm



## SWA MEMBERS SURVEY

Do you think “Maritime Heritage” is the strongest brand to reflect the maritime theme of this precinct?



*Over 88% of SWA members saw the maritime heritage as the strongest brand to reflect the maritime theme of the precinct.*

### Survey comments

- ☐ It definitely has the foundation to build on.

5/10/2022 06:54 pm

- ☐ It would be a clear differentiation between the CBD or other precincts.

26/9/2022 11:55 am

- ☐ I feel like most of my comments have answered this at least indirectly.

23/9/2022 05:47 pm

- ☐ As a whole yes but it needs more attention to detail and how it personifies this brand than it currently has. To full embrace I think some additional markers and aspects to really put forth the feel of the "Maritime Heritage" The area needs more Maritime Signage. Masts, Wooden signage, Flags. Current signage is very much modern architectural. A Physical Archway leading to the zone would be amazing. This could even be a large Mast opposite MCEC on the Grassy area bearing signage of the distance is nautical miles to prominent venues, areas and sights. Could refer to the north and south of the wharf as High tide and low tide, ie north hightide and boats and docking etc, south lowtide, less focus the water more on what has been "exposed" by lowtide, shops, buildings, venues etc...

21/9/2022 05:55 pm

What other brand(s) or theming might reflect the maritime positioning better?

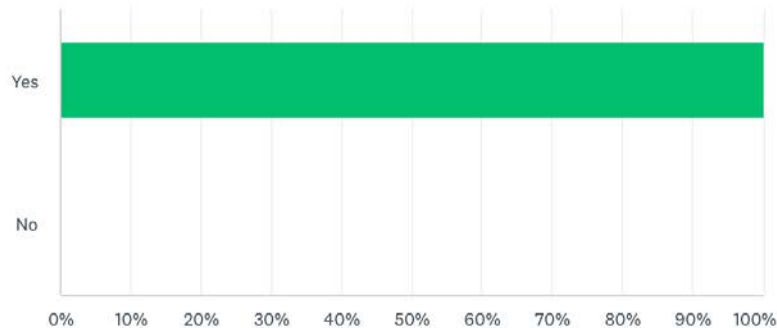
### Survey comments

- ☐ I personally think the target market of maritime heritage is too niche to target it directly. If there was some contemporary art that was aesthetically pleasing to the "instagram users/influencers" this would do far more affective in marketing for the precinct and would eventually reach a large portion of the 'target audience' as well as a considerable amount of other people.

23/9/2022 06:24 pm

## SWA MEMBERS SURVEY

Do you think a maritime heritage brand could be well received by your customers and other visitors to the precinct?



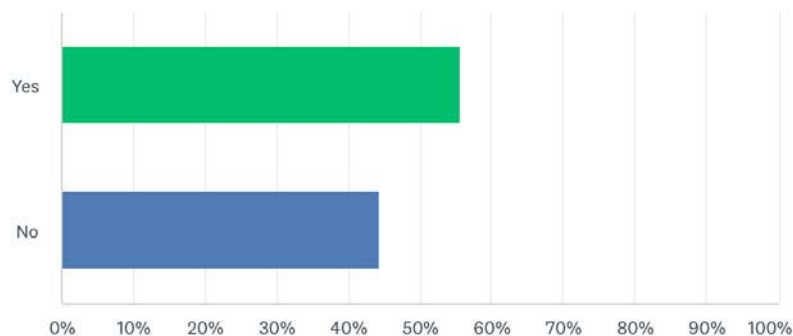
*Overwhelming SWA members saw the maritime heritage brand could be well received by their customers and other visitors to the precinct.*

### Survey comments

- ☐ yes it could be but i don't think it is a draw card, It is more of a once your here you realise  
7/10/2022 01:55 pm
- ☐ I believe it would add an extra element to the customer experience.  
5/10/2022 06:57 pm
- ☐ It would enhance the precinct identity and offer a point of difference while providing a wider breadth of marketing activities in the precinct.  
27/9/2022 12:37 pm
- ☐ I am not really sure. probably is my answer. It doesn't appeal to me personally but that is due to my interests. A lot of people love history  
27/9/2022 08:59 am
- ☐ It assists with our marketing if there is a story/ narrative behind the messaging.  
26/9/2022 12:04 pm
- ☐ I believe most branding or themes could be well received it is just highly dependent on how they are executed. Tessie Pearl has a considerably younger demographic than any other venue on the wharf so something that would be better received in my clientele would be more contemporary and photographable. If there could be contemporary art alongside each side of the river either only visible from the opposing side or only visible from the side you're walking along, telling the heritage story in a new exciting way or some "instagram-able" statues / installations with informative plaques around.  
23/9/2022 06:24 pm
- ☐ If it is brought in to focus more yes  
21/9/2022 05:59 pm

## SWA MEMBERS SURVEY

Are there other destinations and precincts in Melbourne that have a stronger claim to use the maritime heritage positioning and brand?



*44% of SWA members thought that there were other destinations and precinct that had a stronger claim to use the maritime heritage positioning and brand.*

### Survey comments

☐ Docklands - they actually have boats I also feel like I don't know enough to comment on other areas

7/10/2022 01:55 pm

☐ maybe Docklands

27/9/2022 08:59 am

☐ Port Melbourne - Princes Pier, however this is potentially targeting a different market.

26/9/2022 12:04 pm

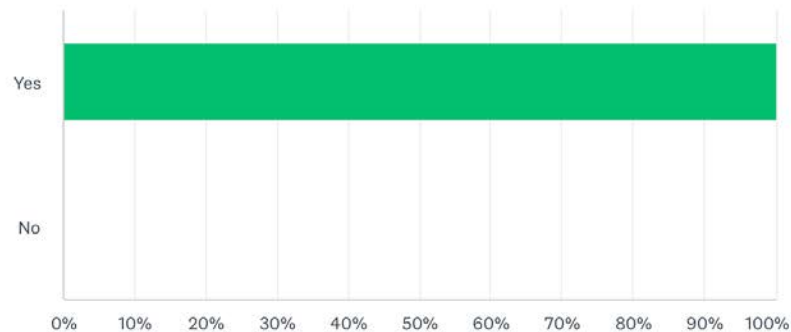
☐ Docklands. There's actually boats and a maritime presence.

23/9/2022 06:24 pm

☐ Port Philip Bay

## SWA MEMBERS SURVEY

Do you think that a single brand can be effectively used for both North and South Wharves?



*100% of SWA members stated that a single brand can be used effectively for both North and South Wharves.*

### Survey comments

- ☐ With the sheds & Pollywoodside on the South side and the new Seafarers development and museum on the North side of the Yarra, it makes sense for both areas to sit under the one banner.

27/9/2022 12:37 pm

- ☐ If the North Wharf want's to leverage off the established patronage of the South Wharf area, it should consider itself part of the precinct.

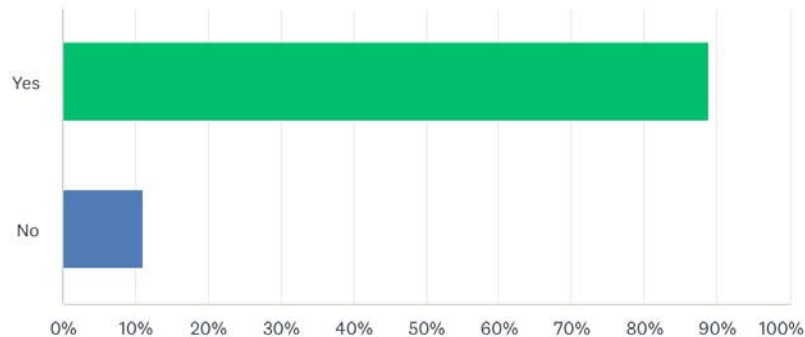
26/9/2022 12:04 pm

- ☐ Again I wouldn't count anything out it is just highly dependant of execution.

23/9/2022 06:24 pm

## SWA MEMBERS SURVEY

Would you use maritime heritage branding guidelines, brand mark and branding support materials in your business/ organisation?



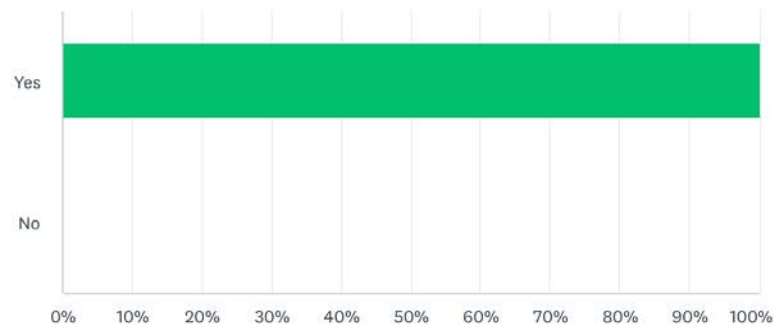
*A high percentage (88%) of SWA members would use the maritime heritage guidelines, brand mark as support material in their businesses.*

### Survey comments

- ☐ Maybe. This would need to be discussed with our brand team.  
7/10/2022 01:55 pm
- ☐ With head office approval, we could add elements to our floor plans.  
5/10/2022 06:57 pm
- ☐ As long as it wasn't tacky  
5/10/2022 09:29 am
- ☐ If approved by Vicinity. This would most likely be adopted externally along the Promenade and Dukes Walk but not in the DFO shopping centre itself.  
27/9/2022 12:37 pm
- ☐ Depends on what they look like. As long as they are strong well designed brands  
27/9/2022 08:59 am
- ☐ It would assist with our marketing of the hotels location, which is still not widely known.  
26/9/2022 12:04 pm
- ☐ This is a very tentative yes. For events if the area had more to do with the branding we'd certainly consider it. As a permanent fixture or decor I don't have the authority to answer that question.  
23/9/2022 06:24 pm

## SWA MEMBERS SURVEY

Do you support the creation and installation of a precinct trail to celebrate and inform visitors of this precinct's maritime heritage?



*There was 100% agreement from SWA members to support the creation and installation of a precinct trail.*

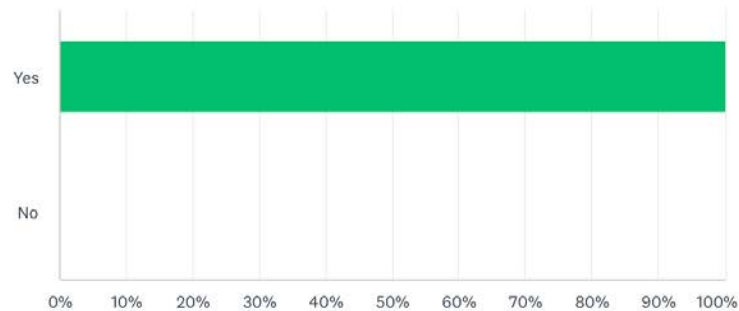
### Survey comments

- ☐ As long as there is supporting promotion and modern visitor interaction  
5/10/2022 09:29 am
- ☐ The more people drawn to the area to follow a maritime heritage trail, the extra foot traffic and interest it brings to the area.  
27/9/2022 12:37 pm
- ☐ This would also provide an additional experience for hotel guests.  
26/9/2022 12:04 pm
- ☐ Anything that can be implemented to get people to walk past the main pedestrian stoppers (Crown, MCEC, Boaties, DFO) that worked I'd be a loud supporter of.  
23/9/2022 06:24 pm



## SWA MEMBERS SURVEY

Do you support maritime related/ inspired art installations within the precinct?



*There was 100% support from SWA members for a maritime related/inspired arts installations within the precinct.*

### Survey comments

☐

As long as there is supporting promotion and modern visitor interaction

5/10/2022 09:29 am

☐

Absolutely. We would incorporate tastefully where applicable - once again mostly externally.

27/9/2022 12:37 pm

☐

As above.

26/9/2022 12:04 pm

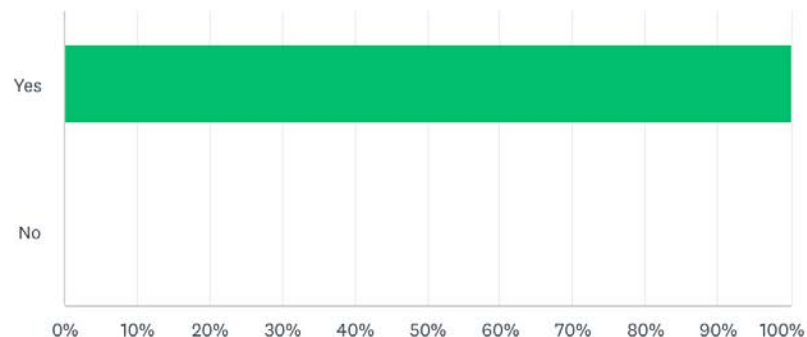
☐

100% I believe I answered this previously. More on the topic we have king tides in summer that could allow adequate conditions to paint murals below the high tide mark which could slot into the "instagram-able" aesthetic and they could be depicting the maritime heritage of the area.

23/9/2022 06:24 pm

## SWA MEMBERS SURVEY

Do you support maritime themed directional signage and way finding within the precinct?



*Once again there was 100% agreement from SWA members who participated in the survey to support maritime themed directional signage.*

### Survey comments

☐ As long as its not tacky

5/10/2022 09:29 am

☐ To the sheds YES, to the DFO shopping centre NO. We have our own brand and would not deviate where it comes to DFO directional signage.

27/9/2022 12:37 pm

☐ As above.

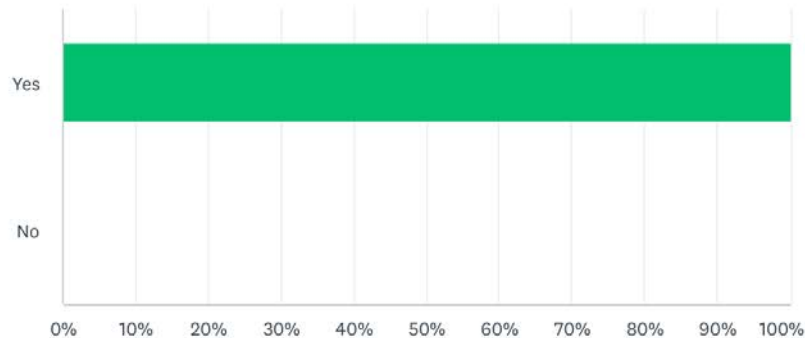
26/9/2022 12:04 pm

☐ Presumably this is done well, without hesitation.

23/9/2022 06:24 pm

## SWA MEMBERS SURVEY

Do you support featuring and linking your digital assets (web and social) to a precinct wide digital footprint branded in the maritime heritage theme?



*100% support for SWA survey participants to feature and link digital assets to a precinct wide digital footprint branded in the maritime heritage theme.*

### Survey comments

☐ Again would be a larger discussion with more consideration

7/10/2022 01:55 pm

☐ With head office approval only.

5/10/2022 06:57 pm

☐ Would need to run this past Vicinity head office marketing department.

27/9/2022 12:37 pm

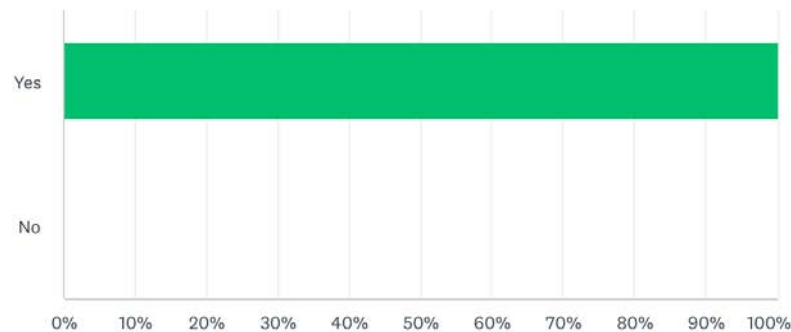
☐ As long as it is within our company brand guidelines.

26/9/2022 12:04 pm

☐ Again, see above comment. I would support any initiative that directly benefited the wharf and the individual businesses

## SWA MEMBERS SURVEY

Do you support the creation and delivery of brand related events and activations within the precinct?



*100% support for SWA survey participants for the creation and delivery of brand related events and activations within the precinct.*

### Survey comments

☐

If they fit with our business well

7/10/2022 01:55 pm

☐

With head office approval.

5/10/2022 06:57 pm

☐

As long as they form part of a strategic plan and not one offs

5/10/2022 09:29 am

☐

Mainly for external areas but yes we would support in conjunction with approval from our head office.

27/9/2022 12:37 pm

☐

Yes, as this could potentially increase patronage of our hotel and F&B outlets.

☐

Always ready to participate in relevant events and activations within the precinct

23/9/2022 06:24 pm

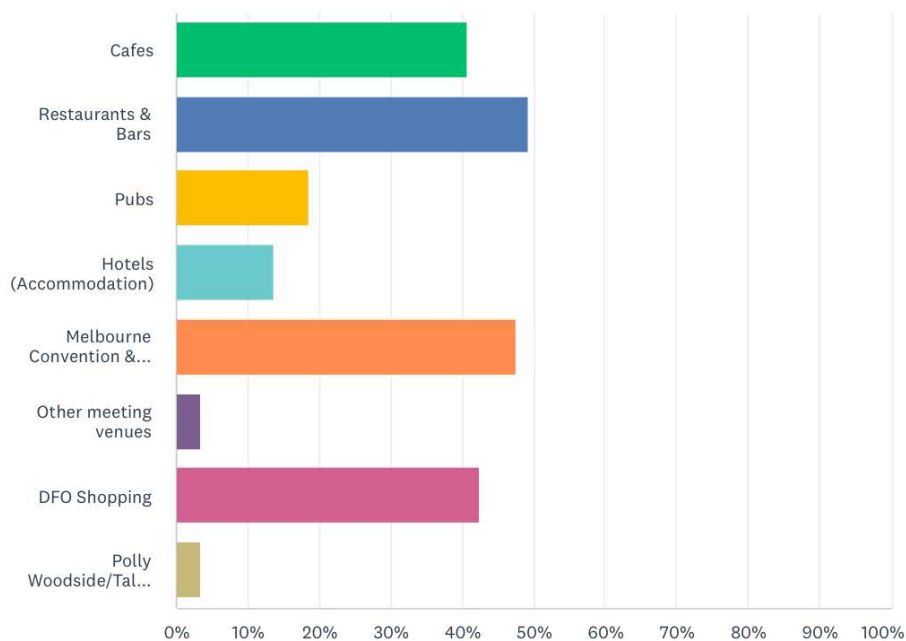
# CONSUMER RESEARCH SURVEY

The following data details the finding of a consumer survey conducted as part of the South/North Wharf heritage positioning & marketing evaluation report.

In total, 59 respondents were surveyed across a five day period. The data was gathered by way of a self-completed online questionnaire which was distributed randomly via Survey Monkeys targeted panel located in Melbourne. Participants of the surveys were required to have visited the precinct over the last 12 months.

## What made you visit the precinct ?

Answered: 59    Skipped: 20

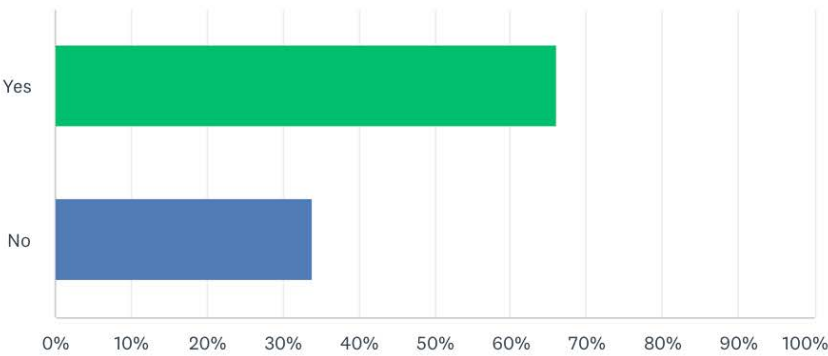


ANSWER CHOICES	RESPONSES	
▼ Cafes	40.68%	24
▼ Restaurants & Bars	49.15%	29
▼ Pubs	18.64%	11
▼ Hotels (Accommodation)	13.56%	8
▼ Melbourne Convention & Exhibition Centre	47.46%	28
▼ Other meeting venues	3.39%	2
▼ DFO Shopping	42.37%	25
▼ Polly Woodside/Tall Ship	3.39%	2

# CONSUMER RESEARCH SURVEY

Were you aware prior to the visit that this area showcases some of Melbourne’s maritime heritage ?

Answered: 59    Skipped: 20



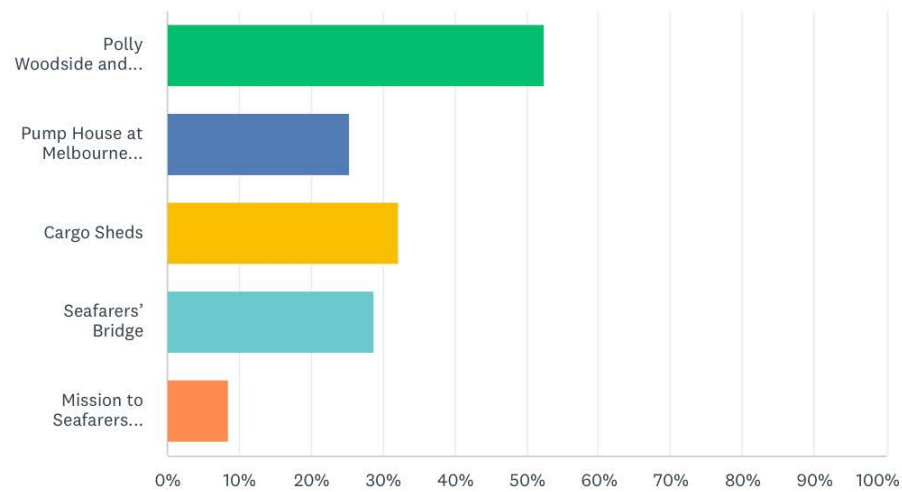
ANSWER CHOICES	RESPONSES	
Yes	66.10%	39
No	33.90%	20



# CONSUMER RESEARCH SURVEY

Did you recall any of the following maritime features in the precinct.

Answered: 59    Skipped: 20

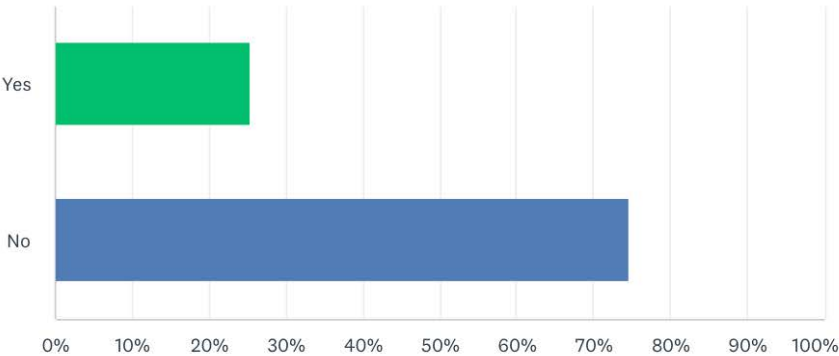


ANSWER CHOICES	RESPONSES	
▼ Polly Woodside and Maritime Exhibits	52.54%	31
▼ Pump House at Melbourne Convention and Exhibition Centre.	25.42%	15
▼ Cargo Sheds	32.20%	19
▼ Seafarers' Bridge	28.81%	17
▼ Mission to Seafarers Building (North Wharf area).	8.47%	5

# CONSUMER RESEARCH SURVEY

Does maritime heritage have any significance to you ?

Answered: 59    Skipped: 20

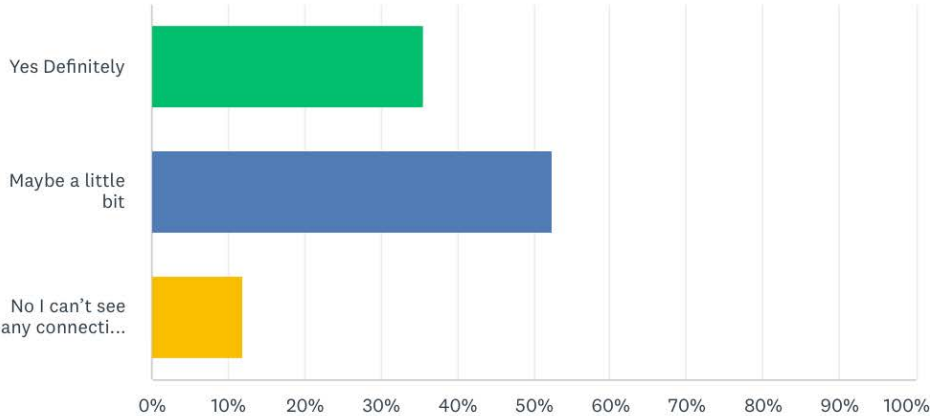


ANSWER CHOICES	RESPONSES	
Yes	25.42%	15
No	74.58%	44

# CONSUMER RESEARCH SURVEY

Thinking about the current product offering do you feel the Maritime theme comes across in this precinct ?

Answered: 59    Skipped: 20

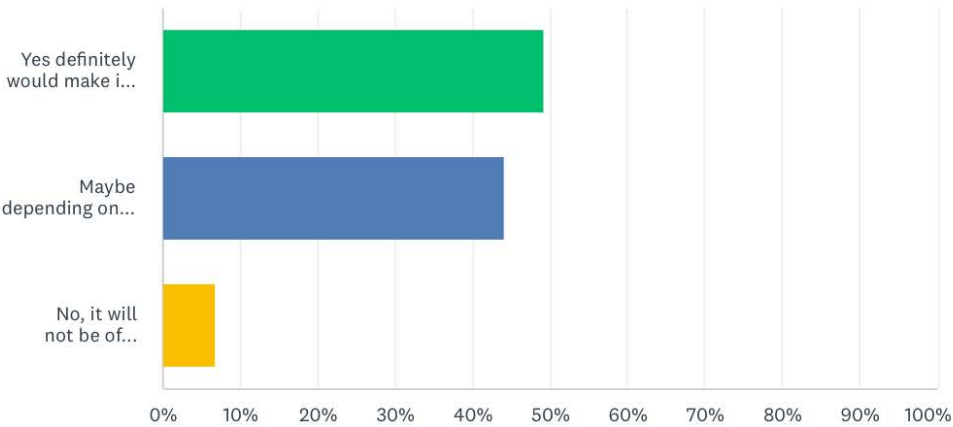


ANSWER CHOICES	RESPONSES	
Yes Definitely	35.59%	21
Maybe a little bit	52.54%	31
No I can't see any connection to a maritime precinct	11.86%	7

# CONSUMER RESEARCH SURVEY

If the precinct was to build on its maritime heritage, would it be something that you think could enhance this area and make it more interesting?

Answered: 59    Skipped: 20

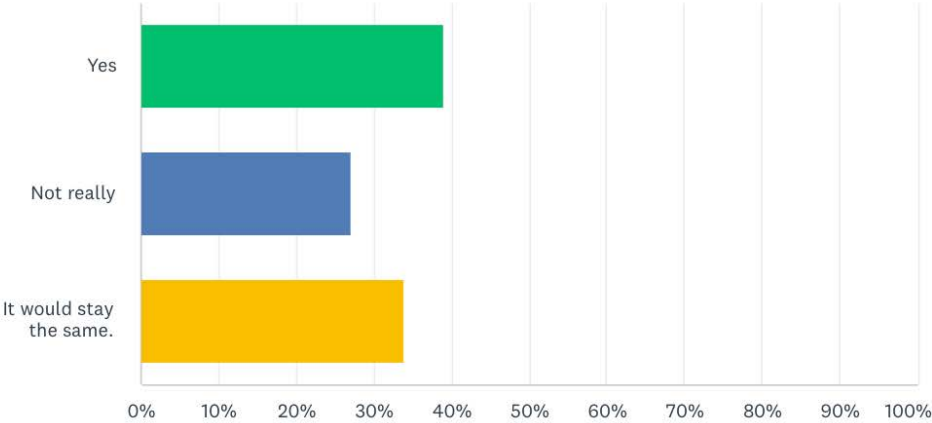


ANSWER CHOICES	RESPONSES	
Yes definitely would make it a place to visit in Melbourne.	49.15%	29
Maybe depending on what is added to the precinct .	44.07%	26
No, it will not be of interest to me.	6.78%	4

# CONSUMER RESEARCH SURVEY

Would it make your visit the area more frequent?.

Answered: 59    Skipped: 20

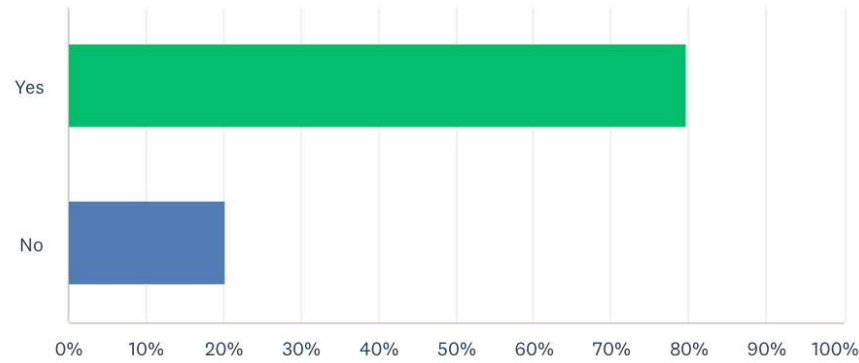


ANSWER CHOICES	RESPONSES	
Yes	38.98%	23
Not really	27.12%	16
It would stay the same.	33.90%	20

# CONSUMER RESEARCH SURVEY

Do you think a maritime theme is the most appropriate brand story to be used to promote and develop the precinct?

Answered: 59   Skipped: 20



ANSWER CHOICES	RESPONSES	
Yes	79.66%	47
No	20.34%	12



# CONSUMER RESEARCH SURVEY

What did you find in the precinct that appealed to you the most.

<input type="checkbox"/>	City views -	27/11/2022 09:20 pm	<a href="#">View respondent's answers</a>	<a href="#">Add tags▼</a>
<input type="checkbox"/>	Space and restaurants	27/11/2022 08:10 pm	<a href="#">View respondent's answers</a>	<a href="#">Add tags▼</a>
<input type="checkbox"/>	Interesting things to look at	22/11/2022 08:43 pm	<a href="#">View respondent's answers</a>	<a href="#">Add tags▼</a>
<input type="checkbox"/>	Restaurants	28/11/2022 09:25 pm	<a href="#">View respondent's answers</a>	<a href="#">Add tags▼</a>
<input type="checkbox"/>	cargo	28/11/2022 09:53 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags▼</a>
<input type="checkbox"/>	It's along the creek, great shopping and amazing restaurants	27/11/2022 10:07 pm	<a href="#">View respondent's answers</a>	<a href="#">Add tags▼</a>

# CONSUMER RESEARCH SURVEY

What did you find in the precinct that appealed to you the most.

<input type="checkbox"/>	Near the sea	22/11/2022 11:24 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The view, ease of parking.	22/11/2022 11:23 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	Don't know everything was good and appealing	22/11/2022 11:21 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	Loved the Polly Woodside ship	22/11/2022 11:20 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The maritime them			
<input type="checkbox"/>	I enjoyed the structures and layout- it is unique in the city and is not found elsewhere - Also very clean	22/11/2022 12:10 pm	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	Social hun	22/11/2022 12:08 pm	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	DFO	22/11/2022 11:59 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	Restaurants and bars.	22/11/2022 11:32 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	Many things to look at			

# CONSUMER RESEARCH SURVEY

What did you find in the precinct that appealed to you the most.

<input type="checkbox"/>	I like learning new areas	22/11/2022 11:17 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	Inclusiveness and variety	22/11/2022 11:17 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	Loved the atmosphere	22/11/2022 11:17 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The scenery	22/11/2022 11:17 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The buildings			
<hr/>				
<input type="checkbox"/>	Restaurants	22/11/2022 11:14 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	I love the views local to the precinct	22/11/2022 11:14 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	Don't remember	22/11/2022 11:13 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The bars and eateries along the water but please get fencing	22/11/2022 11:13 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The history and available amenities			

# CONSUMER RESEARCH SURVEY

What did you find in the precinct that appealed to you the most.

<input type="checkbox"/>	The rich maritime history	22/11/2022 11:12 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	Entertainment	22/11/2022 11:11 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The history and old school feel to the area	22/11/2022 11:11 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The cafes	22/11/2022 11:10 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	I liked the way it was set out	22/11/2022 11:09 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	I loved the general ambiance of the precinct	22/11/2022 11:09 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	Busy and lots of places to explore	22/11/2022 11:09 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The vibe	22/11/2022 11:08 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>

# CONSUMER RESEARCH SURVEY

What did you find in the precinct that appealed to you the most.

- |  |   |                            |
|--|---|----------------------------|
| <input type="checkbox"/> The history and the information was great | <a href="#">View respondent's answers</a> | <a href="#">Add tags ▼</a> |
| 22/11/2022 11:04 am  |   |                            |
| <input type="checkbox"/> Unsure                                    | <a href="#">View respondent's answers</a> | <a href="#">Add tags ▼</a> |
| 22/11/2022 11:04 am  |   |                            |
| <input type="checkbox"/> all of it                                 | <a href="#">View respondent's answers</a> | <a href="#">Add tags ▼</a> |
| 22/11/2022 11:03 am  |   |                            |
| <input type="checkbox"/> all of it                                 | <a href="#">View respondent's answers</a> | <a href="#">Add tags ▼</a> |
| 22/11/2022 11:02 am  |   |                            |
| <input type="checkbox"/> The variety of pubs and bars              |   |                            |
|  |   |                            |
| <input type="checkbox"/> The atmosphere of people                  | <a href="#">View respondent's answers</a> | <a href="#">Add tags ▼</a> |
| 22/11/2022 11:07 am  |   |                            |
| <input type="checkbox"/> Bustling activity                         | <a href="#">View respondent's answers</a> | <a href="#">Add tags ▼</a> |
| 22/11/2022 11:06 am  |   |                            |
| <input type="checkbox"/> The cafes and restaurants and vibe        | <a href="#">View respondent's answers</a> | <a href="#">Add tags ▼</a> |
| 22/11/2022 11:06 am  |   |                            |
| <input type="checkbox"/> The art                                   | <a href="#">View respondent's answers</a> | <a href="#">Add tags ▼</a> |
| 22/11/2022 11:05 am  |   |                            |
| <input type="checkbox"/> The food                                  |   |                            |

# CONSUMER RESEARCH SURVEY

What did you find in the precinct that appealed to you the most.

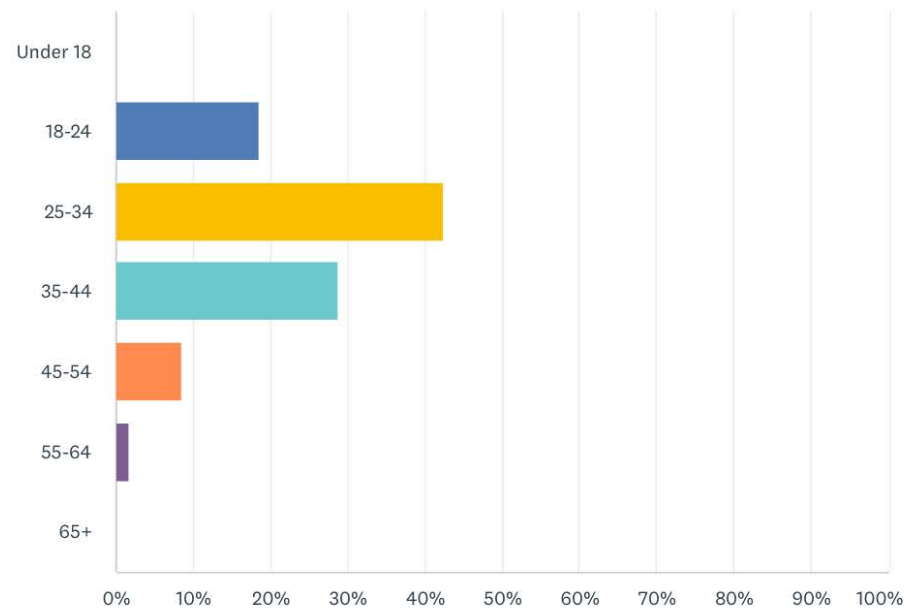
<input type="checkbox"/>	The shops and the restaurants around the area	22/11/2022 11:01 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The water	22/11/2022 11:01 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	It's very beautiful and is a feature to Melbourne's skyline and city aesthetic.	22/11/2022 10:59 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The big boat/ship near decking	22/11/2022 10:59 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	Exhibition centre	22/11/2022 11:02 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The wide variety of options, cafes & restaurants	22/11/2022 11:01 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	Cafes and restaurants	22/11/2022 11:01 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>
<input type="checkbox"/>	The shops and the restaurants around the area	22/11/2022 11:01 am	<a href="#">View respondent's answers</a>	<a href="#">Add tags ▼</a>



# CONSUMER RESEARCH SURVEY

Please may we have some information about you?

Answered: 59    Skipped: 20

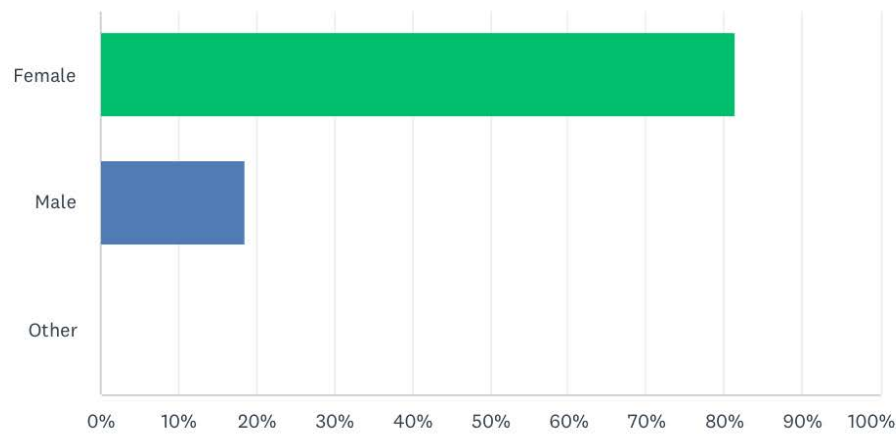


ANSWER CHOICES	RESPONSES
Under 18	0.00%0
18-24	18.64%11
25-34	42.37%25
35-44	28.81%17
45-54	8.47%5
55-64	1.69%1
65+	0.00%0
TOTAL	59

# CONSUMER RESEARCH SURVEY

What is your gender?

Answered: 59    Skipped: 20

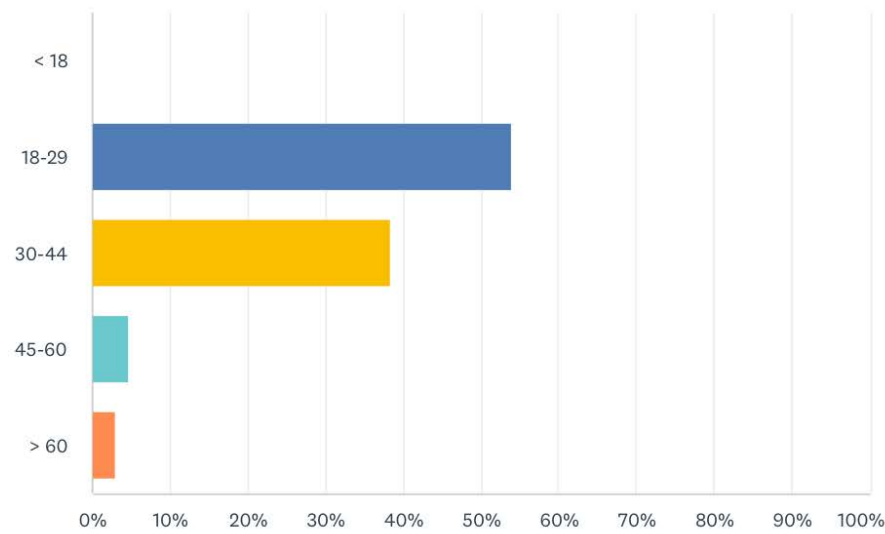


ANSWER CHOICES	RESPONSES	
Female	81.36%	48
Male	18.64%	11
Other	0.00%	0

# CONSUMER RESEARCH SURVEY

## Age

Answered: 65    Skipped: 14

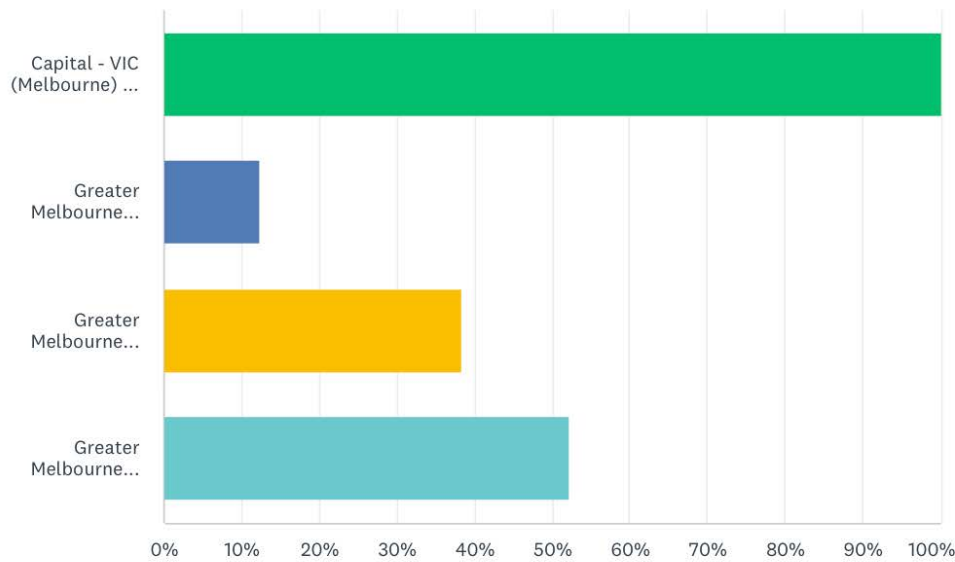


ANSWER CHOICES	RESPONSES
< 18	0.00%0
18-29	53.85%35
30-44	38.46%25
45-60	4.62%3
> 60	3.08%2

# CONSUMER RESEARCH SURVEY

## Australia Region

Answered: 65    Skipped: 14



ANSWER CHOICES	RESPONSES	
Capital - VIC (Melbourne) - Capital cities and regional areas	100.00%	65
Greater Melbourne (Inner) - Cities and regions	12.31%	8
Greater Melbourne (Metropolitan) - Cities and regions	38.46%	25
Greater Melbourne (Outer) - Cities and regions	52.31%	34

# PROFILE CONSULTANTS

---



Jeremy has extensive knowledge of Victoria's tourism industry. He was the Chief Executive Officer of Sovereign Hill, the Outdoor Heritage Museum at Ballarat, from 2002 to 2018. Prior to taking up an Executive appointment at Sovereign Hill in 1995, he held various senior and CEO positions within local government in Victoria.

Jeremy is a past President of the Victorian Chamber of Commerce and Industry and is currently a member of its Executive Council. He also served as Chair of the Victoria Tourism Industry Council from 2006 – 2016 and is a Life Member. He is the current Chair of Great Ocean Road Regional Tourism Board.

In 2019, Jeremy was made a Member of the Order of Australia for "significant services to tourism and the Ballarat community".

---



Roger has over 25 years' experience in Victoria's tourism industry and is the immediate past Executive Director of Tourism Greater Geelong and The Bellarine. Since the formation of Tourism Greater Geelong and The Bellarine in 2013 the region has experienced extensive domestic and international visitor growth.

Roger played a leading role in Victoria by introducing the concept of Destination Management Plans to Regional Tourism Organizations and developed the State's first Destination Management Plan for the Great Ocean Road. Based on the introduction Roger presented the DMP at tourism industry forums through- out Australia and through the United Nations World Tourism Organisation internationally.

---



As previous Director of Marketing for Sovereign Hill, one of Victoria's key tourist attractions, Garry Burns is widely recognised as one of Australia's most astute tourism marketing executives. His key strengths are product development, brand and creative development, event management and public relations. He holds a master's degree in Marketing from Monash University Melbourne.

Garry was the creator of Sovereign Hill's "Winter Wonderlights" event in June/July. The event is now one of the largest regional events in regional Victoria and it now attracts over 120,000 visitors over a 3-week period.

Garry has been a member of a number of Advisory Committees for Tourism Australia and has provided strategic advice and industry briefings on behalf of the Australia Tourism Export Council (ATEC).

# DISCLAIMER

---

DISCLAIMER: THE AUTHORS OF THIS REPORT TAKE NO RESPONSIBILITY IN ANY WAY WHATSOEVER TO ANY PERSON OR ORGANISATION (OTHER THAN THAT FOR WHICH THIS REPORT HAS BEEN PREPARED) IN RESPECT TO THE INFORMATION, OBSERVATION AND RECOMMENDATIONS SET OUT IN THIS REPORT, INCLUDING ANY ERRORS OR OMISSIONS THEREIN.

IN THE COURSE OF OUR PREPARATION OF THIS REPORT, PROJECTIONS AND ASSUMPTIONS HAVE BEEN MADE. IT IS POSSIBLE THAT SOME OF THE ASSUMPTIONS UNDERLYING THE RECOMMENDATION MAY CHANGE. NEVERTHELESS WE HAVE MADE PROFESSIONAL JUDGEMENTS BASED ON OUR EXPERIENCE IN THE INDUSTRY. BEYOND THIS, TO THE EXTENT THAT THE ASSUMPTIONS DO NOT MATERIALISE, THE RECOMMENDATIONS, ESTIMATES, OUTCOMES AND PROJECTIONS OF ACHIEVABLE RESULTS AND OUTCOMES MAY VARY.