

ATTACHMENT B

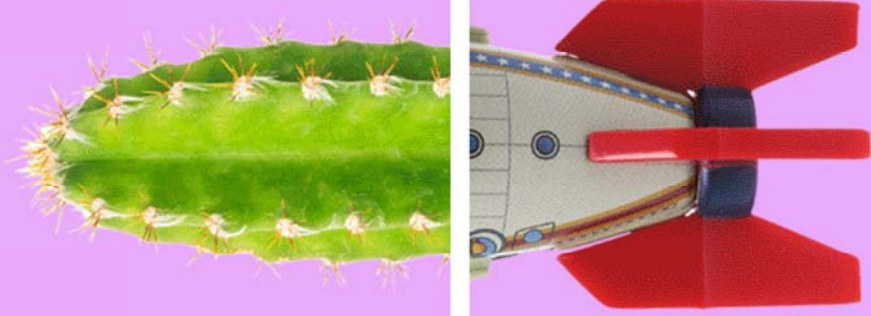
## **ATTACHMENT B**

**CULTURAL RIBBON AUDIENCE  
RESEARCH REPORT**



# Pollinate

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Ideas change in an instant. You have to adapt to progress ...

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## Project Ribbon

Cultural Ribbon audience research

Pollinate

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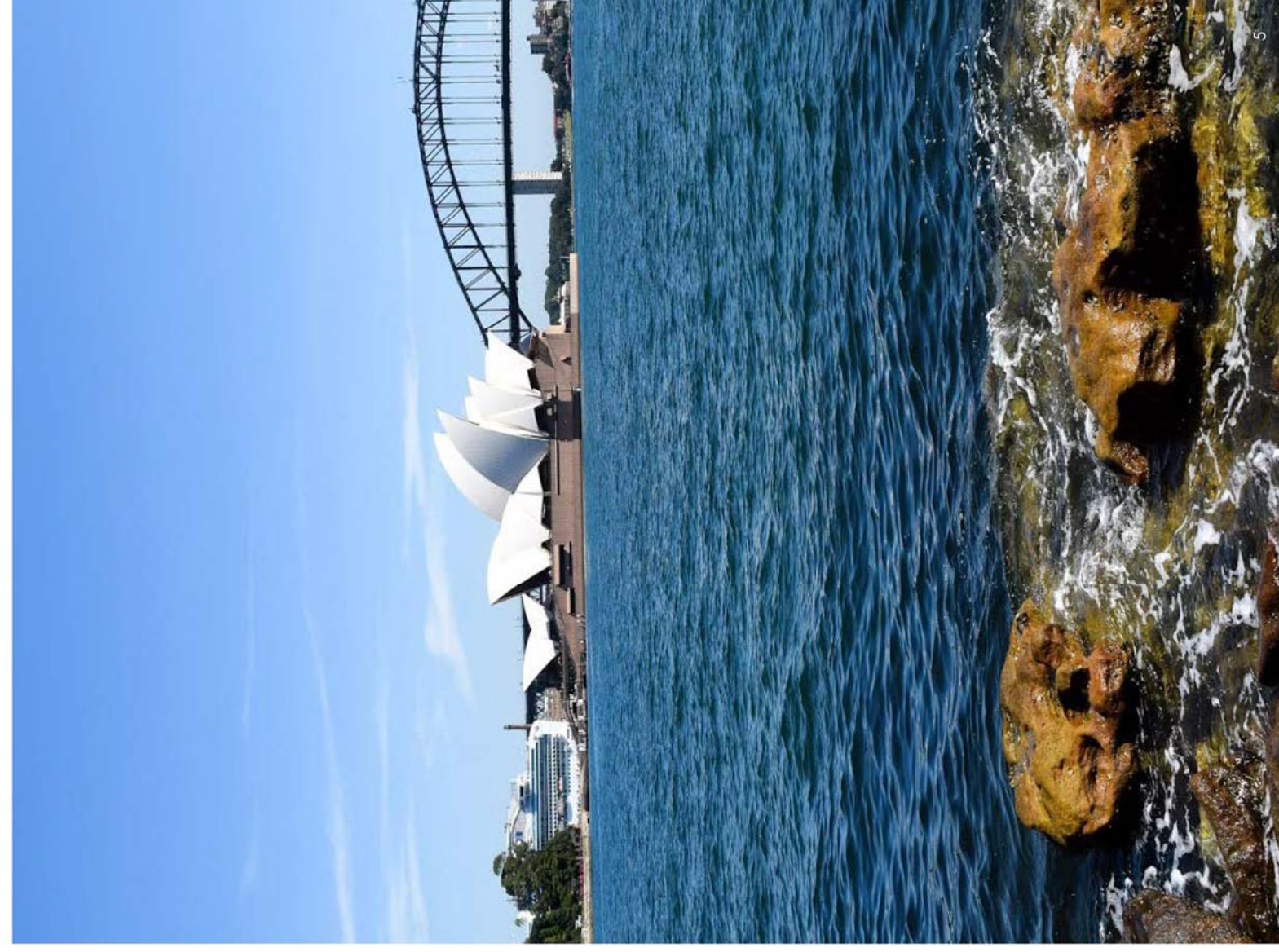
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# Background, objectives and methodology

## Background

The City of Sydney is seeking to develop a nature and culture walk along the Sydney Harbour foreshore from the Maritime Museum to Woolloomooloo. This 9km walk incorporates some of Sydney's leading cultural institutions as well as five harbour bays, four harbour peninsulas and five harbour-side parks. This 'Cultural Ribbon' was identified as one of the 'Ten Key Project Ideas' in Sustainable Sydney 2030 and has recently gained momentum. While the 9km walk currently exists, the project will involve improved walking and cycling infrastructure, public art, lighting and wayfinding elements as well as activation strategies to encourage users to engage with the natural, cultural and historical assets along the route.

The City requires timely research to inform the development of the future Cultural Ribbon offer.



# Objectives and methodology

## Objective

Understand attitudes and behaviours around the Cultural Ribbon to shape its future format and delivery

## Methodology

3-5 minute intercept survey among **current users** of the Cultural Ribbon across different locations

3-5 minute online survey among **Sydneysiders**

## Fieldwork period

Intercept surveys conducted over 6 days between October 1<sup>st</sup> – October 9<sup>th</sup>

Online survey conducted between October 11<sup>th</sup> – October 18<sup>th</sup>

	<a href="#">Current users</a> n=628	<a href="#">Sydneysiders</a> n=127
Males	42%	-
Females	58%	-
17 or younger	5%	-
18-24	21%	5%
25-34	26%	15%
35-44	22%	21%
45-54	13%	25%
55+	14%	33%
Sydney resident	70%	-
Domestic tourist	20%	-
International tourist	10%	-



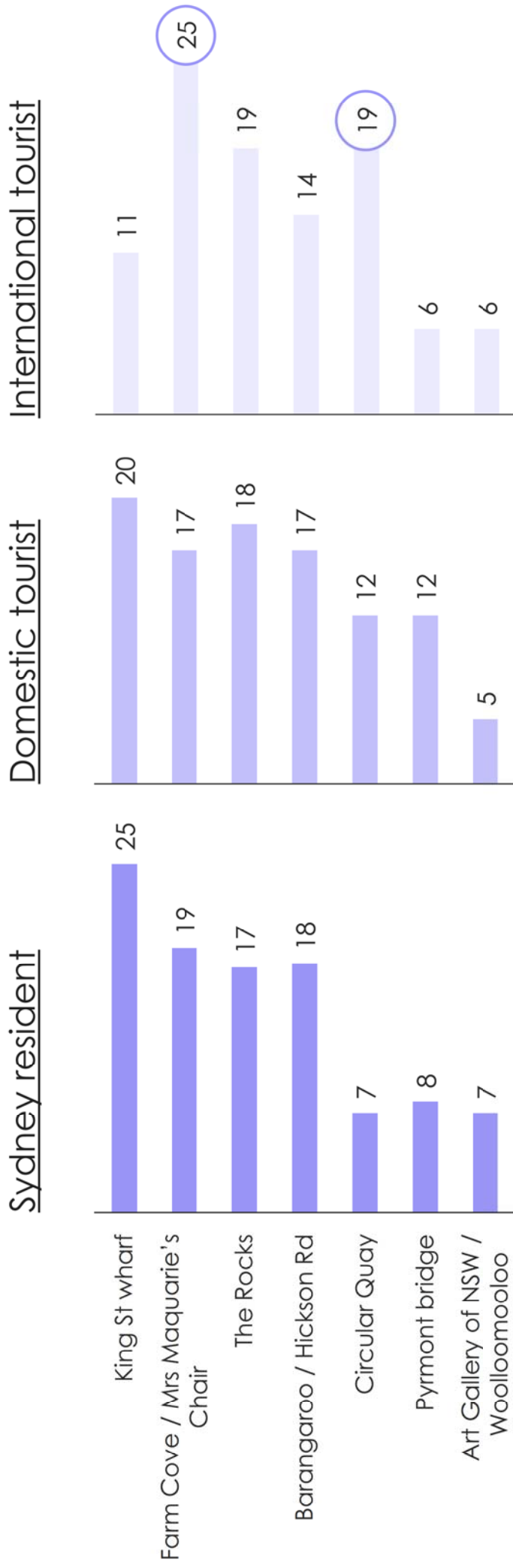
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## Snapshot of current users

Different sections of the foreshore walk skew towards certain user types e.g. Farm Cove, MMC and Circular Quay have a higher proportion of international tourists

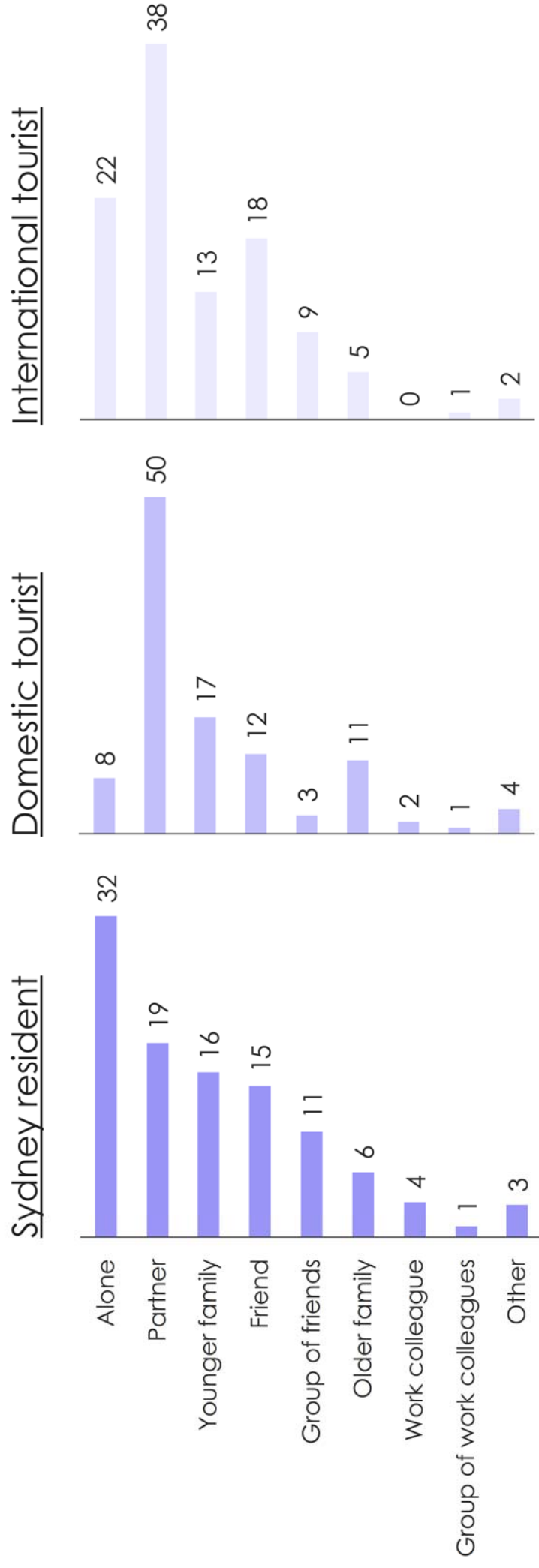
Survey location



Ensure the amenity and programming here is in line with their needs and preferences

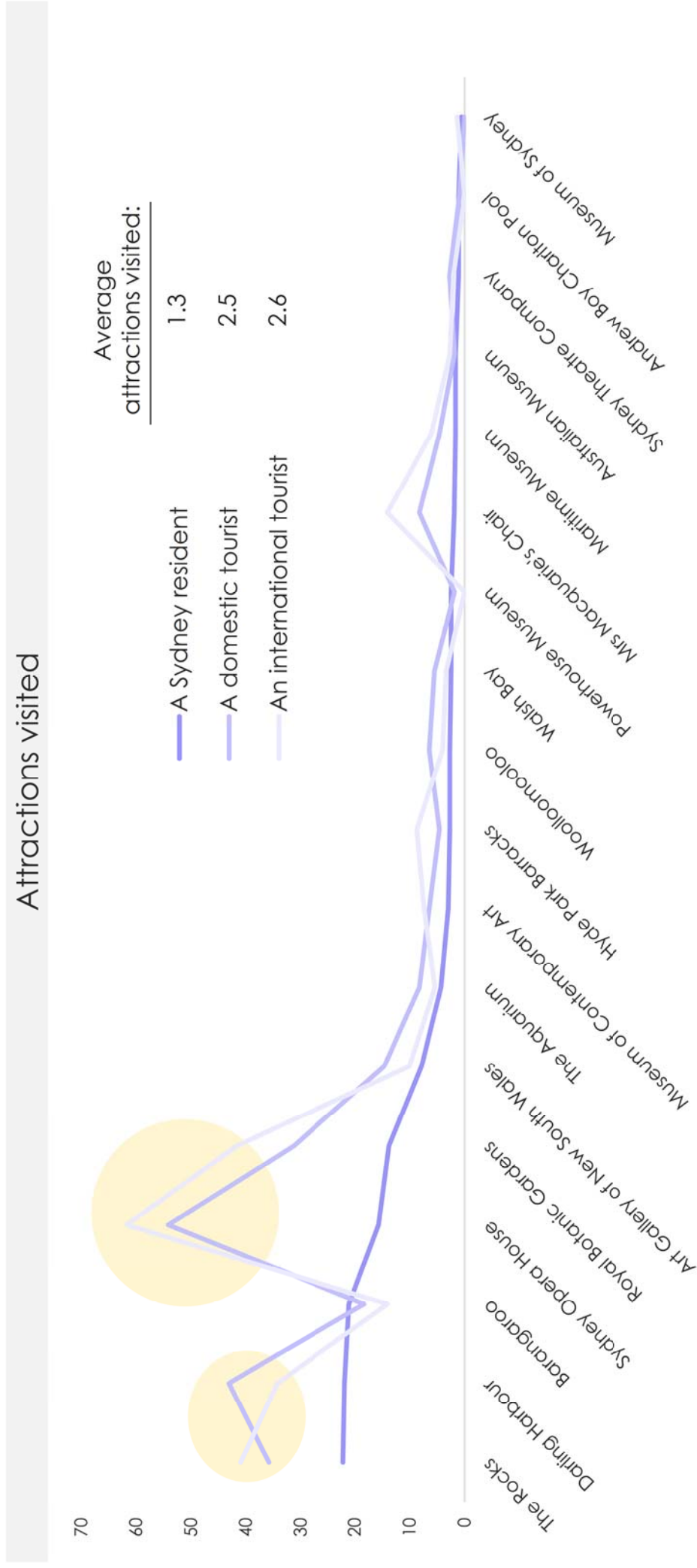
# Sydney residents are far more likely to walk alone while it is more of a social occasion for tourists

Who the respondent was walking with



The foreshore walk should offer opportunities for tourists to connect with one another e.g. food/drink, relaxation areas, guided tours etc.

# Tourists are far more likely to visit a range of top foreshore attractions

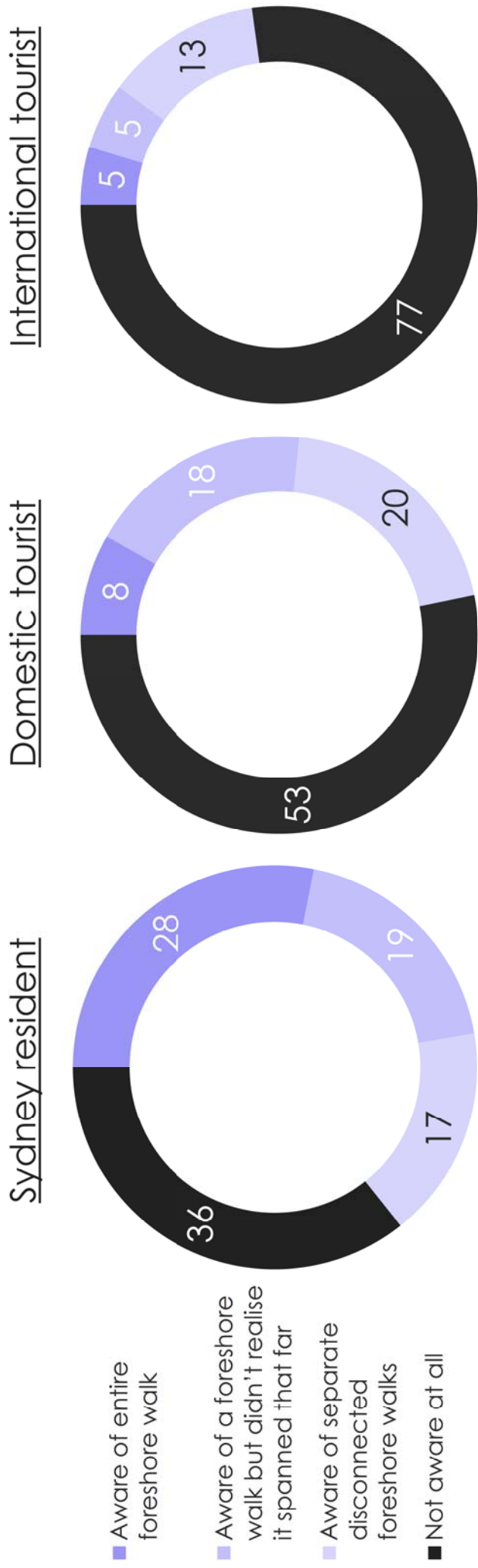


Focus on these top attractions in tourism communications and wayfinding;  
 Play back programming preferences in these locations

B5. And which, if any, of the following destination do you intend to visit or pass through while out on and about today? Base size: Sydney resident n=370; Domestic tourist n=109; International tourist n=149

# While around one in four residents are aware of the entire foreshore walk only a small minority of tourists are

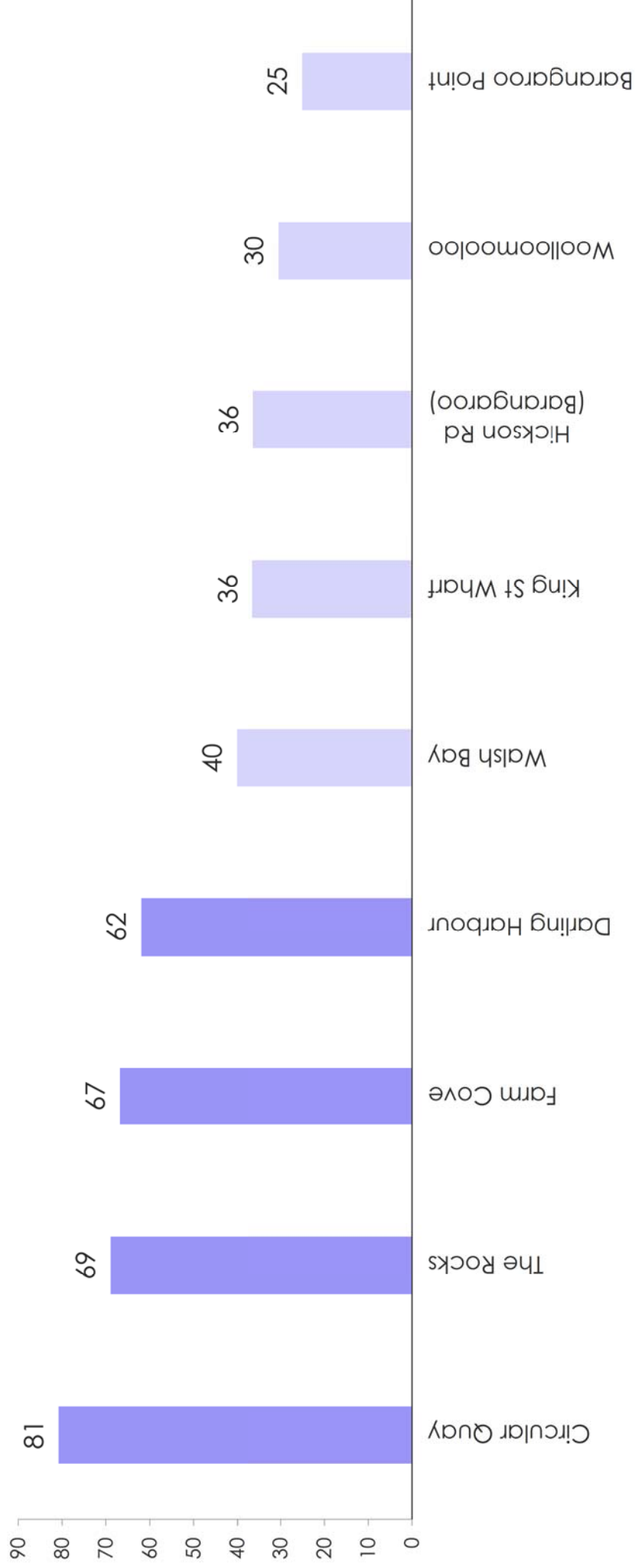
## Foreshore area awareness



Raising awareness of the entire product and all of the attractions and cultural institutions it encapsulates is likely to drive tourist visitation

# The top tier foreshore areas in terms of awareness are Circular Quay, The Rocks, Farm Cove and Darling Harbour

Foreshore area awareness



Focus on infrastructure, wayfinding and advertising to raise awareness of the blackspots

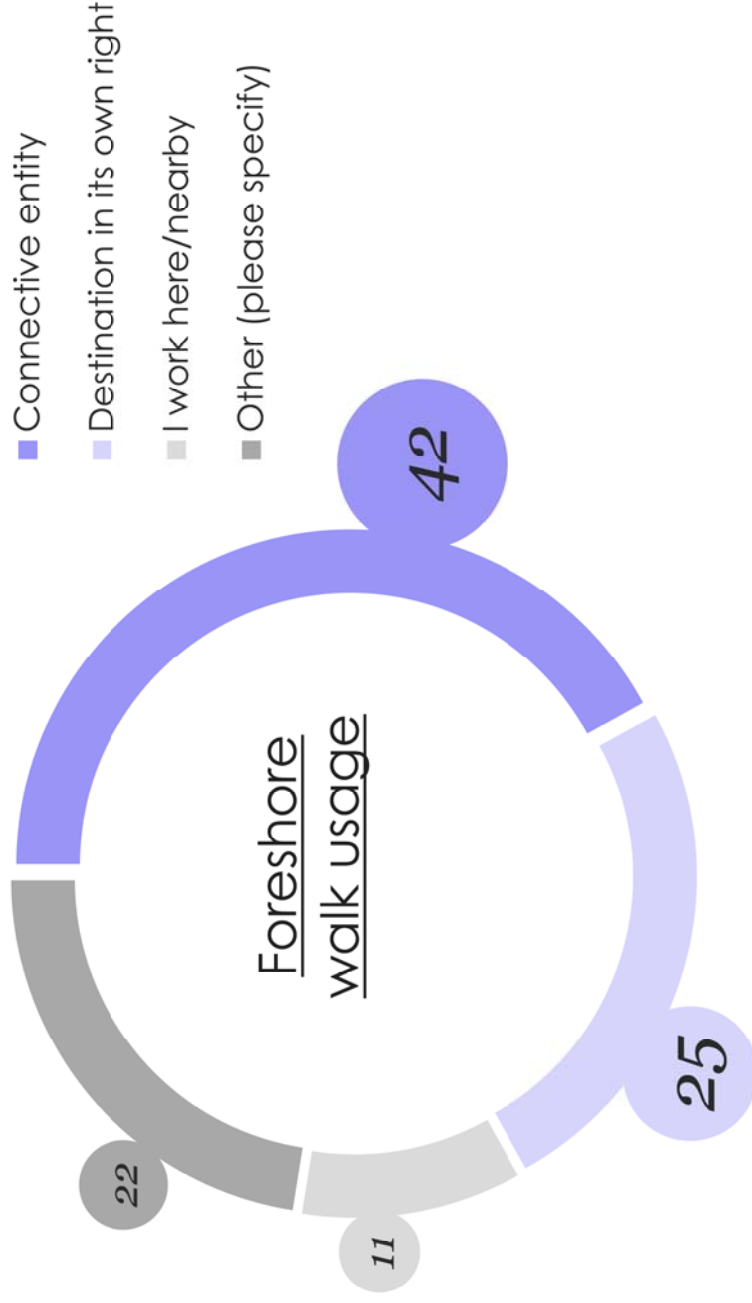
The ribbon is currently used mainly as a connective entity rather than a destination

14% of Sydney residents were using it because they work there/nearby

~50% of tourists were using it for a connective entity

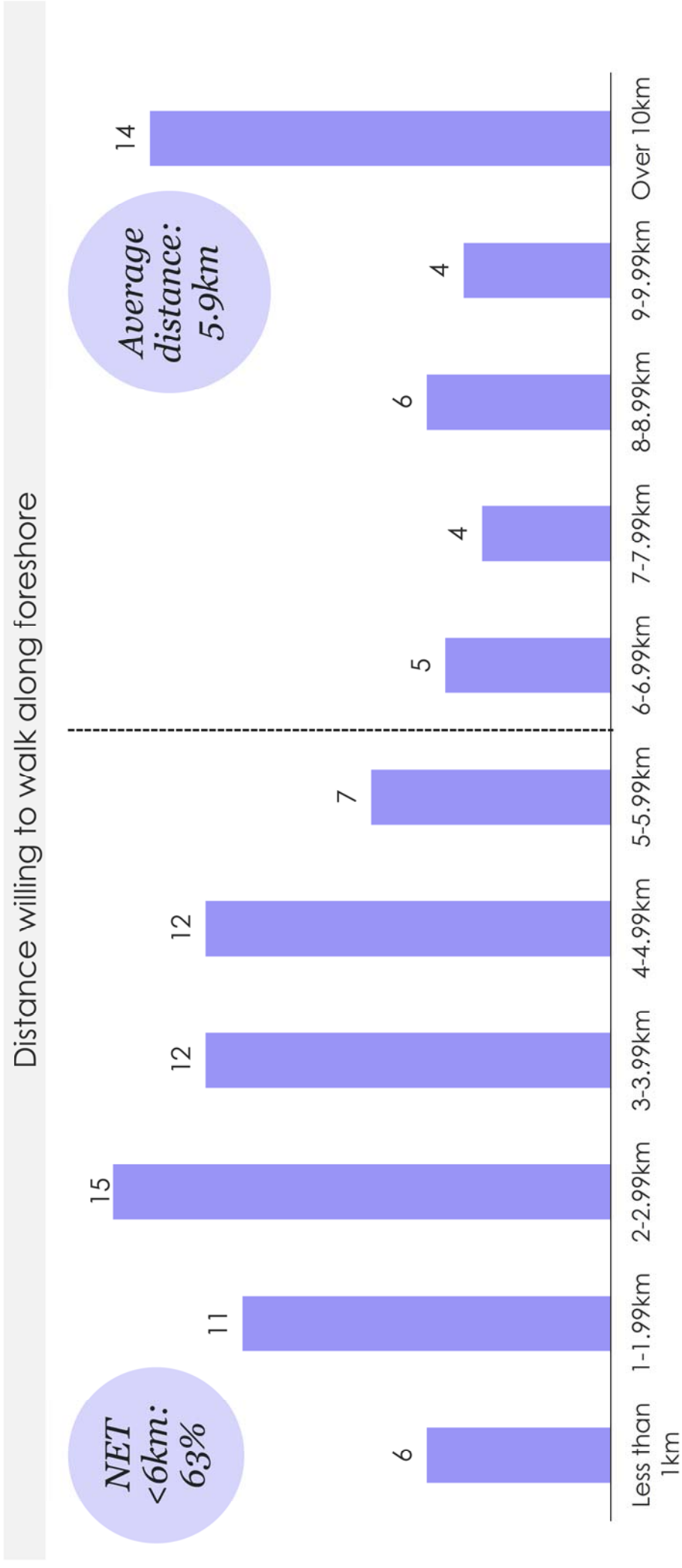
'Other' reasons people were using the foreshore walk were for:

- Leisure
- To eat
- To see the sights
- Relaxing



A user led offering is likely to lead to use of the ribbon as a destination in its own right

# The average distance users are willing to walk is 5.9km; Only around a third would walk more than 6km

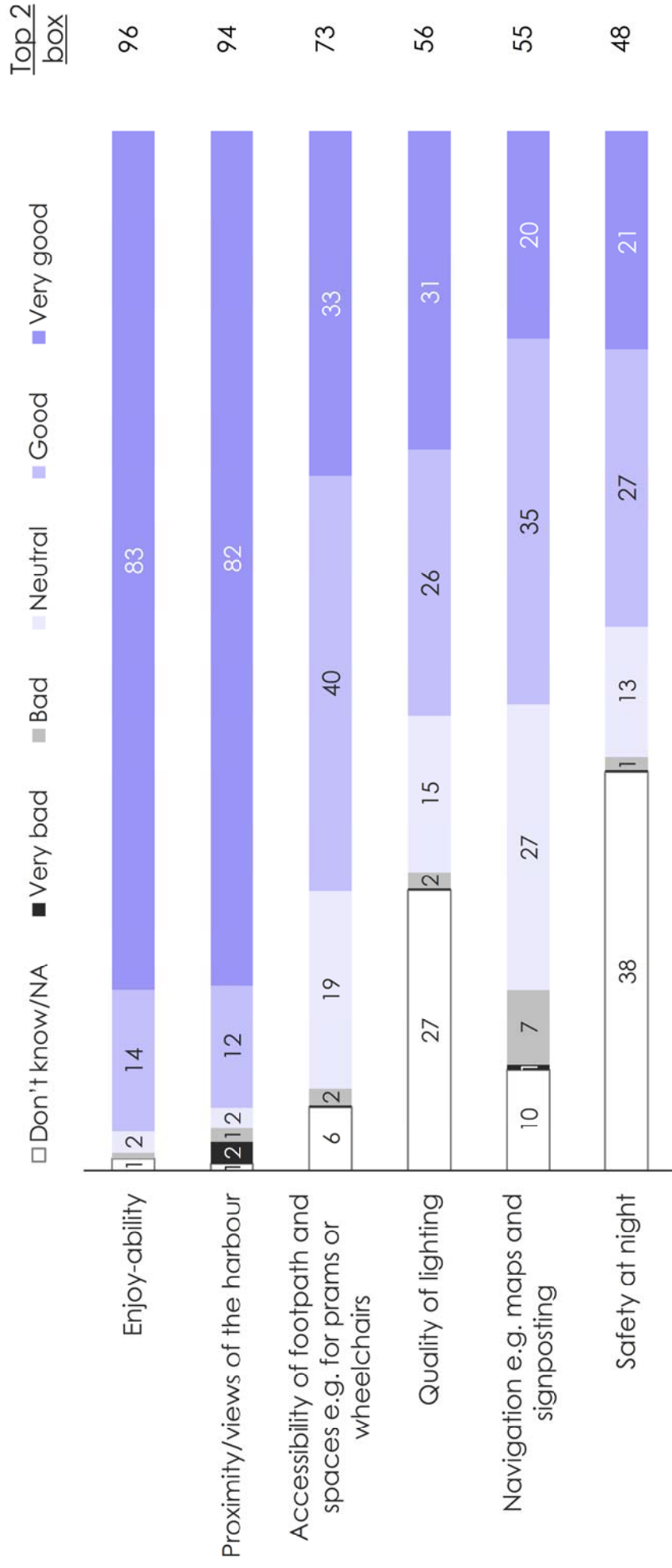


Ensure programming is standalone and allows walkers to hop on and off at different points



The current foreshore walk is rated as highly enjoyable largely due to the harbour views and proximity; there is considerable room for improvement on wayfinding

Rating of foreshore walk elements



The foreshore walk should hero the natural beauty of the harbour



- "Beautiful views of both the city and the water"
- "Being able to be in one spot and see the opera house and the bridge and walk around the harbour"
- "Enjoyed the quietness and peacefulness while walking along this path"
- "Hanging with friends and the sunshine and buskers"
- "I come running along this walk 2-3 times a week. It's a great spot and I never seem to get tired of the views! Running along here gives me a boost of positiveness and energy, I feel great!"
- "Weather, view, accessibility, covering all major attractions"

Current users: The top reasons for enjoying the ribbon walk revolve around the weather, views and the harbour

*What was the most enjoyable aspect of the walk you've been on today?*



## In summary: Snapshot of current users

### Awareness

Around a quarter of residents are aware of the entire foreshore walk, this is much lower for tourists

The current blackspots are focused on the section of foreshore between King St Wharf and The Rocks

### Usage

Around a quarter currently use the walk as a destination in its own right

Tourist are more likely to visit a range of attractions along the foreshore walk

The average distance users are willing to walk is 5.9km

### Rating

The current foreshore walk is universally enjoyed by users owing to proximity to and views of the harbour

Only around half of users rate the wayfinding elements of the walk positively

There is currently low awareness and usage of the ribbon as a distinct product

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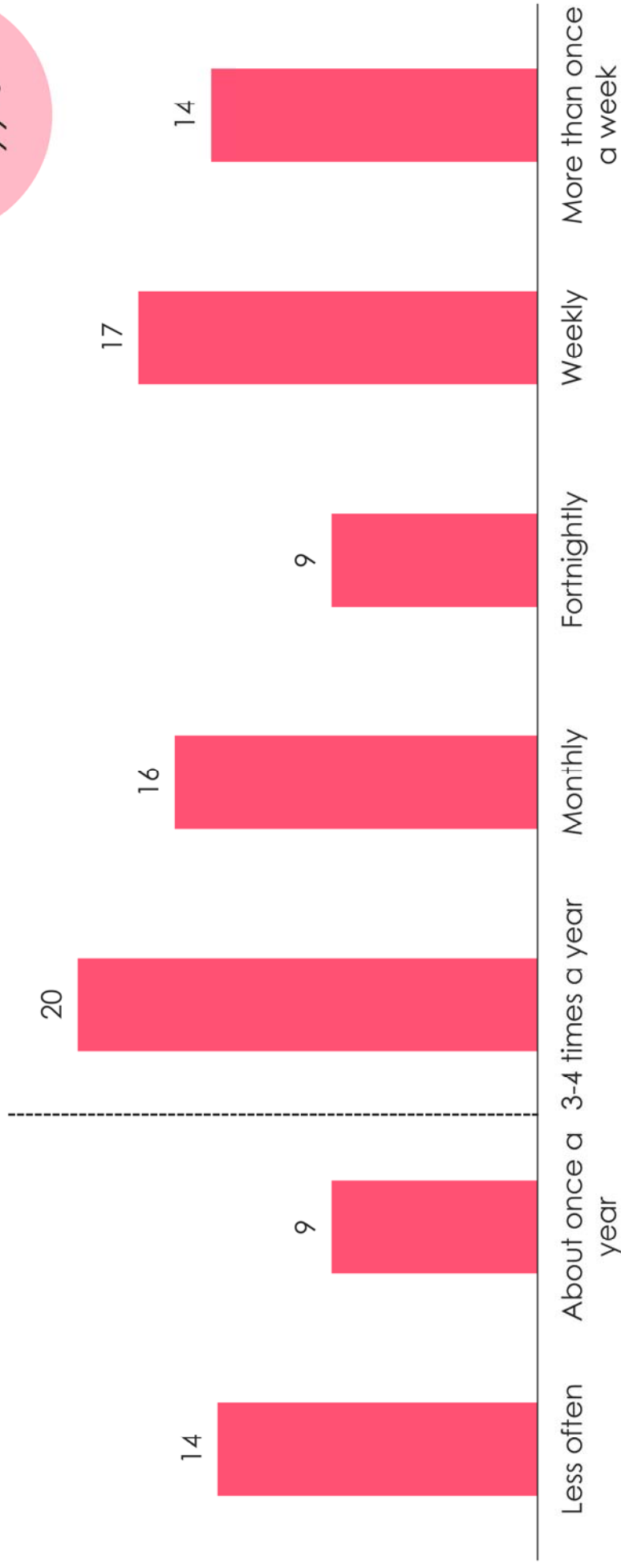
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Developing the  
future offer

## Current users: Around three quarters of current users expect to do parts of the walk at least three times a year

NET 3  
or more  
times:  
77%

How often expect to do parts of the walk

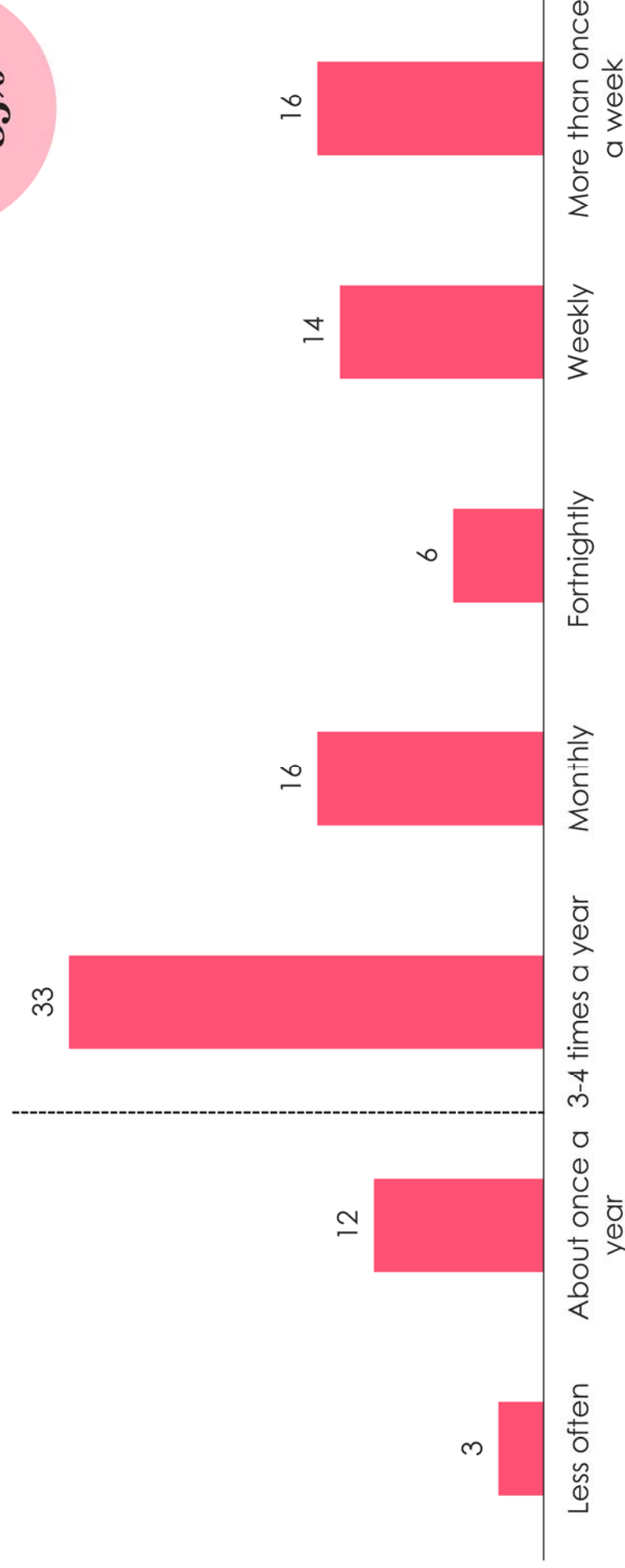


Rotate programming accordingly to ensure the ribbon remains exciting, relevant and novel

## Sydneysiders: The vast majority of Sydneysiders expect to do the walk at least 3 times a year

**NET 3  
or more  
times:  
85%**

How often expect to do parts of the walk



Both current users and Sydneysiders have high intended usage of the ribbon walk

# Sydneysiders: Exercise and love of the harbour/water are key reasons for using the foreshore walk frequently while proximity and business are barriers here

## Frequent users\*



*I walk a lot after work and this walk would probably offer the best view and atmosphere*

*I walk every day - usually around the foreshore from Pymont to Circular Quay, occasionally continuing through the Botanic Garden before returning via Mrs Macquarie's Chair*

*I love being near the water and it is such a lovely place to be*

*I love walking along by the water. Currently I walk 1-2x a week in the botanic gardens / opera house, up to the art gallery*

*I like to get out of the office and walk or run during lunchtime or on the way home from work and this would be perfect*

## Less frequent users



*That's probably the amount of time we would come into the city to specifically enjoy the foreshore and harbour each year*

*I love the harbour, but live 20 minutes away from it so would visit only when planned*

*I don't get into the city that much on weekends during the day, work full time*

*Would love to walk more often but weekends are already busy*

*I don't work or live in the CBS but like to get down to the Botanic Gardens and Art Gallery at least once a year*

*As a local who has grown up in Sydney, I don't tend to go into the city on weekends to do a walk like that as social/fitness activity. The times I do go is when I show visitors around.*

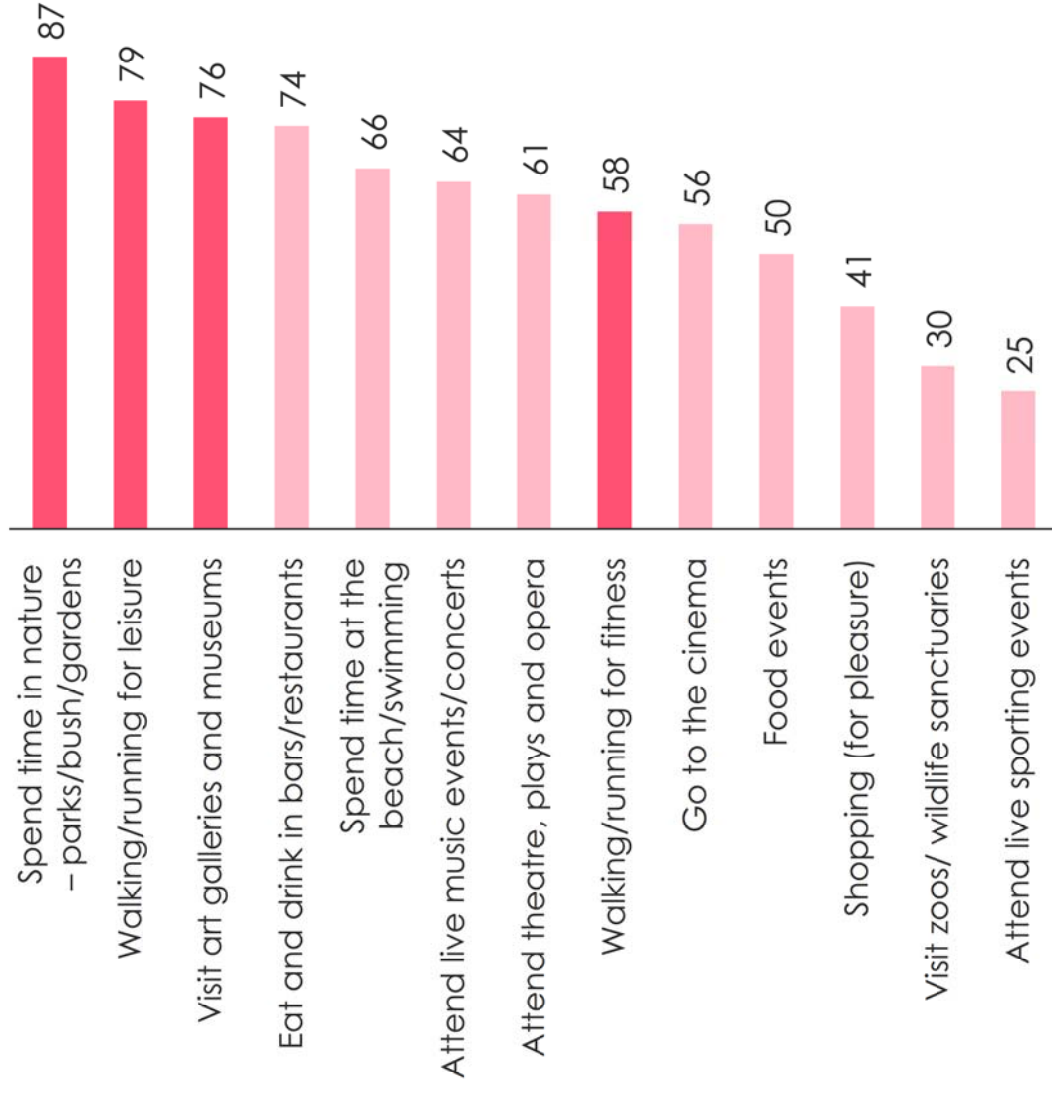
A1. In your leisure time, how often would you be likely to walk along the foreshore walk? A2. And why is that? \*At least once a month

# The ribbon offer is in line with the top leisure habits of Sydneysiders

e.g. spending  
time in nature,  
walking/running  
and galleries/  
museums

When you are not working (i.e. during your leisure time, outside your home, whether you're alone or with family or friends), which of these activities do you do?  
Base size: Sydneysiders n=127

## *Leisure habits*

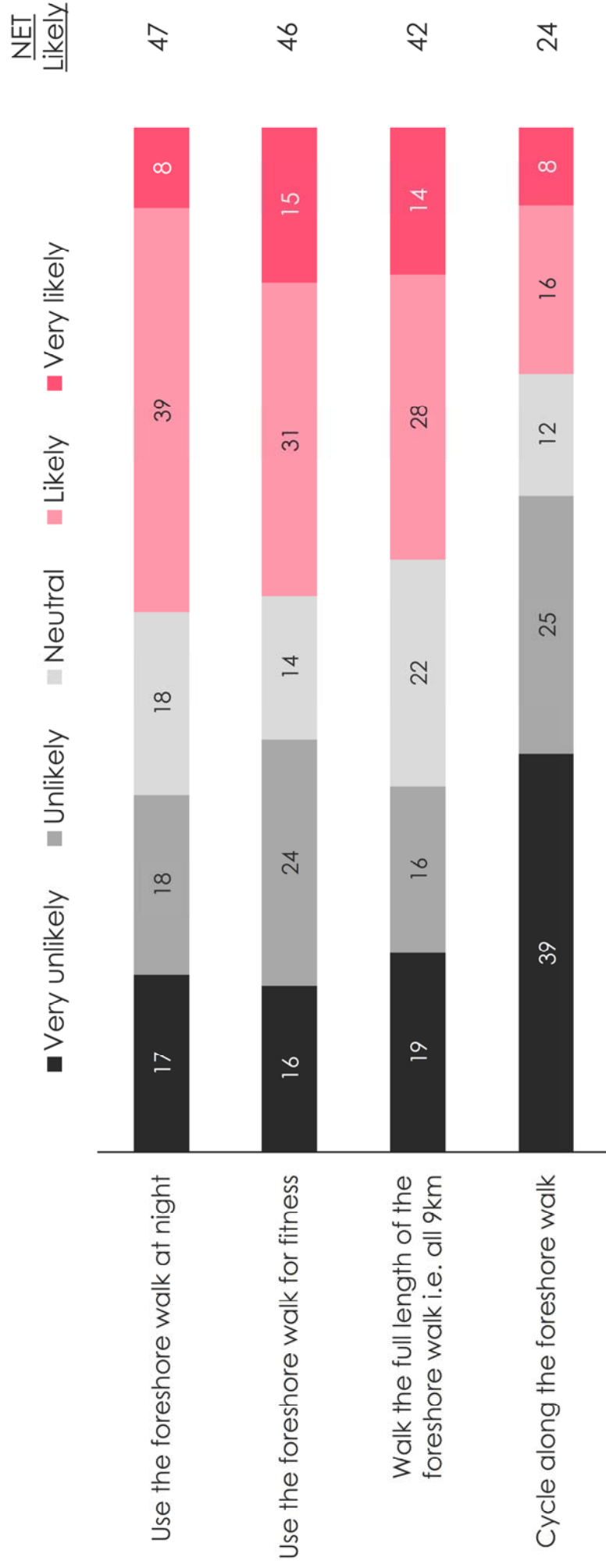


**Framing the offer in terms of these activities  
will help drive visitation**



**Current users:** Around half of residents claim they are likely to use the walk at night and for fitness while a quarter would cycle along it

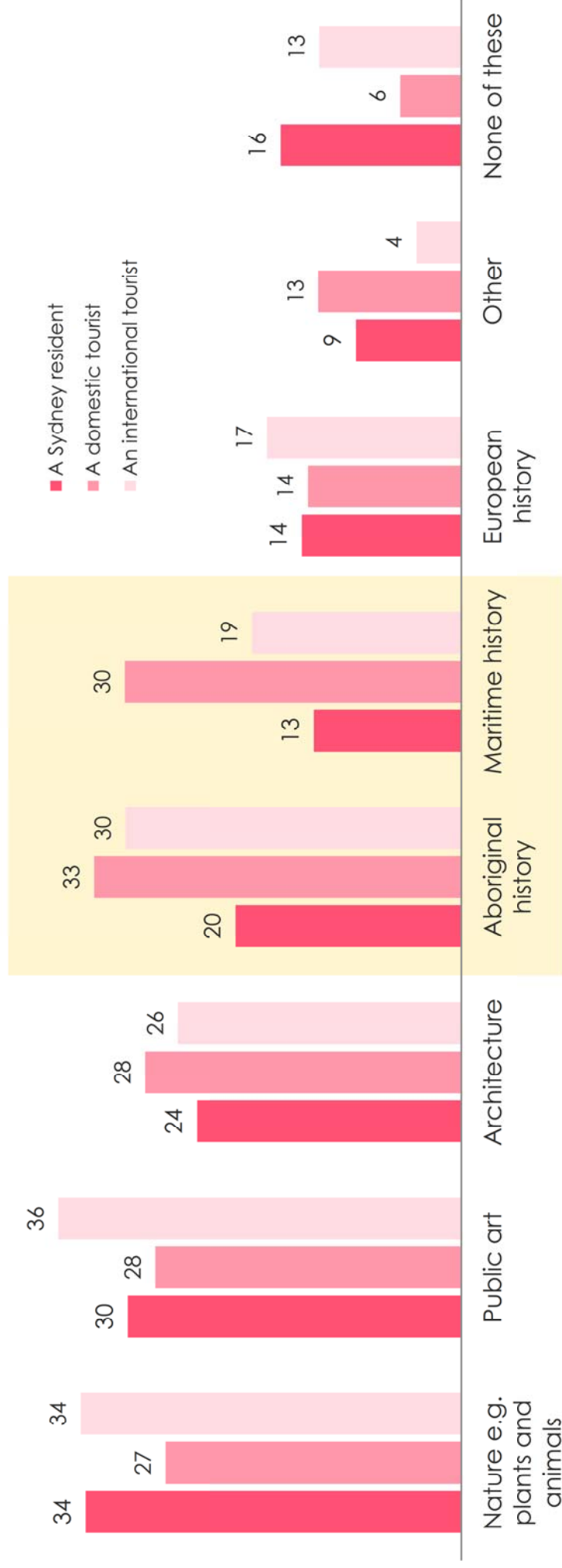
Likelihood to use the walk for...



The foreshore walk should be well lit at night and provide necessary wayfinding and facilities for fitness e.g. distance markers, bubblers, outdoor gym equipment etc.

## Current users: There is a spread of interests across residents and tourists with local nature, art, architecture and Aboriginal history the top tier areas

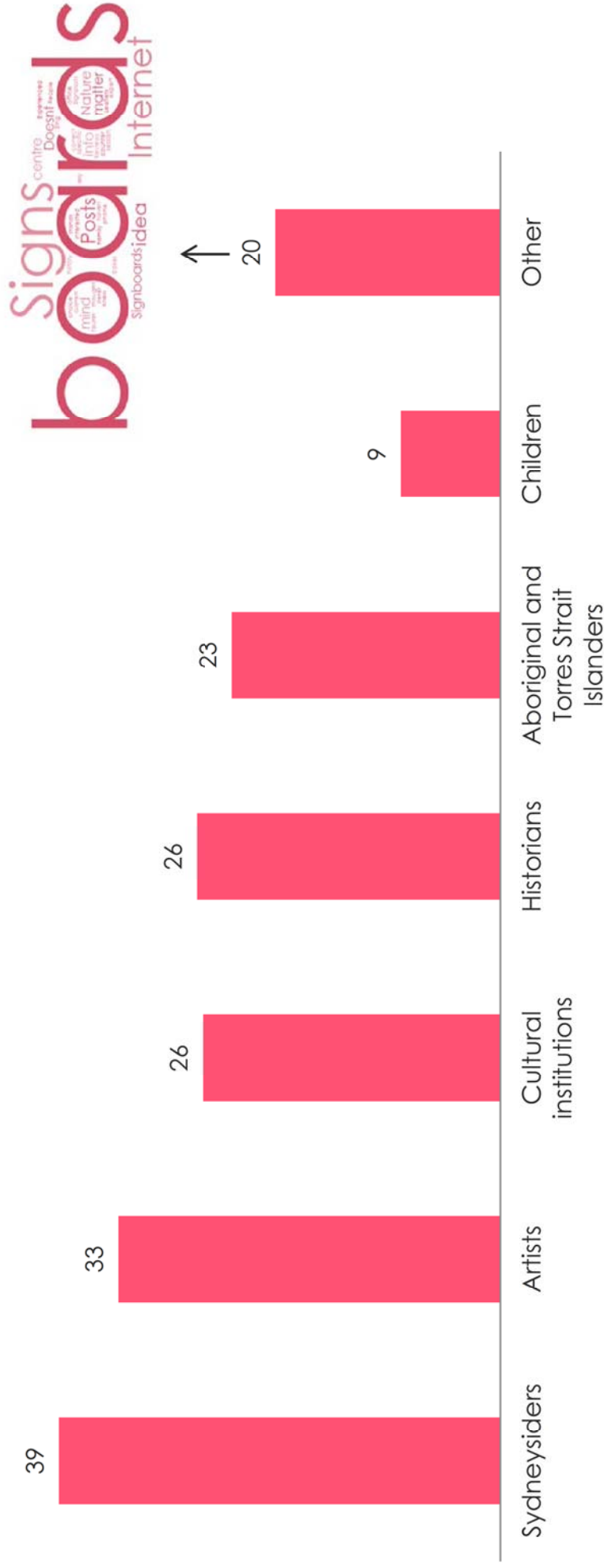
Information most interested in



Tourists are generally more interested in Aboriginal and maritime history; Cater to the diverse interests of users by offering a range of local information

Current users: Many would like to hear from Sydneysiders and artists for local information, beyond this cultural institutions, historians and indigenous peoples also have a role

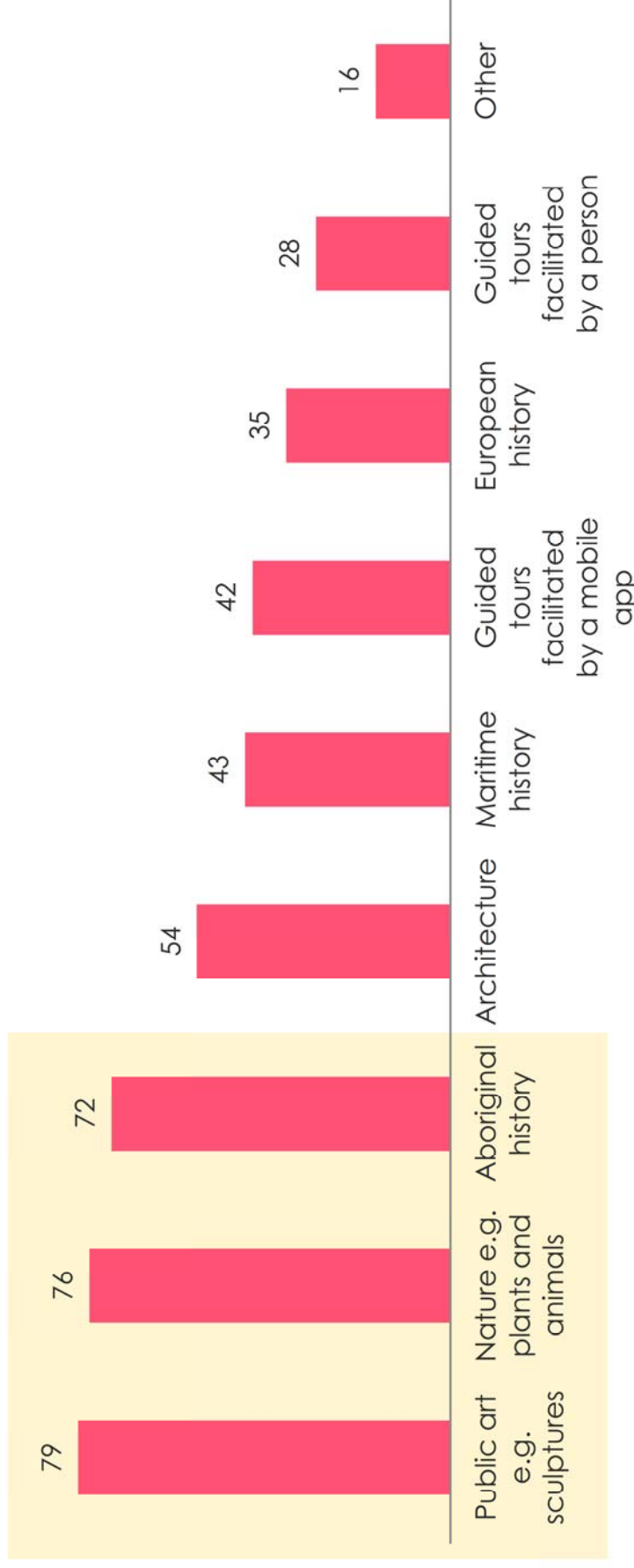
Who you would like to deliver information



The foreshore walk should offer diverse local information from a range of sources and perspectives

**Sydneyiders:** Similarly to current users, Sydneyiders are most interested in art and nature information as well as Aboriginal history; There is more appetite for mobile app tours than those facilitated by a guide

Information most interested in



Offering art, nature and Aboriginal history information through the convenience of an app tour is likely to attract Sydneyiders

# Current users: Current users have enjoyed a variety of walks both locally and overseas

## Walks enjoyed



*Definitely Bondi-Coogee walk in Sydney!*

*Walking around near the opera house and the quay*

*Waking across the harbour bridge we did it today*

*Clovelly and Gordon's bay are my favourite spots to walk around*

*We love nature and lakes. We enjoy coming here in the Botanical Gardens when we visit our son in Sydney*

**Bondi-Coogee**  
**(20%)**

**Manly-Spit (5%)**  
**Harbour Bridge (4%)**  
**Darling Harbour (3%)**

The Bondi to Coogee walk is a crowd favourite

Current users: The top themes among reasons for enjoying walks are views, the beach and the ocean

Why you enjoyed this walk



*Breathtaking ocean views  
(Bondi-Coogee)*

*I like running there and feeling the  
ocean breeze on my skin  
(Bondi-Coogee)*

*The fresh beach breeze and the sound  
of the ocean (Beach walks)*

*View, accessibility, cafes  
(Darling Harbour)*

*Have done a lot of the walks, but this  
one is definitely my favourite one! So  
calm and relaxing  
(Manly to Spit)*

Set on one of the most beautiful harbours in the world the ribbon walk can deliver to these key drivers of enjoyment

## So what do **current users** want to see more of?

### Spontaneous user feedback

*'Could have a bit more shade and water bubblers'*

'Maybe some children activities along the walk'

*'More shelter for shade would be good. Maybe feature some gazebos/umbrellas etc., also more public toilets'*

'Public washrooms'

'Not enough places to eat and drink around this area'

*'Please make this project happen! It would definitely attract so many more tourists and I can see how it would be such an amazing spot to make it happen.'*

'Would have been nice to have more water fountains!'

*'Some signage/ directions in different languages would be good too, as not everyone speaks English'*

'There should be a bit more signage around. There seems to be lack of signage/directions in certain spots, therefore some tourists would probably get lost or miss out on some beautiful sights.'

Users are generally looking for more public amenity such as toilets, bubblers and seating as well as improved wayfinding

# And what do Sydneysiders want to see more of?



## Sculptures/art

I'd actually love to see it have rotating art sculptures. Interactive exhibits that last a few months each along the walk that rotate through...

Sculpture made by Australian artists! Including some kinetic, sound and light works so it was different at different time so the day and weather...

Interactive art, that you can walk or sit on

sculptures....and many of them

Fountains, I think Sydney has capability of hosting the nations most impressive fountain display

Like sculptures by the sea

Sculpture, discret plaques, teaser questions, Indigenous inclusion,

## Green spaces

Nature... native plants trees birds. Landscaping that suits the environment . It would be great to have access to foreshore water...

Interesting vegetation providing shade...

No additional infrastructure - maintained or enhanced green space, trees etc.

Lots of water features and plants and trees and green space. It would be great if it was carbon neutral and sustainable

Native plants and animals. Places could stop and have a picnic

More biodiversity corridors

Trees, trees, trees And natural beauty -- it is what all cities are short of and people crave

## Public amenity

Food, viewing points, places to sit, shelter

Clean toilets , safe drinking water , shelter to hide in if it rains, regular emergency call stations in case you walk without a phone

History facts and plaques, photo booths, info about the harbour and its sea life, binoculars, pop up coffee trolleys

Bike hire

Modern art museum, swimming pool in the harbour, more tracks for bikes, art studios

Good lighting to feel safe after dark

## Access/infrastructure

Direct access via public transport at key points along the walk, particular beginning and end. Separated bike and pedestrian spaces...

Larger walk ways, so we don't have to jostle spaces with runners or families needing large space  
Better access from the city - too many roads to cross

It would be great to extend this walk and make this open 24 hours a day

Dogs allowed on leashes including national park sections along the paths

Path that is uninterrupted all the way around...

Full access 24/7 across the 9km walk. Botanic garden section is blocked off at night and this is annoying...



## In summary: Developing the future offer



### Intended use

The vast majority of current users and Sydneysiders expect to do the walk at least 3 times a year

Around half of current users intend to use the walk at night and for fitness



### Information

There is an appetite for various forms of local information along the walk including nature, art and architecture

Tourists and Sydneysiders are more interested in Aboriginal history

Sydneysiders and artists are the top tier preferences for information delivery



### Improvements

There is a desire for public amenity e.g. toilets, bubblers, seating as well as improved wayfinding

Sydneysiders are also looking for public art, green spaces, improved access

Across current users and Sydneysiders there is an appetite for local information and room for more amenity, wayfinding elements and public art

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# 4

## Summary and recommendations

## In summary:

### Snapshot of current users



While there is low awareness and usage of the ribbon walk as a distinct product the foreshore walk is highly rated by users due to the natural beauty of the harbour setting

There is low awareness of the section of foreshore between Darling Harbour and The Rocks

### Developing the future offer



There is relatively high intended use of the ribbon driven in part by exercise and love of the harbour/water

There is an appetite for various forms of local information delivered by multiple sources and methods e.g. app

There is a desire for more public amenity, art, green spaces and infrastructure

## Recommendations

Improve wayfinding elements e.g. maps and signage along the walk to drive awareness as a distinct offer

Promote attractions along the current blackspots e.g. Sydney Theatre Company, Barangaroo Point to overcome the lack of awareness here

Rotate programming to keep the offer novel and relevant for users e.g. 3 times a year

Offer a range of information e.g. nature, art, Aboriginal history along the walk in a range of delivery formats (signage, guided app tour etc.)

Ensure programming allows for shorter walks and multiple entry points

Focus on public amenity, art, green spaces and infrastructure to improve the user experience

# Thank you

## Pollinate

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