

# Jarrahdale Trail Centre

## Operational Considerations, Demand & Financial Return

*Discussion Paper*

May 2024

### DRAFT

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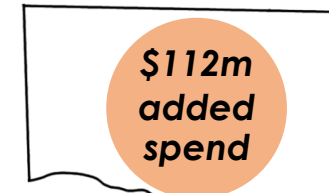
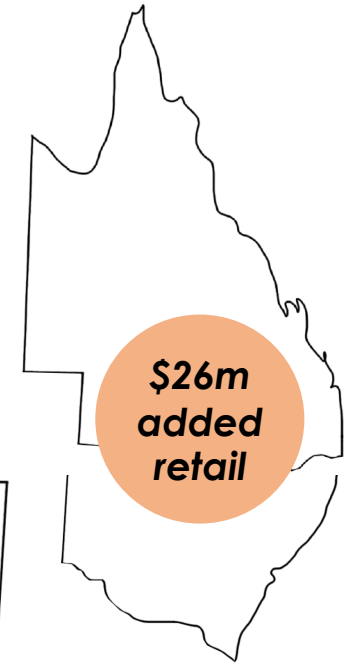
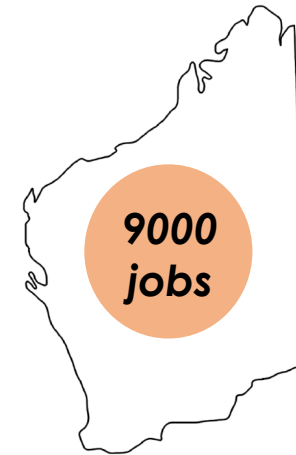
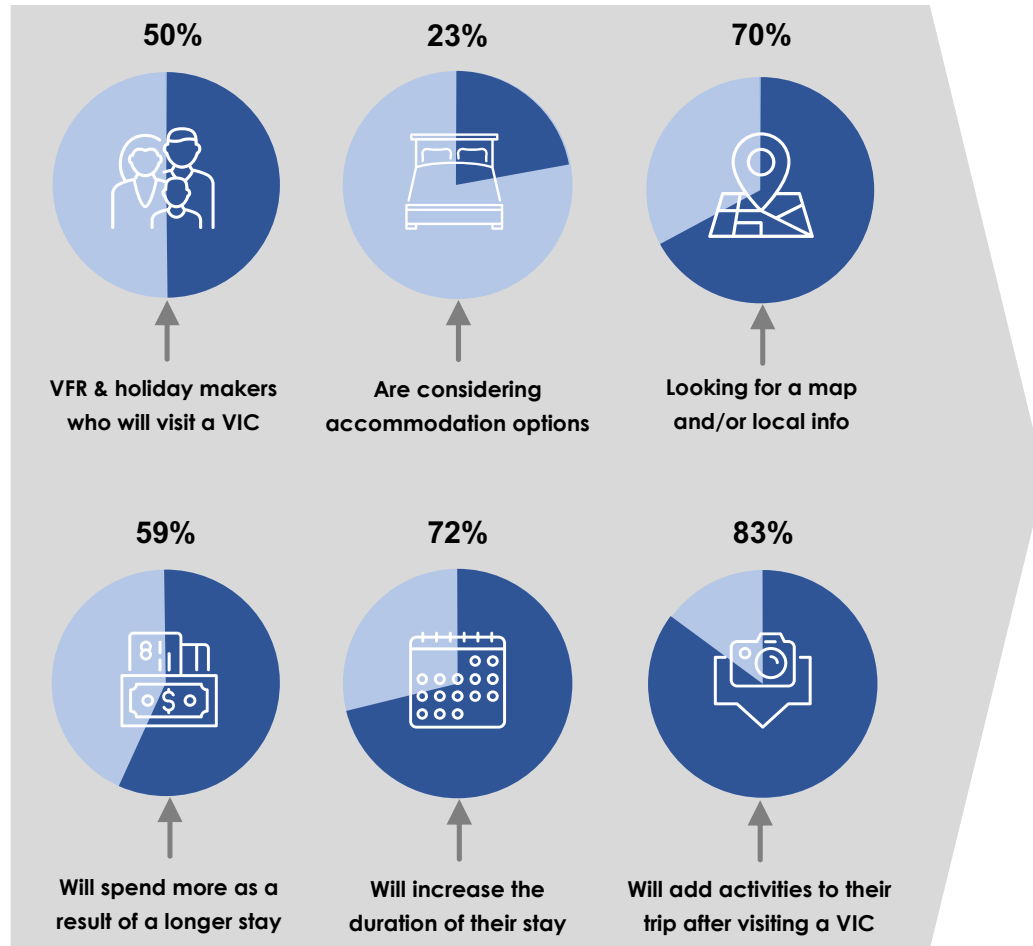
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# i. Visitor Information Service Trends

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# Direct & Indirect Economic Outcomes from Visitor Information Centres<sup>1</sup>

“VICs play a critical role in promoting local businesses, events, and Council and community services to visitors. Through the information shared and the skilful sales and advice provided...VICs [improve]...the visitor experience and unlock visitor spending”<sup>2</sup>



Sources: 1) Visitor Information Service research from SA, NSW, WA, Qld, 2012-2019, various sources (available on request). SWP analysis. 2) DNSW “A National Perspective on Visitor Information Servicing”, 2018.

## Common Characteristics of Effective Visitor Information Servicing

We have reviewed a range of current research on trends in regional and metropolitan Australian visitor centres along with international examples. This has provided insights into the nature, scale and scope of activities being undertaken by visitor servicing providers.

- **Focus on Proactive (not Passive) Visitor Information Services:** Key to a visitor information centre's success is understanding that the centre is one of many, integrated visitor information touch-points that visitors access to learn more about what to do and how to experience the destination.
- **Essence Of Place:** Successful VICs that attract and engage visitors and add value to their visitor economy are a beacon to the communities and place they represent.
- **Location:** A successful visitor centre must be in a high-traffic accessible location or co-located within an already highly visited attraction.
- **Digital Visitor Servicing:** VIC's success depends on embracing and integrating the various online channels to support those visitors whose inclination is to source their information online. The message, content and service drivers remain the same.
- **Curators of local & Regional Stories:** Successful VICs thrive by integrating businesses, people, communities they serve and play a vital role in shaping place narrative, telling stories of the Destination & showcasing what people can see and do during their visit.
- **A Compelling 'must do' Experience:** Successful VIC operators understand that a visitors' decision to travel to a destination isn't because of its visitor information centre but also recognise that to make a visit rewarding, it must offer an authentic & memorable experience.
- **Branding & Theming:** They have clear and consistent branding theming and product offering across web, social channels, signage, information and displays;
- **Capability & Resource:** Successful VICs are appropriately resourced with skilled management and staff. The key to successful engagement are strong retail servicing capabilities, clear goals, performance objectives & success factors understood (visitation, dwell, participation, yield per visitor, advocacy) and performance monitoring
- **Tourism Sector Engagement & Partnerships:** Successful VICs actively engage and collaborate and develop partnerships with the local tourism community to leverage resources, share audiences and identify new opportunities.
- **Engage Local Communities:** Successful VICs recognise the significance of residents, including VFR, retail operators and visitor service providers, in engaging and influencing visitors to a destination and what they do throughout their stay.
- **Funding Revenue and Sustainability:** Developing a responsive value-adding product offering and multiple income stream opportunities (including Venue Hire, Commissions, Retail, Placement, Advertising, and Calendar of Events) is essential for optimal profitability & financial feasibility.

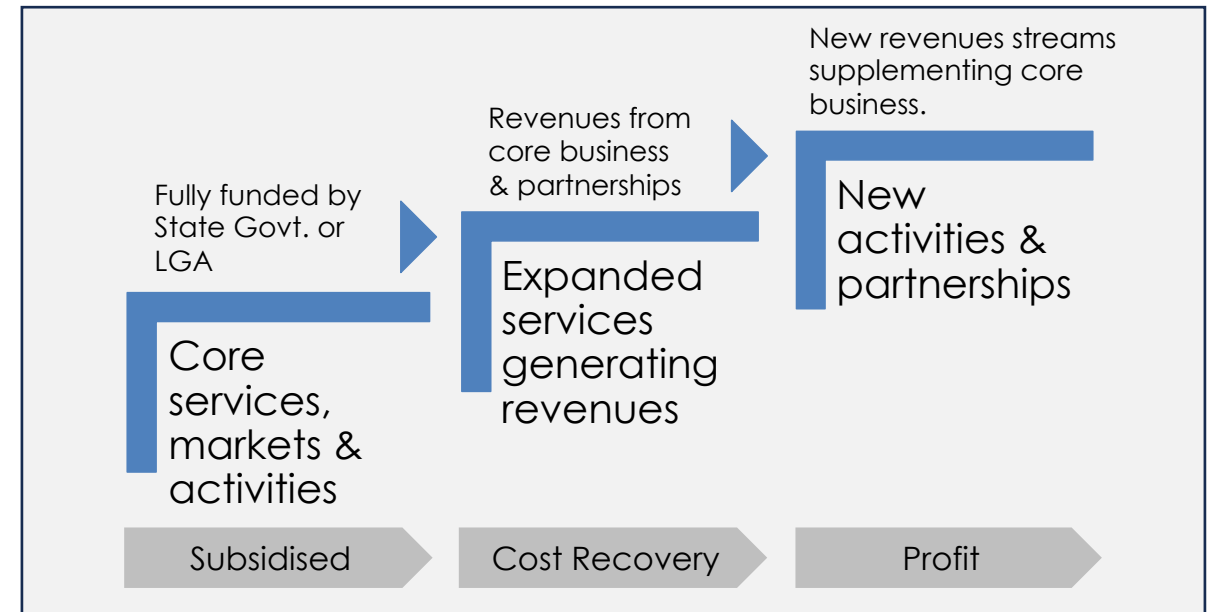
## Learnings from Visitor Centre Benchmarks

Our learnings from benchmarking and desktop research have identified the traits critical to successful provision of visitor information services, as well as common business model options.

### Visitor Information Centre Success Criteria

Critical Traits	Success Criteria
Service Channels	Multi-channel engagement – a mix of web, mobile, social & physical to ensure the varying needs of a complex customer base are met at each stage of their information journey.
Location	Prominent, highly visible, high traffic locations, accessible to locals & visitors
Attraction	A 'wow' factor offering, highly activated & optimised, visitor destinations in their own right
Design	Contemporary, 'Apple store' design, responsive, adaptable, free-flowing, multifunctional & interoperable
Technology	Digital displays, signage, touch-screens, supplemented by, and integrated with, traditional collateral, including guides, maps & brochures
Experience	Welcoming & engaging with content, themes & stories offering a compelling place narrative magnifying what visitors can see and do
Relevance	At the point of need, focus on visitors by type and available time – "what's on today/tonight/right now."
People	Motivated, skilled, knowledgeable staff supported by volunteers, emphasis on retail servicing, sales & value-adding & experience-based specialisation
Funding	LGA support core services with commercial partnerships & revenue streams (venue hire, retail, F&B, events, advertising) underpinning sustainability.
Offering	Products, experiences & services featuring local growers, makers, producers, events, precincts, other attractions & visitor economy partners.

### Business Models Options



*Core, subsidised services are expanded through commercial revenues, strategic partners or major partners/sponsors. Commercial retail and revenue generation help to transition the subsidised business model from full cost, to a sustainable cost recovery, and profit through partnerships model.*

Sources: VIC research published by Destination NSW, Tourism & Events Queensland & TRA; 12 Things Successful Visitor Centres Do Differently – Tourism Collective (Nov 2022). See Appendix for details

## ii. Guiding Principles for Jarrahdale

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## Jarrahdale Trail Town and Trail Centre

We have based our proposed operational direction for The Jarrahdale Trail Centre on the Trail Towns model set out in the Western Australian Strategic Trails Blueprint 2017-2021.

### Trail Town Context

Establishing Jarrahdale as a Trail Town is a stated aim of Serpentine-Jarrahdale Shire Council, and establishes a framework for the relationship between the facilities, services and amenities to be provided by the Trails Centre, and those available elsewhere in the town.

This an important consideration given the sensitivity of existing businesses in the town (especially F&B operators) to potential competition from the Trails Centre.

We have used this framework to determine which services will be provided directly by the Trail Centre, which can feasibly continue to be provided by existing services in Jarrahdale town centre, and how they can be integrated to their mutual benefit.

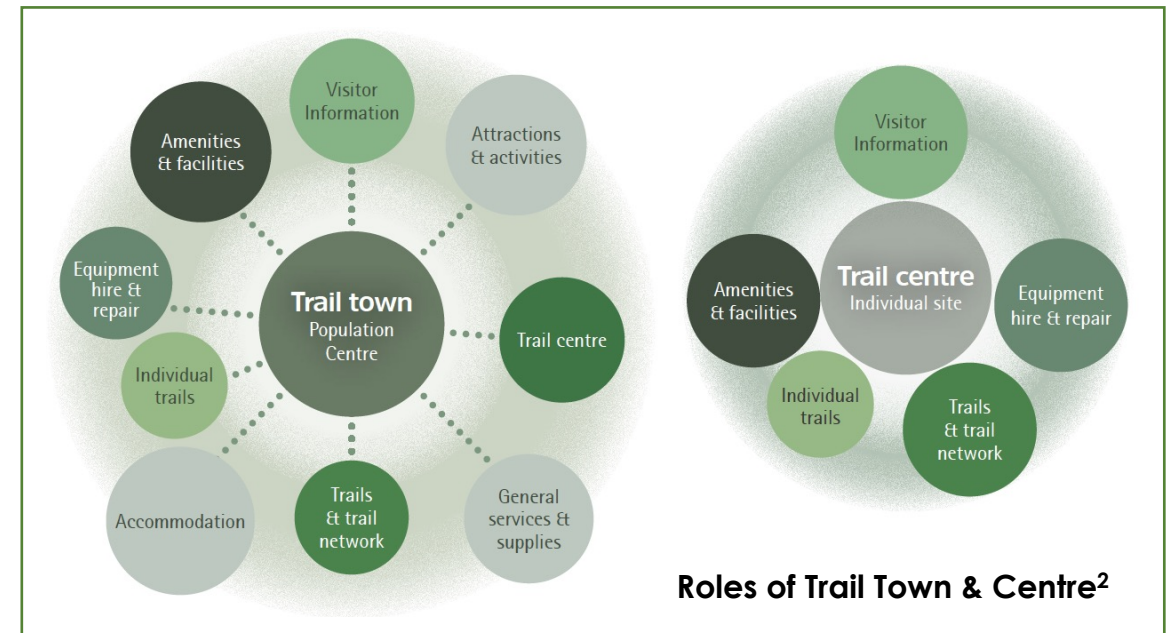
On this basis we propose the following distribution of services:

#### Trail Centre:

- Trails services - servicing needs of trail users including facilities, amenity, equipment and trails specific information & retail.
- Trail Access - close proximity to trail entry & exit
- Visitor information services - providing trail users, general users and locals with general visitor information, retail bookings.
- Tourist Attraction – narrative, interpretation and immersion in to Jarrahdale Timber heritage, indigenous heritage and natural landscape.
- Local enterprise – a backdrop to promote and celebrate local businesses
- Experiences - tours, education and training services
- Administration - staff workspace and amenities

#### Trail Town:

- F&B services - cafes, restaurant, hotel and other attractions
- General services and supplies - general store, post office
- Accommodation
- Popup F&B & retail at the Trail Centre
- Historical interpretation, guides, in Trails Centre.



1) WA Hiking Strategy Bushwalking and trail running in Western Australia 2020-2030 2) Western Australian Strategic Trails Blueprint 2017-2021.



# Multi-Use Facility - Jarrahdale Discovery Centre

Jarrahdale requires a modular, multi-use, flexible space fulfilling roles of Trail Centre, Visitor Centre, Attraction and Admin Service Centre, each with its own audience. To capture the breadth of services being offered we refer to the project throughout as the **Jarrahdale Discovery Centre**.

## Operating Functions

Jarrahdale requires a facility that can fulfill four primary functions, each serving a specific customer audience:

1. Trail Centre
2. Visitor Centre
3. Attraction
4. Administration

### 1. Trail Centre

Servicing: trail users (walking, biking, horse-riding)

- Amenities & facilities to provide rest & comfort on their journey, or preparation for the journey ahead.
  - Dwell points – outdoor & indoor rest areas, refresh, eat & drink, information, wayfinding to plan their journey
  - Coffee, drinks & light food options to refresh.
  - Toilets, showers
- Retail
  - Equipment to prepare and assist with safe use of the trails – hire or sale.
  - Minor repairs.
  - Food & drink to take on the trail.
- Trail access points – either onsite or in close proximity to the centre.

- Trail experiences – guided walks, talks (nature, history, indigenous heritage).
- Education centre - bush awareness training, climate and environmental science, courses for school groups.
- Services – parking (vehicles & bikes), pick up-drop off to-and-from trails or public transport, first aid, emergency response.

### 2. Visitor Information Centre

Servicing: trail users, general visitors, and locals with benchmark quality access to visitor information -

- Multi-channel engagement prior to arrival – web, mobile, social.
- An integrated mix of onsite digital technologies (web-kiosks, digital signage) and traditional maps and brochures.
- Well informed, motivated & available staff providing an interface between customers, information and experiences.
- Location, visibility and accessibility are critical to attracting, engaging and providing an effective service to the largest available audience.
- Relevant, up to date, information that engages the visitor to dwell and stay longer, participate, transact and spend more during their stay.
- Local enterprise – a backdrop to promote and celebrate local businesses
- Local and regional displays, stories and interpretation offering a sample of the types of experiences visitors can see and do.
- Retail – gifts, souvenirs, local produce, equipment, books, maps.
- Bookings for local experiences (tours, wine tasting, restaurants, transport) and launch point to visit the rest of the region.

## Multi-Use Facility - continued

### 3. Visitor Attraction

Servicing: trail users & general visitors with local historical, cultural, indigenous, heritage and natural landscape:

- Historical narrative of Jarrahdale through exterior and interior displays, interpretation, artefacts and exhibitions.
  - Timber town heritage.
  - Jarrah forests, nature & conservation.
  - Indigenous heritage.
- Connection to Jarrahdale Heritage Park – Rail Trail, Nature Walk, Heritage Town walks.
- Long-term potential for major destination driving partnerships to establish significant 'Beacon to the Region' drawcard:
  - Boutique brewery, restaurant, providore.
  - Gin distillery.
  - Producers, Growers and Makers Markets, local and regional events
  - Boutique accommodation.

### 4. Administration

Audience - support for Council staff and others providing services.

- Customer service areas – consultations (discussing visitor needs) and transactions (purchasing products/experiences).
- Shared office space & meeting room
- Staff kitchen (small) and toilets.

### Service Principles

- The Jarrahdale Discovery Centre should be positioned as a place of discovery, a trusted source of information, and a unique attraction in its own right.
- It should create a connected journey to and from nearby trails and local attractions, and be integrated with the Trail Town to provide additional local F&B, retail, and other services.
- It must be the natural information “go to” point for Trail users, visitors and locals and be both a launch pad, and end point for the local Trails network. It should be a “Must do” and “trusted” stop on the journey - an introduction to the Trails and the region, what to do, where to go next & why. It should become a natural location for local community activity.
- The Centre should be a Beacon to the Region - information and experiences should be a showcase of regional stories, content and products.
- Information and experiences will be provided by an integrated mix of digital technologies (kiosks, digital signage, mobile apps), traditional maps and brochures, supported by well informed and motivated staff.
- The Centre should consist of programmable/hirable spaces, that can host onsite activations, entertainment & events, to support revenue generation and service delivery.
- Partnerships & ancillary revenue streams, such as retail, merchandise, licensing, F&B, are key to sustainable operation and delivery of the centres' core service.

## Integration with Local Community

Integrating with the local community not only enriches the experience for trail users but also holds the potential for realisable economic benefits, promoting sustainable tourism and fostering a sense of pride and connection among community members as a value adding virtuous cycle.

### Supporting Jarrahdale's Status as a Trail Town

Integrating the local community within the context of the Discovery centre is crucial for fostering a mutually beneficial relationship that benefits both the community, trail users and visitors. The importance and potential economic impacts are summarised below:

- **Cultural Heritage:** Inclusion of local community elements introduces visitors and trail users to the rich cultural heritage, traditions, and stories of the area, creating a more immersive, authentic and unforgettable experience.
- **Community Engagement:** Engaging local residents in activities and services at the discovery centre fosters a sense of community ownership, pride, and responsibility for the natural environment, local economy, and the essence of the place. This involvement contributes to both short-term benefits and long-term sustainability.
- **Knowledge Sharing:** Local experts can share insights into the trail's history, flora, fauna, and hidden gems, enhancing the educational aspect for trail users and fostering a deeper appreciation for the surroundings.
- **Support for Local Businesses:** Through the integration of local businesses, including hospitality, artisans, producers, makers or equipment rental services, the discovery centre serves as a platform to promote local entrepreneurship and create economic opportunities.

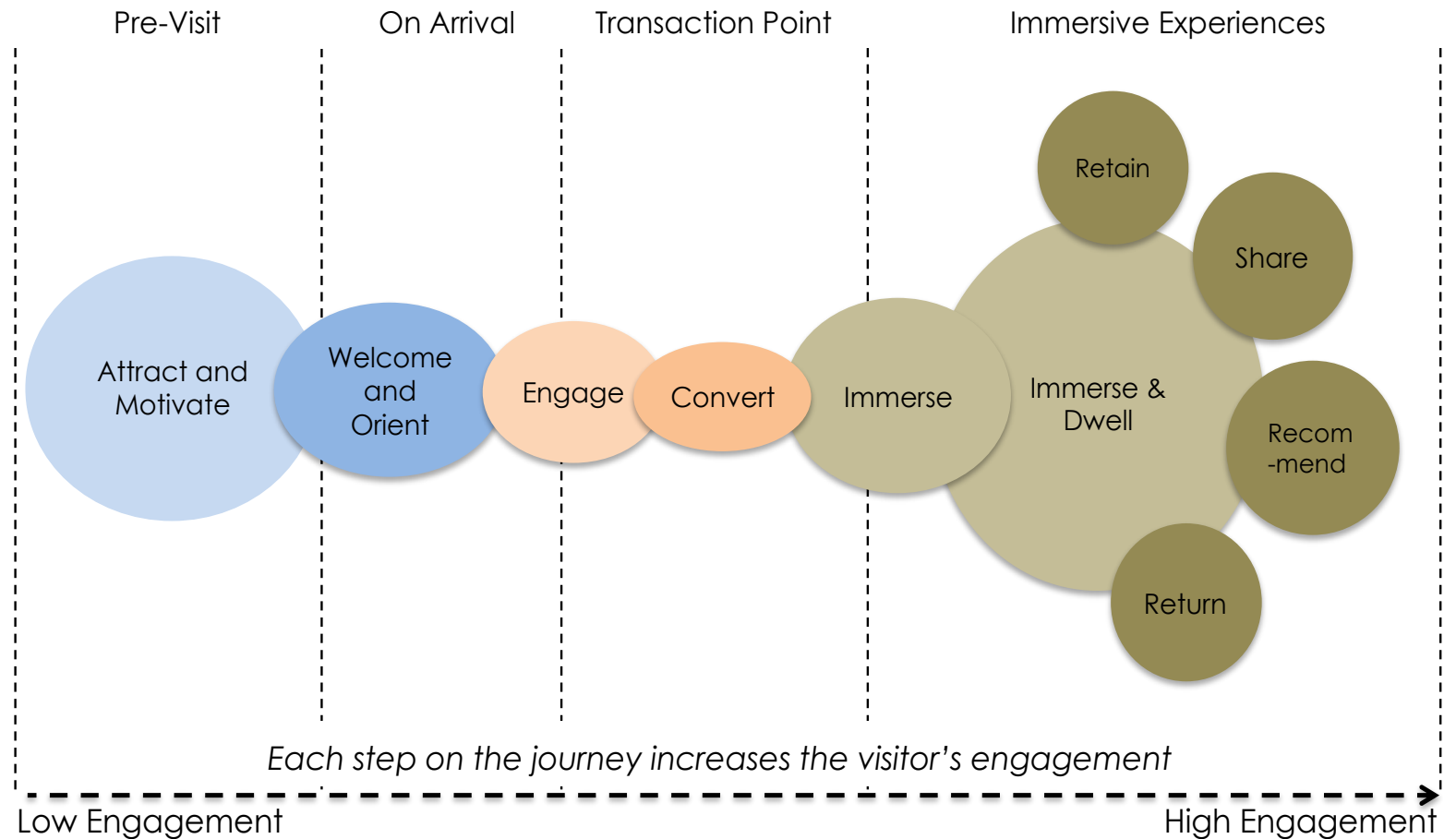
### Potential Direct Economic Impact

- **Boost to Local Economy:** The presence of a vibrant authentic and immersive discovery centre can attract more trail users, and passing visitors generally, leading to increased dwell time and spending on local goods and services, thereby boosting the overall economy of the community.
- **Job Creation:** Collaborating with local businesses, producers, makers, and artisans over time can lead to job opportunities. This can range from trail guides and outdoor educators to positions in hospitality and retail, stimulating employment in the community, fostering support and advocacy.
- **Tourism-Related Revenue:** A well-integrated discovery centre can serve as a hub for organised tours, workshops, functions and events. This helps generate additional revenue streams for local businesses and the community.
- **Infrastructure Development:** Increased trail-related and interrelated tourism may drive the need for improved infrastructure, such as accommodation, parking facilities, public amenities, and upgraded trails. This creates construction and maintenance jobs within the community..
- **Cultural Tourism:** The discovery centre can promote cultural tourism by organizing events, festivals, or cultural showcases that attract visitors specifically interested in the local heritage, contributing to cultural preservation efforts.
- **Increased Property Values:** A flourishing trail, visitor centre and local economy can elevate the appeal of the local area, potentially resulting in increased property values and attracting real estate investment.

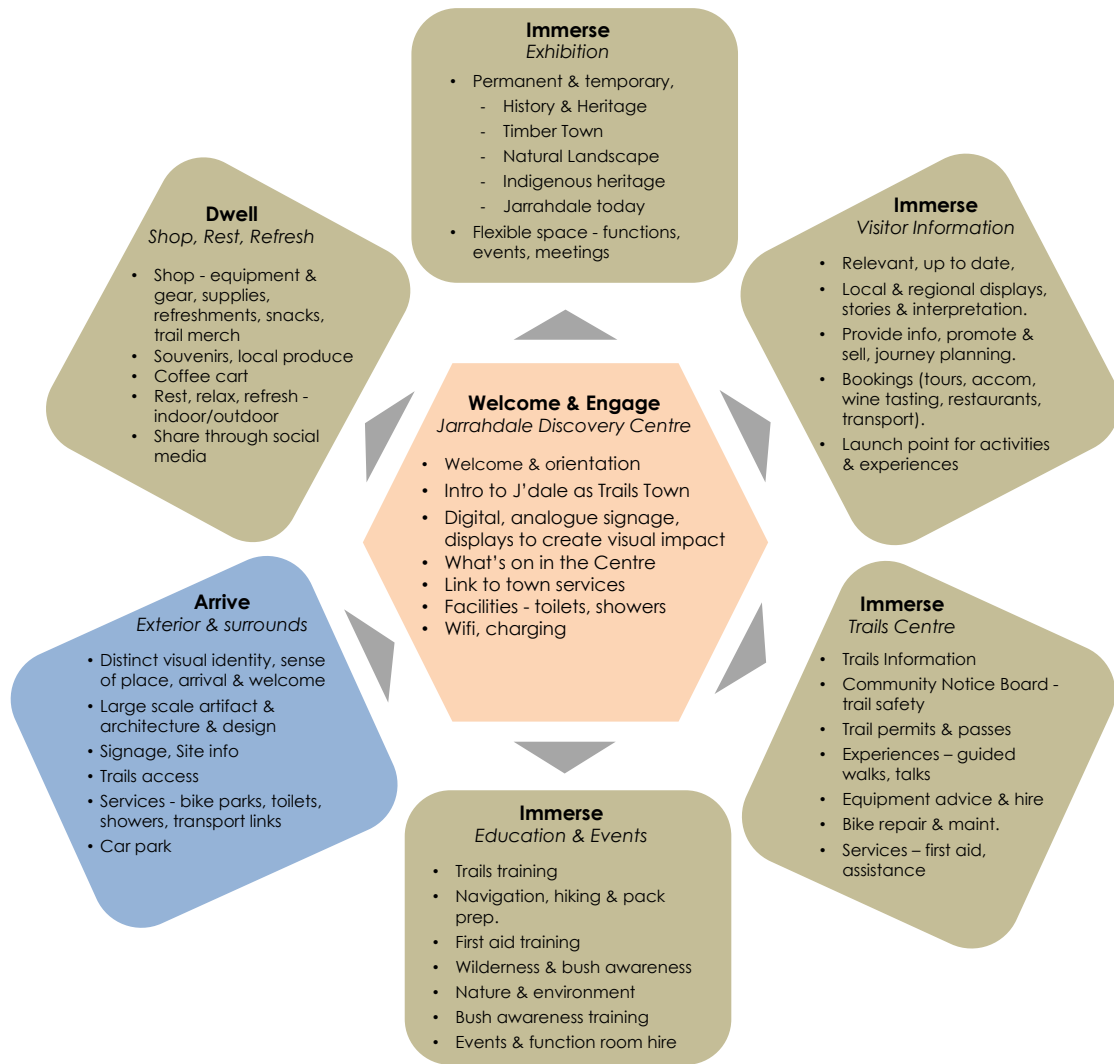
## Visitor Journey

To provide optimal service and commercial outcomes, the aim is to create a visitor journey that increases engagement, from pre-visit online to onsite, across a range of integrated experiences.

- **Attract** – first impressions created to transition the visitor from ‘look’ to ‘learn’. This may be information online, off-site, or onsite through architecture & design, signage, interpretation, wayfinding.
- **Welcome** – greeting the visitor with a uniquely Jarrahdale welcome and a genuine desire to engage, seamlessly steering through entry to give a first glimpse of the range of services and experiences on offer.
- **Engage & Convert** – Clear and straightforward messaging about the trails, available services, local activities, or connections to the broader trails network can encourage visitors to engage in activities, download an app, obtain maps and other information, embark on a scenic walk, take a guided tour, or make a purchase.
- **Immerse** – an opportunity to delve deeper into the narrative of Jarrahdale, local & regional information, trail experiences through, interpretation, engagement, information & interaction.
- **Dwell** – various ways in to rest, relax, refresh, dig deeper into the information they have gathered, share experiences, and purchase a gift or souvenir as a memento of the visit.

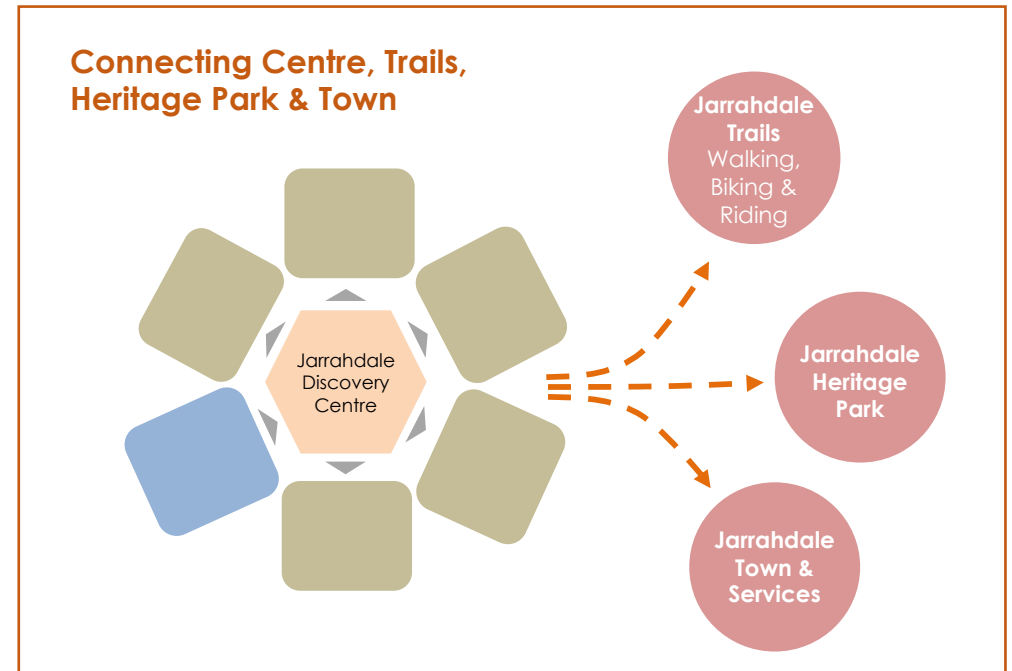


# Integration of Experiences



The visitor journey should be seamless, accessible, attractive, and intuitive:

- The range of functions within the Centre should be integrated, complimentary, and connected visually and functionally.
- The connection to the Trails, Heritage Park and Town should also be clear through information, wayfinding, interpretive narrative and integration of services.



### iii. Functional Zones

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## Exterior - Arrival & Welcome

The welcome should feature an authentic, thoughtful, and visually appealing icon that serves as a place-specific focal point. This enhances the overall Discovery Centre experience, encourages social media engagement, and creates a positive impression, contributing to Jarrahdale's popularity, visitation, and economic success

### Key Elements

A key engagement point that attracts visitors to the site, draws them to the Trails Centre and engages them with a compelling reason to enter.

- Featuring a significant structural &/or design element, adjacent to the building (e.g. old saw-mill equipment), or as part of the architecture and design, to act as a visibly appealing drawcard.
- Welcome & orient visitors to the Trails Centre, Attraction & Visitor Information
- Facilitates arrival and access:
  - Parking - secure designated accessible parking areas for trail users, ensuring convenient access to the trailhead.
  - Access to trail centre - paved, accessible pathways.
  - safe separation of foot traffic, bike traffic & (potentially) horse traffic.
  - Snap-shot information - boards, signs, displays.
  - Wayfinding to assist site orientation, list of services available.
- As access to the site will potentially be from multiple directions (including various trails, the main road, nearby car park) prominent wayfinding at each access point should direct visitors to this main entrance.
- Significant flexible green space adjacent to the centre :
  - Outdoor Seating Areas – seating, picnic tables, grassed areas for relaxation & congregation.
  - Accessible, interoperable, programmable to support activities & events.
  - Food, local wine & boutique beer festival.
  - Farmers, Producers & makers' markets.

- Music & performance.
- Pop-up coffee & food carts, in partnership with local businesses, to support visitation peaks and seasonal demand.

### Benefits of an Iconic Structure:

- **Memorable Experience:** A designated iconic structure adds an unforgettable element to the Discovery Centre experience whilst providing users and visitors with a specific backdrop to take a picture and capture their arrival, beginning or completion of their journey.
- **Social Media Sharing:** In the age of ubiquitous social communications, people love sharing their adventures. An iconic photo point creates an Instagram-worthy moment, encouraging users to share their experiences and, as a result, promoting the centre, trail, and town to a broader audience.
- **Branding and Promotion:** The Discovery Centre logo or brand can be incorporated into the photo point, reinforcing place identity and contributing to consistent branding across online platforms when photos are shared.
- **Community Engagement:** Encouraging users to share photos with a dedicated #discoverjarrahdale hashtag can foster a sense of community among trail enthusiasts, connecting them and providing an avenue for the trail community to grow.
- **Trail Marketing:** User-generated content from the photo point can be leveraged for trail marketing. With users sharing their experiences, the trail gains continual organic promotion and visibility.

## Activating and Enlivening the Site

There is an opportunity to unlock value from the trail experience by creating related activities. These include photography workshops, cultural art installations, maintenance education, adventure events, well-being activities, and mobile information kiosks for a diverse and fulfilling outdoor journey.

### Potential Activations and Engagements

- **Outdoor Photography Workshops:** Collaborate with locally based photographers to organize workshops teaching trail users how to capture the beauty of nature through photography.
- **Nature-inspired Art Installations:** Commission local aboriginal artists to create an authentic cultural/nature-themed art installations along the trail, enhancing the aesthetic appeal of the custodians of the land and outdoor environment.
- **Trail Maintenance Workshops:** Organize workshops on trail maintenance, educating users on responsible trail use and how to support the local community and contribute to the preservation of the natural environment.
- **Outdoor Adventure Events:** Introduce adventure challenges or competitions, encouraging users to complete certain milestones, participate in races, or achieve specific fitness goals on the trail. Link to Apps and Social channels.
- **Health and Well Being:** Host outdoor yoga classes or meditation sessions in scenic spots along the trail, promoting wellness and relaxation.
- **Mobile Information Kiosks:** Deploy mobile information kiosks or carts at strategic trailheads, providing on-the-go assistance, trail updates, and information about upcoming events.

### Infrastructure

- To facilitate Outdoor Photography Workshops, designated areas with adequate lighting and seating for participants, as well as equipment storage, would be beneficial.
- Nature-inspired Art Installations may require specific zones or platforms along the trail, with collaboration spaces for artists during creation.
- Trail Maintenance Workshops could be conducted in equipped workstations near the trail, incorporating educational signage and tools for participants.
- For Outdoor Adventure Events, marked challenge areas, race routes, or fitness stations could be established, along with integration into mobile apps and social channels for participant engagement.
- Health and Well-being activities might benefit from designated scenic spots with suitable terrain and space for yoga classes or meditation sessions.
- Mobile Information Kiosks can be strategically placed at trailheads, offering real-time assistance, trail updates, and event information. These kiosks could include interactive screens, pamphlets, or personnel for a comprehensive visitor experience.



## Trail Centre

By incorporating these offerings, the Trail Centre can enhance the overall visitor experience, contribute to the trail's sustainable management, and create a comprehensive ecosystem that adds significant value to users and contributes to a thriving outdoor community.

### Key Elements

- **Equipment Rentals:** Offer bike rentals, walking sticks, or other gear for visitors who may not have their own equipment.
- **Restrooms and Changing Facilities:** Provide restroom facilities and, if applicable, changing rooms for visitors preparing for or winding down after their trail activities.
- **Trail Permits, Passes or upsell package:** Sell permits or passes required for trail usage, providing access to designated areas or amenities (if commercial offerings an opportunity)
- **First Aid Station:** Offer basic first aid supplies and assistance for minor injuries or emergencies.
- **Guided Tours and Interpretive Programs:** Potential for guided tours or educational programs to enhance visitors' understanding of the trail's ecology and unique features, the local community, history of place, and local flora and fauna.
- **Refreshments and Snacks:** Have a cafe or vending machines for visitors to purchase food and beverages to fuel up before hitting the trail or for unwinding and post-activity refreshment.
- **Trail Merchandise:** Sell trail-related merchandise, such as branded apparel, gifts, souvenirs, and outdoor gear.
- **Trail Maintenance Information:** Share information about trail maintenance schedules, opportunities, and ways visitors can contribute to preserving the trail.
- **Community Notice Board:** Display community events, local businesses, and other relevant information to magnify the sense of community around the trail.
- **Bicycle Repair Station:** Provide basic tools and facilities for trail users to perform minor bike repairs.
- **Environmental Research and Education: Integrate and promote climate** and environmental awareness and responsible trail usage through educational materials and programs to encourage on and off-site participation.
- **Wi-Fi and Charging Stations:** Offer high-speed internet access and rapid charging stations for electronic devices, catering to the connectivity needs of modern trail users.
- **Safety Information: Display trail** rules, emergency contact information, and safety tips to ensure a secure and enjoyable experience for visitors.

## Visitor Information

The Visitor Centre should act as a Beacon to the Region, showcasing regional stories, experiences, content and products.

### Key Elements

- Visible, accessible welcome & customer service points. Pervasive themes of Jarrah forests, timber town heritage, indigenous heritage.
- Staff permeate entry – both from static counters and roving
- Visually impactful displays and design - A ‘wow’ moment, allowing the visitor to feel good about their decision to visit and intrigued about what to do.
- Way-finding and signage highly visible to provide immediate orientation - Information, exhibition, Trails Information, equipment hire & retail, visitor information, interpretation.
- Compelling use of digital and analogue presentation - curated as a taster of the trails experiences, other local attractions, most popular activities.
- Clear messaging about the trails and other experiences, on site and in the local area:
  - Trails - by type, with maps, things to know, connections to local & broader network
  - Experiences - nature & heritage walks - guided or self-guided, talks & other local activities
  - Jarrahdale info - local F&B, shops, accommodation
  - Local region - attractions, wineries, national parks etc
- Presentation to service different visitor needs. For example:
  - Those with time to plan - discover, immerse, consume, unwind
  - Those with time limitations - attract, direct, transact.
  - Those who have booked an experience – greet, direct, check-in

- Prominent information PODS – programmable and with a digital interface to allow for generic and bespoke branding, theming, messaging.
- Free Standing Display Units (FSDU)– to complement entry space with fast moving products, merchandise, gifts, brochures, books, trail essentials.
- Contemporary merchandise units and signage with digital signage integrated where able for real time programming and cost reduction on printed material.

### Visitor Experiences & Tourist Product Transactions

- Trails Experiences - guided walks, talks, training sessions
- Tours, Tickets to local events, exhibitions, activities
- Attraction tickets
- Accommodation & restaurant bookings

### Infrastructure

- Welcome counter - minimalist ‘floating’ design, accessible for all users (including wheelchair).
- Digital wall or large high definition/resolution, split screen, multi-feed
- FSDU's - mobile, hard wood/metal finish, to scale integrated screens, power
- Information pods – embedded digital screens with integrated space on two sides to present physical brochures and leaflets. To contain screen plus small PC, LAN connected or wifi to access CMS.
- Services/outlets to be designed to allow for different layouts and to accommodate functions and events.

## Attraction/Exhibition Space

An Exhibition space will provide a narrative of Jarrahdale's significant historical, heritage and natural landscape. It will draw visitors to the site, and encourage deeper engagement, longer dwell time, and increased spend.

### Key Elements

- Historical narrative of Jarrahdale through exterior and interior displays, interpretation, artefacts and exhibitions.
  - Indigenous heritage.
  - Timber town heritage.
  - Jarrah forests, nature & conservation.
  - Jarrahdale today
- Segue from Visitor Information to the exhibition using light interpretation via digital and analogue displays.
- Integration of displays, digital touch screens, kiosks and collection items within the Trail Centre/Visitor Centre and retail areas, allows for casual interaction but encourages a transition to an immersive exploration of the rest of the visitor journey.
- The Exhibition space should provide a connected journey and narrative focused on the four main themes, likely to be curated by the local historical society.
- A combination of static and digital displays, interactive screens, and kiosks, artefacts, video, images and audio, the experience guides visitors through the four themes and interconnects them.
- This experience should provide a further segue to trails based activities:
  - Trails through the Jarrah forest
  - Jarrahdale Heritage Park – Rail Trail, Nature Walk, Heritage Town walks.

- Permanent exhibition could be supplemented by temporary exhibitions in this same space or throughout the centre:
  - Explore specific aspects of local history
  - Feature local artists.
- Exhibition space should be flexible:
  - Allowing for a range of interpretation approaches.
  - Potential for use for functions, functions, meetings and events.

### Infrastructure

- Power and data capability for digital, video and audio content.
- Flexibility and Versatility –
  - movable walls or partitions to allow for flexible exhibition layouts.
  - versatile flooring that can adapt to various exhibition requirements
- Display Systems:
  - Wall space and hanging systems for artwork display.
  - Adjustable lighting fixtures to highlight artworks effectively.
  - Display cases or platforms for three-dimensional pieces
- Contemporary fixtures and fittings for associated retail.
- Lighting Design:
  - Adequate natural and artificial lighting to enhance the visual appeal of artworks.
  - Lighting fixtures with adjustable settings to accommodate different types of exhibitions

# Retail

The retail offer must be closely aligned with the core services of the Trail Centre and Visitor Centre. A mix of Trails specific equipment and supplies, tourist merchandise and featured local produce, wine and

## Key Elements

Retail will be an important revenue source as well as establishing the Discovery Centre as both a vital start point & pit-stop for trail users, but also a “Beacon to the Region” for other visitors and locals.

- Themed and segmented range appealing to locals and visitors.
- Significant sales and promotion opportunities around seasonal trail activities, local events.
- Aligned with onsite experiences and activations to leverage visitor interests and to attract new audiences.
- Integrate the sale of produce, goods, wine etc by regional growers and producers.
- Products should be a mix of essential trail supplies, local and regional produce and products, mementos and souvenirs:
  - Trail equipment gear and supplies.
  - Equipment repair essentials, safety, first aid,
  - Refreshments, snacks, other trail merchandise.
  - Local produce, beer, wine etc.
  - Featured growers and makers.
  - Local arts and crafts.
  - Jarrahdale branded merchandise and souvenirs.
  - Maps, general travel supplies.

## Infrastructure:

- Point of Sale (POS):
  - A reliable POS system, integrated hardware and software
  - Staff assistance and transaction points, and appropriate seating
- Store Layout and Fixtures:
  - Efficient, customer-friendly layout maximizing available space, functionality & flow to encourage easy browsing.
  - Shelving units, interchangeable merchandise displays, & racks
  - Comfortable aesthetic and well-designed seating to encourage dwell.
- Lighting and Ambiance:
  - Well-designed lighting to highlight products & create an inviting atmosphere.
  - Balance of natural light and artificial lighting, music and ambient sound to contribute to a pleasant shopping environment
- Storage and Inventory Management:
  - Storage solutions, shelves, racks, cabinets, for efficient organization of inventory.
  - Inventory management software, receiving area shipments & deliveries.

## Administration

An administration area will provide workspaces and support areas for Council staff and others providing services.

### Key Elements and Infrastructure

- Open plan workspace for staff - desks, chairs, PCs
- Hot-desk for tour guides research, tour content prep
- Office for Manager - desk, chair, PC
- Office for Researcher (university partnership) - desk, chair, PC
- Tour Guide common room
  - Utilities room
  - Lunch-room with small kitchenette
- Storage:
  - Files, stationery, office equipment.
  - Visitor information - brochures, maps, product details, research materials.
  - Guided tour/trail walk research and content - books, maps etc
- Meeting Room
  - staff meetings
  - Tour preparation
- Facilities:
  - Toilets, lockers, showers
  - Mud room for guides returning from trails

## iv. Demand, Operating Model & Financial Return

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## Determining Likely Demand

To estimate the demand for the Jarrahdale Discover Centre (JDC), we have applied a modelling approach used previously for various regional and metropolitan visitor centres. Demand is determined using three key factors: 1) potential international and domestic visitors; 2) the population of the local catchment; and 3) the conversion of this potential audience into actual visitors to the JDC (visitor conversion rate “VCR”).

Audience	Definition	Potential Market	
<b>Visitors</b>	<ul style="list-style-type: none"> <li>Overnight and day visitors to local metropolitan area (as defined below) from interstate or international markets</li> </ul>	Potential tourists from domestic and international markets that <u>could</u> undertake a visit to JDC	Tourism Research Australia (TRA) survey data plus growth forecasts from Jarrahdale Trail Town Business Case.
<b>Locals</b>	<ul style="list-style-type: none"> <li>Metropolitan area, local population (Serpentine-Jarrahdale LGA)</li> </ul>	Potential metro & regional population (local population) that <u>could</u> undertake a visit to JDC	Australian Bureau of Statistics historical data and population growth forecasts.
<b>Conversion</b>	<ul style="list-style-type: none"> <li>Depth and quality of visitor engagement:               <ul style="list-style-type: none"> <li>– Visitor experience</li> <li>– A “place to be”</li> <li>– Integration with broader precinct</li> </ul> </li> <li>Awareness of offering and engagement narrative</li> <li>Location and ease of access</li> </ul>	Local population and tourists that actually undertake a JDC visit (i.e. <b>Visitor Conversion Rate “VCR”</b> )	Likely conversion scenarios based on recommended service offer, benchmarked against comparable visitor centres.

## Forecast Rationale

Our forecasting approach utilizes tourist visitation and local population data, applying a VCR to establish a baseline measure of demand for the JDC. The growth in demand over time is calculated using growth estimates consistent with the Jarrahdale Trail Town and Lot814/815 business cases.

### Demand

- To calculate an estimate of demand for the JDC we have applied known conversion rate benchmarks for visitor information centres to current and forecast estimates of visitors to the Serpentine-Jarrahdale LGA (international and domestic overnight visitors, plus domestic day visitors) and locals (residents of the LGA). The forecast is based on the following assumptions:

#### Current Visitation to Serpentine-Jarrahdale

- Annual visitation to the Serpentine-Jarrahdale LGA, as at 2019<sup>1</sup>:
  - International overnight = 5,000
  - Domestic overnight = 42,000
  - Domestic Day Visitors = 258,000
  - Total Visitation to LGA = **305,000**

#### Local Population

- To determine Local population in Serpent-Jarrahdale we have used the latest ABS population estimate (2021)<sup>2</sup> of 33,349.
- The population has grown at a rate(CAGR) of 5.4% per annum since 2011. On this bases we have arrived at an estimate of the population in 2024 of **39,048**.
- We note that this growth rate aligns with population estimates used by Urbis in their business case for Lot 814/815, the proposed site of the JDC.

### Potential JDC Demand - Baseline

- By combing current tourist visitation and the local population we arrive at a total baseline audience who **could potentially visit** the JDC of **344,048**.
- Our Demand forecast applies benchmarked visitor conversion rates to this baseline audience. We have assumed that a significant proportion of visitors to the LGA will be dedicated trail users and used a visitor conversion rate at the high end of benchmarks (see Revenue forecast below).
  - Conversion of non-Locals who will visit the JDC (15%) = 45,750
  - Conversion of locals who will visit the JDC (5%) = 1,952
  - Total estimated visitors from current audience = **47,702**.
- This number would appear to be consistent with trail use counter data at the nearby Langford Park Mountain Bike Trail which suggests there were 40,000 users in 2020.

### Potential JDC Demand - Increased Visitation from Trail Town Business Case

- The Jarrahdale Trail Town Business Case<sup>2</sup> has forecast growth in visitation to the Serpentine-Jarrahdale LGA, over a 7- year period, as a result of investment in Jarrahdale becoming an accredited Trail Town. This estimate is based on existing participation rates in trail activities (bushwalking, cycling, and horse riding) and forecast visitor growth rates for WA.
- We have applied benchmarked visitor conversion rates to this forecast of LGA visitation growth, plus forecast growth in local population, to arrive at estimated visitation to JDC for the same 7- year period.

Sources: 1) Shire of Serpentine-Jarrahdale "Jarrahdale Trail Town Business Case" (2021), based on TRA data. 2) ABS " Population Estimates by LGA and Electoral Division (ASGS2021), 2001 to 2021 - Final". 3) Urbis (2022) "Lot 814 / 815 Millars Road, Jarrahdale Business Case".

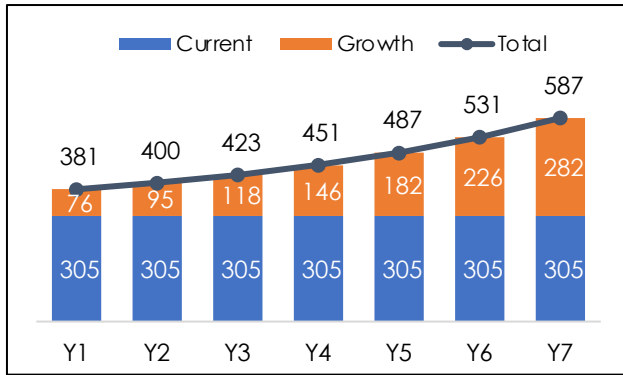


# Forecast Demand

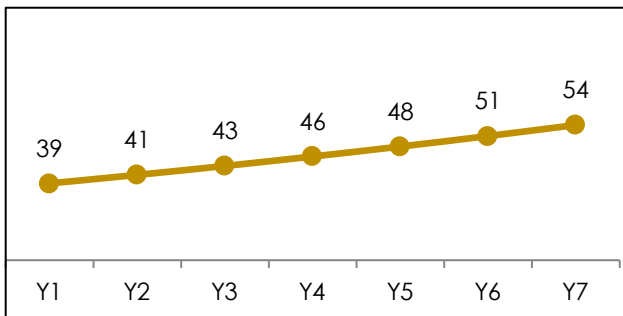
Our modelling suggests that the potential audience of tourist visitors and locals will increase from 420K to 640K over the forecasted 7-year period in the Jarrahdale Trail Town Business Case. Based on this growth, we anticipate visitor demand for the JDC will be approximately 59K upon opening and could reach 91K by Year 7.

## Potential Visitors

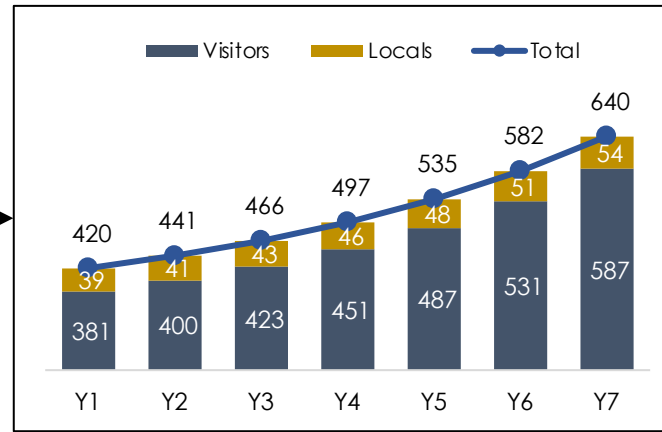
Visitors (000s)<sup>1</sup>



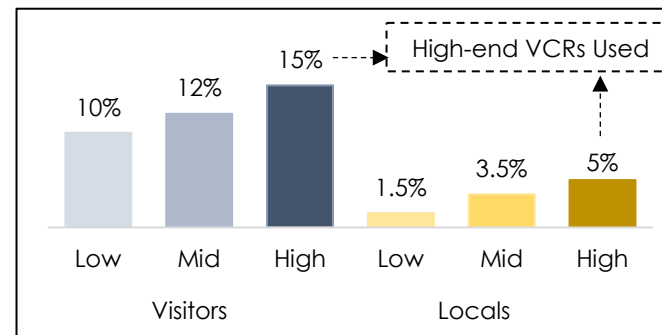
Locals (000s)<sup>2</sup>



Total Potential Audience(000s)

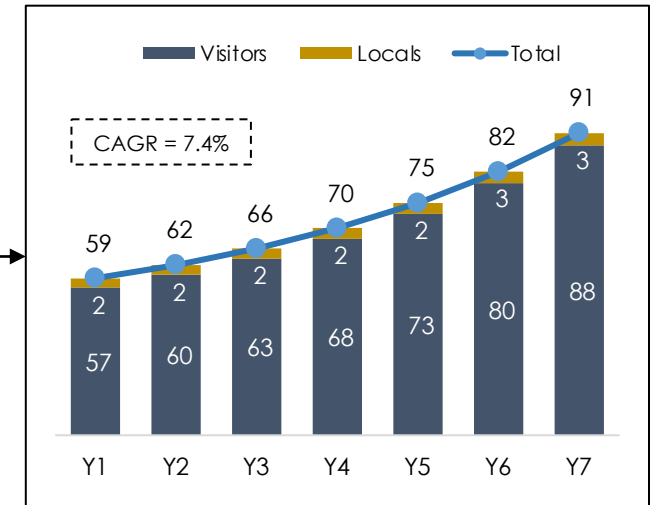


Visitor Conversion Rate (VCR)<sup>3</sup>



## Demand

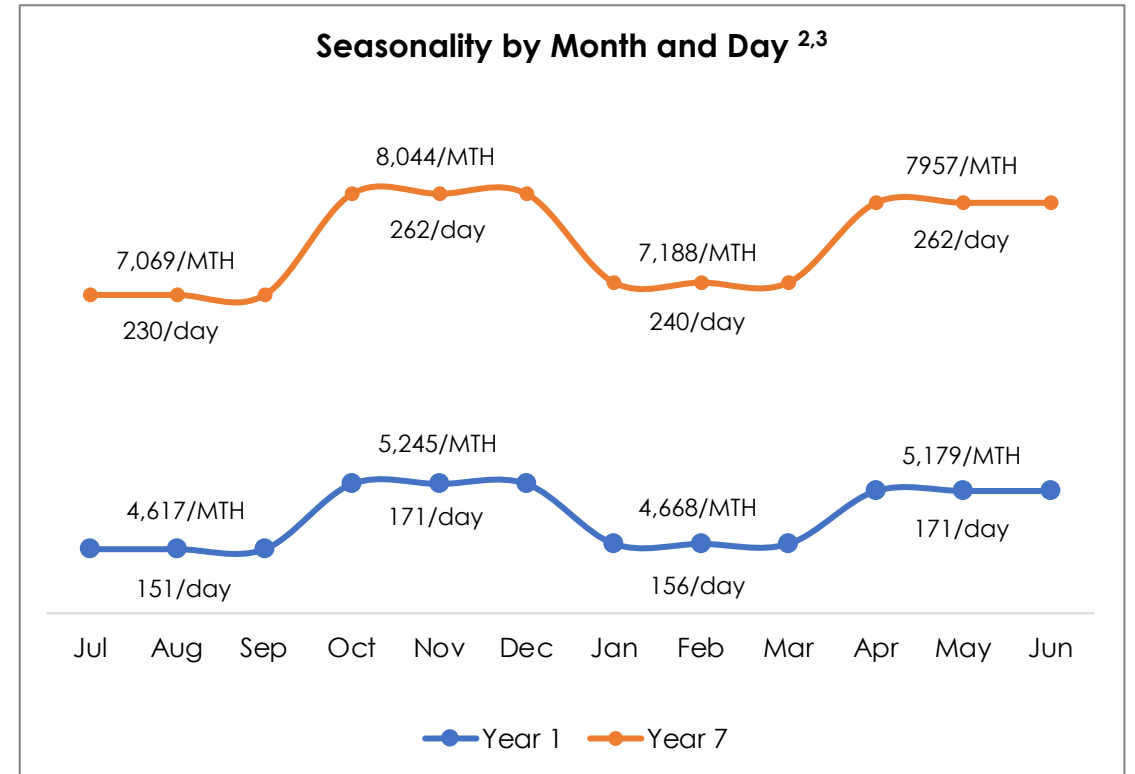
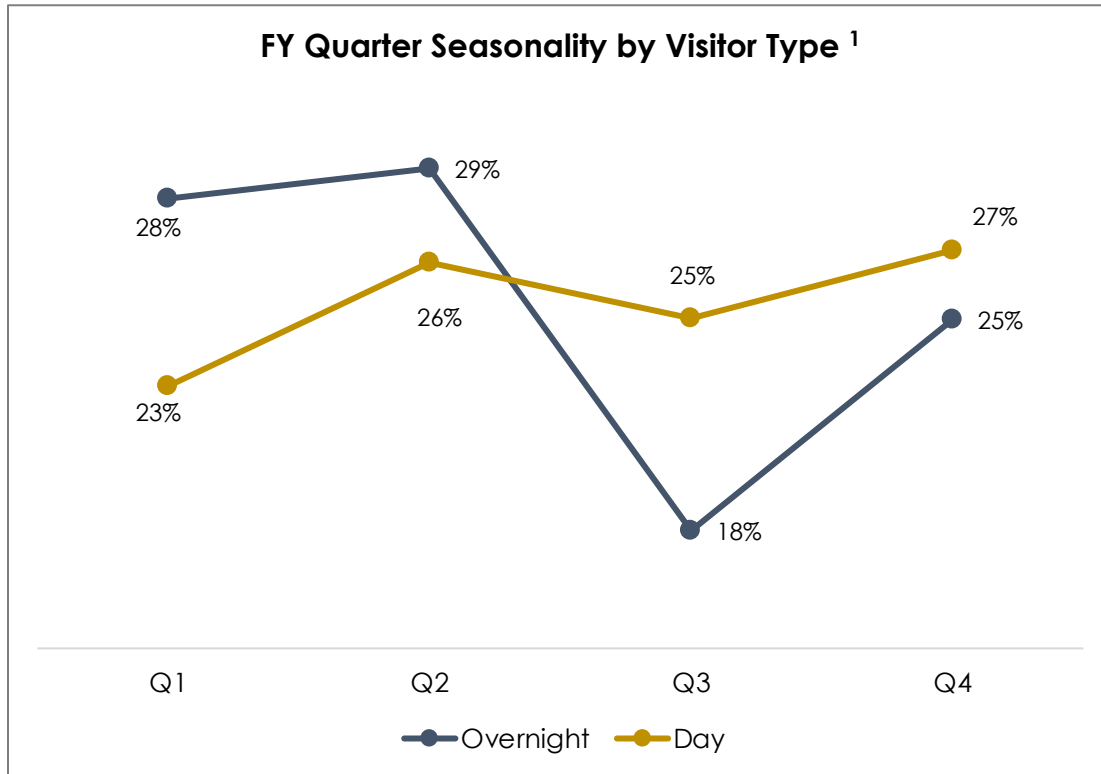
Forecast Visitors to JDC



Sources: 1) Visitors - Shire of Serpentine-Jarrahdale "Jarrahdale Trail Town Business Case" (2021), based on TRA data; Locals - ABS "Population Estimates by LGA and Electoral Division (ASGS2021), 2001 to 2021 - Final". 3) Sandwalk benchmarks (high end).

## Seasonality of Demand

Based on Urbis's estimate of seasonality of domestic & international overnight and domestic day visitors<sup>1</sup>, we have estimated the monthly and daily visitation to the JDC\*. This suggests seasonal variation in visitors to the JDC between 151 to 171 per day in Year 1, and between 230 and 262 in Year 7.



\*Note: For the purposes of this estimate we have included local visitors with domestic day visitors  
 1,2,3: sources are SWP analysis of data from 1) Urbis (2022) "Lot 814 / 815 Millars Road, Jarrahdale Business Case" and 2) "Jarrahdale Trail Town Business Case" (2021), based on TRA data; 3) ABS "Population Estimates by LGA and Electoral Division (ASGS2021), 2001 to 2021 - Final".

# Operating Model - Resourcing and Services

For the JDC we propose services be provided by a combination of Council FTE staff and third-party partners.

## Resourcing

Based on forecast demand and benchmarked resourcing levels from the visitor information service sector, we have made the following assumptions of staff levels in the JDC. Our proposed resourcing allows for scaling staff and numbers up and down in response to low and high season demand.

JDC Resourcing				
Resource	Low Demand		High Demand	
	Mon - Fri	W/E	Mon - Fri	W/E
Management	1	0	1	0
Vis Serv F-T	1	1	1	1
Vis Serv Casuals	0	1	1	2
Partners	2	2	2	2
<b>Total (non-Mgt)</b>	<b>3</b>	<b>4</b>	<b>4</b>	<b>5</b>

## Service Provision

We propose that services be provided by a mix of Council staff and third-party partners.

### Essential Services - Council Staff

- **JDC Manager** - a dedicated management resource will be required to directly manage staff and partners to deliver the customer engagement, retail services other commercial activities that are required.

- **Council Staff** - we propose 1 permanent FTE and 1 casual staff FTE will have primary responsibility for provision of general visitor information services.
- Trained, skilled and knowledgeable , staff will be rostered to service demand across low and high demand periods.

### Complimentary Services - Partners & Content Providers

We recommend that specialist, trail related services, including commercial offerings, be provided through partnerships with:

- University & schools - heritage, environmental science and sustainability, nature-based walks & talks, and understanding, protecting, and preserving the natural environment and its resource.
- Trail clubs and associations - trail craft, bushcraft, local trails knowledge for those who share interest in bushwalking and outdoor adventure
- Historical Society - dedicated to preserving, collecting, researching, and interpreting historical information, items and stories of place.
- Local First Nations community - First nations heritage, narrative, interpretation and tours.
- Association members - trail enthusiasts, hikers, bikers and environmental champions, will offer roving support - welcoming visitors to the site, providing general/trails local knowledge.

## Operating Model - Capability

The JDC model will require a shift in management and service skill to deliver the required quality of customer service and commercial outcomes.

### Expanded Service Delivery

The JDC model will require significant uplift in proactive service delivery from the very small-scale visitor information service currently offered at the Council Community Information Office.

- Upskilling of management and staff, particularly in commercial engagement, customer servicing and retail skills.
- Collation, and continual refresh of information, curated into content for experiences, activities, itineraries, and products.
- Accessibility of knowledge and expertise – relevant, up to date, local knowledge should be available and accessible to all customer service staff.
- A content management system will be needed to hold and present digital data information resources are needed.
- Tech support will be needed plus training for management, staff.
- Informed and accessible staff and are vital to delivering the customer experience visitors are seeking and should be available throughout the JDC.

### Welcome

The service function of Trail Centre staff should be on providing engaging interactions and an authentic “Welcome from a local”. Roving across the various functional areas of the site (outside and inside) they will provide a seamless link across the various services, ensuring that customers are assisted in getting the most out of their visit.

In addition, support from trail clubs and associations will provide important subject matter expertise required for the JDC to provide trail related information.

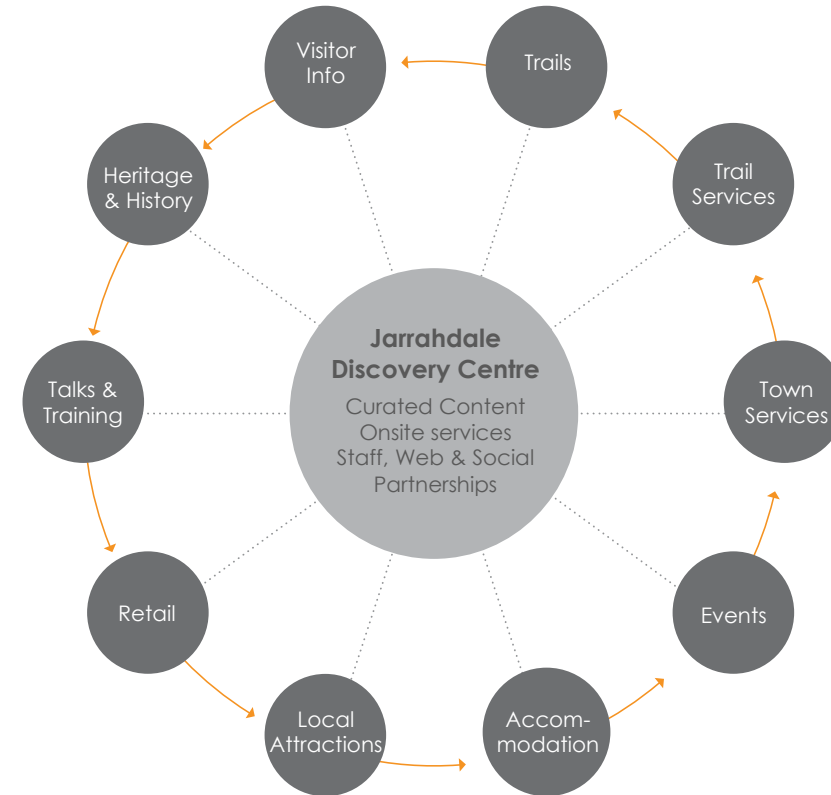
- **Welcoming and orientation** – many visitors will need assistance to orient themselves and start their journey. Visible and accessible staff (on arrival, within the visitor information, trail centre and exhibition spaces) can assist by welcoming visitors, directing them, and providing expert advice.
- **Engagement and conversion** – the customer service focus is to help visitors to find the information they are seeking, learn about the “essential Jarrahdale experiences”, nearby attractions and finding their way around the JDC to the information they are looking for.
- **Transaction** – they will assist visitors to make choices and decide what activities they want to book or purchase. Once the visitor has decided their choice, they can assist with the purchase, either completing it themselves, handing-off to a cashier, or directing the visitor to a self-serve kiosk.
- **Subject Specific Expertise** - members of local bushwalking, mountain bike or equestrian clubs can provide subject specific information, advice and expertise to add value to the customer service provided by the JDC. This will also be a potentially important mechanism to assist Serpentine-Jarrahdale to engage and partner with local trail clubs, associations.

## Operating Model - Commercial Return from Services

While some services will be free of charge (visitor information) others will provide revenue streams. These include convenience F&B, retail, bookings, local activities and experiences. Sustainable commercial return requires linking all services, activities, and commercial offerings and related activities via a 360° visitor engagement framework.

Services	Inclusions	Revenue
Information	<ul style="list-style-type: none"> <li>▪ What's On – what to do during your visit:                             <ul style="list-style-type: none"> <li>○ Trails - bushwalking, trail bikes, horse riding.</li> <li>○ Accommodation, F&amp;B options</li> <li>○ Local attractions, events, activities.</li> <li>○ Events, festivals, local markets.</li> <li>○ Jarrahdale Trail Town services</li> </ul> </li> <li>▪ What's Next – locally, in the region, elsewhere in WA</li> </ul>	MIX
Bookings	<ul style="list-style-type: none"> <li>▪ Bookings for accommodation.</li> <li>▪ Tickets to local attractions, events, activities.</li> </ul>	YES
Retail	<ul style="list-style-type: none"> <li>▪ Trail equipment, gear, tech, supplies - sale and/or hire</li> <li>▪ Refreshments, snacks, drinks to take on the trail</li> <li>▪ Regional produce, wine, spirits, beer &amp; food.</li> <li>▪ Jarrahdale branded merchandise, souvenirs &amp; gifts.</li> <li>▪ Maps, travel supplies</li> </ul>	YES
Activities & Services	<ul style="list-style-type: none"> <li>▪ Activities and Services:                             <ul style="list-style-type: none"> <li>○ Guided walks - nature &amp; heritage</li> <li>○ Training, educational programs</li> <li>○ Equipment repair</li> <li>○ Talks &amp; events - "Meet the Maker, " "How To"</li> <li>○ Cellar Doors; Venue hire - meetings, functions, events</li> </ul> </li> </ul>	MIX
Partners & Content Providers	<ul style="list-style-type: none"> <li>▪ Tourism WA, TICWA</li> <li>▪ Airbnb, hotels, motels</li> <li>▪ Trail Clubs &amp; Associations</li> </ul>	MIX

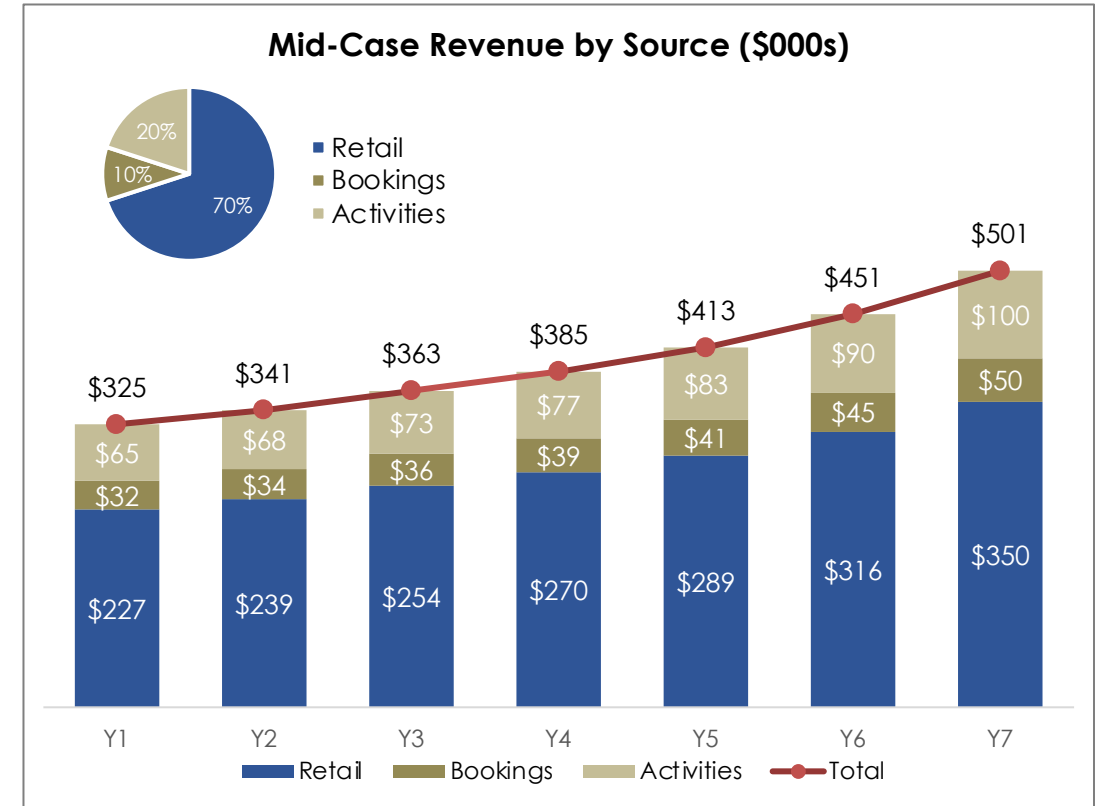
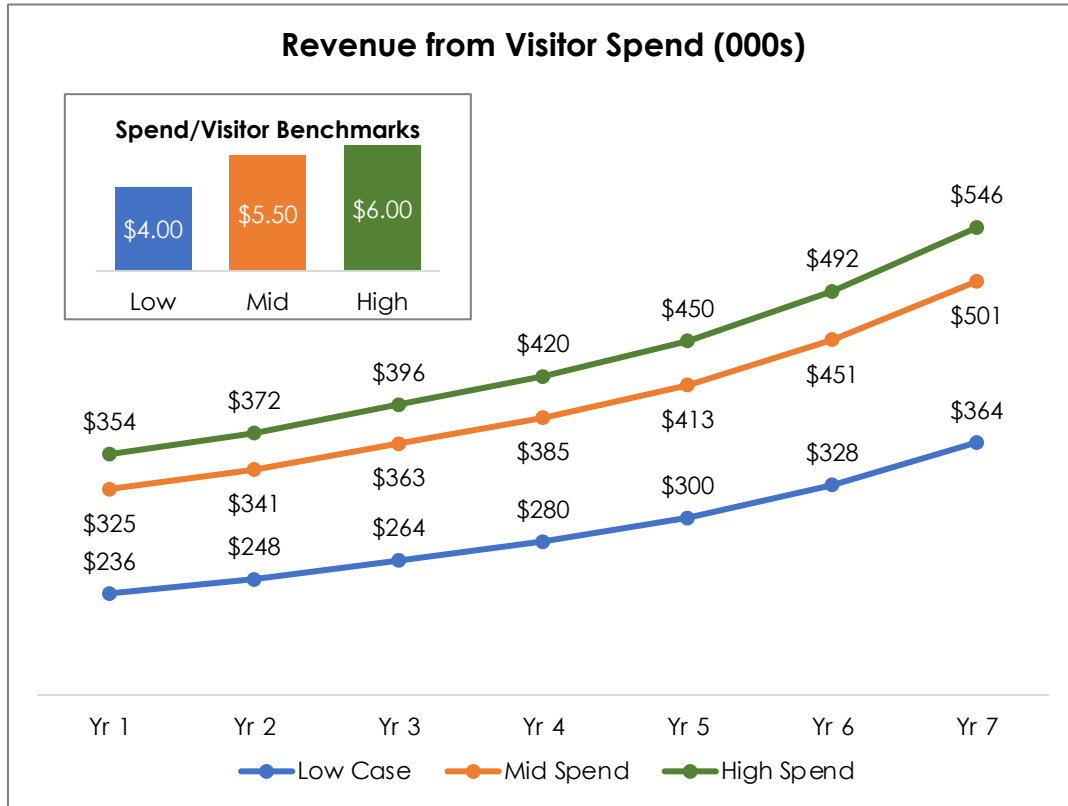
## 360° Visitor Engagement to Unlock Commercial Revenues



Visitor engagement and sustainable commercial revenues are unlocked by linking all services through 360° engagement to cross promote, upsell & bundle the array of available activities and products integrated as a beacon to place.

## Forecast Revenue\*

Our revenue forecast is based on spend/visitor benchmarks from the visitor information sector. This suggests that mid case spend should generate around \$325K in Year 1, up to \$501K in Year 7. The majority of revenue (70%) comes from retail, with activities generating 20% and bookings 10%.



### \*NOTE

- Revenue modelling uses actual spend/visitor benchmarks are set to low (\$4.00), mid (\$5.5.) and high (\$6.00) case scenarios. We believe that average spend in a trail centre setting may be higher given that a visit to a trail centre is more targeted than to a general visitor information centre.
- However, as we do not have specific benchmark data for trail centre spend, we feel that visitor information centre spend is a valid, if conservative, alternative.

## Costs, Profit & Loss

Profit or loss has been forecast for each scenario based on projected annual revenue and applying cost of goods, operating costs, and a full complement of staff. This suggests that all scenarios will operate at a loss, with the mid case improving from -\$101K in Year 1 to -\$36K by Year 7.

### Cost Assumptions

#### 1. Retail Cost of Goods Sold (COGS)

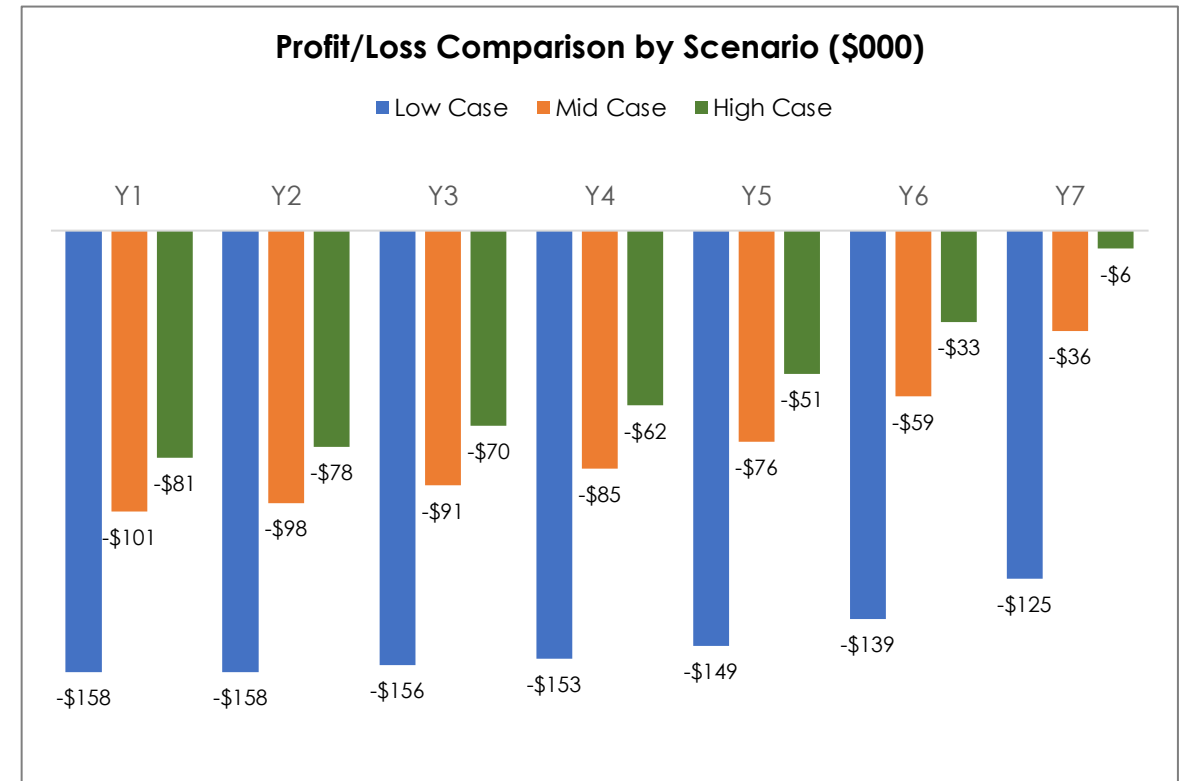
- COGS are based on 50% of likely retail revenue

#### 2. Resourcing Cost

- Staffing assumes resourcing to service demand across a 7am -5pm to 7-day operation.
  - JDC Manager - 1 FTE at cost of \$112.5K, fully loaded
  - Permanent VIC staff (1.0 FTE) at cost of \$65,000
  - Casual VIC staff (1.0 FTE) at \$65,000 plus 15% loading.

#### 3. Opex

- We have assumed the following additional costs deriving from the addition of new services and content delivery :
  - \$20K in Year 1 for content development and delivery.
  - \$10K per annum for content development.
  - \$10K per annum for technology support
  - \$10K per annum Community Support (Activities & Events)
  - \$20K annual operational contingency.
  - An annual CPI increase at 2.5% has been included for all Opex costs.
- Building utilities – are not modelled as operating cost.



## Impact of Staged Implementation

Staging of the project assumes Stage 1 will allow for standalone operation of the Trail Centre in years 1-5, with Stage 2 opening a commercial facility as a straight tenancy in years 6 & 7.

### Staged Approach

Staging of the development has been proposed:

#### Stage 1: Trail Centre

- Trail Centre and Visitor Centre services.
- Potential commercial revenues from retail, bookings (accommodation, local activities) other onsite activations (eg, venue hire).
- Operating costs to deliver

#### Stage 2: Commercial Tenancy

- Leasable commercial space to act as an attraction (eg F&B outlet, micro-brewery or distillery).
- Revenue would be a lease agreement on commercial terms.

### Management Model

The option of the stage 2 commercial tenant taking over management of the trail centre has been proposed. The viability of a tenant managing the trail is currently unknown and will depend on:

- Alignment of tenant's core skill-set and capability with delivery of Trail Centre services.
- The business model and commercial terms of the tenancy.
- The potential for the tenant to capex investment offset against reduced or waived rent for a period of their lease.

### Impact on Financial Forecast

Our assessment of operating model and forecast of revenue and operating costs, assume that:

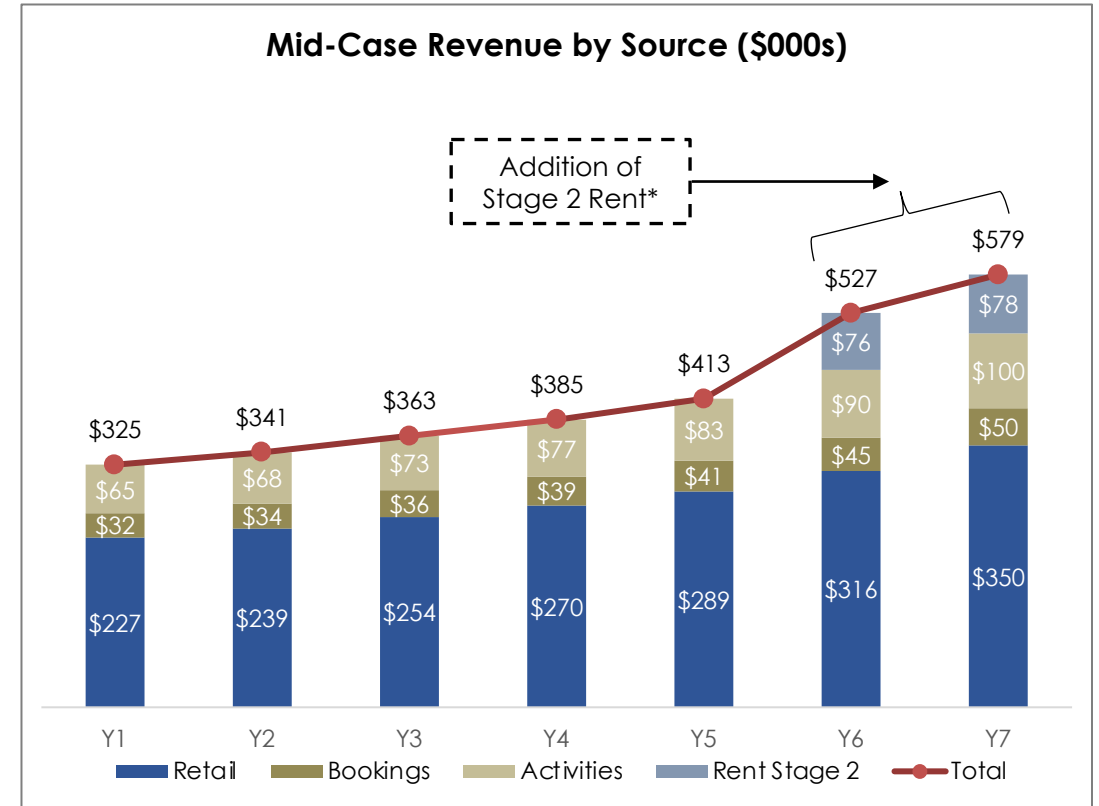
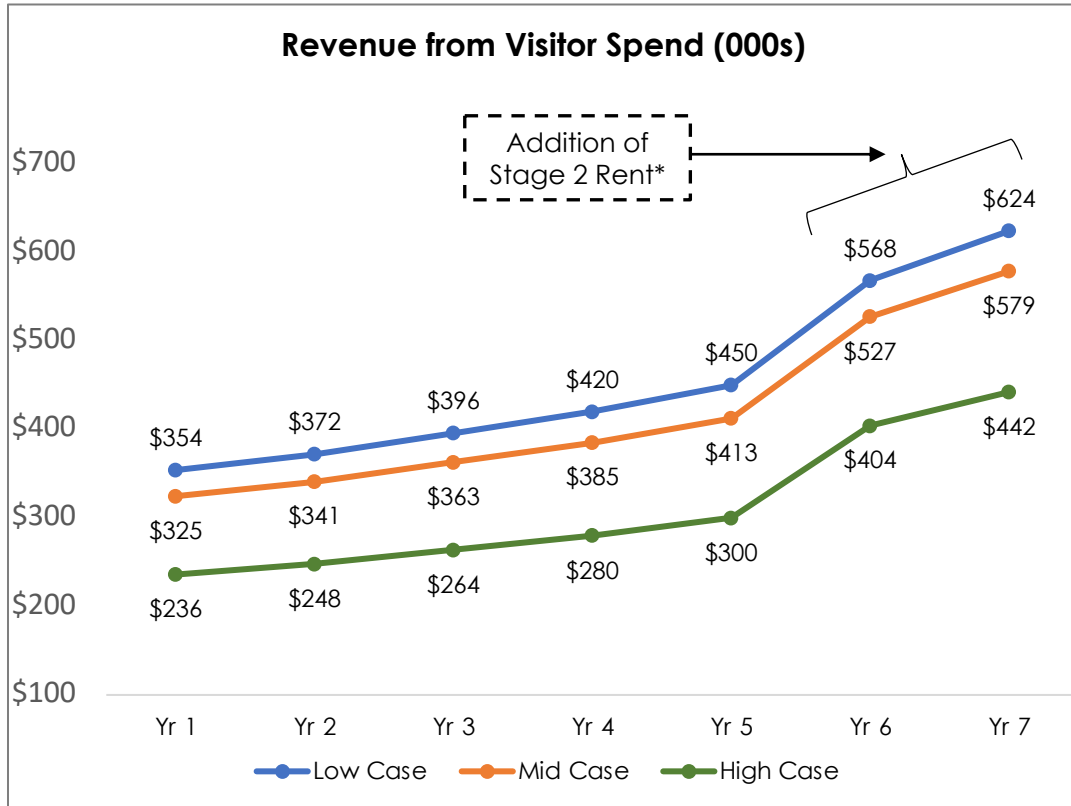
- Stage 1 will be a stand-alone, fully functional facility built in accordance with the design principles and construction standards as set out in S2 Architects design response.
- It will be equipped to deliver the trail and Visitor services, retail, venue hire and other commercial opportunities as set out in this document.
- Stage 2 development of a commercial space would be a self-contained facility, although fully integrated with Stage 1 upon completion.
- On this basis, our forecast is for the operating model, revenue opportunity and operating costs to deliver of Stage 1 only.
- For Stage 2 we have assumed a simple commercial tenancy at market rates\* (\$250/m<sup>2</sup>) for the total commercial footprint of 220m<sup>2</sup> internal space and 80m<sup>2</sup> external terrace.

\*Note: Rental rate proposed is an estimate of mid-range rent for an empty commercial space in Greater Perth. Actual rent achieved will depend on the nature of the tenant's business and negotiated commercial terms.



## Stage 2 Impact - Forecast Revenue

To assess the impact of Stage 2 we have added rental revenue from a commercial tenancy from Year 6 onwards, equating to around \$76K.



**\*NOTE**

- Rent revenue from a commercial tenancy in Stage 2 is calculated assuming a footprint of 305m<sup>2</sup> (220 internal and 80 external) at \$250/m<sup>2</sup>.
- This equates to \$76K in Year 6, growing to \$78 in Year 7 in accordance with CPI of 2.5%.

## Stage 2 Impact - Costs, Profit & Loss

Addition of Stage 2 commercial rent offsets the operating cost of the Trail Centre in years 6 & 7 in the mid and high case scenarios.

### Cost Assumptions

#### 1. Retail Cost of Goods Sold (COGS)

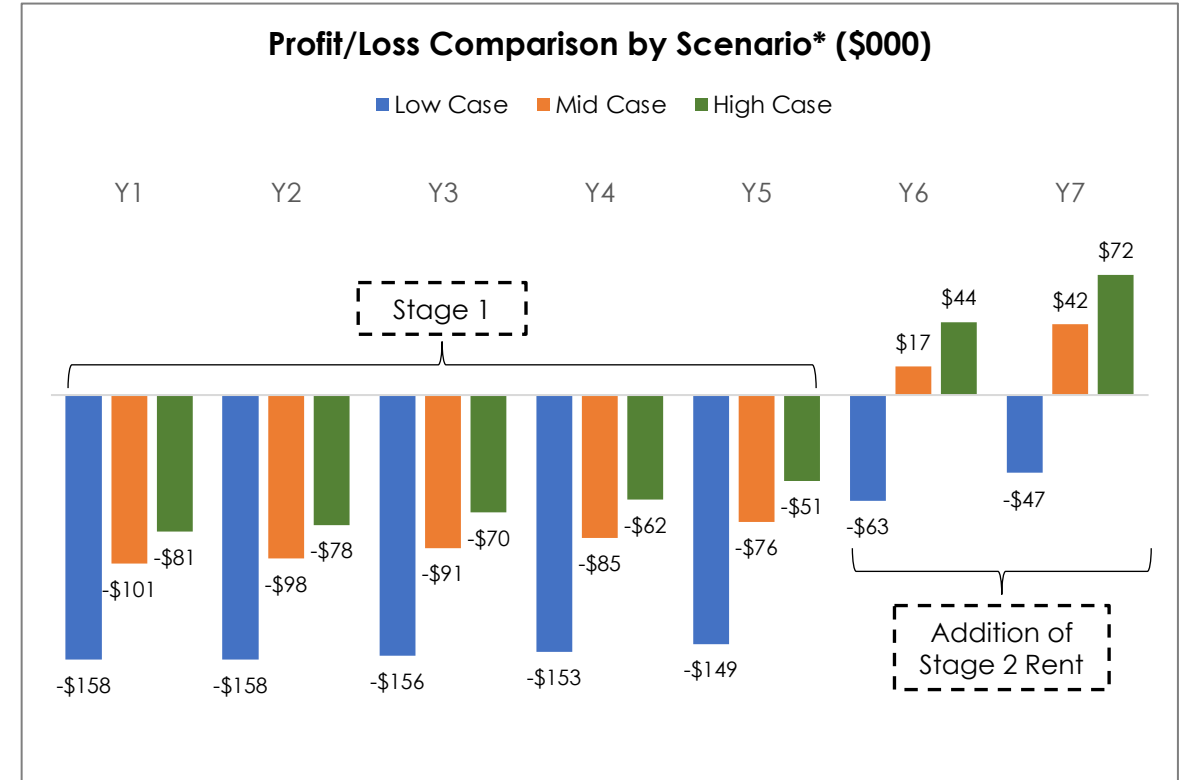
- COGS are based on 50% of likely retail revenue

#### 2. Resourcing Cost

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- This equates to \$76K in Year 6, growing to \$78 in Year 7 in accordance with CPI of 2.5%.

## DISCLAIMER

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