

1.0 EXECUTIVE SUMMARY

A. Introduction

The purpose of this analysis is to assist the City and Borough of Juneau (CBJ) assess the need to improve visitor information services in downtown Juneau, including the possible construction of a new visitor information center. This assessment is prompted by continued growth in Juneau tourism, changes in visitor traffic patterns, and the community's developing tourism policies. Visitor information offered both in advance and while on a trip influences travelers' choices and spending; this study analyzes the needs and opportunities to improve visitor information services *while visitors are in Juneau*.

Phase I of this project:

- Profiles Juneau's visitors and its current visitor information facilities and services;
- Analyzes the need for improved visitor information services in downtown Juneau;
- Identifies options to meet information needs and opportunities through new or reconfigured visitor information facilities; and
- Estimates benefits and costs of facility options.

Phase II of this project (not yet completed) will include:

- Work with CBJ Assembly to identify options to investigate further and a preferred process.
- Recommend preferred option(s) to meet outstanding needs;
- Evaluate potential locations and recommend a site;
- Identify logical tenants or partners; and
- Refine the cost and benefit analysis.

Sheinberg Associates, a Juneau-based community planning firm, was selected to conduct this analysis. Sheinberg's team members are the McDowell Group, Minch Ritter Voelckers Architects, Charles Bettisworth Company, and USKH Consultants.

B. Juneau's Visitors, Related Goals, and Visitor Information Services

Juneau hosted over 700,000 cruise passengers, 300,000 cruise crew, and an estimated 150,000 independent travelers in 2001. To deliver visitor information to these travelers, the Juneau Convention and Visitor Bureau (JCVB) provides five visitor centers – three of which are in downtown Juneau. These visitor information facilities include a small visitor center at the cruise ship terminal (old Alaska ferry dock), a kiosk at Marine Park, a visitor information area inside downtown's Centennial Hall Convention Center, a counter and brochure racks at both the airport and at the Alaska Marine Highway System

(AMHS) ferry terminal. Table 5 (page 4-6) in the body of this report summarizes the services offered.

There is a direct relationship between Juneau's success at providing visitor information to travelers and in accomplishing Juneau's visitor information and tourism goals. These key goals are:

- The CBJ seeks a healthy and vibrant tourism sector generating business opportunities and employment for Juneau residents, protecting Juneau's heritage and cultural values and its natural resources, and making a positive contribution to the community's quality of life. (*Source: CBJ Resolution No. 2170 adopting Tourism Management Policies, August 2002*)
- Juneau's visitor information services goal is to enrich our visitors' experiences by providing accurate and consistent information with the objective of converting prospective visitors and to increase the economic contribution of arriving visitors. (*JCVB Strategic Overview FY 2002*)

The information that visitors receive before and during their trip directly influences their behavior and attitudes – from where they go, the activities they choose and the amount of money they spend, to whether they choose to return to Juneau on another trip.

To analyze information that Juneau provides to travelers, it helps to group the information provided according to *the outcome the information can help achieve*, and to show how those outcomes are linked to Juneau's visitor information and tourism goals. We have identified three broad categories of visitor information based on the outcome it can help Juneau to achieve, as follows:

1. Meet Visitor's Immediate Information Needs;
2. Increases Visitor Satisfaction and Local Spending; and
3. Encourages Repeat Visits to Juneau and the Region.

Table 1 and Table 2 (pages 2-6 and 2-7) in the body of this report show how various types of visitor information fit on this 'spectrum' of Juneau's desired outcomes.

When effective, visitor information services are a tool to grow and manage tourism in a way that makes it a welcome element of Juneau's community and economy.

C. Statement of Needs

Juneau's visitors rate their experience in town very highly. This is due in part to the time, attention, and funding that the CBJ, Juneau Convention and Visitor Bureau (JCVB) and tourism businesses are putting into tourism development, management and marketing, and visitor information services and facilities.

Yet, an analysis of our current practices and facilities reveals significant opportunities to improve visitor information services and facilities in order to do a better job of meeting both visitor's needs and Juneau's visitor information and tourism goals.

To complete this analysis, the team identified current visitor information services, facilities and conditions; summarized the CBJ's desired future goals and conditions; analyzed the differences between current and desired conditions, and identified possible solutions. This work was accomplished by completing the following seven steps:

1. Reviewing existing data and reports on Juneau's tourism markets, visitor industry interests, and visitor services;
2. Reviewing surveys about visitor's information needs;
3. Conducting interviews with approximately 50 stakeholders involved in all aspects of Juneau's visitor industry;
4. Hosting a public meeting (sparsely attended);
5. Distributing a short survey via the internet to obtain information on how residents use visitor information facilities and services;
6. Interviewing visitor center managers in other Alaskan communities and Outside; and
7. Surveying visitor facilities in Alaska to assess operating costs.

This investigation revealed the following needs and opportunities to improve visitor information, services and facilities. The needs and opportunities are presented according to the outcome they would help achieve.

1. Improvements to Meet Visitor's Immediate Needs

A. The majority of cruise passengers do not use visitor information services at present, which is lost potential to convert them to future returning visitors.

For the cruise market, visitor information facilities must be at each dock -- a kiosk or center is needed at the South Franklin dock; the visitor center at the cruise ship terminal is extremely crowded when tour busses and vans are staging in front of it; the Marine Park kiosk is too far from the docks to attract a significant number of cruise visitors.

B. Independent travelers are better served at Centennial Hall than they were at the Davis Log Cabin, but significant gaps exist in visibility of the facility and ease of use. Parking is limited and difficult to find. The recent reorganization of the parking lot has made tour bus and van passenger drop-off and pick-up more difficult. The Centennial Hall building is monolithic and a visual barrier to visitors – this is not a problem for a convention center, but successful visitor centers must be visually obvious and look welcoming.

- C. **The visitor information area and counter at the Juneau International Airport needs better signage to be more visible to arriving passengers, needs more consistent summer staffing, and ideally, should be enlarged.** This is a key location for meeting independent travelers immediate information needs.
- D. **Better signage to alert arriving passengers visitors to the presence and location of the visitor information counter/area at the AMHS ferry terminal is needed.**
- E. **Visitor information signage or a kiosk at Front and Franklin Streets, and directional signage strategically around town** is needed to help direct visitor movement, provide interesting information, and point out attractions.
- F. Improvements to visitor facilities to better meet the cruise visitor's immediate needs are **more public restrooms and public telephones at the downtown docks and in the downtown shopping district.**

2. Improvements to Increase Visitor Satisfaction and Spending

- A. **An analysis of survey results on visitor participation rates for tours and shopping indicates there are significant opportunities to increase visitor spending.**

For air travelers, 30% are not shopping while in Juneau, 58% are not taking a tour, and, 17% are not even spending a night in Juneau (just passing through to another Southeast destination).

Only 17-23% of large cruise ship passengers are visiting downtown's non-tour attractions such as the City Museum, the Russian Church, or the State Museum. Cruise passengers said that once they heard about these attractions, they wished they could have visited them.

About 25% of small cruise ship passengers could not rate Juneau tours, suggesting they did not partake. One-fifth could not rate Juneau shopping. And, just under one-half of small ship passengers said they did not spend money in Juneau on additional tours or shopping.

- B. **JCVB Visitor Center and kiosk volunteers find that after 5:30 pm during the prime tourist season, and anytime during the off-season, there are few attractions, experiences and tours to suggest for visitors.**
- C. **Visitor information and facilities do little to welcome, explain and promote Juneau as Alaska's Capital City.** There is a need to create a

uniform theme and signage to welcome, explain, and promote Juneau as Alaska's Capital City.

- D. Improvements to visitor services that will increase visitor ease and spending include **developing luggage storage downtown, rental car facilities downtown, and increased shuttle services between downtown and the ferry terminal.**

3. Improvements to Encourage Repeat Visits to Juneau and the Region

- A. **Exit surveys confirm most first time visitors have not been exposed to the types of information that could entice them back** – a significant portion of surveyed small and large ship cruise passengers say they “did not experience” or “did not experience enough of” Juneau’s most notable features: Juneau history, mining history, Native culture, nature/wildlife, and glaciers.

For example, two-third of cruise passengers did not receive any, or enough, information about Juneau’s mining history; while 52% did not experience enough, or did not experience at all, Juneau’s Native culture. Exposing cruise passengers to this information about Juneau enriches their trips and entices them to return for more of what they could only get a glimpse of during their short stay.

- B. **On the cruise docks, visitor kiosks and information centers must focus on providing quick information** illustrating what to do today, providing bathrooms, and quick-to-digest displays and posters that provide a glimpse of all Juneau offers for travelers with more time. The cruise ship terminal visitor center renovation will help accomplish this.
- C. **To improve repeat visitation, an investment is needed in high quality interpretive materials at Juneau’s primary visitor center.** This material should engage the visitor with information on Native culture, mining history, aviation and maritime history, wildlife, and natural history – information to show the rich experiences that can be enjoyed on their next trip to Juneau. Similarly, the facility should be multi-agency for the broadest representation.
- D. Visitors indicate they want to experience the smaller towns, scenic byways, wildlife refuges, and wilderness areas. **Visitor facilities should promote Juneau as the gateway for regional visitation to neighboring communities and attractions.** Juneau is ideally situated to capture this opportunity.
- E. **Visitor facilities should provide the staff, information, displays and space necessary to assist with trip planning** and booking (or referrals) to facilitate return visits.

- F. **New facilities will benefit from a stronger relationship with the community**, from ensuring that the facility is used year-round, and offering content of value to local residents as well.

D. Options to Address Needs

Four options to improve visitor information services and facilities, with estimated construction costs ranging from a low of \$50,000 to a high of \$10 million, are identified following. These options address identified needs and opportunities to better meet Juneau's visitor information and tourism goals. Table 10 (pages 6-12, 6-13) in the body of this report summarize each option, the pros and cons, estimated construction costs, potential operating revenue and grants, and likely operating costs.

While four distinct options are presented, they belong on a spectrum of possible improvements. Thus, crafting the package that best meets Juneau's needs at a price Juneau is willing to spend could include combining various features or uses.

Option 1: Use Existing Resources with Minor Visitor Center Upgrades

Option 2: Expansion of Centennial Hall

Option 3: Construct a Moderate-Scale Visitor Center on New (or Renovated) Site

Option 4: Construct a Large Multi-Use Visitor Center on New (or Renovated) Site

Option 1 addresses the most basic visitor information needs such as better signage, a new kiosk, and reconfiguring /minor renovation to Centennial Hall Visitor Center space. Estimated costs range from \$50-300,000. If option 1 includes construction of a new downtown restroom, this would add another \$225,000 to \$0.5 million to building costs.

Potential operating revenues could range \$11,000 to \$22,000 due to more leased space, retail sales and increased advertising presence. (Note that all figures include approximately \$8,600 in current annual revenue.)

Option 1 would satisfy the immediate information needs of cruise ship visitors, and make strides toward satisfying the immediate information needs of independent travelers.

Option 1 also complements the construction of the new cruise ship terminal visitor center/port office that is already under design (\$2 million including related dock upgrades).

Option 2 would double the size of the visitor information space in the Centennial Hall visitor center from 2,250 sf. to 4,000 sf. and create a new visible entrance. Estimated construction cost ranges from \$200,000-\$0.5 million. This option offers the ability to increase potential operating revenues to a range between \$18,000 and \$28,000. This

option would increase the functionality of our current visitor center for destination visitors and make it more visible to all.

Option 3 would create a moderately-sized, 5,000-15,000 sf., visitor center in downtown Juneau (on a new or renovated site). For comparison, the 1st floor of the National Guard Armory is about 8,600 sf. The facility would both increase visitation, use, and functionality of the center for all visitors, but especially independent travelers. Option 3 is estimated to cost \$2-5 million to build, and could generate \$32-40,000 in annual revenues.

A key issue raised by any new facility involves site and location. At this point, general discussions have focused on sites between the Subport area and the old AJ warehouse on South Franklin Street, with the following possible sites: old AJ warehouse, old police station, current City Hall, Elks Hall, lot next to parking garage, Capital Motors site, across the street from Centennial Hall at the Subport area, and space adjacent to Centennial Hall at the Armory.

Option 4 would build a large, sophisticated facility to serve all visitor needs and provide complete visitor information services. It would be a new or renovated facility of 20-30,000 sf., probably collocated with the City Museum (or a similar use). For comparison, the Subport Building is 63,000 sf. and the City Museum's full facility is 6,000 sf. with about one-third used for displays.

This facility would especially address visitor and resident's interests in a more in-depth understanding of our unique locale, history and culture. The exhibits, information, and trip planning services would convince visitors to take the time for more varied itineraries and heighten the appeal of a return visit to Juneau and the region.

Multiple tenants such as the Forest Service, Alaska Marine Highways, State Parks, and the National Park Service, in addition to CBJ functions, would provide information, services and amenities that would enhance resident quality of life and accomplish the CBJ Comprehensive Plan's call for multi-use and function visitor facilities. It is estimated to cost \$6-10 million to build and would likely be able to generate \$87-110,000 annually in operating revenue.

E. Phase I Recommendation

The information needs and potential advantages to Juneau identified in Phase I are sufficiently clear to recommend proceeding through Phase II. In Phase II the consultant team will work further with the Assembly to identify a preferred option(s); evaluate potential locations; recommend a suitable site; identify logical tenants or partners; and refine the cost and benefit analysis for the preferred option.

Proceed with Phase II.