

Juneau Tourism Management Plan

April, 2002

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We want to commend city staff - who were as determined as we are to have this planning project produce not a document – but the basis of a solution to the issues facing Juneau’s tourism and, just as importantly, the path toward a tourism future that Juneau can embrace and build together.

Juneau’s business community and tourism industry have partnered fully with this planning process. We were tested, as we should have been, on both our tourism knowledge and whether we came with an agenda. The local tourism industry helped this team understand issues in both discussion and by taking us flightseeing, whale watching, glacier cruising, etc. The insights from leaders and from experiences helped very much in this planning process.

We want to thank the cruise industry for providing information when it was needed, and for responding positively to Juneau’s request to reframe the relationship between this community and your industry.

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The Forest Service has been most cooperative as we have asked challenging questions about impacts, permits, and resource integrity. We appreciate the help the agency has given this project.

In particular, we want to thank the Assembly. We have had extremely open and frank conversations with most of the Assembly and found Juneau’s leaders, whatever their leaning, to be committed to a future that is good for both residents and businesses. Assembly members have listened hard to both our technical findings and our community assessments – and have challenged us with insightful questions.

Along the way, our team has spent time in many Juneau living rooms. We’ve shared meals and coffee with many of you. We’ve met into the night and over the phone. We’ve tasted home-smoked salmon and home made bread. And in the process we’ve developed a real fondness and respect for those of you that call Juneau home and who have shared so openly with us.

On behalf of this team, thank you.

Bob Harvey, Team Leader

Egret Communications

Executive Summary

The Juneau Tourism Plan development process was undertaken by Egret Communications and ARA Consulting in April 2001, under contract with the City and Borough of Juneau, Alaska. This planning process was initiated in response to community concerns about rapid cruise tourism growth, but has focused on managing the success and impacts of both cruise tourism and destination travel.

The project, from the beginning, has employed sustainable development philosophy and criteria to the development of a plan that is designed to work for both community and tourism industry. This plan, from inception, has focused on reducing impacts, creating a more supportive tourism business environment, improving product quality and visitor experience, and developing a partnership between residents and local businesses to manage for success.

The planning process has actively sought input from both the community and the tourism industry. Public processes, including web polling, have been aimed at seeing past the ongoing public discussion and taking the pulse of the broader community. Local input has been balanced with technical expertise brought to this project by the team, and by comparing tourism performance and trends in similar situations around the world. The changing environment for tourism, resulting from recent terrorism events, has been taken into account in both planning and forecasting.

The following sections capture an abbreviated look at key parts of Juneau's new tourism management plan.

Juneau's Intentions in Tourism:

Juneau intends to succeed at both cruise tourism and destination travel – with success being defined on Juneau's terms. That success entails maximizing the benefits of tourism in Juneau, while minimizing the costs and impacts. Juneau looks to tourism expecting social, economic, and environmental benefits. Juneau seeks a more positive image among its neighbors in Alaska, and with its visitors and travel industry partners. Juneau intends tourism to help create a more diverse economic base. To that end, Juneau will work to create a positive atmosphere for business investment and operations, especially those businesses that are locally owned and operated. Juneau wants, through tourism, to bolster its commitment to its heritage and cultural values. Juneau intends to be a high quality destination, providing rich and positive experiences for its visitors. It intends to make those visitors feel warmly welcomed.

Vision:

“A healthy and vibrant tourism sector generating business opportunities and employment for Juneau citizens, protecting Juneau’s heritage and cultural values¹ and its natural resources, and making a positive contribution to the community’s quality of life.”

Guiding Principles

This plan is based on:

- A partnership between the community of Juneau, its tourism industry, and the cruise tourism industry
- Tourism management that is sustainable economically, socially, and environmentally

Strategic Positioning

- Juneau intends to succeed at both cruise tourism and destination travel.
- Juneau will work proactively to grow the destination travel component of the local economy, setting out to become a premier destination, attract high value customers, and focus on guided experiences.
- Juneau will strengthen and maintain its strong position in the cruise tourism marketplace, including small ship cruising, building on the mix of experiences now offered and improving the downtown business experience.
- Juneau will position itself as a small meetings and conference host serving regional and niche markets.

Modernizing Juneau’s Tourism Management

- Juneau will take a more proactive approach to tourism, guiding the future with a plan and developing an organization to foster the evolution of tourism in Juneau.
- Roles for the CBJ and JCVB will undergo some modification to better enable management of tourism resources, management of impacts, and performance-based marketing.

¹ Note from the planning team:

A place (a community, a region, a nation) owes its character to the people, the way of making a living, the geography and climate, and the history that has brought it to the present. Each area has practices, events, cultural ways that are uniquely important to it that have been shaped in the process of weaving together time, culture, geography, and lifestyle. Tourism can be managed to reinforce those values – or, as in such places as Disneyland or Las Vegas, tourism can proceed on its own course, developing in such a way that ignores (and sometimes even overwhelms or compromises) the culture of the region and the relationship between its people, their history, and the natural world.

Additionally, tourism research indicates that visitors are, increasingly, seeking legitimate cultural and heritage experiences and that they value knowing that the destination they visit is actively working to protect those values.

“Protecting, enhancing, preserving, and/or building on cultural and heritage values” is standard tourism planning terminology, recognized and used around the world. Peoples from all corners of the planet have come to understand these terms and hold this concept as an important consideration in managing and developing tourism.

The Juneau Tourism Partnership (JTP)

The JTP will become the venue for collaborative discussion and cooperative action among the many stakeholders in Juneau's tourism picture. The JTP will guide the implementation of the plan, and work with all sectors to coordinate and facilitate cooperative solutions to issues and responses to opportunities. The JTP will pull representatives of all key stakeholders groups into the discussion through the extensive use of working groups and committees. The JTP will encourage community-wide input on tourism topics that have social implications and will work to achieve consensus when community/business issues need to be addressed. Solutions that require public sector action will be presented by the JTP to the Assembly.

- Will serve as the coordinating organization for tourism collaboration, cooperation, and discussion in Juneau
- Non-profit organization built with a balance of community tourism business leaders and community members
- Staffed with an executive director and support staff
- Will serve as point of contact for queries, issues, etc. in Juneau
- Will oversee the implementation of the Juneau Tourism Plan
- Will monitor and manage impacts arising from tourism
- Will guide tourism development to enhance the community's quality of life
- Will provide a venue for collaborative and cooperative planning
- Will provide guidance and input to marketing and public relations

JTP Roles and Functions

- Lead tourism product development as guided by the Juneau Tourism Plan
- Centralize monitoring and performance information
- Lead the discussion about impacts
- Advise the Assembly on actions that will improve tourism and tourism's performance in relationship to impacts and benefits for Juneau
- Facilitate the fall tourism forum – a yearly discussion in Juneau that reviews performance, analyzes impacts and community relationships, and plans for the future
- Recommend to the Assembly ways to update and evolve the Juneau Tourism Plan
- Sponsor training to upgrade current destination tourism products and facilitate development of products that attract destination travelers
- Collaborate with JCVB to provide guidance and input to Juneau's destination marketing and convention marketing, and collaborate with cruise industry on marketing

Managing impacts

- The JTP will hold a major annual tourism forum to facilitate community-wide tourism discussion on impacts, benefits, performance
- The JTP will work with the industry to assist with Best Management Practices and field community response to operations issues
- The CBJ and JTP will work with operators, residents, and community segments to implement a phased development of alternate heliports for flightseeing
- The JTP will lead collaborative discussions regarding float plane noise, with a solution targeted for presentation at the 2002 fall tourism forum.

- Downtown congestion will be improved by upgrading infrastructure and operations related to loading passengers on vehicles, by considering a park and ride approach to augment downtown parking, by addressing delivery timetables, by considering relocation of facilities that generate truck traffic through downtown, and by improving pedestrian crossings
- The JTP will monitor congestion issues outside the downtown area and work with operators to alleviate problems
- The JTP will host ongoing monitoring and discussion of congestion issues, will work with the CBJ, operators, and the community to identify and resolve issues proactively
- The JTP will review the various tourism related air and water quality monitoring programs by state and federal agencies, channel reports to the agencies, keep the community informed, host an annual discussion on the issues, and work proactively with all parties to accomplish needed improvements
- The Trails Working Group will continue to work on the commercial use of trails, its work fostered by the JTP
- The JTP will work with resource managers and the tourism industry to proactively encourage and report on monitoring programs and to facilitate changes needed to safeguard resources and species

Product Development

Product development will be led by the JTP and will focus on two key themes:

- Facilitating the product development and upgrading process to enable significant growth in the destination tourism sector
- Substantially enhancing the attractiveness of Juneau as a destination community

Hence, product development includes:

- The JTP will lead the process of developing standards for accommodations, guides and interpreters, attractions, restaurants, and the service sectors
- The JTP will sponsor training initiatives focusing on guide training and certification, tour operators, accommodation sector, and the restaurant sector
- The JTP will lead Juneau's effort to attract and promote investment in destination lodging facilities and upgrades to current operations and facilities
- The CBJ will amend the Comprehensive Plan to include provisions for a comprehensive waterfront plan, to reflect Juneau's tourism management objectives in various non-residential parts of the borough, and to support the siting of small lodging operations
- CBJ will undertake waterfront revitalization, in a manner that serves residents and visitors
- DBA and JTP will expand Juneau's events program for downtown, including events that draw locals into downtown, events that share downtown experiences with neighboring communities, and events that augment Juneau's tourism image or marketing efforts
- JTP and CBJ will explore a combination visitor center and performing arts center close to cruise ship docking, using this facility to enrich visitor experiences, court return visits, and refocus the community on downtown activities
- JTP will explore development of an outdoor (potentially including an indoor component) float plane museum that celebrates the importance of float planes in the development of Southeast Alaska and defines Juneau as the place to come learn about this exciting heritage
- As guided by this plan, Juneau will share its heritage and culture appropriately with visitors, as represented by the Alaska Capitol and Governor's Mansion, Tlingit and Haida Culture, gold mining history, and state and local museums

- As guided by this plan, Juneau will strengthen its position as the premier place in Southeast Alaska to access exciting natural resources, especially in a guided fashion, and will develop new appropriate ways to share exciting and enriching natural resource experiences with visitors. In particular, Juneau will focus on evolving more natural resource experiences for multi-day destination visitors who are targeted for their interest in and abilities to participate in outdoor experiences
- As guided by this plan, Juneau will continue to develop and improve its sport fishing product and work hard to strengthen its image in the marketplace

Marketing

- The JCVB will continue its responsibility for marketing, becoming more targeted in its marketing efforts, developing a marketing advisory committee, and budgeting a higher proportion of its budget for marketing
- The JTP will collaborate with JCVB on marketing and will support the effort by contracting the development of a guiding marketing plan
- Marketing performance will be tracked and analyzed by the JCVB, with regular reporting to the Assembly, the JTP, and the Parks and Recreation Department

Monitoring Plan Performance and Impacts

- Safety valve mechanisms are established in the plan; these are actions to go into effect if growth or impact parameters are exceeded, to protect community and business interests if growth or impacts approach or pass acceptable levels
- Separate safety valve mechanisms are established for cruise tourism and destination travel, and others can be developed
- Indicators are established (for both cruise tourism and destination travel) and a process is prescribed to activate triggering mechanisms
- The JTP is required, in the plan, to review indicators during each fall tourism forum, and to take community and industry input into that process
- Should the JTP activate a triggering mechanism, it is directed to work with the CBJ, the community, resource managers, and the industry to initiate safety valve mechanisms
- The JTP is directed to be proactive in updating indicators and mechanisms and to work with industry, the CBJ, resource managers, and the community to manage capacity and impact issues before they reach indicator levels

Plan Implementation

- Enabling Steps
 - Putting the enabling policy framework in place
 - Providing a budgetary framework for the JTP and priority projects
 - Establishing institutional framework for tourism management
 - Create the Juneau Tourism Partnership
 - Set up destination marketing structure
 - Set up performance monitoring system
 - Set up impact management structure
- Implementing the Plan
 - Priority Development Projects
 - Waterfront Plan
 - Events Development
 - Heritage and Cultural Interpretation
 - Destination Products
 - Priority Product Development Programs
 - Tourism Training
 - Investment Promotion
 - Marketing Program
 - Impact Management
 - Flightseeing
 - Congestion
 - Air and Water Quality
 - Resource Health
 - Fall Tourism Forum
 - Plan renewal and performance

1. Situation Analysis

1.1 Physical Setting

Juneau sits at the hub of Southeast Alaska, in a zone of extreme coastal topography typified by fjords, mountains, glaciers, lakes and streams, waterfalls, vast forests, and abundant wildlife. Juneau's northern location, the nature of its terrain, and its proximity to the western edge of the Pacific Ocean have produced a wet climate where cold is modified by the nearby waters. Abundant rainfall at sea level and snows in the mountains have produced a lush terrestrial environment and have spawned vast ice fields. The Borough of Juneau is, in fact, approximately one third water, one third ice covered, and one third challenging coastal and mountain terrain. The majority of Juneau's 3,000 square miles are managed by the US Forest Service and a relatively small area is left for private development.

1.2 People, Culture, and Heritage

The remote nature of Juneau, and the fact that access is limited to air and water arrivals, have resulted in a current small regional population of about 30,000 residents. Before Western colonization, the region was populated with Tlingit and Haida peoples, who developed a rich culture and resource related lifestyle. Russians colonized the region initially. The region eventually became a United States territory and then state. Current regional culture reflects the many peoples that have occupied this landscape.

Juneau has a special relationship with gold and the heritage of the gold rush period. Mining was the major driver in development of the City of Juneau and Juneau continues to have influence from its history with mining.

Timber harvest and fishing, two important industries to Southeast Alaska, have left their mark on Juneau, the way local people relate to natural resources, and the expectations of industry impacts on natural resources.

Float planes, boats, and ferries are as much a part of Juneau's heritage as horses, tractors, and pickup trucks are to the American west. Transportation in the challenging Southeast Alaska region has always been a challenge, dictating a dependency between people and these exciting modes of travel.

Finally, with statehood, came the influence of hosting Alaska's State Capital. Juneau, unlike other regional communities has enjoyed the constant influx of people and ideas from outside. The capital has given Juneau an energy and has mixed a sector of public employees in with Juneau's traditional mining, timber, and fishing heritage. The differences in outlook generate some misunderstanding and community discourse.

1.3 Tourism Resources

Juneau is rich in natural and cultural resources for tourism. The 1,500 square mile Juneau Icefield is the primary tourism attraction in the Juneau area. The most popular single attraction is the 100 foot tall, 1.5 mile wide, 12 mile long Mendenhall Glacier, located 13 miles from downtown Juneau in the scenic Mendenhall Valley. A walk-up visitor's center is operated by the Forest Service at the foot of the Mendenhall Glacier, and can be reached by ground tour. Flightseeing tours and helicopter-assisted walking and hiking experiences on the glacier are available. Day boat tours of the twin Sawyer Glaciers, located southeast of Juneau in Tracy Arm, are also offered. Daily tours also serve Glacier Bay National Park, a spectacular wilderness reserve containing tidewater glaciers.

Juneau's many other natural attractions offer visitors a wide array of activities and experiences. Natural attractions include the waters of the Inside Passage and the many lakes and rivers in the area, and an abundance of wildlife, including Orca and humpback whales, brown and black bears, bald eagles, porpoises, sea lions, harbor seals, mountain goats and Sitka black tailed deer. These many assets can draw visitors to the area to engage in activities, such as kayaking, dogsledding, rafting, biking, boating, hiking, glacier hiking, bear viewing, whale watching, nature observation, and wildlife photography. The Borough of Juneau boasts over 100 miles of trails of various difficulties.

Juneau is also blessed with the Eaglecrest alpine and Nordic ski area. Winter enthusiasts enjoy snowboarding and downhill, cross-country and heli-skiing.

Fishing is also a popular pursuit in the Juneau area. Salt water, fresh water and fly fishing experiences are all available. Sport species found in the area include five species of salmon, Pacific halibut, Dolly Varden, cutthroat and steelhead trout.

Another tourism draw is the area's rich Native American historic and contemporary culture. The Tlingit tribes offer visitors the opportunity to meet community members and participate in a wide variety of Native American tourism experiences such as music and theatrical presentations, eco-cultural tours and purchasing arts and crafts.

Built attractions in the area tend to focus on or include natural and/or cultural themes. They include the Alaska Raptor Center, the Alaska State Museum, the Gastineau Salmon Hatchery, the Last Chance Mining Museum, and the Mount Roberts Tramway.

1.4 Infrastructure

The tourism infrastructure in Juneau and surrounding areas becomes an important part of the experience here. Juneau was not built for tourism. The downtown and waterfront area have limited capacity for hosting masses of cruise visitors, but the road systems are well constructed and managed and visitors leaving the downtown area in tour transportation rapidly disburse to various centers of activity. Juneau has a good system of public bus transportation and cab service is readily available.

Juneau enjoys great air service, as the hub of Alaska Airlines in Southeast Alaska. Several commuter and charter airlines fly out of Juneau, making it the hub for travel into communities and remote regions of Southeast Alaska and nearby parts of Canada. Similarly, it is well connected on the Alaska Marine Highway (ferry) service. The airport is well connected to the rest of Juneau with bus, cab, and rental car service. The ferry terminal has less than optimum connections to enable arriving visitors without vehicles to move into areas with good public transportation service.

Juneau has a network of trails leading from the road system into backcountry. The 100 miles of trails are well maintained and utilized by residents. The community has devised a system for managing commercial and non-commercial trail use that recognizes tourism opportunities and residents' needs.

The CBJ owns and operates a small, resident oriented ski area - Eaglecrest - offering a surprising level of quality and diversity. While this facility primarily serves local residents, it carries capacity and quality that are consistent with serving winter visitors.

Juneau has a great fleet of boat-based tourism offerings, including sport fishing, wildlife watching, and sightseeing tours. Size ranges from small sport fishing vessels to larger vessels for day tours to Tracy Arm and Glacier Bay.

Similarly, Juneau is home to a wide diversity of helicopter and float plane tourism infrastructure, enabling access to fishing lodges, glacier tops, remote bear watching, and flightseeing.

Juneau has a fine base of health and safety services. Medical service is readily available and the community has adequate ambulance service. The CBJ maintains quality police and firefighting services.

1.5 Tourism Development

Tour Operators

There is a wide array of tour operations in the Juneau area, including land and water-based nature, culture and outdoor adventure tours as well as boat and fishing charters. Listed in the Juneau Alaska 2001 Travel Planner, they demonstrate an ecotourism/adventure tourism market emphasis, most of which focuses on the area's natural and cultural assets.

Special Events

Juneau's special events calendar offers a variety of events throughout the year. Key annual events include Gold Rush Days, the Alaska Folk Festival, the bi-annual Native Cultural Conference, and the 56th Golden North Salmon Derby. The community's large arts and entertainment community is also very active and offers regular events, such as Friday concerts in the park, music productions by the Juneau Lyric Opera and Juneau Symphony, new exhibits at the Alaska State Museum, and new productions from Juneau's Perseverance Theater.

Visitor Accommodation & Convention Facilities

There are approximately 78 accommodation establishments in the Juneau area and the nearby communities of Angoon, Douglas, Elfin Cove, Funter Bay, Gustavus, Hoonah, Pelican and Yakutat.² Collectively, the establishments comprise about 1,300 guest rooms. Of these, 48 facilities fit generally into the B&Bs and Inns accommodation type category, 14 into the Hotels and Motels category, and 16 into the Lodges and Resorts category. Juneau itself has two major hotel centers: downtown and at the Juneau Airport in the Mendenhall Valley.

Accommodation Type	No. of Operations	No. of Rooms
B&Bs	48	197
Hotels and Motels	14	918
Lodges and Resorts	16	197
Total	78	1,312

Camping/RV services are available at the Spruce Meadow RV Park and at facilities operated by the Forest Service.

Juneau's main convention facility is the Centennial Hall Convention Center which can accommodate groups of up to 700. In addition, there are many facilities that can accommodate smaller convention groups and meetings.

Other Visitor Services

There is a range of food and beverage services in Juneau, from takeouts and coffee shops to gourmet restaurants. Though many food establishments specialize in preparing local delicacies such as king crab, halibut and salmon, a variety of exotic and ethnic cuisine is also available.

Juneau offers a large number of retail establishments, including fine art and jewelry shops and many gift shops that sell local arts, crafts and souvenirs. As a capital city, government center and business and trade center, Juneau also has a full range of professional services.

1.6 Tourism in Juneau

Several studies conducted over the last five years provide insight into the economic impact of tourism in Juneau:

- A 1996 study on the impact of the tourism industry in Juneau estimated that in 1994 visitors spent \$97 million while in Juneau, including \$40 million spent by cruise passengers and crew, \$50 million spent by independent visitors and

² Based on accommodation listings in the Juneau Alaska 2001 Travel Planner.

\$6 million spent by convention visitors. Including indirect and induced spending, visitors accounted for \$130 million in sales in Juneau in 1994.³

- In 1998, a study was conducted on the effects of the cruise industry in Southeast Alaska on local government revenue and expenditures. A follow-up study in 2000 detailed the economic impacts of the cruise industry in Southeast Alaska. The 2000 study reported that approximately \$181 million was spent in Southeast Alaska in 1999 by cruise lines, cruise ship passengers and crew. Juneau garnered the largest share, capturing nearly half (\$90 million) of the spending, including \$75 million spent by cruise ship passengers, \$11 million in direct cruise line spending (e.g., for maritime services, port/dockage fees, federal and state fees, local goods) and \$5 million by cruise ship crew.

Sales tax revenues accruing to Juneau resulting from cruise-related spending were estimated at \$2.8 million in 1999. The industry also generated an estimated 750 jobs and \$15.2 million in payroll in Juneau. Cruise-related employment accounted for 10% of Juneau's basic industry sector, defined as industries that produce goods and services that are consumed by non-residents of the area and attract new money into the local economy.⁴

1.6.1 Visitor Volume

Non-resident Visitors

In 1999, total cruise and other non-resident visitor arrivals in Juneau totaled about 700,000. This represents an increase of 4.1% over 1998 and an average annual increase of 9.4% between 1993 and 1999. The cruise ship industry accounts for about 85% of these arrivals as shown in the table below. Non-cruise arrivals are estimated at about 157,200. A definitive profile of these arrivals is not available. Information has been used from various sources to derive breakdowns for non-cruise arrivals in terms of trip purpose and origin as indicated in the table below.

Juneau Tourist Arrivals (estimated, 1999)	
Tourist Type	
Non-Resident:	
Cruise	595,500
Other Non-Resident	104,500
Total Non-Resident	699,900
Resident:	
Resident Arrivals*	52,700

³ McDowell Group, March 1996, Juneau's Visitor Industry: An Economic Impact Study.

⁴ McDowell Group, October 2000, The Economic Impacts of the Cruise Industry in Southeast Alaska.

Total Arrivals	751,600
Trip Purpose	
Total Non-Cruise Arrivals	157,200
Business (40%)**	62,880
Vacation (40%)	62,880
Other (20%)***	31,440

* Resident (Alaska) visitors or regional travelers were estimated to be about 7% of total visitors by Juneau Convention and Visitors Bureau representatives.

** 63% of business travelers were on a combination business and pleasure trip.

*** Includes local residents, other personnel, government/convention/meeting, visiting friends and relatives, group tour.

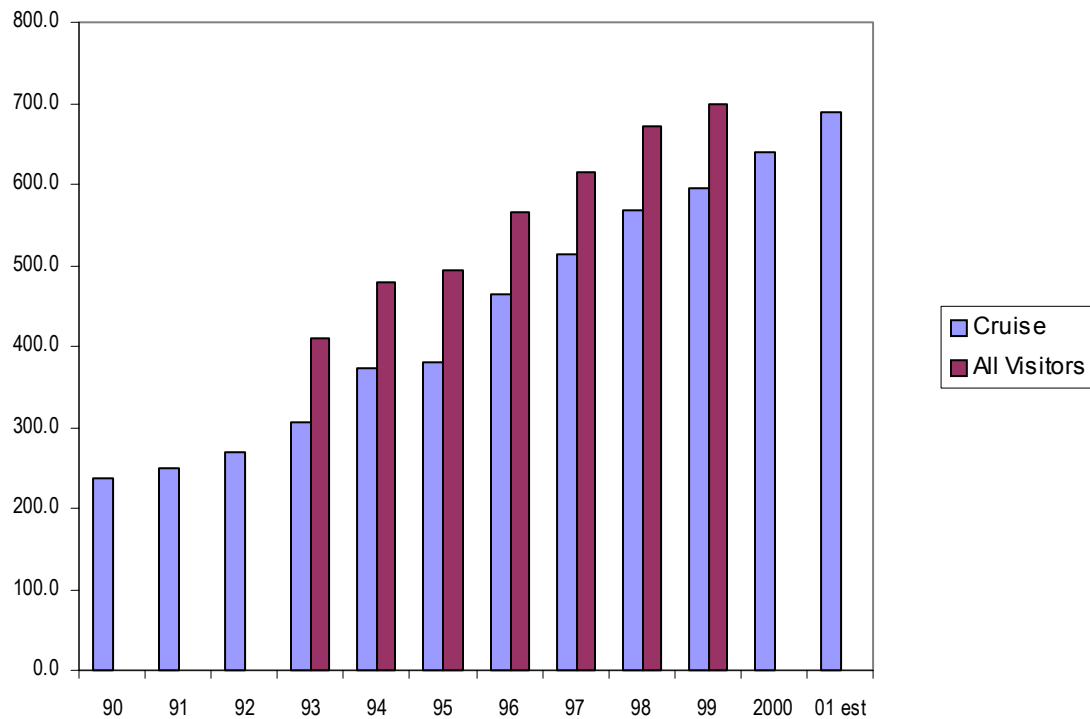
Sources: Cruise Arrivals and Total Non-cruise Arrivals – Juneau Convention and Visitors Bureau, 2001

Trip Purpose – Juneau Convention Visitors Bureau, Overnight Commercial Lodging Guests, 1999 Survey Results, April, 2000.

It must be emphasized that estimates of non-cruise arrivals are order of magnitude estimates only.

The cruise ship industry is the most important segment of Juneau's tourism industry. The 2000 cruise season marked the 10th straight year of cruise visitor growth, with over 640,000 passengers sailing into Juneau's port. This represents an increase of 7.5% over 1999 and an average annual increase of 10.5% between 1990 and 2000. The market share represented by cruise passengers has grown steadily since 1993, and comprised 85.1% of arrivals in 1999. The cruise market is forecast to increase another 7.5% in 2001 (**Exhibit 1.1**).

Exhibit 1.1: Non-resident Visitors to Juneau, Alaska, 1990 to 2000 (000's)



All Visitors	n/a	n/a	n/a	408.7	480.0	493.0	565.0	615.0	627.3	699.9	n/a	n/a
% change	n/a	n/a	n/a	n/a	17.4%	2.7%	14.6%	8.8%	9.3%	4.1%	n/a	n/a
Cruise	237.0	248.4	269.4	306.6	373.0	380.5	463.5	513.0	568.3	595.5	640.4	688.7
% change	n/a	4.8%	8.5%	13.8%	21.7%	2.0%	21.8%	10.7%	10.8%	4.8%	7.5%	7.5%
% of total visitors	n/a	n/a	n/a	75.0%	77.7%	77.2%	82.0%	83.4%	84.5%	85.1%	n/a	n/a

*n/a = not available

Source: Juneau Convention and Visitors Bureau, 2001

1.6.2 Market Profile of Non-Cruise Visitors to Juneau

Some insight into the non-cruise visitor market (resident and non-resident) to Juneau is provided by a 1999 survey of 167 overnight commercial lodging guests.⁵ While a small sample, it is useful for indicative purposes (**Exhibit 1.2**).

Trip purpose – Vacation or business, each at 40%, were the primary trip purposes for most lodging visitors to Juneau.

⁵ Juneau Convention and Visitors Bureau, April 2000, Overnight Commercial Lodging Guests 1999 Survey Results.

Gender – Lodging guests were equally likely to be of either gender.

Age – Lodging guests tend to be middle aged or seniors. The average age of lodging guests in 1999 was 46 years, and 58% of them were 45+ years old.

Income – The average household income of lodging guests was \$80,000.

Employment – 71% of lodging guests surveyed were employed.

Expenditures – On average, lodging guests spent \$291 in Juneau per room per day, with the greatest proportion of per day expenditures going to lodging (average \$97), followed by retail purchases (average \$60), food (average \$51) and entertainment and sightseeing (average \$39).

Party composition – About four in 10 lodging guests (41%) traveled in parties of two while another 30% traveled alone. The median travel party size was 2.0 people.

Trip Length – The median trip length was 7.0 days, but the majority of guests (58%) reported being on a trip of 5+ days and 27% were on a 10+ day trip.

Length of Juneau Visit – The median length of stay in Juneau was 3.0 nights. Although the majority of respondents (68%) indicated they were staying two or more nights, a significant proportion (31%) stayed only one night.

Top 10 Activities – While in Juneau the most popular activities were shopping (69%) and visiting the Mendenhall Glacier (53%). Other top activities were the State Museum, Mount Roberts Tram, the Hatchery, Tracy Arm Fiord and Glacier Bay National Park.

Repeat Visitors – While the majority of business visitors and total visitors had visited Juneau previously, only about one-quarter (26%) of vacation visitors were on a repeat trip.

Travel Mode – The dominant mode of travel for lodging guests was airlines (76%), followed by ferry (15%) and cruise ship (4%).

Information Sources – Word of mouth (45%) is by far the most popular source of information used for planning a trip to Juneau. Other important sources included travel agents (25%), travel guidebooks (18%) and the Internet (17%). Use of the Internet was particularly popular among vacation travelers, with 58% going online to plan their trip.

Exhibit 1.2: Juneau Non-Cruise Visitor Profile (1999)

Trip Purpose	
Vacation	40%
Business	40%
Local Residents	7%
Other Personnel	7%
Getaway Weekend	5%
Other	1%
Demographics	
Gender	50% Male 50% Female
Age	
Average Age	46 years
35-44 years	28%
45-54 years	33%
55+ years	25%
Employment	71% full-time
Average Household Income	\$80,000
Expenditures (Per Party Per Day Average)	
Lodging	\$97
Retail Purchases	\$60
Food	\$51
Entertainment and Sightseeing	\$39
Total Expenditures Per Room	\$291
Party Composition	
One Person	30%
Two People	41%
Median Size	2.0 people
Trip Length	
5+ Days	58%
10+ Days	27%
Median Length	7.0 Days
Length of Juneau Visit	
One Night	31%
2-4 Nights	42%
5+ Nights	26%
Median Length	3.0 Nights

Top Ten Activities			
	Total	Vacation	Business
Downtown Shopping	69%	75%	68%
Mendenhall Glacier	53%	75%	36%
Museums	39%	59%	21%
Mt. Roberts Tram	38%	51%	26%
Hatchery	26%	39%	13%
Tracey Arm Fjord	25%	36%	17%
Glacier Bay National Park	24%	39%	13%
Bear Watching	22%	36%	11%
City Tour	19%	33%	11%
Flightseeing	18%	26%	13%
Repeat Visitors			
	Total	Vacation	Business
Visited Juneau Before	61%	26%	82%
Travel Mode – Arrival			
Airline		76%	
Ferry		15%	
Cruise Ship		4%	
Information Sources			
Word of Mouth		45%	
Travel Agency		25%	
Travel Guidebooks		18%	
Internet		17%	
Juneau Travel Planner		14%	
Travel Brochures		13%	
Juneau Visitor Information Center		11%	
Newspaper (ads)		10%	
Newspaper (articles)		9%	
www.traveljuneau.com		8%	
Internet Use			
	Total	Vacation	Business
Used Internet	31%	58%	14%

Source: Juneau Convention and Visitors Bureau, April 2000, Overnight Commercial Lodging Guests 1999 Survey Results.

1.7 Tourism Trends that impact Juneau

Tourism has historically been regarded in most economies as a second cousin to other economic sectors ranging from resource industries to manufacturing. Indeed, in the past several decades of economic reporting, tourism expenditures were always hidden in various service categories. Today, however, there is an increasing recognition of the contribution that tourism can make to a jurisdiction – not only in terms of foreign exchange earnings and value added, but also in social, cultural and even export industry terms. This recognition is reflected in the current data on the tourism sector worldwide. It is the fastest growing and largest industry in the world, generating some \$3.5 trillion in expenditures. Many countries are now investing in better tourism reporting through the use of such techniques as satellite accounts, all in recognition of the importance of tourism. The World Travel and Tourism Council (WTTC) has been encouraging satellite accounting from 160 countries around the world for the last decade. The WTTC now estimates that the travel and tourism industry⁶:

- Comprises 11% of global GDP (US\$3,575 billion)
- Generates 8% of total employment or 1 in every 12.4 jobs worldwide
- Supports 200 million jobs worldwide.

Their recent global tourism forecasts released in 2000 indicate a growth to \$6,591 billion in global GDP (11.6%) of the world's total. The WTTC is now aggressively encouraging governments to become proactive and to embrace travel and tourism in policy making processes as a positive economic contributor for future generations.

“Tourism Satellite Accounting research and analysis has clearly quantified Travel & Tourism as the world's foremost economic activity,” says Jean-Claude Baumgarten, President of WTTC. “As well, it is the only industry which promotes the understanding and preservation of culture and the environment, fosters co-operation between the private sector, public sector and local communities and presents career opportunities unlike any other industry. It is the industry of the future which embraces the values and lifestyles of future generations.” – WTTC Media Centre, 2001

1.8 Destination Marketing – New Directions

Paralleling the sophistication in the tourism industry's product is a new sophistication in marketing. Destinations are also spending ever greater amounts on tourism marketing to create greater awareness of the destination in target markets and facilitate industry's efforts to “close the sale.” Traditional destination marketing has focused on creating awareness of the destination in target markets, usually with some form of destination branding or logo “call to action.” For example, in British Columbia, the province uses “Super, Natural” to describe the tourism experience they offer. The Vancouver Tourism and Convention Bureau

⁶ World Travel and Tourism Council Media Centre, 2001 (www.WTTC.org)

builds on the destination awareness created by British Columbia and has adopted a complementary branding approach – “Spectacular by Nature.” Recognition of the importance of tourism has carried with it ever increasing investments by many jurisdictions seeking to strengthen their tourism sector and compete effectively in the marketplace.

1.9 Contribution to a Destination’s Quality of Life

An equally important, and more profound trend, is the contribution tourism is now making to environmental protection, heritage and cultural resource protection, and quality of life in a destination. Tourism markets today expect destinations to be environmentally responsible and are more interested than ever in a “learning/education” experience. For example, the State of Hawaii (in a syndicated survey) asked those customers interested in beach vacations about their preferred activities.⁷ Surprisingly, the majority identified cultural activities and experiences as number one. As a result, Hawaii restructured its tourism marketing effort and invested in product development consistent with the expectations of the market in this regard. This has appeared to contribute to much greater attention on cultural history and expressions of culture through various venues in the state. Indeed, in destinations around the world investments are being made in heritage, cultural and natural resource protection and interpretation because of the benefits to the destination’s tourism sector. In a similar vein, cities in North America that have invested in their waterfronts – making them places for people – have enhanced their image and contributed to greater tourism arrivals, not only from vacationers but also from meetings and conventions markets. There are now developing country cases where such things as waterfront developments are taking place as an investment to explicitly strengthen the destination’s tourism attraction. This contributes not only to a stronger economy but also to enjoyment by a destination’s residents of its waterfronts.

In developing countries, the interest tourists take in destination learning experiences has been a boon, given that many of these countries have been able to effectively link tourism with heritage protection, cultural development, national parks and other attractions. Through revenue generated by tourism activity, these countries have been able to afford a greater level of protection and interpretation than would otherwise be the case. In turn, this has meant greater awareness in the country’s resident population of its history and culture.

The important underlying trend, from the perspective of a destination, is the opportunity that a jurisdiction is afforded to shape tourism and manage its activities in ways that enhance the destination’s quality of life and generate a range of benefits well beyond economic activity alone.

⁷ Discussions with State Tourism Department representatives, 1994.

1.10 Growth Areas within the Tourism Sector

Several segments of the tourism industry have experienced substantial growth, building on lower travel costs and more disposable income available for tourist activities. Examples range from major attraction areas such as the Disney, Branson and Universal facilities to ski and golf resorts. Of more relevance to Juneau and Alaska is the strong growth in ecotourism and soft adventure travel. Identified by the travel industry, including the research arm of the World Tourism Organization, as the fastest growing segment of tourism, this offers substantial potential for a destination such as Juneau, endowed as it is with significant natural resources and interesting heritage/culture.

Another product area that has emerged over the last two to three decades as one of the leading products is the cruise experience. Similar to the all-inclusive resort experience, cruise travel offers a single, all-inclusive price, modern facilities, an opportunity to see interesting destinations, and safety and security. Consistently voted by consumers as one of the top products in the world, the growth in the cruise industry has reflected this market interest.

1.10.1 What Are the Hottest Product Trends?

Future product trends have been forecast by the World Tourism Organization (WTO) in their *Tourism: 2020 Vision* publication (1998). The WTO predicted that the following five tourism products will emerge as the hottest trends over the next two decades (WTO 1998):

- **Adventure travel** – with most of the world already being explored, the trend will be for tourists to travel to the world’s highest peaks, to underwater sites (such as the Titanic) and places at the “ends of the earth” (such as Antarctica).
- **Cruises** – the cruise sector is expected to expand at the high annual growth rates that have been seen in recent years.
- **Cultural tourism** – Europe, the Middle East and Asia are predicted to enjoy especially strong tourism growth.
- **Ecotourism** – trips containing a nature component will continue to gain in popularity.
- **Themes** – thematic tourism, where a special interest is the main travel motivator, is also expected to see strong growth.

Juneau not only has a strong cruise market, but also the potential for greater levels of destination travel than the area is currently experiencing. In addition to cruise tourism, three of the remaining four hottest product trends identified by the WTO are of particular interest to Juneau for destination travel; adventure travel, cultural tourism and nature tourism.

At the same time, tourism is not without its issues and concerns. Management of tourism in a way that strengthens the destination's quality of life is a challenge that many destinations are now taking much more seriously through the introduction of tourism policies, master plans and development strategies that facilitate tourism activity in ways consistent with the destination's vision and objectives.

1.11 Cruise Tourism Trends

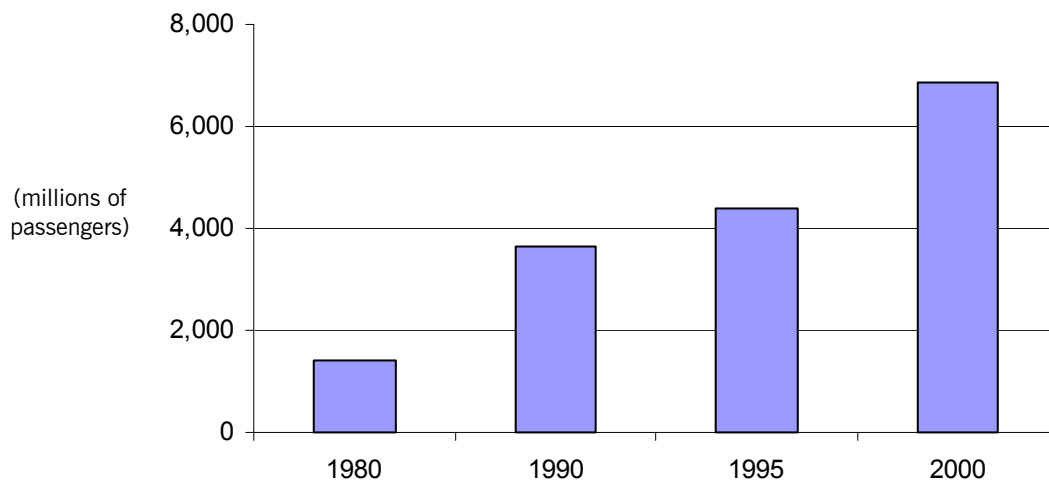
1.11.1 The North American Cruise Product

In North America, cruising comprises only 4% of the North American destination resort market and those who have cruised at least once comprise about 13% of the North American tourism markets. The profile provided below is based on data provided by the Cruise Line International Association (CLIA) and discussions with a representative of the NorthWest Cruise Industry Association.

1.11.2 Volume and Capacity

Over the last three decades overall passenger growth in the cruise industry has exceeded other North American travel sectors. Between 1980 and 2000 the number of North American cruise passengers grew from 1.4 million to 6.9 million, representing an overall increase of 382% and an average annual increase of 8.4% (**Exhibit 1.3**).

Exhibit 1.3: North American Annual Passenger Market (2-day or more cruises)



Source: CLIA, Cruise Industry Overview, March 2001

At the present time, the market is somewhat soft, largely because of a slowing economy in the US. Despite this situation, however, the number of passengers taking cruises grew by 16.8% in 2000 (**Exhibit 1.4**). Average capacity rose at a rate of 7.4% between 1981 and 2000, from 41, 073 berths in 1981 to 155,649 in 2000. Based on contracted capacity estimates, it is forecast that capacity will increase at an average rate of 10% over the next six years.

Exhibit 1.4: North American Cruise Passengers (1996-2000)

Year	Passengers ('000's)	% Increase
1996	4,656	--
1997	5,051	8.48%
1998	5,428	7.46%
1999	5,894	8.59%
2000	6,882	16.76%

Source: CLIA, Cruise Industry Overview, March 2001

In 2001, the number one destination for capacity placement is the Caribbean (44.5%), followed by Europe (20.8%), Alaska 7.9%, Trans-Canal (4.0%), U.S. Coastal West (3.3%), Hawaii (2.6%) and South America (2.4%).⁸

The future market outlook for the North American cruise industry is bright. Research done by the Cruise Lines International Association (CLIA) in 2000 found that more than 68 million Americans are interested in taking a cruise in the next five years. Of these individuals, 43.6 million indicate that they definitely/probably will take a cruise in the next five years, an increase of 5.2% over 1998. This represents a \$57 billion cumulative opportunity.

1.11.3 Product

The primary product in North America is the historically strong Alaska route and the more recently developed East Coast cruise product. The Alaska product has been growing in the range of about 6% for several years. Interestingly, there is about a 10% increase in total sailings from the Pacific Northwest (Vancouver, Victoria and Seattle), indicating growth in venues other than Alaska.

On the East Coast, the cruise market is expanding to an April to October market. Originally conceived as a niche market to showcase fall foliage on the St. Lawrence River, this

⁸ Capacity placement refers to deployment of passenger capacity (number of passengers) by year in cruise destinations throughout the world.

product has expanded into the summer season and now includes visits to a range of cities (Portland, Bangor, Sydney, Corner Brook, Boston, Quebec City, Halifax, Sydney, St. John, St. John's). The primary homeports for this region are New York and Boston, with Montreal and Quebec City as turnaround ports for some voyages. Together with on-ship amenities/experiences and city visits, this product concentrates on visiting interesting historical cities and is proving to be popular.

1.11.4 Length of Cruise

According to CLIA, cruises of about one week in duration continue to make up more than one-half of cruise vacations. Reflecting the overall North American trend to shorter, more frequent vacations, cruises of this duration or longer are losing market share. As a result, the hottest growth category is now two to five day cruises, which comprise 36.9% of the market, an increase of 12.6% since 1980.

Exhibit 1.5: North American Average Length of Cruise

Length of Cruise	Market Share by Cruise Length*		
	1980	2000	Change
2-5 Days	24.3%	36.9%	12.6%
6-8 Days	59.1%	50.8%	-8.3%
9-17 Days	15.4%	11.6%	-3.8%
18+ Days	1.2%	0.7%	-0.5%
TOTAL	100.0%	100.0%	+0.0%

* Adjusted to 100% of cruise lines. CLIA data do not include one-day cruises.

Source: CLIA, Cruise Industry Overview, March 2001, citing CLIA Passenger Carrying Report

In the three to four-day cruise segment, increases in group cruising (weddings/family reunions, educational and business-related incentives) all play a major role. With these trends, cruise companies have been adding more amenities and flexibility to appeal to younger and more active markets. These include flexible dining arrangements, less formality, recreational amenities (such as golf driving, climbing walls, and spas) and activities for young people including non-alcohol disco clubs, play schools, theatres and libraries.

1.11.5 Market Characteristics

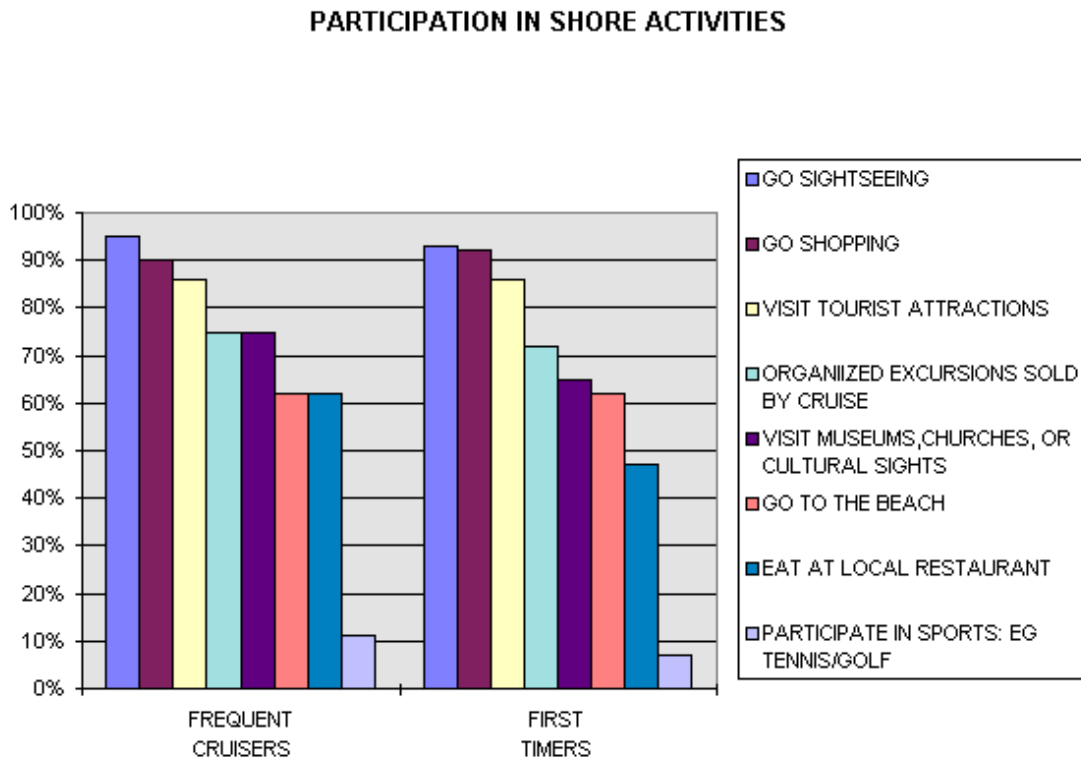
CLIA data show that the cruise market has changed in the last ten years, particularly as prices have decreased. In 1990, according to the North West Cruise Industry Association, the average age of cruise passengers was about 60 years old. Data from a study conducted by CLIA in 2000, however, shows an average age of 50 years among those who had taken a cruise in the past five years. A younger and more family-oriented market is now

occupying an increasingly important proportion of cruise passengers. In terms of earnings, cruisers tend to be relatively well-off, with a mean household income of \$79,000.

Relaxation, pampering, opportunities to see different geographic areas, value for money and a variety of activities are the top reasons why cruising is rated better than other vacation types.

A high proportion of cruisers participate in shore activities, such as sightseeing, shopping, visiting attractions, organized excursions, visits to cultural attractions and sites, going to the beach and eating in a local restaurant (**Exhibit 1.6**).

Exhibit 1.6: Participation in Shore Activities



Note: Legend item order is left to right on chart

Source: CLIA, Cruise Industry Overview, March 2001, citing CLIA, Cruising Dynamics Study (no date given)

1.12 The Alaska Cruise Market

Alaska captures 9% of the global cruise market operated by US-based cruise companies that are members of the International Council of Cruise Lines. These 17 companies handle about 7 million passengers per year. In general, cruising satisfaction rates very high among consumers (one of the top products in the world) and generates significant repeat cruising. Alaska rates among the highest satisfaction levels for consumers in terms of both the destination itself and onboard experience.

The Alaska cruise season extends from May to September each year. Vancouver is the homeport for the majority of the cruise lines operating in Alaska. The number of ships on the Vancouver-Alaska cruise route has remained relatively constant at 21 to 25 ships in the last ten years. Overall capacity has, however, grown by 127% percent based on two factors; larger ships, and the extension of the operating season. There were 571,000 total berths available in 1999 compared to 545,000 in 1998, representing an increase of 5%.⁹

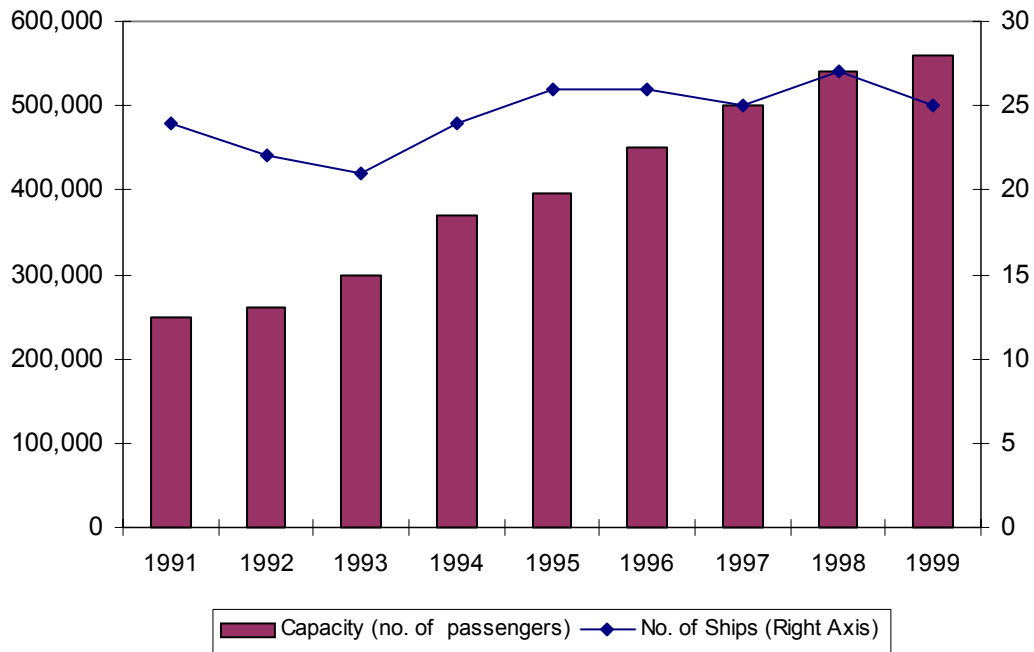
In 1999, the Vancouver-Alaska voyage was taken by 566,100 passengers, and 14,747 crew members worked on this route. The San Francisco-Alaska voyage was taken by 21,900 passengers and the Seattle-Alaska voyage by 6,615 passengers.¹⁰ Departures from the Port of Seattle have increased substantially with 120,000 passengers in 36 ships in 2000 and 170,000 passengers in 56 ships scheduled for 2001.¹¹

⁹ CCG Consulting Group Ltd., An Analysis of the Economic Impact of the Cruise Line Industry in Canada, 2000.

¹⁰ CCG Consulting Group Ltd., An Analysis of the Economic Impact of the Cruise Line Industry in Canada, 2000.

¹¹ Personal communication with Port of Seattle.

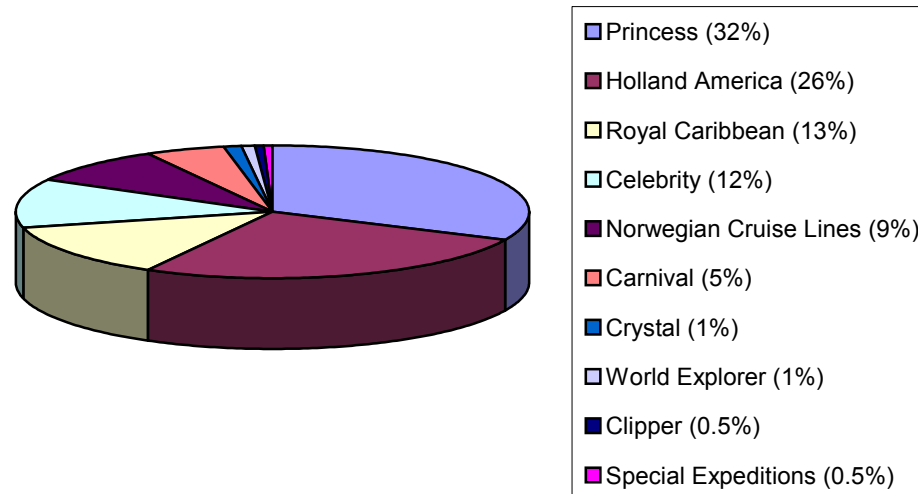
Exhibit 1.7: Capacity and Ships on the Alaska Route (1991-1999) (Vancouver departures)



Source: CCG Consulting Group, An Analysis of the Economic Impact of the Cruise Line Industry in Canada, 2000, citing Cruise Industry News 1999 Annual

In 1999, four companies dominated the Alaska cruise industry with 92% of the total capacity. They were Princess Cruises, Holland America Line, Royal Caribbean International/Celebrity and Norwegian Cruise Lines. The share of total passenger capacity by company is provided in **Exhibit 1.8**.

Exhibit 1.8: Alaska Market by Capacity 1999 (Vancouver departures)



Source: CCG Consulting Group, An Analysis of the Economic Impact of the Cruise Line Industry in Canada, 2000, citing Cruise Industry News 1999 Annual

Trends in cruising of particular interest to Alaska include:

- The shorter 3 to 4-day cruises
- The growth in small ship cruising

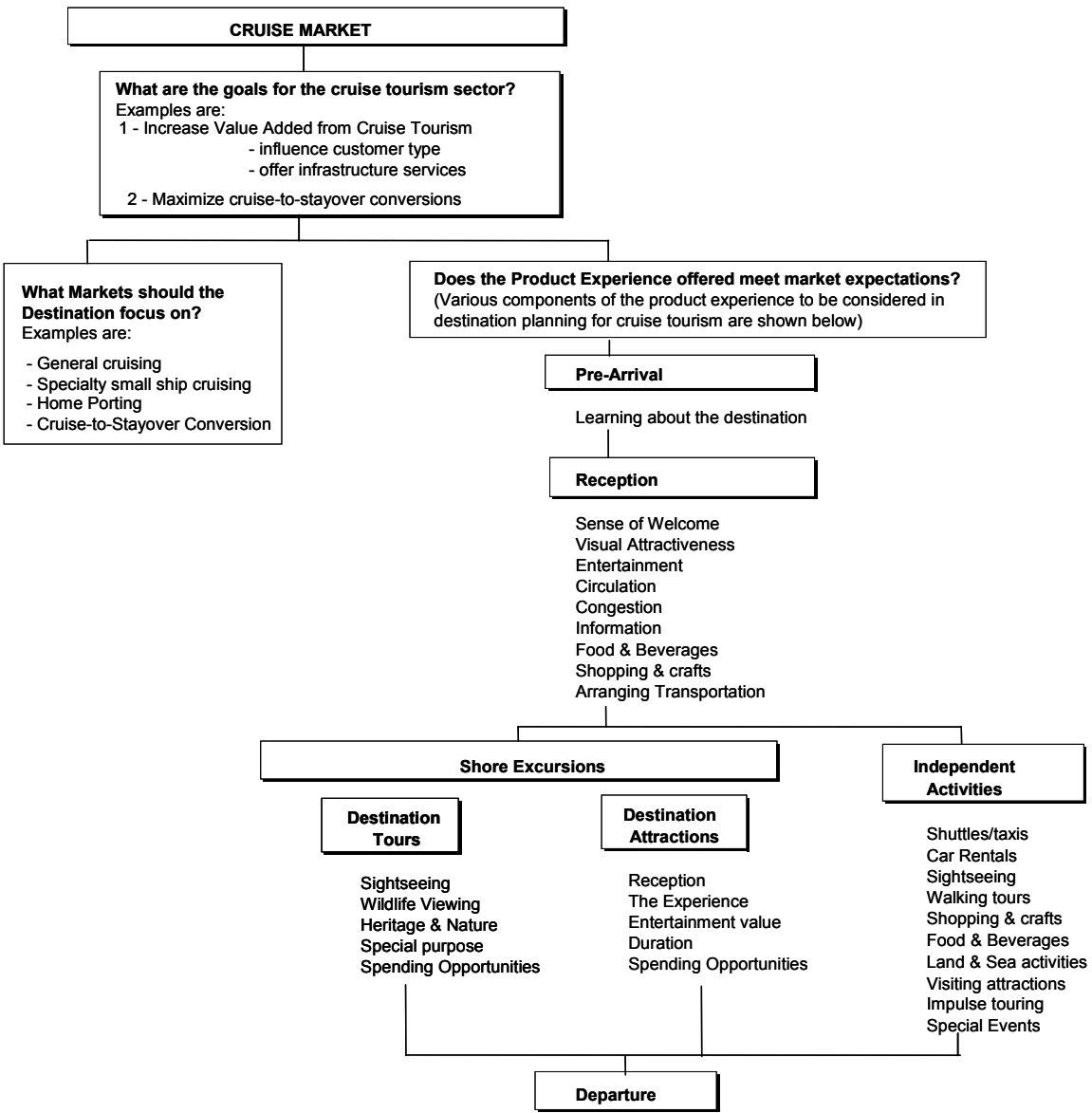
In the case of shorter cruises, Royal Caribbean initiated short cruise products in 2000, calling at Victoria, Vancouver and Seattle. These proved to be popular, appealing to consumers with time and money constraints. The success in these short products has attracted the attention of other companies, with Holland America introducing a product this year.

The second important trend is based on increasing marketing segmentation in terms of preferences. Some market segments do not like large groups and opt for the small ship cruise experience. Other small ship cruise products specialize in nature experiences and offer such activities as kayaking from the ship. This appeals to the ecotourism/adventure market segment. In the case of small ship cruising, however, there are no economies of scale such as those enjoyed by large cruise products. Therefore, to offset the high cost of operation they typically target upscale consumers.

1.13 A Destination Perspective

From a destination perspective, a cruise strategy is typically built around a clear understanding of the expectations the destination has for benefits from cruise markets. **Exhibit 1.9** illustrates the range of considerations for destinations.

Exhibit 1.9: Cruise Tourism – Illustrative Destination Concerns



1.13.1 World Trends – Destination Travelers

Currently, the cruise market for Juneau is complemented by a destination traveler (defined generally as independent travelers staying overnight in Juneau and area) and regional market of about 100,000 arrivals per year.¹² When considering a tourism strategy for any destination, it is important to consider the destination traveler market. Unlike cruise passengers, they tend to:

- Spend more in the local area at accommodation facilities, restaurants and on tourism services; and
- Experience more of the destination in terms of tours, attractions and activities.

Destination travelers to Juneau include:

- Business travel including meetings and convention markets,
- Regional travel,
- Vacationers, and
- Those visiting friends and relatives.

In considering potential for growth in the destination travel segment for Juneau, the most important market is the emerging (and fastest growing) market segment seeking nature, heritage, cultural and soft adventure experiences. With their interest in learning and experiential activities, this market is well matched to the outstanding natural and heritage/cultural resource base in Juneau and surrounding area. This is not to say that other destination travel markets are less important but rather that the potential for growth is simply not as great as that offered by this market.

1.13.2 Ecotourism/Nature Travel/Adventure Tourism Market

Typically termed ecotourism, it is defined at its most basic level as “responsible travel that conserves the environment and sustains the well-being of local people” (The Ecotourism Society, 1995). In operational terms, ecotourism focuses on interpretation and understanding of the environment and culture of the area visited and can include non-consumptive adventure recreation components, or ‘soft adventure’ components, such as horseback riding, snorkeling, canoeing, or kayaking.

Originally a niche market, ecotourism is now one of the fastest growing segments of the tourism industry (WTO 1997; WTO, Sep/Oct 1998b). Initially, ecotourism attracted wealthier, more educated and well-traveled people, but now the client base is expanding to include a wider range of incomes, educational backgrounds and travel experience.

¹² Data supplied by Juneau Convention and Visitors Bureau, 1997-2000.

There are no definitive statistical data on the overall size of the ecotourism market. However, various estimates and studies of the ecotourism market and the larger nature tourism market all indicate that the market is large and growing. For example, in 1992 Filion estimated that 40-60% of all international tourists are nature tourists and 20-40% are wildlife-related tourists. More recently, in 1997 the World Tourism Organization (WTO) estimated that ecotourism and all nature-related forms of tourism now account for 20% of all international travel and that ecotourism is now worth some \$20 billion a year (WTO, Jan/Feb 1998).

There is also evidence on a regional basis of growing market demand. For example, in Nepal, trekking tourism (adventure tourism) surged by 255% between 1980 and 1991 (Wight, citing Gurung and De Corsey, 1994). In Costa Rica, considered one of the top ecotourism destinations, visitation doubled in 1992 after the country introduced a new marketing program that helped to position it as an ecotourism destination. By 1996, more than 66% of all tourists traveling to Costa Rica reported visiting a natural protected area during their stay (Instituto Costarricense de Turismo, 1996).

In the US, a 1991 US Travel Data Center survey found that nearly 7% of American travelers had taken at least one ecotourism trip during that year (Cook et al, 1992). Meantime, by 1997 a survey by the Travel Industry Association of America found that 50% of traveling Americans had taken an adventure vacation within the past five years, with 47% taking a 'soft adventure' and 3% taking a 'hard adventure' vacation (TIA, 1998). Another example of the growth in nature-based tourism demand in the US market is provided by a recent survey conducted by government agencies and the Sporting Goods Manufacturers Association. It found that 54 million Americans took part in birdwatching in 1994-95, a 155% increase over the 21 million counted in 1982-83 (Cordell, 1999).

In terms of the demand for ecotourism experiences in Canada, the recently released Environmental Canada study *The Importance of Nature to Canadians* reported that 20 million Canadians 15 years of age and over spent \$11 billion on nature-related activities in Canada in 1996. This included \$6 billion for nature travel-related items, \$3 billion for equipment and \$2 billion for other items needed to pursue nature-related activities (Environment Canada, 1999).

1.14 Trends resulting from Terrorism Activities

The events set into motion on September 11, 2001 have impacted the way people travel and traveler confidence in tourism venues further from home. While the sense of security is gradually increasing among potential patrons, the impacts on the world tourism industry from a period of sudden low patronage have been astounding. How will all of that impact Juneau and this tourism plan?

First, the industry is reeling from lost revenues and new, higher costs of doing business. This creates an environment in which investment is tentative and in which forecasts are conservative. Cruise lines had a rough winter in the Caribbean and moved three additional ships in Alaska itineraries for the 2002 season. However, with the soft nature of early

reservations, prices were discounted deeply, perhaps attracting a clientele less able to afford Juneau's spendy high end tours. Similarly, the cruise lines predict a modest 4% growth rate for several years following this season, reflecting uncertainty on a number of levels.

Destination travel to winter destinations dropped precipitously following September 11. Those destinations that marketed aggressively and discounted began to see response by March 2002, with some ability to recover pricing for the tail of the winter season. Alaska did not muster the resources to market its way out of the situation for summer 2002, while competing destinations did. Further, with the low price of cruise passage, traditional lodge based experiences in Alaska compare as expensive this year. Uncertainty is again key in understanding 2002.

One complicating side effect of the lost tourism and travel revenues has been the loss of numbers of flights offered by airlines. Indeed, some airlines have gone out of business altogether. Interestingly, Alaska Airlines was the first US based carrier to recover its entire schedule and has even expanded into new markets.

Beyond 2002, assuming that no more significant terrorism attacks take place and that terrorism does not focus on tourism, one can expect slowly recovering confidence of travelers and growing patronage of Alaska's traditional products. Competition among destinations eager to market their way out of crisis will continue. For the near future (1-5 years) domestic adventures may have a marketing advantage over international competition.

As travelers have abandoned old patterns and are building new, this becomes a good market for Juneau to build its destination patronage. That conflicts with a hesitancy for investment at this stage, noting that Juneau is missing key lodging components to its destination packages.

2. Strategic Audit

In the course of this planning project, Egret Communications and ARA Consulting have consulted extensively with the public, the local tourism industry, the Alaska Tourism Industry Association, public resource managers, CBJ staff, all Assembly members, JCVB, and the cruise industry. The team has employed a raft of techniques for capturing public sentiment, from interviews with community members, ongoing discussions with representatives of concerned groups, public meetings, and web polls. The team has held focused meetings with small groups concerned with key issues that face Juneau tourism. This team is convinced that we have taken the pulse of Juneau on tourism, and that this document speaks to both a balance of the views and to specific concerns that have the potential to derail Juneau's ability to collaboratively achieve the goals set out in the vision presented in Section 3.

2.1 Process

The effort to develop a tourism management plan for Juneau started with initial consultations in the spring of 2001 with key stakeholders and groups involved in or affected by the tourism sector. This diagnostic stage included an assessment of current tourism activity for both the cruise and destination/regional traveler market segments. As part of the process, case studies from other destinations were prepared to provide information to stakeholders on some of the lessons learned and potential from various tourism management approaches. Cooperation from the Juneau media helped to raise awareness of the availability of this information on the city's web site. The work in this stage concluded with a working paper on the tourism sector and the possible futures Juneau could consider in proceeding with tourism management activities. It was published on the planning project's web site in August, 2001 along with the case studies.

A broader public consultation program for the public was put in place following the summer tourism season. This included a web site polling capability on tourism issues and preferences – intended to provide indications of the concerns as well as the ideas of Juneau's citizens concerning tourism. The web polling was made available to all registered voters in the City and Borough of Juneau and implemented in October 2001.

As part of the consultation program, web polling was complemented by a public meeting held in early October, 2001 to review the findings to date and discuss tourism trends, types of tourism, and ideas for tourism in Juneau.

In December, this team presented a technical review of Juneau tourism options, opportunities, and issues. That review looked at Juneau preferences based on public, industry, stakeholder, CBJ, and resource management perspectives. It also projected tourism performance, based on international tourism trends and standards, and available information following the fall terrorism events. That technical review presented Juneau with five options for tourism development and management strategies.

In January 2002, the team again met with stakeholders, industry, public officials, and resource management to solidify a course of action. The team presented a draft outline to the Assembly based on a modification of the alternative “Manage for Destination and Cruise Travel Success”, taking into consideration evolving data on future cruise passenger volume (again heavily influenced by fall terrorism events). The Assembly instructed this team to develop that option into this draft tourism plan.

2.2 Findings that Shaped this Plan

The tourism sector in Juneau is characterized by a very strong cruise tourism segment, generating about 700,000 visitors per year. Much less developed is the destination travel segment. Here, regional and business tourism arrivals provide a significant proportion of all destination arrivals. As such, destination travel was found to be under-developed, which is somewhat surprising given the superb resource base and natural features of the Juneau area.

During the course of the initial stakeholder meetings and consultations, it was evident that alternative tourism futures for Juneau must examine a blend of cruise and destination travel tourism, with cruise tourism receiving the greatest attention in terms of the tourism issues already experienced by the population of the Borough. There was considerable interest in the potential for destination travel and the opportunities it offered to the community. It was also acknowledged by many, including several representatives of the tourism sector, that this travel segment was indeed underdeveloped and could grow significantly with appropriate management and support.

Perhaps the single most important finding related to the vision for tourism is quality of life. Most stakeholders and groups agreed that tourism offered the community economic benefits and that the challenge was to manage it to enhance their quality of life, not compromise it. This agreement provides an excellent foundation on which to base a tourism management plan that is proactive in securing the benefits from tourism through partnerships with the industry.

The two tourism segments were characterized in the first working paper for this project (see the web site at www.cbjtourism.com) generally as shown in the table below.

Tourism Segment	Current Status	Issues and Opportunities
Cruise tourism	<ul style="list-style-type: none"> • About 700,000 cruise arrivals in 2001 • Growth of almost 10% annually between 1993 and 2000 • About 85% of all non- resident arrivals to Juneau in 1999 • Highly seasonal – May to September • Key attractions for cruise passengers include natural beauty and glaciers, flightseeing and sportfishing adventures, visiting the state capital, and downtown shopping 	<ul style="list-style-type: none"> • Cruise impacts are of concern to many stakeholders, while almost all appreciate economic benefits – estimated at \$90 million in 1999 and about 750 jobs¹³ • Impacts include flightseeing noise, congested downtown, water and air quality • Volume of passengers in small harbor and downtown space seen as issue by many • Positive impacts for economy, opportunities for enhancing downtown and waterfront areas • Provides source of fee revenue
Destination travel	<ul style="list-style-type: none"> • In 1999, about 100,000 non-resident arrivals, and an estimated 53,000 Alaska resident visitors • Of these an estimated 40% are business travelers • Most business travelers (63%) combine business and pleasure while visiting Juneau • Over 1,300 rooms of which majority are hotels and motels (70%) and another 15% are bed and breakfast facilities • Strong natural, heritage and cultural resources with diverse attractions 	<ul style="list-style-type: none"> • Nature, culture and adventure tourism together comprise the fastest growing segments for tourism worldwide • Juneau has superb natural resources of interest to this segment as well as interesting heritage and cultural resources to provide a diversified experience and, overall, a strong destination experience • Pleasant and friendly community adds to appeal • Juneau is not positioned to target this market, nor are the travel intermediaries and tourism management mechanisms in place to take advantage of this potential • Juneau lacks key private sector infrastructure to be significantly successful in this market, but has tours in place that could serve the market with small modifications. Certainly there is the opportunity to strengthen the destination product by building on this base.

¹³ See the Working Paper online at www.cbjtourism.com

2.2.1 Web Polls

Three polls were conducted in late October through mid November.

	<i>Registered Voters</i>	<i>Students</i>	<i>Total</i>
Poll 1	1,293	218	1,511
Poll 2	1,011	78	1,089
Poll 3	916	61	977

The web polls, for the most part, ratified the findings of the team gathered from client and stakeholder interviews on the positions held by the public on tourism-related issues. They have helped, as anticipated, to clarify priority issues and have strengthened the ability of the planning process to identify common ground and use that common ground as a foundation for tourism planning.

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As expected, the polls clearly show a bipolar distribution of desired outcomes, priorities, and world views. In other words, polls show two groups of highly motivated residents, with strongly differing ideas about how Juneau should relate to tourism. One significant part of the population is focused on jobs, business opportunities, and the economics of growth. Another equally significant part of the population is focused on managing negative impacts, scale, and growth. A more neutral middle population swings from side to side, depending on the topic and demographical issues.

A quick read of results, therefore, generally indicates a population that seemingly wants the socio-economic benefits that accrue to Juneau from tourism without the negative impacts. Juneau wants local government to be in the business of managing tourism volume but also indicates that it is not ready to reduce the number of cruise ships calling on Juneau.

With the swing vote bouncing from side to side, depending on the issue, the polls indicate Juneau wants to improve tourism economics while reducing the social impacts generated by that tourism. While one part of the population is more focused on economics and another on managing negative impacts, the more neutral segment reinforces both. While these might seem to be competing perspectives (and local discussions often portray them as competing) sustainable tourism planning frequently focuses on increasing economic and social benefits while decreasing negative impacts.

Common ground has been fairly easy to find – and it is hoped that a plan that secures common goals will enable competing parts of the population to compromise where agendas differ. It is very clear that Juneau residents, regardless of where they stand on other tourism issues, want clean air and water. The common endorsement of clean air and water propelled them to top priority levels in every way the polls tested them.

It is clear from the polls that the local population wants to maintain or increase regional and business travel. It is similarly clear that Juneau supports the growth of the destination travel component of its economy (commonly referred to as independent travelers in local discussions). It should be noted, though, that there is a strong message that Juneau does not want this growth out of control, or to be overwhelmed by negative impacts related to destination travel.

There is strong agreement that the City and Borough of Juneau should be in the business of managing tourism on behalf of residents. There is, although weaker, the sense that CBJ should manage visitor volume as a part of its role in managing tourism. There is clear division, however, in the directions of that management, with varying viewpoints on the preferred scale of tourism and the goals of management.

Responses to questions 14 and 15 on poll 3 show that the population has a wide set of expectations from a tourism plan, but that neither side in the local discussion wants the other side's agenda to dominate the goals of the plan. Both “the reduction of flightseeing noise” and “providing a positive environment for tourism businesses” ranked **high** as priority goals – and both ranked even **higher** on the list of goals that are **least** important. ***This reflects a concern, often expressed in stakeholder interviews, that one faction or the other might “own” the planning process.***

Community Goals¹⁴		
Rated for contribution to Impact Management and Tourism's Economic Success		
Factor	Impact Management	Tourism's Economic Success
<i>Safeguarding air and water quality (48%)</i>	Direct	Direct
<i>Reducing flightseeing noise (30%)</i>	Direct	Direct
<i>Providing a positive environment for tourism business operation (28%)</i>	Indirect	Direct
<i>Managing Growth so that negative impacts don't get out of hand (27%)</i>	Direct	Direct
<i>Managing tourism to pay for the negative impacts it generates (26%)</i>	Direct	Indirect
<i>Growing the economic benefits of tourism in Juneau (24%)</i>	Indirect	Direct
<i>Reducing Congestion (23%)</i>	Direct	Direct
<i>Increasing the percentage of destination (including independent) travelers (23%)</i>	Indirect	Direct
<i>Protecting the tourism that Juneau has now (22%)</i>	Indirect	Direct

This team found that while there is significant concern about negative impacts from tourism, that there is little support for scuttling or significantly downsizing the industry. Rather, one can read a clear message from several questions that the majority of those concerned about the negative impacts of tourism want those impacts addressed – but that they don't want the benefits of tourism (jobs, economics, business opportunities) to go away. This indicates that, with some engineering of tourism and some relationship building, that Juneau can enjoy reduced impacts AND provide a supportive environment for private sector tourism businesses.

The feedback concerning negative impacts is particularly interesting. The majority of people are bothered by flightseeing noise (at least to some degree). Helicopter flight paths cross more residential areas than float plane flight paths and poll responses show a corresponding higher number of residents bothered by helicopter noise. In areas that experience both helicopter and float plane noise impacts, the polls indicate that both bother a significant number of residents. The community calls for a reduction of both helicopter and flightseeing noise in the polls – but strongly does not feel those activities should go away. The polls clearly indicate that this is an important set of issues for residents – but it is clear that other issues match flightseeing noise in priority. This team reads flightseeing as an issue that must be addressed, however, if tourism is to continue in Juneau.

¹⁴ From Poll 3, Question 14

Downtown congestion is clearly concerning to local residents. There is a strong mandate to improve congestion in the downtown area – but also a strong concern that a tourism plan might focus on reducing congestion at the expense of economics. It seems that residents are ready for creative solutions that proactively address congestion (and other downtown issues) without sacrificing the benefits that cruise tourism brings to Juneau.

The scale and growth rate of cruise tourism is clearly on the minds of people in Juneau. Although there is general disagreement about what scale is appropriate, there is an underlying implication that Juneau needs to exercise some management of this industry and not just be at the whim of sudden changes in volume. While respondents indicated they want to manage the impacts and benefits of cruise tourism, there is openly a segment of the population that feels volume needs to be controlled.

One of the concerns of the planning team is related to the speed of action needed to satisfy the local population. Public dialogue concerning some of tourism's impacts has implied a sense of urgency. Among the consequences of international events is reduced capacity of tourism businesses (both international and local) to engage in short term investment. Polling indicates, however, that so long as the public is confident that tourism planning addresses concerns that there will be patience to enable change to proceed in a manner that can be handled by industry and the public sector.

2.3 Technical Review

The team adopted several guiding principles and underlying assumptions concerning how tourism was likely to perform in each of the alternative futures discussed in this working paper. These are described below.

Tourism development should enhance quality of life

Quality of life and quality of tourism product are integrally related. For Juneau's tourism economy to operate in a sustainable manner, it must function in a way that protects the character of Juneau. The actions that protect that character also tend to support quality of life, as perceived by local residents. At the same time, it is not just a matter of protection. Tourism can also contribute to an enhanced quality of life through investments in social, cultural and physical facilities made possible by the revenues tourism brings to the community.

Juneau can influence the growth and direction of the tourism sector

Management of the tourism sector and its impacts on Juneau to maximize positive impacts are within the reach of Juneau. What is required is a vision for tourism that receives broad support from the community and from tourism sector partners including cruise and destination travel segments. The vision must be easily translated in a realistic and practical approach to developing and managing the sector.

Tourism management needs a partnership between the public and private sectors

Adoption of a tourism management plan requires the commitment and support of both the public and private sectors. Similarly, ongoing tourism management activity is best undertaken within the context of a collaborative approach or partnership between the public and private sectors.

Destination travel offers considerable potential for Juneau

While the destination travel segment is clearly underdeveloped in Juneau, the Borough has an internationally competitive resource base (marine and land resources) as well as diverse heritage and cultural activities and attractions. Therefore, if Juneau chooses to pursue destination travel growth it is eminently possible to be successful within the context of existing world markets.

Juneau as a competitive cruise destination

Juneau is a preferred destination for the cruise industry. However, cruise tourism trends and volume in SE Alaska waters will not be determined by Juneau's decisions. If Juneau opts to freeze or reduce the number of ships stopping at Juneau, or presents itself in a manner that doesn't feel welcoming, it will hasten the developing of competing ports in nearby waters. These ports, without the baggage of Juneau's conflict with the cruise industry, will be successful in attracting a significant percentage of the existing cruise ships away from Juneau, as well as servicing new growth. The cruise industry, with minor changes in marketing materials and programs, will be able to deliver all of the current experiences (except a visit to the state capital) outside Juneau.

The destination must support tourism if it is to be successful

Successful tourism in a destination with a low population requires a sympathetic and supportive local population. Tourism, unlike basic industries, relies on the hospitality and friendliness of host communities as a part of the experience it delivers. Tourism in an unfriendly or unreceptive destination cannot compete successfully for market share nor can it command good prices for product. Therefore, tourism planning must seek paths that win the support of local populations. It is not enough to have a political or social majority supportive of tourism – tourism needs broad support.

The tourism vision must be grounded in reality

While the scenarios have been selected and tested based on local aspirations, they were also tested against how tourism works in a real world. So, testing has reflected tourism trends and past performance under similar situations.

Current events introduce uncertainty

Uncertainty is the operative word for tourism's short-term future, after the international events of late 2001. A truly sustainable tourism economy can survive short-term uncertainty. However, it is more difficult to make economic transitions in a time of uncertainty – and much more difficult to forecast. Each of the scenarios was tested for how it would survive during an uncertain transition.

Current events will lead to more domestic travel

The US is aggressively promoting travel within the US to its citizens. It is expected that overseas travel will decline in favor of the selection of vacations in the US by US residents. Alaska generally and Juneau specifically can benefit from this significant change in attitude and approach to domestic travel.

2.4 The Scenarios

Based on the findings and guiding principles/underlying assumptions, the team tested the following scenarios.

Scenarios	Scenario Description
Status Quo	Under this scenario we assume a business as usual approach and deal with impacts as they arise. Think of this as the current trends and operating assumptions carried into the future.
Manage for Destination Travel Success	Under this scenario, Juneau sets out to succeed with destination travel – growing volume, developing appropriate businesses, generating employment and managing both benefits and impacts to community and environment. Juneau neither encourages nor discourages cruise tourism growth but responds to social and environmental issues as they arise.
Manage for Cruise Travel Success	Juneau sets out to succeed with cruise travel, growing revenues, developing appropriate businesses, generating employment and managing both benefits and impacts to community and environment. Destination travel is essentially neglected and develops at historic rates.
Manage for Destination and Cruise Travel Success	Juneau sets to succeed with both cruise and destination travel, growing revenues in both cases. Juneau actively manages social and environmental impacts and proactively builds infrastructure and programs that make tourism successful with both visitors and residents.
Freeze Cruise Travel Volume and Manage for Destination Travel Success	Juneau sets out to freeze cruise tourism volume and succeed with destination travel.

The “**Manage for Destination and Cruise Travel Success**” scenario was chosen, with modifications as new cruise volume projections were developed, for elaboration into this plan.

3. Strategic Framework for Tourism Management

Juneau needs a vision and framework for carrying out tourism. The vision defines what Juneau wants to achieve from the tourism sector and the framework specifies how, when and where the various professional and community discussions and actions about tourism take place. The framework also needs to define roles among the various public and private sector entities involved in tourism. It needs to lay out where tourism is going so that both businesses and residents can make plans with a common understanding of direction and scale. And it needs to prescribe the actions that move Juneau toward its tourism goals.

When building a new strategic framework, which is happening through the adoption and implementation of this plan, transitions must be incorporated into the planning process. Roles need to be handed off at appropriate times, dictated either by funding cycles or tourism seasons.

3.1 Vision and Objectives

Juneau intends to succeed at both cruise tourism and destination travel – with success being defined on Juneau’s terms. That success entails maximizing the benefits of tourism in Juneau, while minimizing the costs and impacts. Juneau looks to tourism, expecting social, economic, and environmental benefits. Juneau seeks a more positive image among its neighbors in Alaska, and with its visitors and travel industry partners. Juneau intends tourism to help create a more diverse economic base. To that end, Juneau will work to create a positive atmosphere for business investment and operations, especially those businesses that are locally owned and operated. Juneau wants, through tourism, to bolster its commitment to its heritage and cultural values. Juneau intends to be a high quality destination, providing rich and positive experiences for its visitors. It intends to make those visitors feel warmly welcomed.

Accordingly, the vision for tourism is:

“A healthy and vibrant tourism sector generating business opportunities and employment for Juneau citizens, protecting Juneau’s heritage and cultural values¹⁵ and its natural resources, and making a positive contribution to the community’s quality of life.”

3.2 Overall Guiding Principles for the Tourism Plan

This tourism plan is based on the development and management of a partnership between the people of Juneau, local tourism businesses, and the international cruise tourism industry. In the sections that follow, relationships of that partnership are described, responsibilities outlined, and venues for working out issues among the partners are laid out in considerable detail.

In a partnership approach, all partners invest to achieve results that cannot be achieved outside that partnership. In this case, investment ranges from financial, to time, to energy, to the sharing of Juneau with outsiders. A true partnership plan recognizes and values all these levels of investment.

This plan is based on the principles of sustainable tourism development. That means that social, economic, and environmental resources must be utilized in such a way that they keep their integrity, and at such a pace that they can withstand the impacts of use. Our guideline in building this plan is to assume that at the start of each season social, economic, and environmental resources should be in as good or better shape than at the start of the previous season.

This plan also recognizes that Juneau is home to Tlingit and Haida peoples, whose culture is rapidly being swallowed by Western culture. There is a special burden on tourism in Juneau to respect and honor these cultures, and to proceed in a way that gives them every

¹⁵ Note from the planning team:

A place (a community, a region, a nation) owes its character to the people, the way of making a living, the geography and climate, and the history that has brought it to the present. Each area has practices, events, cultural ways that are uniquely important to it that have been shaped in the process of weaving together time, culture, geography, and lifestyle. Tourism can be managed to reinforce those values – or, as in such places as Disneyland or Las Vegas, tourism can proceed on its own course, developing in such a way that ignores (and sometimes even overwhelms or compromises) the culture of the region and the relationship between its people, their history, and the natural world.

Additionally, tourism research indicates that visitors are, increasingly, seeking legitimate cultural and heritage experiences and that they value knowing that the destination they visit is actively working to protect those values.

“Protecting, enhancing, preserving, and/or building on cultural and heritage values” is standard tourism planning terminology, recognized and used around the world. Peoples from all corners of the planet have come to understand these terms and hold this concept as an important consideration in managing and developing tourism.

chance to hold onto precious heritage, and to be actively involved in any decision to share of that culture, or profit from the draw it creates for visitors.

3.3 Strategic Directions – Tourism Positioning

The market and product analysis conducted as part of this tourism management planning process revealed that Juneau has a superb opportunity to strengthen its destination tourism sector. The combination of an outstanding natural resource base, diverse history and culture, and coastal community location make it attractive to the growing nature, adventure, heritage, and ecotourism travelers. This potential notwithstanding, it is clear that Juneau will have to establish leadership in realizing this potential. Industry cannot make Juneau a successful destination by itself – it needs a partnership with government, particularly in marketing and training areas.

Juneau's competitive position in the Alaska cruise market is already strong. Juneau's tour products are rated among the top in the world. The cruise industry indicates its continued desire to bring its customers to Juneau. There is general agreement that the volume of visitors (about 700,000 in 2001) represents a near-capacity situation for Juneau harbor. Industry advises that they will be allocating an additional ten percent capacity for 2002, although there is no guarantee they will be able to fill that capacity with customers given the September terrorism events. Beyond that, the industry expects growth to settle down to about four percent per year. The most appropriate course of action for Juneau to assume in the cruise sector involves maintenance of its current competitive position, but to prepare for the possibility of continued vigorous growth.

Juneau has not realized success in the development of a meetings and convention market, in spite of its stature as a state capital. However, with general improvements in tourism product quality and greater attention to both destination and waterfront development, we believe that this situation can be reversed.

Based on the technical product and market analysis prepared for this tourism management plan, the recommended strategic directions for Juneau tourism are as follows:

1. Premier destination, combining nature, adventure, heritage, and cultural experiences
 - Attracting high value customers
 - Focusing on guided experiences
2. Maintain and strengthen Juneau's competitive position in the Alaska cruise tourism market
 - Build on current strong tour product mix
 - Significantly enhance visitor experience in downtown Juneau
3. Position Juneau as a small meetings and convention host in Alaska, the Pacific Northwest, and matched niche markets

3.4 Rationalize and Modernize Juneau’s Approach to Tourism

Unlike many communities throughout North America, Juneau experiences annual tourism visitation well in excess of its population. In 2001, Juneau hosted over 800,000 visitors, of which about 700,000 were cruise arrivals. The cruise industry is a major contributor to Juneau’s economy, generating estimated economic benefits in 1999 of about \$90 million and 750 jobs.¹⁶ Clearly, Juneau is in the tourism business and must organize itself to respond to the opportunities, challenges and issues it faces in ensuring that tourism sector activities enhance, rather than compromise, the community’s quality of life.

3.4.1 Current Management Approach

Juneau’s approach to tourism management has largely been delegated to semi-independent boards and agencies as shown below.

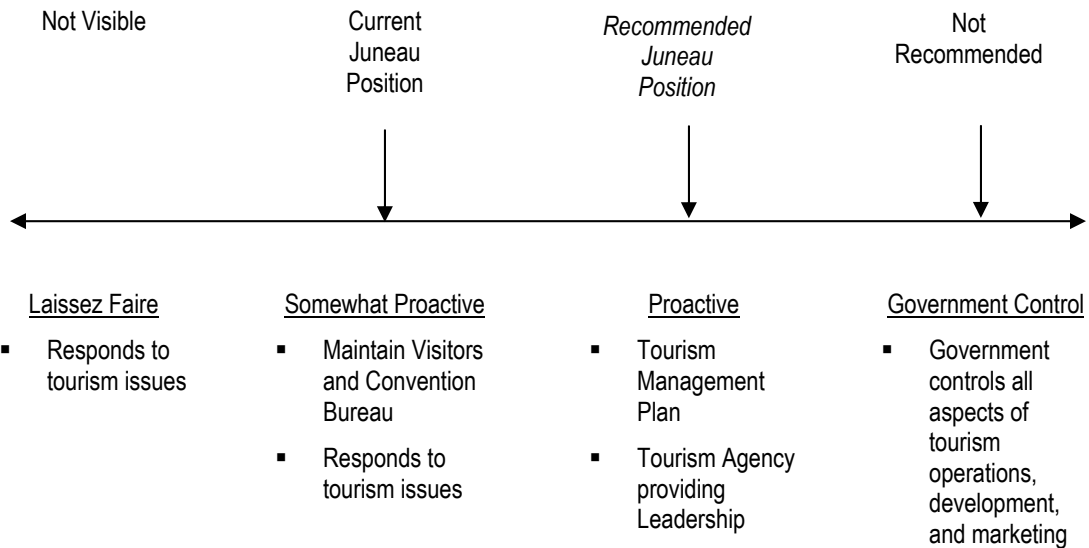
Agency	Role and Responsibility
Docks and Harbors Board	All matters related to Juneau’s port including primary interaction with the cruise ship industry
Juneau Convention and Visitor Bureau	Primarily focusing on destination marketing and responsible for attracting meetings and conventions to Juneau

In 2000, Juneau created a Tourism Planning Manager position within the City staff organization, reporting to the Deputy City Manager. The primary purpose for this position was to respond to tourism issues raised by the community. Juneau also decided to proceed to prepare a tourism management plan to provide a blueprint for appropriate tourism sector management.

3.4.2 Alternative Models for Tourism Management

There is a range of potential models the CBJ could implement for its tourism management function. Tourism management can take a laissez faire approach at one extreme, or it can extend to a full partnership approach with the tourism industry, guided by a tourism management plan. In some regions of the world, government assumes a more controlling role, directing the path and nature of tourism development and tightly holding access to operation, development, and marketing rights. In light of the scope and scale of Juneau’s tourism sector, the opportunity for growth in the destination market segment, and the need to better manage community impacts, this plan takes a much more proactive approach to tourism sector management and Juneau’s current position. This is illustrated in the chart below.

¹⁶ McDowell Group, October 2000, The Economic Impacts of the Cruise Industry in Southeast Alaska.



The recommended position for the community and government of Juneau in establishing itself as a full partner with the tourism sector is premised on two initiatives:

- This Tourism Management Plan, approved by the Assembly and establishing the framework for CBJ policy and program support for tourism.
- The creation of an appropriate agency or tourism entity – responsible for implementation of the Tourism Management Plan on behalf of the CBJ and all stakeholders.

What Type of Tourism Agency?

Most communities or municipalities throughout North America manage their relationship with the tourism sector based on the “somewhat proactive” position that Juneau has followed for a number of years. The sheer scale of the tourism sector in Juneau coupled with the lack of diversity in Juneau’s economy, however, require an approach to tourism that is more akin to the traditional role of states and provinces. The traditional world model is one in which the country, state, or province assumes responsibility for marketing the tourism destination and a range of product development support programs. While this is not a typical role for communities, it is appropriate in the case of Juneau (and similar communities) where tourism activity dominates Juneau’s community life for several months of the year. It is also more common among destinations where tourism is a significant part of the economy.

The question of the type of tourism entity that should be established presents some challenges. The history of Juneau tourism is fraught with significant community debate and division over the impacts of tourism (both positive and negative). While one could consider delegation of the tourism function to an “authority”, we believe that this is not sufficient to

overcome Juneau's history. The authority model is typically dominated by the tourism industry and focuses on tourism marketing and development. The matter of impacts and issues related to tourism tend to be left to other government processes. In the case of Juneau, a model based on the concept of a "true partnership" between the community and the tourism industry is recommended. *The partnership model institutionalizes a venue in which the community and the tourism industry can together develop and promote the tourism sector in ways that always enhance the quality of life for the community.*

3.5 Update the Comprehensive Plan

The CBJ adopted a position on tourism in its Comprehensive Plan to guide its actions related to the tourism sector. With the adoption of this Tourism Management Plan that position should be updated to achieve consistency.

The adopted tourism policy in the Comprehensive Plan CBJ is aimed at encouraging tourism in a collaborative manner:

Policy 2.12. It is the policy of the CBJ to encourage tourism, convention and other visitor-related activities through the development of appropriate facilities and services, while protecting Juneau's natural and cultural attractions for local citizens and visitors alike, and to participate in the accommodation of the future growth of tourism in a manner that addresses both community and industry concerns.

Included in the plan are a number of implementing actions to carry out the intent of this policy. Both the policy and the implementing actions are now superceded by the formal development of a tourism management plan by the CBJ. Given the proposed adoption of this plan by the CBJ, the Comprehensive Plan will need to be updated accordingly. The recommended amendments to the Comprehensive Plan are structured to recognize the Tourism Management Plan as the mechanism by which the CBJ will promote and manage tourism. In this way the Comprehensive Plan recognizes by reference the (adopted) Tourism Management Plan as the "Implementing Actions" of the CBJ position on tourism.

The Comprehensive Plan amendments are recommended as follows:

Delete Policy 2.12 and the “Implementing Actions” pursuant to this policy and substitute the following amendments

1. Policy 2.12. It is the policy of the CBJ to promote and manage tourism based on the following vision for tourism:

“A healthy and vibrant tourism sector generating business opportunities and employment for Juneau citizens, protecting Juneau’s heritage and cultural values¹⁷ and its natural resources, and making a positive contribution to the community’s quality of life.”

Implementing Actions:

2. Policy 2.12.1 It is the policy of the CBJ to encourage tourism in accordance with the Tourism Management Plan, adopted on [insert date] by the Assembly.
3. Policy 2.12.2 It is the policy of the CBJ to re-confirm the Tourism Management Plan including any amendments consistent with the vision and objectives for tourism, annually, based on the recommendations of the Juneau Tourism Partnership and the CBJ staff.

¹⁷ **Note from the planning team:**

A place (a community, a region, a nation) owes its character to the people, the way of making a living, the geography and climate, and the history that has brought it to the present. Each area has practices, events, cultural ways that are uniquely important to it that have been shaped in the process of weaving together time, culture, geography, and lifestyle. Tourism can be managed to reinforce those values – or, as in such places as Disneyland or Las Vegas, tourism can proceed on its own course, developing in such a way that ignores (and sometimes even overwhelms or compromises) the culture of the region and the relationship between its people, their history, and the natural world.

Additionally, tourism research indicates that visitors are, increasingly, seeking legitimate cultural and heritage experiences and that they value knowing that the destination they visit is actively working to protect those values.

“Protecting, enhancing, preserving, and/or building on cultural and heritage values” is standard tourism planning terminology, recognized and used around the world. Peoples from all corners of the planet have come to understand these terms and hold this concept as an important consideration in managing and developing tourism.

4. Juneau Tourism Roles

With a much stronger focus on tourism and its potential for economic and social contribution to Juneau, an institutional framework will be required to facilitate the recommended partnership approach and tourism strategies. Accordingly, there are a number of recommended modifications to the roles of existing institutions, agencies and organizations as it relates to their tourism activities.

4.1 CBJ Roles and Organizational Actions

This plan takes nothing away from the responsibility of the Assembly to the people of Juneau. In fact, it strengthens that role. The Assembly will continue to make public level decisions regarding tourism. Additionally, the Assembly will re-assume the lead role in making planning and policy decisions regarding Juneau's downtown waterfront.

The CBJ will get out of the business of front line response to tourism impact management. Most of the concerns raised by residents focus on annoyance that is not caused by illegal activities. Therefore the day-to-day reception of residents' concerns and the acts of forwarding those concerns to appropriate parties and integrating those concerns into a framework for guiding practices and policies will move to the Juneau Tourism Partnership (JTP).

To this end, the CBJ will dissolve its Tourism Office, which was set up to focus on impact management and mitigation. This planning team sees the need, however, for a "special projects assistant" position inside the City Manager's Office, to work on a mix of tourism and non-tourism projects.

It is important, for this plan to succeed, that the management of harbor facilities serving the cruise industry is carried out in a manner consistent with the plan. It is also important to manage lines of communications concerning the harbor facilities and adjacent waterfront with the cruise industry, residents, downtown businesses, shoreside operators, and others. Therefore, the Assembly will assume responsibility for planning and policy for the cruise docks, lightering facilities, and shoreside extensions of those activities. The Docks and Harbors Board will continue to manage the shipside operations. Under this plan, the Assembly will consider having the Parks and Recreation Department manage passenger loading for ground transportation and community use issues.

4.1.1 Creation of the Juneau Tourism Partnership

The most significant institutional change recommended for approval by the Assembly is the creation of the Juneau Tourism Partnership. The JTP will become the venue for collaborative discussion and cooperative action among the many stakeholders in Juneau's tourism picture. The JTP will guide the implementation of the plan, and work with all sectors to coordinate and facilitate cooperative solutions to issues and responses to opportunities. The JTP will pull representatives of all key stakeholders groups into the

discussion through the extensive use of working groups and committees. The JTP will encourage community-wide input on tourism topics that have social implications and will work to achieve consensus when community/business issues need to be addressed. Solutions that require public sector action will be presented by the JTP to the Assembly.

The JTP is discussed as part of the strategic framework for tourism management recommended in Chapter 3 and the structure, roles and responsibilities are described in Section 5 of this tourism management plan.

4.2 Related Agencies

4.2.1 Forest Service Roles and Organizational Actions

The Forest Service has two key responsibilities that are important to tourism in Juneau. First, the agency is responsible for managing and protecting the integrity of the resources under its charge. Second, the agency is responsible for helping the people of the United States understand and appreciate the resources. The Forest Service is also heavily involved in Juneau tourism through the issuance and management of permits for commercial tourism activities.

This plan asks the Forest Service to sit at the table with the Juneau Tourism Partnership and engage in full (but non-voting) discussion as Juneau evolves its tourism product, monitors and manages impacts, and plans for its future. The plan invites Forest Service sponsorship of some key parts of the JTP budget.

This plan asks that the Forest Service excel at managing and protecting the integrity of the resources under its charge. Further, it promises that the Juneau Tourism Partnership will coordinate tourism industry efforts to assist in that management in ways that the Forest Service identifies as appropriate and needed.

This plan acknowledges that the Forest Service and the tourism industry are in partnership in acquainting the agency's constituency with the resources it manages in Juneau. The JTP will work with the industry and the Forest Service to improve interpretive training of guides and information for visitors. The plan also asks the Forest Service to help fund some appropriate JTP activities, especially in the early years.

If Juneau is to succeed at developing a significant destination component to its economy, new guided commercial outings will be needed on Forest Service lands. This plan asks the Forest Service to speed up the process of approving permits, to eliminate the current bottleneck in developing new tourism experiences on Forest Service lands. It offers the JTP board as a sounding board when the Forest Service needs to put permit applications in the context of the tourism plan or potential community concerns. And the plan calls for the development of a budget to help fast-track permits when needed.

4.2.2 Juneau Convention and Visitor Bureau

The JCVB has had frontline responsibility for marketing to destination (independent) travelers and conventions/meetings. The past setup did not include formal responsibility for tracking the performance of marketing activities, nor did it give a way for the Assembly to carry out its responsibilities for publicly collected monies.

This plan envisions a close, collaborative, mutually supportive relationship between JCVB and the JTP, acknowledging JCVB's marketing role and the JTP's guiding role in tourism.

Under this plan, the JCVB will continue to receive the bed tax marketing dollars and will be responsible to the Assembly for their performance. The JCVB will move toward marketing strategies that are more targeted (both niches and regions). Marketing efforts will also focus on lengthening the time spent in Juneau and raising the spending per arrival.

The Parks and Recreation Department will contract with the JCVB for the marketing of Centennial Hall conventions which will be responsible for performance of marketing efforts. The JCVB will develop a more targeted approach to marketing to new convention customers, focusing on the niches and regions that match the targets for destination travel marketing, and seeking groups that are more likely to stay longer and patronize Juneau's outstanding natural and cultural experiences. The JCVB will improve its efforts to secure repeat business from existing convention customers.

The JCVB will establish a marketing committee consisting of JCVB board members and non-board individuals, with recognized marketing expertise, to guide the board in the development of its annual marketing plan, including representatives from Alaska Airlines, Alaska Marine Highway, the JTP director, and recognized Juneau tourism marketing experts.

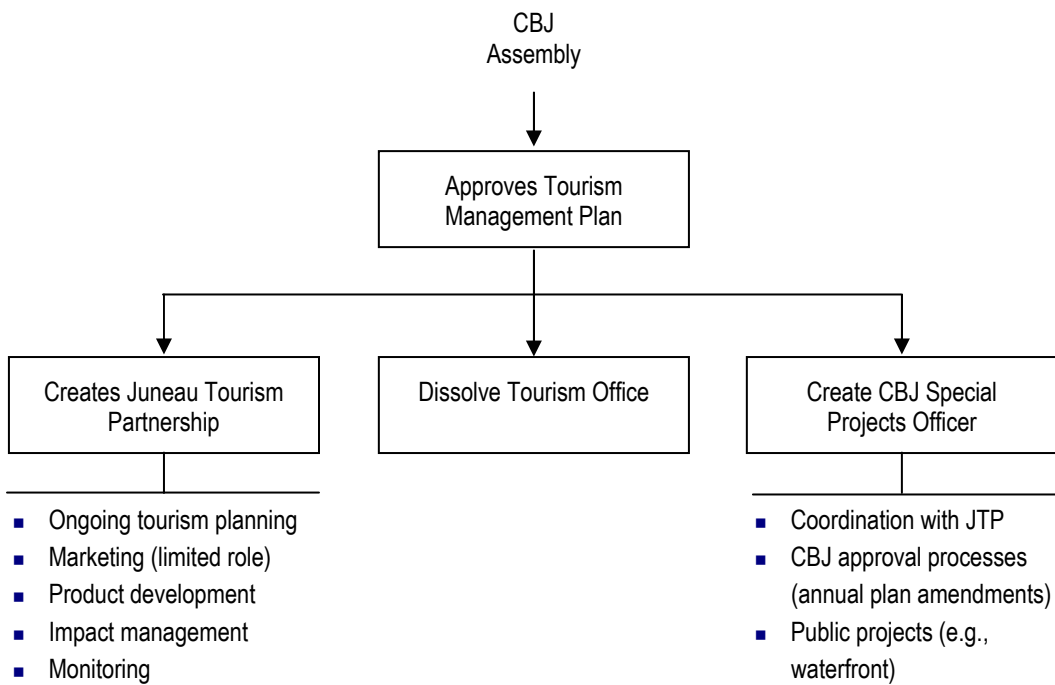
The JCVB will track performance of both destination and convention marketing activities. It will separately track conventions that JCVB found and brought in, and those that it service, but which were introduced to Juneau by other means. Tracking will reflect expenditures with Centennial Hall, and other expenditures within the community. The JTP will conduct other tracking research. The JCVB will be responsible for demonstrating to the Assembly and JTP the effectiveness of marketing in quarterly reports, along guidelines included with this plan. Quarterly reports on marketing activities and tracked results of convention marketing will be presented to the Parks and Recreation Department and the JTP. The JCVB will present a review of its marketing activities and results during the annual fall tourism forum. The JCVB will present marketing activities and tracked results to the Assembly during the development of each biennium budget. The Parks and Recreation Department will present data on revenue breakdown, make comparisons between revenues, costs, and marketing budgets, and recommend adjustments. The JTP will provide perspectives for that discussion based on input during the fall tourism forum, world tourism trends, and competing market performance.

After the fall tourism forum, the JTP director and the JCVB CEO will meet as necessary to synchronize the JCVB's marketing efforts with adopted changes in the tourism plan. The

JCVB board and marketing committee will work to adjust strategies to accommodate shifts in the Juneau Tourism Plan.

4.3 Functional Roles and Responsibilities

Within the context of these broad organizational changes, particularly as it relates to the CBJ, functional roles and responsibilities change, as do lines of communication. In illustrative terms, the chart below illustrates the relationship between the CBJ and functional responsibilities for tourism management under a partnership approach.



A summary of the functional changes recommended as part of this tourism management plan are provided in the table below.

Function	Task	Current Responsible Party	Current Line of Communications/ Approvals	New Responsible Party	New Line of Communications/ Approvals
Tourism Planning	Tourism Management Plan	Assembly	All lines of communications pass through city	JTP leads discussion, may call on Assembly to fund supportive research Assembly has bottom line responsibility for decisions regarding use of CBJ public resources	Annual planning session involving public, businesses, public partners
	Plan Evolution	Not applicable	Not applicable	JTP leads annual review Assembly adopts changes to the plan	JTP originates changes, with stakeholder and community input. Assembly adopts changes.
Marketing	Marketing (destination)	JCVB markets destination	The Assembly has a dedicated seat on the JCVB board of directors Regular reports have been presented by the JCVB to the Assembly	Assembly responsible to people/businesses for effective use of bed tax JCVB will develop annual marketing plan, with input from marketing committee and JTP JTP will contract, during year one, for the development of a marketing plan JTP and JCVB will coordinate efforts so that marketing reflects adopted tourism plan	JCVB will present quarterly reports to Assembly, JTP regarding activities, tracked performance JCVB will present annual report during fall tourism forum

Function	Task	Current Responsible Party	Current Line of Communications/ Approvals	New Responsible Party	New Line of Communications/ Approvals
	Marketing (meetings and convention)	JCVB markets convention center	The Parks and Recreation Department has a dedicated seat on the JCVB board of directors Regular reports have been presented by the JCVB to the Assembly	Assembly responsible to people/businesses for effective management of Centennial Hall JCVB will develop annual marketing plan, with input from marketing committee and JTP JTP and JCVB will coordinate efforts so that marketing reflects adopted tourism plan	JCVB will present quarterly reports to Parks and Recreation, JTP regarding activities, tracked performance JCVB will present annual report during fall tourism forum
	Marketing (community cooperative programs in SE Alaska)	JCVB	JCVB has had a relationship with the Southeast Alaska Tourism Council	JCVB will have a strong relationship with the Southeast Alaska Tourism Council	Emphasis on marketing the region, with the understanding that Juneau products will benefit from that marketing
	Marketing (cruise)	Cruise lines	Cruise lines manage, partner with ATIA etc.	Cruise lines	Cruise lines manage, partner with JTP, ATIA, etc.
Product Development	Tourism Standards and Product Quality	Individual businesses	Unclear	JTP in cooperation with businesses	Annual planning session involving public, businesses, public partners Quality initiatives, training, by JTP (with public/private partners) and by contract
	Training	Various, ad hoc	Ad hoc	JTP	Facilitates, cooperates with others on planned basis

Function	Task	Current Responsible Party	Current Line of Communications/ Approvals	New Responsible Party	New Line of Communications/ Approvals
	Evolving the product	No one	Not applicable	JTP	<p>The JTP will track trends, evaluate visitor satisfaction, and monitor community-related issues, then meet annually to prioritize product evolution strategies</p> <p>Staff will work with industry to guide product evolution</p>
	Public Infrastructure (Tourism related)	Assembly	Assembly with public input	<p>Assembly with input from public and JTP on tourism matters</p> <p>Note that the JTP will involve public input in arriving at recommendations</p>	JTP will assess needs for public infrastructure changes, modifications, during the fall tourism forum, and pass recommendations to the Assembly
	Public Infrastructure (Waterfront)	Harbors Board	Confused	Assembly	<p>Assembly will make planning and policy decisions regarding the cruise-related facilities and activities on the waterfront, with input from the Harbors Board</p> <p>The Harbors Board will maintain operational role</p> <p>Planning discussions with the cruise industry, operators, and the community will be led by the City Manager's Office</p>

Function	Task	Current Responsible Party	Current Line of Communications/ Approvals	New Responsible Party	New Line of Communications/ Approvals
	Trails Use	Parks and Recreation Department (on CBJ trails), Forest Service (on Forest Service trails), State of Alaska (on State trails) through Trails Working Group	Coordination of working group and community, resource managers	JTP will sponsor Trails Working Group Resource management will continue to issue permits and take input from Trails Working Group	Trails working group will continue to be point Outcomes will be integrated into fall tourism forum and publicized by JTP
	Investment Promotion and business recruitment	JEDC works to promote economic development	Unclear	JTP	Annual planning session involving public, businesses, public partners. Recruitment reflects adopted plan
Operations	Convention Center Operations	Parks and Recreation Department	Parks and Recreation reports to City Manager, who then reports to Assembly	Parks and Recreation Department retains responsibility, but oversees contracted operations	After July 1, 2003, Parks and Recreation will offer to contract operations and if a suitable contractor submits an acceptable offer, will contract those services. Parks and Recreation will continue to report to the Manager and Assembly
Impact Management	Tourism Impact Events (Hotline)	CBJ	All lines of communications pass through city	JTP coordinates communications, businesses manage own direct responses	JTP manages input, passes concerns directly to business involved for response, action JTP compiles pattern for November impacts discussion

Function	Task	Current Responsible Party	Current Line of Communications/ Approvals	New Responsible Party	New Line of Communications/ Approvals
	Mitigation of Tourism Impacts	Assembly	All lines of communications pass through city	Assembly for city level public decisions, businesses for direct business action, JTP for actions that don't require expenditure of public funds or use of public infrastructure	JTP hosts discussion, crafts solution, presents to Assembly only those parts requiring public decisions
	Monitoring impacts	Various federal and state agencies	unclear	Various federal and state agencies JTP will review the monitoring results and share with community	JTP will assemble monitoring results and share in annual community review
Monitoring	Monitoring tourism trends	Various organizations do some of this, but none has responsibility	JCVB has reported trends to industry	JTP	JTP will track tourism trends in both destination and cruise industries and, regularly, share new data with Juneau's tourism industry and community

Function	Task	Current Responsible Party	Current Line of Communications/ Approvals	New Responsible Party	New Line of Communications/ Approvals
	Monitoring Juneau's marketing performance	JCVB	JCVB to membership and Assembly	JCVB	<p>JCVB will track performance of marketing and will provide performance info back to the Assembly and JTP and the Juneau tourism industry</p> <p>JCVB will track performance of convention marketing and will provide performance info to Parks and Recreation and JTP</p> <p>Performance will be presented at the fall tourism forum and during biennium budget sessions</p>
	Monitoring Juneau's visitor satisfaction	<p>No one has responsibility to do this on behalf of Juneau</p> <p>JCVB has done some of this</p> <p>The cruise industry does this, both from individual lines and collectively</p> <p>Private companies do this on a selective basis</p>	<p>JCVB has reported to its members</p> <p>Cruise industry results are proprietary</p> <p>Private results are proprietary</p>	JCVB and JTP with industry (cruise and destination)	JTP will conduct polls and will report to industry, Assembly

Function	Task	Current Responsible Party	Current Line of Communications/ Approvals	New Responsible Party	New Line of Communications/ Approvals
	Monitoring community attitudes toward and relationship with tourism	CBJ has historically performed this role, but is not tagged as responsible for it in Comprehensive Plan	Not applicable	JTP	JTP will conduct polls and sessions during the fall tourism forum, will report to industry, Assembly

5. The Juneau Tourism Partnership

The proposed Juneau Tourism Partnership (JTP) would be structured as a non-profit organization, with core funding from the CBJ and with a board of directors representative of the industry, the community and with the CBJ and the Forest Service having ex-officio positions on the Board of Directors.

An overview of the proposed tourism partnership is shown in **Exhibit 5.1** and its mandate and functions are discussed below.

5.1 JTP Role and Mandate

The JTP will become the venue for collaborative discussion and cooperative action among the many stakeholders in Juneau's tourism picture. The JTP will guide the implementation of the plan, and work with all sectors to coordinate and facilitate cooperative solutions to issues and responses to opportunities. The JTP will pull representatives of all key stakeholders groups into the discussion through the extensive use of working groups and committees. The JTP will encourage community-wide input on tourism topics that have social implications and will work to achieve consensus when community/business issues need to be addressed. Solutions that require public sector action will be presented by the JTP to the Assembly.

The JTP should be tasked with overall implementation of the adopted tourism management plan, including:

- Serving as the coordinating organization for tourism collaboration, cooperation, and discussion in Juneau.
- Serving as the point of contact for queries, issues, etc. in Juneau.
- Serving to oversee the implementation of the tourism plan.
- Monitoring and management of impacts arising from tourism.
- Providing a venue for collaborative and cooperative planning.
- Guiding tourism development to enhance the community's quality of life.
- Collaborating with JCVB on marketing and public relations.

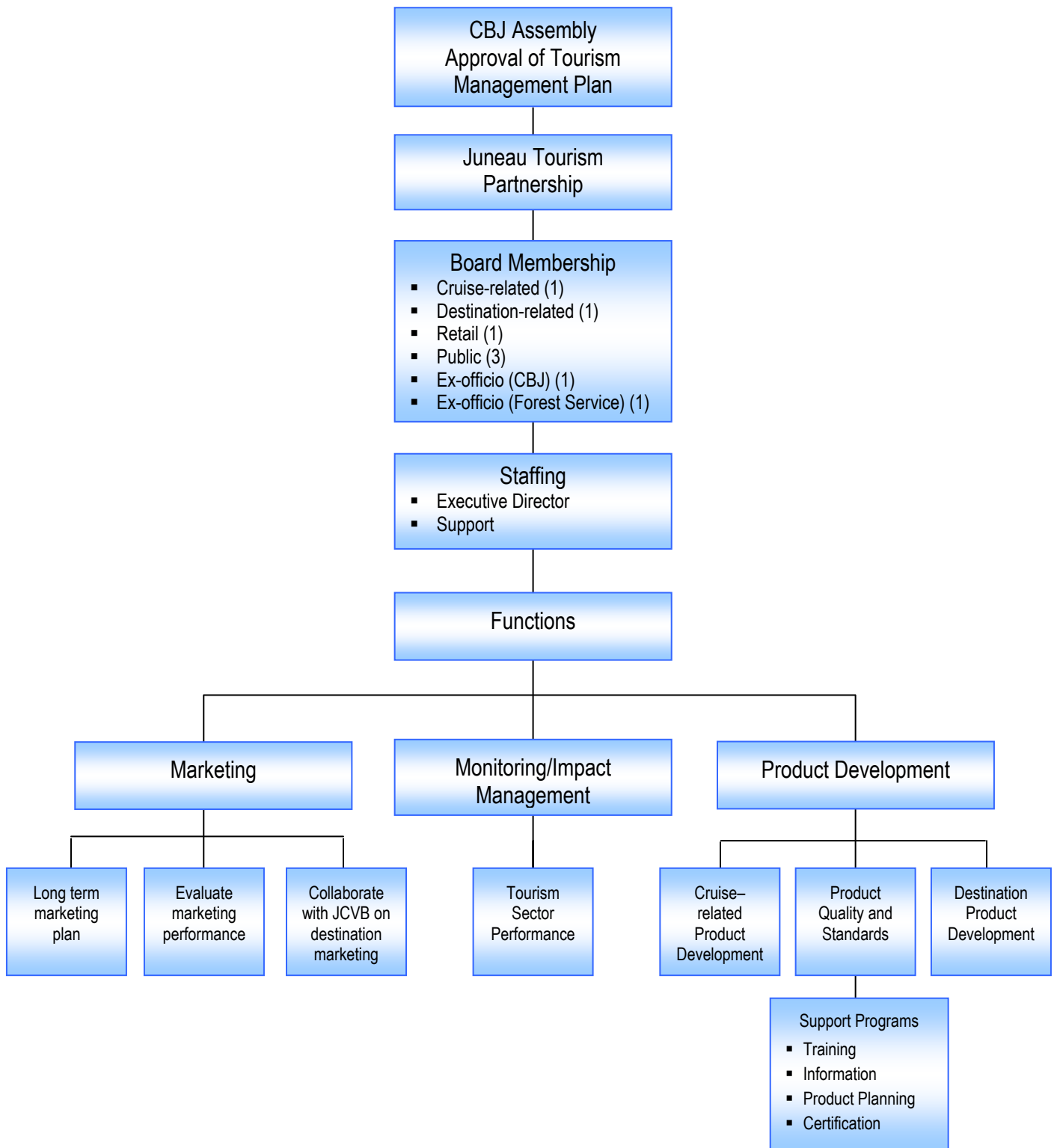
5.2 Board of Directors

The makeup of the board of directors should reflect the partnership theme espoused throughout this tourism management plan. Accordingly, seats on the board should be allocated as shown in the table below.

Stakeholder Group	Segment	Representation (All Local)
<i>Tourism Industry</i>	Cruise-related local tourism industry	One representative from cruise-related business
	Destination industry	One representative from non-cruise-related businesses
<i>Juneau Business Community</i>	Retail sector	One representative, preferably from a tourism-related business
<i>Public</i>	Juneau residents (with no immediate family ties to tourism businesses)	Three representatives
<i>CBJ</i>	Assembly	Ex-officio seat on the board
<i>Forest Service</i>	Juneau Ranger District	Ex-officio seat on the board

At least one board member should be a member of Juneau's Native American community.

Exhibit 5.1: Tourism Partnership – Overview of Functions



The representative approach will be incorporated into the recommended charter for the tourism partnership. It should also include provision for:

- Board members' commitment to the collaborative model as part of a memorandum of agreement to serve on the Board.
- Revolving position retirements.
- Provision for appointment of new members based on the representation model described above.

5.3 JTP Functions

The JTP must assume three general functions in order to effectively guide the implementation of the tourism management plan. These are:

- Tourism product development - both encouraging new products to develop and facilitating improvement in existing products.
- Monitoring and impact management – and attention to developing more positive benefits for Juneau from tourism.
- Tourism marketing involvement, cooperating with JCVB and the cruise industry in marketing and providing information services for visitors.

5.4 Staffing and Budgeting

Recommended staffing for the JTP includes an Executive Director who can also serve as Tourism Product Development Manager. The Executive Director will be supported by a professional tourism administrative assistant and one or more interns. It is imperative that the Executive Director assume the position without baggage or “history” related to tourism issues in Juneau. This must be a senior position with extensive experience in tourism development, tourism planning and impact management, management of public discussion and consensus building, knowledge and experience relating to tourism trends and markets, and destination tourism initiatives. Interns will be sought from university graduate programs focusing on tourism and resource management. A long term relationship with a graduate program might be developed.

The preferred skills and experience of each position is shown in the table below.

JTP Position	Skills and Expertise
Executive Director	<p>Demonstrated significant hands-on experience in:</p> <ul style="list-style-type: none"> • Destination Tourism Marketing and Public Relations • Packaging • Destination Product Development • Tourism Business Management • Tourism Finance • Travel/trade events <p>Demonstrated significant hands-on experience in:</p> <ul style="list-style-type: none"> • Managing an energetic board of directors • Working inside a public environment • Managing public discussions • Consensus building <p>Demonstrated connections:</p> <ul style="list-style-type: none"> • With national/international tourism partners • Travel media <p>Demonstrated knowledge of:</p> <ul style="list-style-type: none"> • Marketing • Packaging • Destination Product Development • Public Relations • Tourism trends • Tourism Lingo <p>Dedication to:</p> <ul style="list-style-type: none"> • Community/tourism industry partnership • Impact management and mitigation • Sustainable development • Juneau's tourism plan
Tourism Administrative Assistant	<p>Demonstrated hands-on experience some aspects of tourism industry, such as:</p> <ul style="list-style-type: none"> • Destination Tourism Marketing and Public Relations • Packaging • Destination Product Development • Tourism Business Management • Reservation Systems <p>Demonstrated knowledge some aspects of tourism industry, such as:</p> <ul style="list-style-type: none"> • Marketing • Packaging • Public Relations • Tourism trends • Tourism Lingo

JTP Position	Skills and Expertise
	<p>Demonstrated Proficiency in:</p> <ul style="list-style-type: none"> • Microsoft Office applications (especially Word, Excel) • Website construction • Desktop publishing • Public interface <p>Dedication to:</p> <ul style="list-style-type: none"> • Community/tourism industry partnership • Sustainable development • Juneau’s tourism plan

5.4.1 JTP Budget

What kind of budget is needed to guide the growth, the vitality, and sustainability of Juneau’s \$90 million tourism economy – and to make sure that economy delivers the social, economic, and environmental benefits that Juneau seeks and avoids the impacts it fears?

The budget must provide enough resources the JTP can:

- Bring Juneau together behind a vision for tourism
- Get Juneau working together toward a tourism future that is widely embraced
- Match the investment of energy and funds that residents and local businesses will need to invest to build Juneau’s tourism future
- Build the foundation for a strong destination tourism economy
- Attract and keep the high powered staff necessary to lead the process
- Facilitate and lead the process of reducing and mitigating impacts from tourism
- Coordinate with public and private partners

The budget for the JTP will be based on core costs (staffing and office space, day-to-day activities) and special programs budgets. The first year budget includes funds for both tourism and collaborative advice, to help the new organization get started. Tourism assistance could be provided by the team that built this plan, helping to get the new board up to speed on a wide range of issues in the plan.

The organizational budget for Year 1 (July 1, 2002 to June 30, 2003) is \$295,000, estimated as set out below.

Juneau Tourism Partnership Year One Organizational Budget	
Salary and Benefits, Executive Director (including relocation costs)	\$110,000
Salary and Benefits, Support Staff	\$45,000
Office (space, utilities, office equip and furniture, telephone service)	\$35,000
Fall Forum (including pre-meeting polls, publications, meeting space and services, advertising)	\$20,000
Monitoring programs (collecting data on satisfaction, demographics, community attitudes, etc.)	\$20,000
Travel (to connect with various levels in Alaska and National travel industry, to work with investors, and to support event and product development)	\$20,000
Connections (Web site, memberships, publications, press releases, hotline)	\$15,000
Year one tourism advisor and collaboration assistance	\$30,000
Total	\$295,000

*CBJ to perform Y1 legal and financial audit

A projects budget will be necessary for the JTP to launch various programs for which it is responsible. These include the marketing plan and the creation of a comprehensive training and certification program for the tourism sector. The proposed programs and projects of the JTP are discussed in Chapter 7. Year 1 budget for project start-up is proposed at \$160,000 as shown below.

Juneau Tourism Partnership Year One Project Budget	
Contracted Marketing Plan (new marketing plan reflecting directions set out in the adopted tourism plan)	\$50,000
Training and Certification Programs – covers cost of bringing in outside expertise, facilities use, printed materials	\$20,000
Standards Development – covers cost of bringing in outside expertise, facilities use, printed materials (will be tied to training and certification where appropriate)	\$20,000
Investment Promotion – funds used to court new development, help launch new operations	\$30,000
Forest Service Permits Pool – fund to speed up (eliminate current bottleneck) special use permitting process	\$20,000
Events Development (covering travel, corporate sponsorship development, events funding proposal preparation, etc)(assumes development of signature float plane event, and that the event will have its own larger budget)	\$20,000
Total	\$160,000

Funding sources proposed for the JTP budget for Year 1 are shown below in the sources and applications of funds table. Recommended funding from the CBJ includes the passenger fee fund (\$275,000) and an additional \$70,000 from the CBJ. An estimated \$110,000 of the JTP budget is proposed from other sources including the Forest Service, Alaska Airlines, various local business sources and cost recovery from the tourism industry.

Juneau Tourism Partnership Year One Proposed Budget Sources							
<i>Application</i>	<i>CBJ – Passenger Fee</i>	<i>CBJ - Other</i>	<i>Forest Service</i>	<i>Alaska Airlines</i>	<i>Other - Specify</i>	<i>Cost Recovery</i>	<i>Total</i>
Staff	\$155,000						\$155,000
Office	\$25,000				\$10,000 Local Business Sources		\$35,000
Fall Forum	\$20,000						\$20,000
Monitoring Programs	\$20,000						\$20,000
Travel	\$5,000			\$10,000	\$5,000 Alaska Ferry Service		\$20,000
Connections					\$15,000 Local Business Sources		\$15,000
Tourism Advisor	\$30,000						\$30,000
Marketing Plan		\$50,000					\$50,000
Training and Certification			\$15,000			5,000	\$20,000
Standards Development			\$20,000				\$20,000
Investment Promotion		\$15,000			\$15,000 Local Banks		\$30,000
Forest Service Permits Pool	\$20,000						\$20,000
Events Development		\$5,000 Parks and Recreation			\$15,000 DBA, Chamber, Civic Orgs		\$20,000
Totals	\$275,000	\$70,000	\$35,000	\$10,000	\$60,000	\$5,000	\$455,000

For future years, this plan recommends that the CBJ consider an increase in the bed tax from the current 7% level to 9%. When Juneau’s current visitor tax is compared to other destinations that serve patrons with the same profile, this bed tax would not be seen as a deterrent to patronage. About \$150,000 of this increase could be used to help fund the JTP (providing a balance to passenger fee funding and removing reliance on other CBJ funds) and the rest channeled to marketing. This should be discussed by the JTP with the industry and the Assembly in the spring of 2003.

5.4.2 Tourism Marketing Budget

This plan recommends that the JCVB continue to receive the marketing budget outlined below:

The Year 1 marketing budget is shown below.

Source/Formula	Contracted to JCVB*	Total
4/7 Bed Tax	\$505,000	\$505,000
Convention Center Marketing	\$128,000	\$128,000
Total	\$633,000	\$633,000

See section 4.2.2 for details on increasing the percentage of the JCVB budget that goes directly to advertising and on increasing the emphasis on targeting niches and regions that make sense for Juneau (for both destination and convention marketing). That section also details increased performance tracking and reporting.

Note that this plan also calls for the JTP to contract the development of a marketing plan. Marketing, in the environment of a destination working together to achieve both business and social goals, is not just about filling rooms or tours. Marketing begins the process of establishing a relationship between host and visitor that is richer than just a business transaction, increases the rate of spending and percentage of return, and selects market targets based on a match for Juneau’s set of experiences and a likelihood of respect for people, culture, place, and environment. Hence, marketing begins to shape the relationship of host and visitor, the behavior of the visitor, and the way the experience is delivered – beginning the process, before arrival, of reducing negative impacts from tourism and generating the things Juneau seeks in tourism. If this is to work, marketing needs to be quite successful at generating a flow of patrons to businesses and needs to evolve as the destination product inventory develops.

Note also that Juneau will need to develop a larger marketing budget as it increases its commitment to building the destination tourism segment of its economy.

6. Programs: Managing Impacts

Juneau recognizes that tourism, like every human activity, has impacts. Juneau will manage those impacts proactively, working cooperatively as a community in partnership with businesses from both within and outside Juneau. The Juneau Tourism Partnership will become the venue for collaborative discussion of issues, defining and updating standards, and crafting of solutions.

6.1 Annual Process for Impact Discussions and Actions

The Juneau Tourism Partnership (discussed in detail in Section 3.3.4) will manage impact discussions and then lead the process to implement solutions.

Each fall, around the first of November, the Juneau Tourism Partnership will convene a community tourism forum to review the season's performance, discuss issues, and update tourism planning. One key part of that forum will address impacts. The JTP will present a report on impacts that reflects season-long community input and industry observations. The JTP will facilitate a community discussion to analyze progress on various impact topics, and to anticipate impacts from changing tourism patterns and volume. The JTP will, with community and industry input, build and adjust impact management and mitigation plans and build community support for those plans or adjustments. The JTP will build budgets for those plans and work with the industry (inside and outside Juneau), the Assembly, and other partners to finance implementation.

6.2 Role of Best Management Practices

In the spirit of cooperatively addressing issues, the Juneau-based tourism industry will continue to develop and implement a "Best Management Practices" program to, through programs and practices, reduce impacts from tourism to the community. This program will be reviewed during the fall tourism forum hosted by the Juneau Tourism Partnership, and the JTP will make suggestions for modifications of practices and procedures for the upcoming season. The JTP will host a session prior to each tourism season during which the industry will unveil updated Best Management Practices for the coming season. The JTP will post the plan on a community tourism web site and collect feedback during the season. Success of this program will shape the ability of the industry to count on community support for key tourism initiatives, and will shape the nature of the tourism discussion. To that end, the JTP will work closely with the industry to help guide practices that reflect community wishes and concerns.

6.3 Impact Management Recommendations

6.3.1 Managing Flightseeing Impacts

Noise from both float plane and helicopter flightseeing has bothered a number of Juneau residents for several years. The analysis that led to this plan concluded that Juneau has no alternative but to address flightseeing noise in a significant way. Both float plane and helicopter flightseeing impacts need to be addressed separately, with the acknowledgement that those noise impacts are cumulative for many residents.

6.3.2 Managing Helicopter Noise

The plan acknowledges the important work accomplished in the Alternative Heliport Site Analysis study and the community discussions conducted by the Assembly regarding that study. The plan also acknowledges the efforts of the helicopter operators to adopt and follow practices and routes that have reduced noise and the number of people impacted by that noise. The plan further acknowledges the data gathered by web polling which indicates that helicopter flightseeing noise does “bother” a significant portion of the Juneau population. Frequency and volume are both significant factors in noise irritation.

Following the recommendations of the noise study, and understanding that relocation involves further study, time, and both public and private sector investment, the plan calls for phased relocation of heliports. Heliport relocation processes will be coordinated by the City Manager’s office in close partnership with the JTP, and will be designed to collaboratively work with various stakeholders to find mutually workable solutions.

Relocation processes will pay close attention to:

- Reducing helicopter noise levels for residents
- Fostering a healthy business environment for the operators
 - Assisting small operators (Coastal, Northstar) in making the move
 - Protecting cooperating operators from uncooperative competition
 - Creating an environment that enables reasonable growth
 - Avoiding actions that substantially raise costs of operation
- Ensuring a quality experience for visitors
- Mitigating impacts caused by the relocation
- Avoiding environmental damage, mitigation if required

The first phase will involve the development of a new heliport south of Juneau, probably in the vicinity of Dupont or Sheep Creek. The development will require impact analysis, land transfers, zoning adjustments, potential road development and/or improvement, potential lightering and related development costs, construction of one or more helipads and support facilities, and mitigation of impacts on effected parts of the community. Once complete, and after operational agreements and/or contracts are in place, ERA’s flightseeing

operations will move to the new heliport. The new heliport, and associated flight paths, will substantially reduce helicopter flightseeing noise.

The second phase will develop a northern heliport. The Alternative Heliport Site Analysis study points to Montana Creek as a target site. The process will concentrate on moving toward that site, but will collaborate on reasonable alternatives presented by operators and community early in the process. The development will require impact analysis, land transfers, zoning adjustments, road improvement, construction of one or more helipads and support facilities, and mitigation of impacts for nearby residences. Once complete, and after operational agreements and contracts are in place, TEMSCO, Coastal, and Northstar flightseeing operations will move to the new heliport facility. The new heliport, and associated flight paths, will substantially reduce helicopter flightseeing noise.

The cruise lines serving Juneau, as represented by Northwest Cruise Association, have indicated they will agree to voluntarily limit flightseeing sales to companies cooperating with the heliport relocation effort. Non-cooperating companies and new companies that don't locate at the designated flightseeing helipads will not be eligible for on-board sales of flightseeing packages. The JTP will explore additional options to preclude the opportunity to set up a new flightseeing operation that does not base from one of the new heliport sites.

The CBJ and the JTP will press phase one forward with as much speed as possible, making every effort to move operations by the 2004 season. The CBJ and the JTP will move phase two forward more slowly, working to enable the move about one season after the southern site is operational.

Until relocation is complete, the helicopter flightseeing operators will work to reduce noise (both volume and coverage) through neighborly flying practices. The Juneau Tourism Partnership will forward community observations during each tourism season and will conduct a review of the issue in its impact session each fall. The operators will meet annually, after the review, and adjust routes and practices as needed. Each season the route and practices plan will be provided to the JTP, which will distribute to the public through the media and on a dedicated portion of the community tourism website operated by the JTP.

6.3.3 Managing Float Plane Flightseeing Noise

Float plane flightseeing noise irritation is associated with take-off, climb-out and then flight paths close to residences. Noise is currently of the biggest concern in the Gastineau Channel southeast of the bridge. Float plane noise from the pond at the airport may produce lower impacts on fair weather days. Taku Lodge-bound flights originating in the pond would pass over more households. Frequency is a significant factor in noise irritation. (These findings are from the Alternative Heliport Site Analysis study.)

This plan acknowledges the ongoing efforts of the Gastineau Channel float plane operator, Wings of Alaska, for past upgrades to quieter equipment and in limiting growth and managing practices to reduce noise. The plan further acknowledges the data gathered by

web polling which indicates that float plane flightseeing noise does “bother” a significant portion of the Juneau population, especially those adjacent to the channel.

The draft of this plan included a proposed course of action. That path was clearly not proactive enough for some of the community and was, in the end, rejected by the operator as too costly.

This plan will utilize the strength of the collaborative venue of the JTP to address the floatplane noise issue in the Juneau harbor. The situation the JTP inherits is one in which flightseeing noise from floatplanes originating in the Juneau harbor, which is not in violation of any law, is bothering a significant portion of people along the flight path. The operator is willing to invest in quieter technology, to a limited extent, without a fixed timeline. The investment may result in fewer flights (as 5 passenger Beavers are replaced with 10 passenger Otters), but the operator is not open to limits on future expansion. The operator is willing to speed up the conversion, if CBJ provides economic incentives or assistance. Concerned residents have held back on assertive action for the past year to give the planning process a chance to work, and may be willing to be patient for a short period to give the JTP an opportunity to move beyond the progress in this plan. However, this team does not predict a very long window of opportunity for those discussions to bear fruit.

Therefore, the JTP is charged with holding collaborative discussions among stakeholders in the issue of floatplane noise from operations based in the Juneau harbor. The JTP is challenged to present a collaboratively devised solution during the fall tourism forum that yields lowered float plane noise levels and opportunities for business success for the operator.

6.3.4 Managing Vehicle Congestion

Vehicle congestion related to cruise tourism is an issue that is important to the people of Juneau. The primary focus of this issue is in the downtown area, with a secondary focus on streets, highways, and outlying areas. This plan acknowledges the prior work by the City and Borough of Juneau, in partnership with the cruise industry through passenger fee funding, in modifying infrastructure to relieve some of the congestion issues. This plan acknowledges voluntary efforts by ground transportation providers to modify routes and practices to reduce congestion. This plan acknowledges the use of crossing guards, implemented by CBJ in 2001, to facilitate pedestrian crossing and reduce congestion. This plan also acknowledges the concern about congestion expressed in the web polling. This plan proceeds from the assumption that congestion can interfere with resident access to public and business areas in the downtown, can make downtown a less “people friendly” place, can irritate travel on streets and roadways outside downtown, and can interfere with access to waterfront or trails in outlying areas.

Congestion management will have three foci:

1. Steps focusing on management of downtown
2. Steps to manage congestion outside downtown
3. Ongoing process to evaluate and update congestion planning issues

Downtown Congestion

Downtown congestion will be addressed through improvements to both infrastructure and practices. It is important that improvement planning take into account the call, in this plan, for a comprehensive waterfront planning effort, which may result in reconfiguration of some infrastructure or activities. It is important to note that geography severely limits infrastructure options in this area.

Downtown congestion issues addressed in this plan include:

- Improving efficiency of transportation services for cruise patrons
- Parking Issues
- Delivery Issues
- Truck Traffic Issues
- Pedestrian Issues

Improving efficiency of transportation services for cruise patrons

While transportation services for cruise patrons are not the only contributor to downtown congestion, their impact is both significant and highly visible. It is also quite evident that the buses and vans involved in this service are more “noticeable” than most other congestion contributors and more likely singled out for negative attention.

There is considerable vehicle congestion near the Steamship Wharf and much of that is related to passenger loading onto commercial vehicles. Construction of a convertible plaza between Marine Park and the library would improve vitality of the waterfront, improve efficiency of passenger loading, reduce congestion, and raise the quality of visitors’ arrival experience in Juneau. Ideally, a project like this should be undertaken within the context of an adopted Comprehensive Waterfront Plan, as described in Section 7.2.1. This plan understands that CBJ may designate this project as having sufficient urgency to merit that the CBJ, with funding from the cruise industry, undertake to design and construct that plaza. The development of this space would involve decking over the hole between the current dock and the street.

A second phase of this project would involve the upgrading of Marine Park. This phase would be fully developed after a comprehensive waterfront plan is in place, to maximize the ability to expand resident and public access to the waterfront, and to facilitate the quality of that access.

Management of passenger loading activities will be crucial to the success of improving congestion and expanding public benefits. Under this plan, the Assembly will consider transfer of the management of the passenger vehicle loading process from the Harbor Board to CBJ, to be administered by the Parks and Recreation Department, with appropriate levels of staffing. Any bus backing will be assisted by a ground attendant (provided by the company or manager of the area) and with the backup beeper temporarily disabled. The managing agency will be charged with making the convertible space serve the public needs as much of the time as possible.

When loading or holding spaces for commercial passenger loading are all occupied, buses and vans will cue *outside the downtown area*, in a space to be designated by CBJ, until the loading attendant signals the next driver that space is available. CBJ will choose the holding space(s) to enhance the ability of drivers to provide a quality interpretive experience for patrons and to not interfere with community activities.

The managing agency will revise the regulations for the use of loading zones, so that tour operators with light loads (fewer passengers to pick up or drop off) will be rewarded when switching to a smaller vehicle. The managing agency may consider granting access to the A zones for the duration of such a switch, or some financial incentive.

Parking Issues

Geography, changing personal use of motor vehicles, and the expansion of cruise-related business activities have contributed to a shortage of parking spaces in the downtown area. The search for parking contributes to congestion. The parking shortage combined with congestion present a barrier to residents' access to downtown public, retail, and service facilities. The spillover of parking by people working in downtown or cruise-related businesses into residential areas degrades neighborhood quality of life.

The Community Development Department has developed a parking plan for the CBJ. This plan urges early implementation of the parking plan, with the understanding that the proposed Comprehensive Waterfront Plan may require adjustments to the parking plan, if circulation patterns change.

The CBJ will consider potential "park and ride" locations between downtown and Lemon Creek and on Douglas Island (an option (but not a recommendation) in the new parking plan). The CBJ may develop a "park and ride" program that offers frequent low, or no, cost shuttles between outlying parking locations and downtown. This program may be supplemented by passenger fee funds, as a significant percentage of the impact comes from business and employee parking from cruise-related businesses. The JTP will work closely with the DBA to attain a high level of shop owner and employee participation in the park and ride program, hence fostering the ability of the community to access downtown during the cruise season. This participation may be incorporated into the Best Management Practices program.

The Juneau Tourism Partnership and the Community Development Department will convene a community and business discussion the first November after this plan is implemented, that explores the option of making parts of downtown a no-parking zone when cruise ships are in port. This option would only be developed in conjunction with the “park and ride” program described above.

Delivery Issues

Delivery vehicles, stopped in the circulation pattern around cruise ship activities and associated retail, contribute substantially to congestion. Deliveries during shopping hours also degrade the visitor experience and de-market Juneau’s visitor retail offerings. Most cities regulate delivery hours to minimize conflicts with high traffic periods.

The Assembly will work with downtown merchants to devise regulations to restrict deliveries on South Franklin and nearby sections of downtown to when cruise ships are not in port. Downtown merchants and other delivery recipients will work with delivery companies to adjust times of delivery to minimize increased business costs.

Truck Traffic Issues

Freight and fuel transportation from the Rock Dump through downtown add to the congestion issue. The appropriate committee of the Assembly will explore options for long term relocation of freight facilities to other locations.

Pedestrian Issues

Pedestrians, especially cruise patrons, crossing Egan Drive, Marine Way, and South Franklin Street contribute to traffic congestion. Conversely, congestion makes these crossings less than inviting for pedestrians, whether they are from Juneau or visitors. In 2001, CBJ initiated a program (with financial support from Passenger Fees) to utilize crossing guards to increase safety and lower pedestrian contribution to congestion.

The CBJ will continue to utilize crossing guards in the future, potentially expanding that program. The CBJ will work with the Department of Transportation to improve pedestrian crossing options in the neighborhood of the Centennial Hall (from the public parking area) and near the Seadrome Dock.

6.3.5 Managing Congestion outside Downtown

Operators will use voluntary Best Management Practices programs to limit congestion on roadways, parking areas, and trail and beach access points outside downtown. The Juneau Tourism Partnership will work with operators to shape practices, and to publicize those programs in the media and on the dedicated web site.

This plan encourages the CBJ to continue on the path set out in the currently adopted CBJ Transportation Plan. The prioritization of another Gastineau Channel Crossing by the Assembly in adopting that plan will provide congestion-relief options to both tourism-related traffic and local residents.

The Juneau Tourism Partnership will review issues related to congestion outside downtown during the fall community tourism forum. The JTP will work with operators to update programs and practices, utilizing input from the fall forum, with revisions announced well before the upcoming tourism season. The JTP will pass infrastructure and traffic management related suggestions and recommendations to the CBJ for consideration.

6.3.6 Ongoing Process to Evaluate and Update Congestion Planning Issues

The Juneau Tourism Partnership will host the ongoing discussion on congestion. The JTP will:

1. work closely with CBJ and DOT to analyze opportunities and bottlenecks,
2. take input from the community during and between cruise tourism seasons,
3. include a major discussion on congestion in the fall community tourism forum, and
4. Work with operators to annually update and distribute the Best Management Practices program.

6.4 Air and Water Quality

Air and water quality were ranked among the most important things that Juneau residents want to protect from the impacts of tourism economic activities. Much of that protection, though, falls under the jurisdiction of state and federal agencies. Under the new Alaska law, a fee is imposed to fund monitoring. The cruise industry has also adopted its own set of industry standards which often exceed state and federal standards. This plan acknowledges the voluntary efforts made by various cruise lines in regard to both air and water quality. It also acknowledges the efforts and activities of Juneau citizens to watchdog these issues.

The Juneau Tourism Partnership will:

1. review the monitoring programs, synthesizing that information into a comprehensive report which will be presented during the annual fall forum;
2. collect input from community sources during tourism seasons;
3. work with media to make sure that the community has comprehensive understanding of practices, measures, monitoring results, and incidents;
4. conduct a review of the state of air and water quality during each fall community forum (based on reports from state and federal agencies, with the invited input of those agencies, community, and cruise industry);

5. work with the cruise tourism industry to accomplish procedural adjustments to improve air and water quality protection if state, federal, and voluntary industry efforts are insufficient (e.g. switching to shore power);
6. work with CBJ to enact any dockside infrastructure or program adjustments that will further improve air and water quality if state, federal, and voluntary industry efforts are insufficient (e.g. extending shore power to public docks); and
7. Work with CBJ, state, and federal agencies to address any regulatory needs regarding air and water quality.

Shore power is already in place, as an air quality tool, on the Franklin dock. The Princess fleet has been updated to switch off generators and utilize local electricity. Other major lines are upgrading to cleaner burning engines and generators and moving to higher quality fuel. Royal Caribbean has the first turbine powered ship calling on Juneau. Smaller ships have not made similar advances at this time.

The Juneau Tourism Partnership will continue to review the monitoring results, looking at both total air quality and variations by vessel. If, after three seasons, there are significant differences in ship to ship output, the JTP will conduct discussions with the industry, the community, and the CBJ regarding a restructure of fees or other incentive to reward the better-performing vessels.

6.5 Recreational Resources

The commercial use of trails and access points for backcountry and offshore outings can conflict with residential use. The health of natural and cultural resources is affected by all human activities, including commercial tourism. Maintaining that health is critical, both in terms of environmental and heritage issues and in terms of sustainability of tourism activities.

Fortunately, Juneau developed a system for managing location, volume, and profile of commercial activities that use trails and access points. The recent Trails Working Group report reflects past efforts to balance community needs with commercial opportunities, and the cooperation of various resource managers. That process will be kept intact, with the working group reporting to the Juneau Tourism Partnership and the community during the fall community tourism forum. The trails and access discussion in that forum will provide additional community and commercial input for the working group to consider. The working group will integrate that input into an annual revision of the report, due before January 1 of each year. The JTP will distribute that report to media and through the website.

While resource management agencies are responsible for protecting the integrity of natural and cultural resources, a proactive tourism community can play a strong role in protecting the vitality of the resources. The Executive Director of the Juneau Tourism Partnership will meet several times each year with representatives from each key resource (Forest Service,

CBJ Parks and Recreation Department, Alaska Fish and Game Department, etc.) to discuss issues regarding resource vitality. The JTP will encourage (help find funding when necessary) management-driven monitoring projects and then help distribute reports concerning resource health.

When resource health issues are detected, the Juneau Tourism Partnership will convene a discussion between the key resource agency and the commercial operators/enterprises involved. The JTP will act to support reasonable solutions and work to leverage businesses compliance with agency management decisions.

The Juneau Tourism Partnership will seek ways that Juneau's tourism industry can contribute to improved resource health and management. It will work with resource management agencies to identify projects that can be supported with industry funding and/or energy that will enable better resource access, improved resource health, or lower management costs. The JTP will sponsor beach and river clean-up events and leverage industry participation in those events.

The Juneau Tourism Partnership will, in the fall community tourism forum, dedicate sessions to resource health issues. It will report on monitoring results and elicit community input. It will showcase cooperative activities by the industry on behalf of resources. It will, in those sessions, seek to find ways to improve resource vitality through changes in industry practices. The JTP will, after the fall forum, work with industry to identify changes in the Best Management Practices program for the benefit of resource vitality. It will also make recommendations to resource management agencies for procedural or program changes that leverage increased resource health. Finally, the JTP may, if needed, suggest changes to the Assembly regarding permit regulations and resource health.

7. Programs: Product Development

The proposed tourism product development program focuses on two key themes:

- Facilitating the destination product development and upgrading process to enable significant growth in the destination tourism sector (primarily the role of the JTP).
- Substantially enhancing the attractiveness of Juneau as a destination community (CBJ plays a partnership or direct role in collaboration with JTP and others).

The product development program has two main components:

1. Ongoing product development programs to support growth in the destination tourism sector.
2. Priority product development projects that will benefit both the cruise sector and destination travelers.

An overview of the program is provided in **Exhibit 7.1**. The implementation plan to undertake product development in the first year of operation of the tourism management plan is detailed in Chapter 10, based on the recommendations in the remainder of this chapter.

7.1 Product Development Programs

7.1.1 Tourism Standards/Product Quality

Juneau has developed some outstanding cruise tourism experiences that are ranked among the top experiences in the world. Some of the destination travel experiences in Juneau offer outstanding opportunities to experience Juneau's natural world. The planning team's review and assessment of the existing destination travel product reveals that Juneau will need to engage in further product development to meet an even higher level of product quality expected of the high-end destination travel market. It is important to also note that it is rarely possible to successfully mix cruise passengers with destination visitors on the same tour, as expectations, aptitudes, and abilities differ substantially. Growth in the destination tourism sector will be dependent on product quality upgrading (generally across the board) and certification programs in specific sectors such as guides and tour operators.

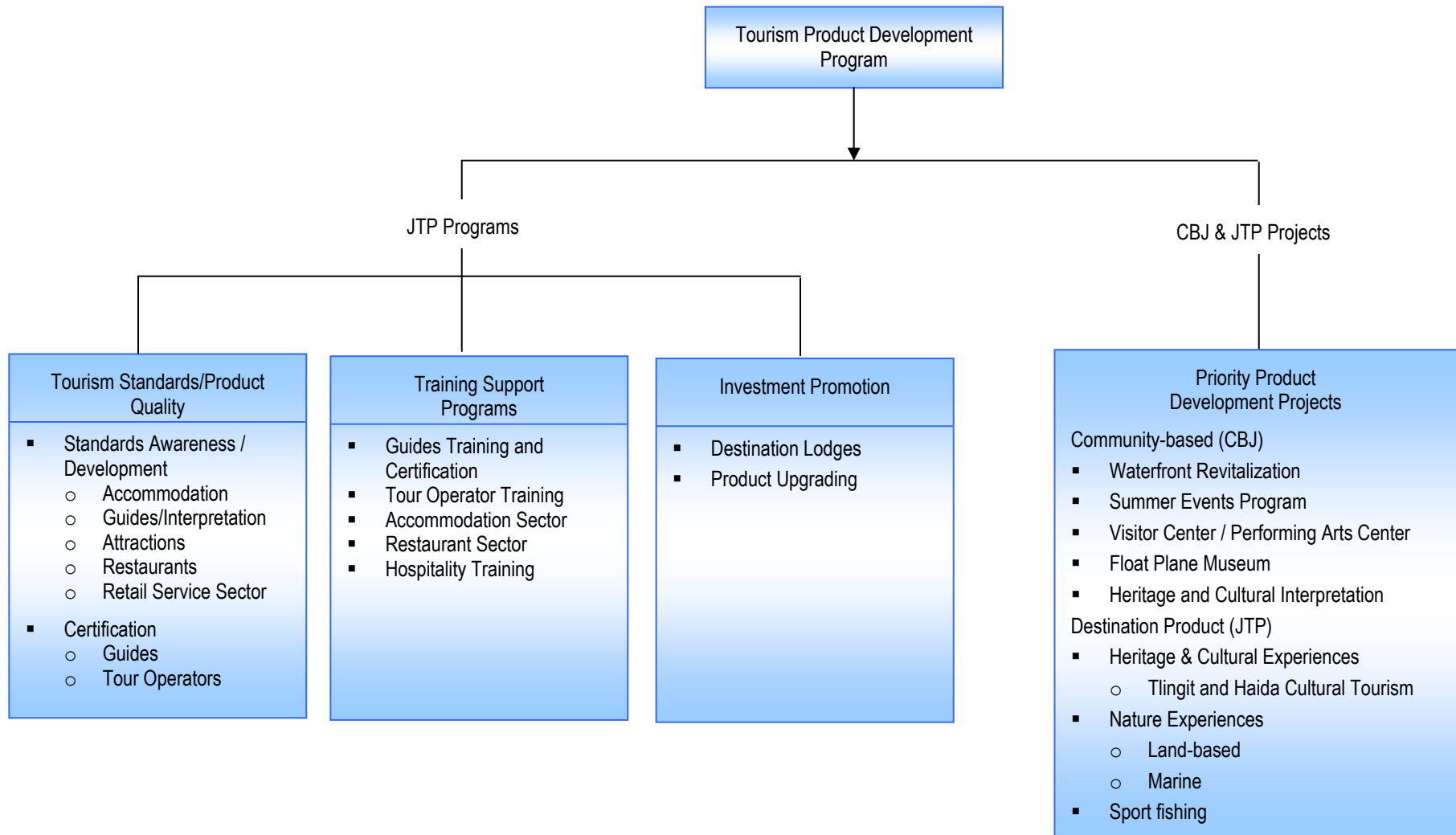
Given these needs, the JTP will implement a comprehensive standards awareness and development program for:

- The accommodation sector
- Guides and interpreters operating in tour situations or at fixed-roof facilities
- Attractions
- Restaurants
- Service sector

Standards awareness workshops are recommended for all groups to expose them to the standards expected by destination travelers in today's high end international tourism markets. The JTP will need to assemble standards information and benchmarks for use in the workshops. In the case of guides/interpreters/tour operators, it is suggested that standards be developed specific to the Juneau situation along with a certification program. Standards, training programs and certification programs are available from many jurisdictions to assist the JTP in designing and delivering on this program.

For the purpose of that implementation, the recommended approach is to establish an industry working group on standards/certification and tourism training. The working group would be mandated with the task of working with the JTP executive director to identify standards and associated training requirements, and to prepare an action plan for industry consideration at the first annual November industry conference.

Exhibit 7.1:



7.1.2 Training Support Programs

The foregoing discussion on standards awareness is targeted to owners/operators. An integral part of the destination tourism initiative will be the delivery of a full suite of training programs for owners/operators and their staff. The JTP will facilitate the delivery of training programs in the following priority areas:

- Guides training and certification
- Tour operator training (both marine and land-based)
- The accommodation sector
- The restaurant sector

In addition to these priority areas, it is suggested that hospitality training be delivered for frontline workers interacting with visitors (not only the industry but also ferry, airport and other frontline personnel).

In line with the recommendations for standards and certification, it is recommended that the industry working group suggested above also take on the task of training support programs given the inter-relationships between the two.

7.1.3 Investment Promotion

A third component of the destination tourism priority is the promotion of investment in four areas critical to successful destination tourism activity:

- Destination lodges
- Product upgrading in both existing accommodation and existing tour and guiding operations
- New lodging and other tourism facility development
- New tour and guiding operators

A dual approach is suggested for investment promotion activities of the JTP.

Promoting Investment and Facilitating Ease of Access to Financing

The JTP will work with JEDC and local financial institutions to encourage and facilitate ease of access to financing for investments that further the aims of the adopted plan.

Strengthening the Planning Environment for Tourism Development

The CBJ comprehensive development plan has not been developed with a tourism future of the type we propose in mind. While the plan recognizes tourism, there are no provisions other than a general statement of its importance. In order to meet the objectives for tourism set out in this plan, four planning related actions are recommended to strengthen the environment for planning. These include:

1. amending the plan to provide for an integrated waterfront development plan as discussed previously in this plan
2. amending the plan to reflect the provisions of this tourism management plan where appropriate, including a requirement to consider Juneau's tourism objectives and vision in review of planning applications outside of residential areas and in formulating planning policies for:
 - a. the downtown and waterfront
 - b. coastal areas
 - c. major transportation corridors and the airport
 - d. commercial areas
 - e. publicly owned land and facilities
3. amending the plan to designate areas for small scale lodging (bed and breakfasts, small hotels of up to 25 rooms) within the CBJ for which permits may be issued through administrative procedure through the following process:
 - a. The Director of Community Development works with the JTP to review the plan and identify areas within the CBJ in which tourism lodging and acceptable and desirable. In so doing, the typical standards for this type of lodging will be taken into account
 - b. The Director of Community Development recommends plan amendments to the Assembly based on the results of (a) above.
4. Amending the plan to prohibit additional development of private cruise ship docking or lightering facilities that connect to road system of Juneau.

7.2 Priority Product Development Projects

Juneau, with some strategic investment, can improve the performance of tourism economically, socially, and with regards to natural and cultural resources. This section identifies priority development projects, identified by the planning team (based on noted strengths, product gaps, community-indicated needs or wants, and pressing development issues), that, each in its own way, present Juneau with unique venues for improving tourism performance, business opportunities, local lifestyles, or to celebrate Juneau's heritage with tourism's help.

The first four projects are community-based (see Exhibit 7.1) focusing on enhancing the attractiveness of Juneau as a community destination. This will generate benefits for both cruise and destination tourism sectors. The remaining priority product development projects are largely oriented to the destination tourism sector although all can serve the cruise market as well. Implementation steps for these projects are described in Chapter 10.

7.2.1 Waterfront Revitalization

Juneau has a superb opportunity to strengthen its waterfront as a place for people and as a major attraction for both cruise and destination visitors. From a tourism perspective, waterfront redevelopment is a key strategy in any community tourism development plan.

The concept underlying successful waterfront development is the delivery of a quality, pedestrian-oriented "experience" to both residents of the city and their visitors. The better the experience, the greater the impact on resident quality of life and the perception of the city's image by visitors.

In short, an integrated and comprehensive waterfront plan is desirable – one that is broadly supported by the public and the private sector – to define and enhance public use and private sector investment opportunities. It should reflect a vision for the waterfront for Juneau residents and businesses and be fully integrated with and support the accepted tourism future for the City. In the planning team's view it is not just a logical next step based on the tourism management plan. It is much more than that – a key planning tool to guide the development and use of the waterfront in a comprehensive way for the benefit of Juneau's residents and businesses.

There is an urgency to this planning need that has been brought about by the deployment of a new generation of large (Panamax) cruise ships, already beginning to call on Juneau. Juneau's harbor is not configured appropriately for these ships and will need modification if they are to be accommodated.

Current Waterfront Plans and Projects

The planning team notes there have been a series of plans for various parts or functions of the waterfront but none appear to be integrated as part of any larger waterfront vision. The tourism planning process presents an excellent opportunity, through greater certainty about the vision and future for tourism activity in the City, to proceed with the development of a comprehensive waterfront plan, integrating the various plans that have been developed to date as appropriate.

The table below summarizes projects now being planned in the downtown waterfront area and the history of planning for the waterfront.

Project Title	Organization	Status	Scheduled Completion Date
Alaska Mental Health Land Trust	Alaska Mental Health Land Trust	Planning study	July 2002
Performing Arts Center Needs Assessment	Juneau Arts and Humanities Council	Programming and siting study	May 2002
Gold Creek Entrance Enhancement	CBJ Docks and Harbors	Habitat restoration	July 2002
Egan Drive – Whittier to Main	Alaska Department of Transportation	Enhanced pedestrian/traffic flows	December 2003
Egan Intersection Improvements (10 th Street)	Alaska Department of Transportation	Enhanced traffic flows/congestion reduction	December 2003
Steamship Wharf and Marine Park Improvement Project	CBJ	Planning and design	May 2003
Downtown Transit Center	CBJ Engineering Department	A multi-purpose 1,000 square foot staff building with facility for ticket sales	December 2003
Downtown Visitor Center Needs Assessment and Site Location	CBJ /JVCB	Programming phase	May 2002
Port Office	CBJ /Docks and Harbors Board	1,360 square foot office and visitor facilities to be located near People's Wharf	December 2002

In addition to these projects, the downtown waterfront has been the subject of many plans over the last several years. These are shown below.

Planning Document	Agency	Year
Downtown Waterfront Plan	Community Development Department	1986
Juneau Comprehensive Plan (1984) Updated in 1995	Community Development Department	Originally adopted by Assembly in 1984, with ongoing renewal
Juneau Coastal Management Plan	Community Development Department	Adopted by Assembly in 1986
Capital City Vision Project	Community Development Department	1997 (not adopted)
Juneau Waterfront Strategic Analysis and Improvement Plan, Phase 1	Docks and Harbors	2001 (adopted by Docks and Harbors Board)

This range of projects and studies indicates the need to pursue an integrated waterfront development approach, justified in part by the economic benefits that enhanced tourism can generate.

Waterfront Plan – Objectives and Scope

A key, early initiative of the tourism management plan should be the completion of a waterfront plan to provide direction for all stakeholders in the community and the tourism industry. The City Manager’s office should take lead on developing this plan, with strong input by the Juneau Tourism Partnership, the Community Development Department, the Parks and Recreation Department, and the Docks and Harbors Board. The recommended requirements for the waterfront plan are set out below (see addenda for additional details, scope).

The objectives for the waterfront plan are recommended as follows, consistent with a waterfront that enhances the image of the community, adds to the quality of life for community residents, and facilitates tourism activity and investment:

- meets the needs and aspirations of the community, the cruise tourism sector and the destination tourism sector;
- effectively balances the desires of the community to enjoy its waterfront with needs of the tourism sector;
- builds on and enhances the cruise experience that Juneau already offers, strengthening its position as the premier cruise destination in Alaska;

- ensures that the plan recommendations maximize the potential from destination travel, with clear linkages to the needs and expectations of this segment of tourism for a community-based experience;
- ensures that the plan recommendations provide a strong base for strengthening the meetings and convention market for Juneau;
- ensures that the waterfront can serve as a venue for events and other activities for people, including major events that can become regular annual tourism products for Juneau;
- provides effective linkages between downtown retail facilities and the waterfront, promoting the area as an exciting place to for shopping and entertainment;
- develops waterfront development themes that capture the character of Juneau and its waterfront, are linked to tourism market positioning for the community, and function as “organizing elements” for waterfront development and activities; and
- Transforms the image of Juneau’s downtown and becomes an engine for economic development and contributes to attracting investment.

It is anticipated that the waterfront plan will, upon adoption, form part of the CBJ Comprehensive Plan.

The deliverables for the integrated waterfront plan should include:

1. a waterfront concept plan specifying vision and objectives for the waterfront, design guidelines taking into account community needs, the tourism perspective, and infrastructure requirements
2. a public process for the development of the waterfront plan that is both interactive and educational in illustrating ranges of design options and ideas with sketches and plans
3. a financial and tourism impacts analysis for the preferred concept
4. a detailed waterfront land use plan based on the preferred concept, specifying public and private spaces and translating design guidelines where appropriate into land use requirements

5. an implementation plan including:
 - an infrastructure development program and accompanying budget/schedule for public sector investment in infrastructure, parks and open spaces, pedestrian and vehicular circulation, and parking as appropriate – areas in which private sector investment will be encouraged (note that this program will finish the design and programming for the convertible space and Marine Park as indicated in Section 6.3.4)

7.2.2 Events program for downtown and waterfront

Juneau can build an events calendar to serve three distinct purposes:

1. Events can be used to draw local residents back into spending more time in downtown.
2. Events can be used to draw residents from neighboring communities to Juneau for special occasions, performances, and other amenities, strengthening Southeast Alaska relations and boosting Juneau's economy.
3. Juneau can share special events with visitors from around the world, using those events to position Juneau in both cruise and destination travel markets and bolstering low patronage times in the tourism cycle.

The rapid evolution of downtown, largely shaped by the development of outlying retail development, increased cruise volume, and cruise-related development, has broken many residents' habits of frequenting the downtown area and patronizing downtown businesses.

Marine Park concerts are one ongoing example of events that can revitalize the relationship between Juneau residents and downtown. The expansion of available public space in the Marine Park area, accomplished with the construction of convertible space alongside the Steamship Wharf (see elsewhere in this plan), opens the door to more community activities in the downtown area.

Downtown merchants should lead the process to plan events for "light-volume periods" during the 2002 and future cruise seasons, partnering with cruise-related businesses and CBJ Parks and Recreation Department. These events should "intend" to mix residents and visitors, provide high energy community activities, and be matched by open shops in the downtown retail core, even if no ships are in port. The events could invite residents to participate in flightseeing and other tours at special rates, serving to both entertain and educate.

The convertible space opens special event opportunities outside the cruise season, with the ability to set up multi-day events that draw Juneau to its downtown waterfront.

The proposed visitor center/performing arts complex (see section 7.2.3) would be able to host an ongoing schedule of concerts, theatre performances, regional music and performing festivals and competitions, and visiting presenters for both local residents and neighboring communities. Downtown Juneau merchants should prepare to serve the patrons drawn in from around Southeast Alaska by these events, and to service those who spend long hours in the facility practicing and preparing for the events.

Downtown needs to establish a standard for quality of appearance for shops that close seasonally. Boarded up windows and other similar approaches de-market downtown and hurt business (local and visitor) for those businesses investing in staying open. Such a standard should be adopted by the Downtown Business Association, but can also be addressed by the JTP if needed.

The Need for “Signature” Events

Juneau needs to develop one or more key annual events that establish Juneau’s tourism “brand” and solidify its position in both cruise and destination travel marketplaces.

An annual “Float Plane Rendezvous or Festival” typifies this type of event. Scheduled for a long weekend in May, the event would draw vintage and current float planes in from around the world and a substantial following of float plane enthusiasts. The cruises scheduled to come to Juneau during that time period could be pitched for the event, helping early season sales. Other historic aviation equipment and practices could be included in the event.

The event could include contests for best restoration of vintage planes, best bush pilot outfit, furthest distance traveled, etc. A float plane rodeo could showcase worldwide float plane uses, such as water drops (for fire fighting), a fishing derby based from float planes, and multi-stop races.

Juneau could bring in international financial support and energy in coordinating and publicizing the event, including investments by aviation and gear (clothing, equipment, etc.) manufacturers, credit card companies, oil companies, timber companies, etc. Juneau could possibly attract participation by Harrison Ford or another personality associated with float planes in entertainment media.

The event could be tied to Juneau’s new float plane exhibits and could establish Juneau’s position as a hub for adventure activities in Southeast Alaska. It should also be used to showcase quiet technology and to leverage funds to continue investment in quiet technology for Juneau’s float plane fleet. Clearly, Juneau’s

residents will need to concur that flightseeing noise is being proactively addressed for the development of such an event to be possible.

Other events may be conceived, with similar lines of thought. These should be used to leverage patronage of Juneau's tourism offerings during low cycles, to establish or reinforce Juneau's "brand" among either cruise or destination markets, and to enrich local residents.

Implementation Approach

The approach to implementation (described in Chapter 10) involves the following general steps:

- Develop and execute a full events and activities program to the extent possible for the summer of 2002
- Monitor results and evaluate events as part of the preparation of the 2003 program in time for the annual November review
- Initiate the creation of a signature event for Juneau beginning in June, 2002.

7.2.3 Visitor Center/Performing Arts Complex

In order to welcome and educate visitors, and to entice cruise passengers to become destination visitors, Juneau will explore options to design and construct a visitor center complex close to the cruise ship docks. That center could also serve as a key "bad weather" experience when other activities are less desirable or possible. As Juneau's cruise tourism season is less than half a year, the facility could be designed as dual purpose, also housing facilities for a performing arts center. ***This center is conceived as an icon for the new win-win relationship between Juneau and tourism.***

For the visitors, that center could be a multiple-faceted experience. Cruise ship passengers would find this center both a guide to the Juneau tourism offerings and an invitation to experience Juneau in ways that cannot happen on a cruise stopover. The center might also house a world class media extravaganza (like an IMAX) that focuses on Tlingit culture, glaciers, bears, float planes or mining history. Over time, multiple productions could be rotated, offering repeat cruise passengers a reason to come back to this center. Programming during the cruise season should be designed to ***not*** compete with tour offerings, expanding on bad weather days to fill in when some tours have to be cancelled.

The center would, of course, be offered to non-cruise travelers as the hub of Juneau's visitor experience, with key opportunities to connect with experiences and products based out of Juneau – and an opportunity to learn about the natural and cultural environment of the destination.

From October through April the center could focus on hosting performing arts events for Juneau and neighboring communities. The facility that houses the media

extravaganza in the summer might be a concert and theatre facility, with top quality acoustics. With a constant parade of events in the downtown area, and a perpetual flow of performers to practice in the facility, downtown business would be stimulated outside the cruise season. Restaurants and shops would have reason to be open to serve Juneau and visitors from neighboring communities.

Juneau could work with the cruise industry and other partners to jointly fund the development of the center. Operational expenses could be covered by a new dedicated passenger fee, making access to the center's performances free to cruise passengers (covered by passenger fee) – providing a new reason to board a ship calling on Juneau. This fee could cover part of the expenses for managing the facility on a year-round basis.

The Juneau Tourism Partnership will lead the discussions on the development of the center. The JTP will be responsible for exploring community consensus of support for and excitement about this project. The comprehensive waterfront plan can identify potential locations for such a facility. The Assembly can, if the project is supported in Juneau, work with the JTP to find planning funds, to secure the site, and to leverage funding for the facility.

Note that there are existing downtown visitor center planning efforts underway (see table in section 7.2.1) by the CBJ/Docks and Harbors Board and the CBJ/JCVB. Similarly there is a study underway for the Juneau Arts and Humanities Council. Those plans could be consolidated into this facility, with the understanding that other efforts at serving arriving visitors will need to take place until this facility is operational. JCVB should have a significant role in development and operation of this center.

7.2.4 Museum of Float Plane History

Float planes have been an important part of Juneau's history, and an important element in the development and culture of Southeast Alaska. Float planes hold a special mystique for travelers, both cruise and destination. Float planes are a special part of Alaska's heritage and should serve, together with the capital, as a draw for in state visitors and extra points when Juneau competes for regional conventions.

Juneau will explore the option of assembling a set of float plane exhibits, outdoors, along the waterfront near downtown and the cruise ship docks. The exhibits, some featuring vintage planes, will be accompanied by a walking map, interpretive signs relating float plane facts and history, and, possibly, a set of indoor exhibits. Other heritage aviation equipment can also be featured in exhibits and interpretive materials.

The Juneau Tourism Partnership will take the lead on the Float Plane Museum discussion. The JTP will work with local float plane operators, historians, civic groups, and the CBJ to build a possible plan of action. Some appropriate outdoor exhibit spaces will be identified in the comprehensive waterfront plan. Others may be found back from the waterfront area. Once the basics of a plan are in place and community support is tested, the JTP will work with partners to raise funds to procure and restore vintage aircraft, and to develop exhibits.

Note that this outdoor museum project ties closely with the float plane event described elsewhere. Both are highly dependent on the satisfactory resolution of noise-related issues.

7.2.5 Heritage and Cultural Interpretation Enhancement

There are several aspects to Juneau's human-based heritage and culture that can be enhanced for locals at the same time they enrich the experience of visitors to Juneau and help bolster the tourism economy. Some enhancements simply require focused promotional efforts, while others require infrastructure or programmatic investment.

A short list of major foci include:

- The Alaska State Capitol and Governor's Mansion
- Tlingit culture
- Juneau's gold mining history
- State and local museums

The Alaska State Capitol and Governor's Mansion

The Alaska State Capitol and Governor's Mansion have been an interesting part of Juneau's cruise tourism product. Being "in" Alaska's Capital City has been an important part of the draw for ships to stop in Juneau, as many from the lower 48 have enjoyed keeping a checklist of state capital visits. Many have enjoyed seeing the State Capitol and Governor's Mansion from a tour bus window, but comparatively few have invested time and money on guided tours.

The capital experience will be a nice addition to destination travel itineraries, but will not become a major draw. However, Juneau can work to build a flow of in-state visitors to explore the capital, including school groups. In doing so, it can solidify the location of the capital and enhance tourism revenues during seasonal lows.

The Juneau Tourism Partnership will work with Alaska Marine Highway, Alaska Airlines, tour operators and local lodging providers to build a set of packages for in-state travelers to visit the capital. School groups will be encouraged to visit Juneau, perhaps tying the visit to regional or state sporting or academic events. Historic

associations will be encouraged to hold meetings in Juneau, accessing the capitol building, the float plane museum, gold mines, and museums.

Tourism Exploring Tlingit and Haida Cultures

One of the most sought after tourism products in cruise and high-end nature and adventure tourism markets is legitimate cultural tourism, a significant opportunity for Juneau and for local Tlingit people. Legitimate cultural tourism, unlike earlier tourism styles that focused on staged showy performances with little integrity, reflects a growing demand for learning and integrity as a part of the tourism experience.

It is important to remember that sharing the aspects of one's culture with outsiders is a decision that must be made within the culture. It is inappropriate for tourism to exploit the Tlingit and Haida people and their culture without their consent and without their active participation in the design, development, and rewards of that tourism. Tlingit and Haida people may, as other cultures around the world have done, choose to use tourism to reinforce and reinvigorate members' interest in their culture. Further, tourism that shares a culture must, by its very nature, be designed to protect the integrity of that culture, lest the precious asset of that culture be lost in the rush by visitors to discover and by businesses to profit. This plan includes, among the addenda, draft concepts being used by a statewide Native organization to help Alaskan Native Americans work through the issues around sharing their culture. There are many concepts in this document that also apply to the issues of sharing the community of Juneau with visitors.

There are some Tlingit and Haida tourism experiences and products available in Juneau and Southeast Alaska, primarily to cruise ship passengers. Ketchikan is known as the place to see totem poles. Haines is noted for its carvers. Goldbelt's film gives visitors a glimpse into the culture. But, there is little in the way of visitor opportunities to spend significant quality time learning about the Tlingit culture, or seeing Southeast Alaska's wilderness through Tlingit eyes. There is certainly a hunger, among travelers, for a more intimate look into this culture, which can be converted into economics and cultural reinforcement for local Tlingit people.

The JTP will work with both Goldbelt and Sealaska to explore opportunities that focus on meaningful experiences, cultural respect and integrity, and economics that work for local Tlingits and the corporations. Marketing efforts will be designed to celebrate these cultures and to enhance the ability for Tlingit people to deliver cultural tourism experiences and to present Tlingit artwork and artisanship.

Gold Mining

Gold played a very important role in Juneau's history and still plays a very important role in drawing tourism to Alaska. Juneau, however, has not adequately converted its historical experience with gold mining activities into significant interpretive or

economic activities. Even with all that Skagway has done to capitalize and build on the gold mining heritage, there is room for Juneau in this marketplace.

The narrow roads of downtown Juneau constrict the development of volume tourism into Last Chance Basin. The basin, the heritage site, and the wealth of lore and artifacts present an opportunity to develop a set of high quality/low volume tourism experiences that will be attractive to both Alaskans and outsiders seeking to explore the gold mining heritage.

Juneau has the opportunity to develop both “living history” and “participatory” components to a gold mining tourism sector. The JTP will work with local enthusiasts of the gold rush era to find ways that Juneau’s gold rush heritage can be shared in ways that enhance economics without compromising integrity.

State and Local Museums

Juneau, as the Alaska State Capital, houses important state historical collections. The Alaska State Museum, together with local museums, represent an important tourism opportunity, so long as Juneau understands the regional and niche nature of these products.

The Alaska State Museum is of primary interest to Alaskans, but can also supplement other visitors’ experiences. The most important tourism value the museums have for Juneau is to draw Alaskans to Juneau. This “Alaskan” component of Juneau’s tourism economy can be managed to level out the low patronage periods associated with cycles to Juneau’s other tourism experiences and legislative sessions.

The JTP will work with museum managers, hoteliers, the Alaska Marine Highway System, and Alaska Airlines to devise campaigns aimed to draw Alaskans to Juneau at times when room nights are most needed and inter-Alaskan travel is light. To some extent, this marketing effort can extend to history buffs beyond Alaska, with promotional communications passing through history associations.

In order to commence work on strengthening heritage and cultural interpretation experiences as part of the tourism product, we have recommended the formation of two working groups from industry:

- the first to address fixed roof tourism products (e.g. museums); and
- The second to address guided experiences.

Both working groups would include representatives from the destination and local cruise industry. Each would prepare action plans working with the JTP and present preliminary ideas at the annual November conference in the fall of 2002. Following input at that conference, the plans would be refined and become formal programs of the JTP for implementation in collaboration with industry and others as appropriate.

7.2.6 Destination Product

Nature Experiences

Nature and man's adaptation to the natural world of Southeast Alaska are the dominant tourism products Juneau has to offer to both cruise and destination travelers. Juneau has, in the past excelled at establishing a reputation as a “nature tour” cruise stop. Juneau has not established this reputation among potential destination travelers. A key finding that will drive this part of the plan is that most, if not all, of Juneau's natural tourism product can also be delivered elsewhere in Southeast Alaska.

Juneau will work to solidify its position as the premier “tour” stop among Southeast Alaska cruise destinations. To keep that ranking, Juneau will:

- work to maximize quality of experience,
- work to maximize quality of interpretation,
- track competing products,
- find new, innovative nature tour products to offer, and
- Use marketing to focus cruise patrons on Juneau's tours.

The Juneau Tourism Partnership will manage the process of protecting Juneau's position as a leading cruise “tour stop”. It will be responsible for researching competing products in Southeast Alaska. It will work with Juneau guides to provide them with access to skill-building training and interpretive data. It will encourage the development of a guide association and the establishment of guiding credentials. It will host an ongoing tourism discussion on product innovation and will assist local entrepreneurs in launching innovative new products. The JTP will manage the marketing efforts to strengthen potential cruise patrons' knowledge of and desire to experience Juneau's tour products.

Juneau will establish its reputation as a premier natural destination for outdoor enthusiasts, for soft adventure travelers, and for people seeking a rich natural heritage experience. That effort will require product development, product refinement, guide training, market analysis, and marketing. Note again that destination travelers and cruise passengers are better served on separate tour experiences.

The nature-based destination experiences that Juneau should focus most aggressively on include:

- Glacier activities such as trekking, exploring, participatory research, and ecology; as combined with small boats, helicopters, float planes, dog sleds, and foot travel
- Bear-related activities such as photography, ecology, participatory research

- Wildlife watching, photography, participatory research, ecology (both terrestrial and marine species, with experiences utilizing small boats, kayaks, helicopters, and float planes)
- Coastal ecosystem exploration and interpretation, ecology, photography, and participatory research using small boats, kayaks, float planes, and foot travel
- Forest ecosystem exploration and interpretation, ecology, photography, and participatory research using foot travel

The Juneau Tourism Partnership will lead the drive to build Juneau's product for and reputation among destination travelers. It will work with existing tour businesses to build new products oriented to this group of travelers. Similarly, some existing products currently offered to the cruise market may be refined for destination travelers. Destination products will contrast with current cruise-related products in the following manner:

- Experience length will range from a few hours to several days
- These travelers will expect a deeper level of interpretation – less entertainment and more depth of knowledge
- Many of these travelers will be physically prepared to engage in more demanding activities than the majority of cruise passengers
- Many of these travelers will come with, or purchase in Juneau, appropriate outdoor clothing and gear
- Destination experiences with smaller groups of patrons and higher guide to patron ratios are expected by these travelers

The Juneau Tourism Partnership will sponsor training programs to help guides prepare to meet the needs of destination travelers. The JTP will sponsor training programs focusing on interpretive content. The JTP will work with Juneau Public Libraries to enhance the availability of interpretive materials on the natural history of Southeast Alaska.

The Juneau Tourism Partnership will, through its contracted development of a tourism marketing plan, research niche and geographic markets that are a match for Juneau's current and projected destination tourism experiences. The JTP will dedicate much of its marketing energies and budget to building market awareness for Juneau's natural attractions and experiences among key targeted niche and geographic markets. Those efforts will result in Juneau having a real presence among several key markets that facilitates the ability of individual businesses to capture a steady stream of reservations.

Juneau will work with other Southeast Alaska destinations in establishing market demand for regional experiences. Familiarization tours for media and travel professionals should include both Juneau and complimentary Southeast Alaska

destinations. On that same vein, the JTP will encourage packaging that includes attractions and experiences throughout Southeast Alaska.

The Juneau Tourism Partnership will pay particular attention to the satisfaction level of Juneau's destination nature travelers. The JTP will coordinate with local tourism businesses to build a database of visitors. The JTP will survey those visitors, glean knowledge that will help Juneau shape and refine its nature experiences. And the JTP will develop an ongoing communication with those past visitors, seeking to encourage them to visit again and to send friends and family to Juneau.

Sport Fishing

Sport fishing has long been a mainstay for Alaska tourism product. Southeast Alaska's reputation for both freshwater and saltwater fishing extends around the globe. Juneau is a great base for fishing adventures, with both boat and float plane departures to exciting salt water, lake, and stream fishing. Juneau's fishing experiences are enhanced by spectacular scenery and the constant opportunity to share fishing with brown and black bears.

With all that said, Juneau has not adequately established itself as a fishing destination. Those seeking to sell guided fishing experiences or fishing lodge experiences sell into a market that has been cultivated for Alaska as a whole or the Southeast. With its extensive charter air connections to the rest of Southeast Alaska, and the great selection of guided experiences based in or near Juneau, Juneau will work to define itself as the Southeast Alaska hub for fishing experiences.

The JTP will work with charter air, charter fishing, fishing lodges, fishing guides, Alaska Airlines, the Alaska Ferry System, local lodging operations, and local outfitters to build more marketable packages. It will also work, through its marketing contracts, to establish Juneau as a premier fishing destination.

Product Development Implementation

Implementation includes the formation of a working group with a specific mandate to set up pilot testing for packaged products in cultural, nature and sport fishing areas. Part of this effort will include the organization and execution of a working conference with international and national specialty tour operators to assess existing product, product potential and to identify product development strategies. See Chapter 10 for the recommended steps and schedule for implementation of this project area.

7.3 Aligning Priority Projects with Current Priorities

The CBJ develops a list of proposed projects on an annual basis for funding under the passenger fee funds envelope. The list is developed by a committee of industry and CBJ representatives for approval by the Assembly.

For future project identification efforts, it is recommended that the project identification process be incorporated as part of the annual tourism sector review, managed by the JTP. Specific project ideas would be considered during the annual review and a recommendation made by the JTP to the Assembly for adoption.

8. Programs: Marketing

Juneau needs a comprehensive marketing program, complete with a plan, a budget, mechanisms to perpetuate that budget, mechanisms to update the plan, defined procedures to carry out the marketing, mechanisms to track Juneau's performance in the marketplace, and mechanisms to measure marketing performance. The system needs lines of responsibility that track back to residents, businesses, and revenue sources.

The JCVB will continue to lead marketing. It will engineer more of its one million dollar budget into advertising and its advertising strategy will become more target oriented, aiming at regions and niches that are a match for Juneau's experience based tourism.

The JTP will, within the first six months of operation, contract and complete a Juneau destination tourism marketing plan, collaborating with JCVB as it works through the planning process. That plan will be available to guide JCVB marketing decisions and the strategies of Juneau's destination tourism industry.

The JCVB will assemble a tourism marketing advisory group of recognized local tourism business people to coach and oversee marketing efforts. That group will include representatives from Alaska Airlines, Alaska Marine Highway, and the Director of the JTP.

The Juneau Tourism Partnership will focus on the results of its contracted marketing planning project as a part of the first fall community tourism forum. JCVB will report at that forum on the performance of the past year's marketing efforts and will showcase the strategy for the coming season.

The marketing plan, to be accomplished by contracted services, will look at short and long term strategies to target and market to patrons that are the best match for Juneau's destination and convention services. The plan will look at mechanisms to convert cruise visitors to future destination visitors. It will look at geographic and niche markets that can be successfully attracted, noting the nature, scale, and location of Juneau's tourism products. The plan will outline marketing mechanisms, suggest budgets, prioritize actions, prescribe appropriate marketing travel, and outline marketing partnerships. The plan will detail steps for evaluating success, learning from results, and evolving the strategy as trends and world events dictate. The plan will set out formal criteria for evaluation of marketing activities.

Juneau needs to know how its tourism marketing investments are paying back. The JCVB will demonstrate performance to the Assembly and the JTP, by providing

statistics that compare results with investment. Arriving non-cruise, non-business visitors need to be surveyed annually, to understand the impacts of Juneau’s tourism marketing program. The JCVB will present to Parks and Recreation and the JTP a full report on the economic impacts of convention marketing, both in terms of convention operations and in terms of lodging, dining, and other spending. All reports will be forwarded to the Assembly and shared with the public.

JCVB will continue and strengthen its relationships with and memberships in regional, state, and national tourism marketing organizations. In order to keep product development in line with marketing, the JTP will establish similar relationships. Those relationships will include the professional travel community, such as wholesalers, outbound operators, travel media, and various national and regional associations.

Tracking Marketing Performance

In order to ensure more effective and focused destination marketing, a system of tracking and monitoring marketing effort against targets needs to be put in place. Illustrations of the types of data that need to be collected are shown in the series of tables below. For each visit type (e.g. vacation, visiting friends and relatives, business, convention) information on demographics, spending, types of lodging and related variables will be ideally collected and monitored against targets for the segments. The data may indeed be more detailed as the marketing effort becomes more sophisticated, targeting specific segments, (e.g. Nature Tourists, etc.). The challenge is in capturing the data.

Juneau has a surprising lack of data demonstrating tourism performance, trends, and demographics compared to similar destinations around the world – and certainly not enough to excel in the competitive international nature tourism market. Hence year one will establish a base line. Prior to subsequent seasons, targets will be established. Resulting season end data, when used in these trackers, can measure performance in comparison to goals.

Illustration Performance Data

Visit Type	Visitors Current Cycle	Visitors Past Cycle	Net Growth	Target Growth	Performance

Visitor Origins	Visitors Current Cycle	Visitors Past Cycle	Net Growth	Target Growth	Performance
Alaska					
Washington Oregon					
California					

Visit Type	Visitor Spending Current Cycle	Visitor Spending Past Cycle	Net Growth	Target Growth	Performance

Type of Lodging	Occupancy Current Cycle	Occupancy Past Cycle	Net Growth	Target Growth	Performance

Type of Meeting/ Convention	Nights of Lodging Current Cycle	Nights of Lodging Past Cycle	Net Growth	Target Growth	Performance

In addition to tracking performance in terms of results, it is also important to assess marketing effectiveness by marketing channel. This involves the development of a specific business plan for marketing in which each segment is identified, a marketing channel, (or channels) defined (a plan for each channel), and targets for visitors set. An illustration of how this might be structured is shown in the table below.

Market Segment	Sample Marketing Channel	Target Visitors	Actual Visitors	Assessment of Results
Nature Tourists	1. trade			
	2. ads in selected regional markets			
	3. internet			
	4. selected corporate incentive targets			

For each market segment, a results assessment would be done as part of normal business practice to determine the degree to which the channel and the marketing campaign was effective and what might be done to improve effectiveness. Sample considerations are shown in the table below.

Market Segment – Nature Tourists – Results Assessment

Month Quarter, or Annual	Target Visitors	Actual Visitors	Conversion Study results (or other measures)	Economic Conditions in target destination	Effectiveness of partners if any in the marketing	Anecdotal feedback from trade, experts	Conclusions & Recommendations

9. JTP Programs: Monitoring Plan Performance and Impacts

An important part of this plan for Juneau deals with the question of managing growth, and what happens if growth exceeds physical or social capacity. Juneau has made it abundantly clear that, at some point, visitor volume or impacts from visitor activities could tip the benefits/negative impacts scale to the wrong side. Some people see that scale as tipped now, but community input in the planning process indicates that the majority is not ready to put the brakes on tourism, if impacts can be managed.

Hence, this plan relies on a “trigger mechanism” that sets off a “safety valve” chain of events, when physical or social capacities are approached or reached. The safety valve functions are NOT geared around shutting down existing tourism; rather they protect investments and jobs while developing alternative growth options that remove the impacts from the community. In some cases it may be possible to mitigate specific impacts.

Juneau’s focus, in this regard, is around cruise tourism, reflecting the rapid growth over the past decade that “got ahead” of impact management. This plan, reflecting community input, focuses first on managing to reduce impacts and increase benefits, but specifically builds the safety valve discussed here.

Juneau must also look to potential capacity issues for destination travel, even though current volume and growth don’t warrant much concern. This plan, however, is assertive in the development of more destination-related product and in increasing effectiveness of marketing programs. And, the assumption is that it will be much less painful to outline growth parameters now than to impose them on a situation that has become a community issue.

Note that trigger mechanisms, by and large, measure public perception rather than hard numbers. There are good reasons for this approach. First, Juneau indicated through stakeholder interviews, public sessions, and web polling (see web poll results in the addenda) that it prefers to manage impacts and benefits (quality of life) rather than sheer numbers. Second, other parts of this plan aggressively seek to alter the volume/impact ratio, so volume ceases to be a good indicator of social capacity. Physical capacity, similarly, may be altered by infrastructure and operations changes (some prescribed in this plan and others to be developed in the comprehensive waterfront plan) so this plan does not specifically trigger the safety valve based on numbers of arriving visitors.

9.1 Cruise Safety Valve Strategy

In the last decade, growth in volume of cruise patronage outstripped the community's ability to plan for and manage impacts. The industry is projecting slower growth for the next decade and this plan prescribes aggressive impact management. Should, however, the uncertainty in the travel market place speed up growth, or Juneau not succeed in realizing effective impact management, the trigger mechanism is activated.

One potential safety valve for cruise tourism is the development of a new cruise destination off Juneau's road grid but within the same general vicinity. This is a proactive approach consistent with the recommended position of the CBJ on cruise tourism; that is, to become a partner in the cruise sector, seeking to provide a quality product to the industry while deriving needed economic benefits and ensuring that community quality of life is not compromised.

If this option were chosen, the destination would be developed (the JTP and the Assembly become the chief drivers) as a free standing cruise port (visitors don't get shuttled into Juneau) with its own set of experiences and retail offerings. With the development driven by Juneau, every effort would be made to extend business and employment opportunities to Juneau citizens first. And, management of the two destinations would focus on protecting the level of business that Juneau needs while growing the new destination as additional opportunity. The JTP and Assembly would need to work with appropriate partners, including the cruise industry, to shape this development to be attractive to the industry and its patrons. In early years, aggressive marketing will be required to create patron demand for the itineraries that include this stop. This safety valve mechanism can be executed without compromising Juneau's image with patrons or industry partners – and without the need for social conflict in Juneau.

Other options may also be explored to mitigate specific impacts or replace the above option.

9.1.1 Cruise Indicators

The JTP will carefully monitor the following indicators, on an annual basis, and trigger the safety valve (see section 9.1.3) if conditions warrant. This list may be modified over time as issues change or conditions warrant.

Condition	Indicator
Social Capacity	If fall polls indicate that a majority of Juneau residents feel that Juneau has reached or exceeded capacity in serving cruise patrons and strongly feel that the safety valve option should be activated
Social Capacity	If fall polls indicate that a majority of Juneau residents feel that cruise-related impacts outweigh benefits and strongly feel the safety valve option should be activated
Social Capacity	Public and industry discussions during the fall tourism forum indicate a consensus that capacity has been reached, will be reached in the next season, or that impact levels warrant activation of the safety valve
Physical Capacity	<p>As reported in the fall tourism forum, 10% of cruise sailings in the past season (or 15% scheduled for the next season) are unable to call on Juneau because of a lack of capacity for docking and mooring.</p> <p><i>This plan assumes that under the new partnership with the cruise industry that the industry will provide the JTP with forecasts into the future (to the extent possible) and will alert the JTP to any extraordinary changes anticipated in the future that will affect the profile of cruise tourism in Juneau.</i></p>
Resource Impacts	As indicated by reports, polls, or forum discussions, if the conclusion is that significant natural or cultural resource impacts are occurring faster than management and mitigation can handle.

9.1.2 Monitoring Cruise Indicators

Each fall, in preparation for the fall tourism forum, the JTP will meet with the cruise industry to prepare a report detailing all aspects of performance for the completed season, projections for the upcoming season, and longer term projections for Alaska cruises.

Each fall, in preparation for the fall tourism forum, the JTP will contract a random/scientific poll of Juneau residents to measure capacity and impact issues based on the completed season.

The JTP will build sessions into the fall tourism forum to present industry and community perspectives on cruise capacity and performance issues. Then the JTP will facilitate a public discussion to explore those issues. That discussion will be designed to “honor and value” all points of view, and will be facilitated in a manner that is respectful to all parties.

The fall tourism forum will feature a public meeting of the JTP board of directors in which the board will decide if triggering conditions require activation of the safety valve. The board may raise the trigger issue at any other time, but the issue is formally a part of each fall tourism forum.

9.1.3 Activation

If the JTP board formally decides that triggering conditions are present, it will notify the Assembly and begin working with the Planning and Policy Committee of the Assembly on implementation of the safety valve measures.

9.2 Destination Travel Safety Valve

As Juneau builds its destination travel economy, it will share a different relationship than it has with cruise tourism. This economy will be built by Juneau, with the support (as indicated in all public input mechanisms employed in this planning process) of Juneau citizens. Marketing will be driven from Juneau and product development will focus on Juneau-based enterprises. This puts Juneau and Juneau businesses in a greater position to respond to capacity/impact issues.

Capacity and impacts are likely to be viewed in a different manner, as well. Destination travel should never generate the sheer volume that cruise tourism generates, but will generate longer stays (and hence more economic return per arrival). Visitors will disburse to natural areas in and around the borough, spending relatively little time on the streets, and then rarely in groups large enough to justify a bus.

Impacts are likely to be felt in a different manner, as small groups of hikers, kayakers, etc. may be present in places that residents like to frequent. Similarly, one might expect guided fishing and wildlife viewing outings to slip into some spaces that residents also use. These uses may detract from residents’ ability to achieve solitude.

Impacts on natural resources will also differ greatly. While cruise-related hiking tours may access the first mile of a trail system, destination visitors may be out for days. It will be important that the JTP stay in communication with wildlife and resource management agencies.

9.2.1 Destination Safety Valve

Juneau will activate two mechanisms if social or environmental capacity is determined to have been reached or breached. The first of these involves management of lodging capacity and the second involves marketing, which can both affect volume.

If the safety valve is activated, the Assembly will put a hold on issuing new permits for lodging construction or expansion, outside the downtown and airport business lodging areas. That hold will stay in place until the JTP and the Assembly determine that growth is acceptable to Juneau residents.

If the safety valve is activated, the JTP and JCVB will collaborate to modify marketing to take pressure off volume increases (especially relating to specific triggering mechanisms) and focus on growing price per visitor.

Further, if the safety valve is activated due to specific environmental concerns, the JTP will work with resource managers and businesses to shift pressure away from the concerned resource or species. The JTP and JCVB will collaborate to use marketing mechanisms to change demand, as needed, for experiences that are impacting specific species or resources.

9.2.2 Destination Indicators

The following indicators will be used to trigger safety valve actions. This list may be modified as the sector develops and impacts are identified.

Impact	Indicators
Social Impact	Polls indicate that a majority of residents feel a loss of access to solitude, key resources, or quality time in Juneau’s natural areas due to destination travel pressures – and strongly feel the safety valve should be activated
Environmental Impact	Resource management reports that destination travel is impacting resources or species and request that the safety valve be activated
Environmental Impact	Polls indicate that a majority or residents feel that destination travel is degrading the natural environment and/or threatening species to the extent they feel the safety valve should be activated
Social or environmental impact	The industry, resource managers, and the public concur during the fall forum that impacts of any kind warrant the execution of the safety valve

9.2.3 Monitoring Destination Indicators

Each fall, in preparation for the fall tourism forum, the JTP will meet with the destination travel industry to prepare a report detailing performance for the completed season and projections for the upcoming season.

Each fall, in preparation for the fall tourism forum, the JTP will meet with resource managers to prepare a report on the status of species and resources potentially impacted by destination travel.

Each fall, in preparation for the fall tourism forum, the JTP will contract a random/scientific poll of Juneau residents to measure social and environmental impact issues based on the completed season.

The JTP will build sessions into the fall tourism forum to present industry and community perspectives on destination impact and performance issues. Then the JTP will facilitate a public discussion to explore those issues. That discussion will be designed to “honor and value” all points of view, and will be facilitated in a manner that is respectful to all parties.

The fall tourism forum will feature a public meeting of the JTP board of directors in which the board will decide if triggering conditions require activation of the safety valve. The board may raise the trigger issue at any other time, but the issue is formally a part of each fall tourism forum.

9.2.4 Activation

If the JTP board formally decides that triggering conditions are present, it will notify the Assembly and begin working with the Planning and Policy Committee of the Assembly on implementation of the safety valve measures.

9.3 Proactive Approach

Even if the JTP concludes that no safety valve action is required, each fall tourism forum will highlight issues that merit attention. The JTP will work proactively with the industry, appropriate public partners, and the community to shape product and operational procedures to reduce the negative impacts of both cruise and destination tourism sectors. Some modifications of best management practices will evolve from information discussed in the forum and carried by the JTP to specific operations or sectors. The JTP may decide to make specific recommendations to CBJ regarding public infrastructure, operations, permit processes, etc.

The JTP is specifically directed to assume a proactive approach to capacity and growth issues, working with industry, government, and community to manage change before it reaches indicator levels.

10. Implementation Plan

Implementation of this Tourism Management Plan requires a series of institutional and budgetary changes. We have organized these into the following general categories:

1. Preparing for implementation
2. Implementing the plan
3. Ongoing monitoring and maintenance of the plan.
 - a. Annual Fall Plan review
 - b. Tourism Management Plan Updates

10.1 Preparing for Plan Implementation

Several actions are all required as first steps to establish the institutional and policy framework for the plan. These are:

- a. Putting the enabling policy framework in place
- b. Creating the budgetary framework and resources for the JTP and recommended tourism projects
- c. Establishing the institutional framework for tourism management
 - i. create the Juneau Tourism Partnership
 - ii. set-up the destination marketing structure
 - iii. set-up the performance monitoring system
 - iv. establish the impact management structure

In addition to ensuring that policies and budgets are in place to implement the Tourism Management Plan, the institutional framework must be put in place. This involves creating the Juneau Tourism Partnership and structures for marketing, performance monitoring and impact management. A conference with the industry is recommended during the November annual tourism sector review process. This is the ideal venue for industry input into programs under development by the JTP (see “Implementing the Tourism Management Plan” below).

The recommended timing and roles and responsibilities for each are shown in Exhibit 9.1 presented at the end of this chapter. The overall schedule for the policy, budgetary and creation of the Juneau Tourism Partnership assumes completion by July 1, 2002. Activities to operationalize the JTP are scheduled through the summer and fall, 2002.

10.2 Implementing the Tourism Management Plan

The implementation program for the plan includes requirements for the CBJ agencies and the JTP. It includes the following action areas:

- a. initiate tourism development projects and programs
- b. priority tourism development projects
 - i. waterfront development plan
 - ii. summer events program
 - iii. float plane museum
 - iv. heritage and cultural interpretation
 - v. destination product
- c. priority tourism product development programs
 - i. standards and certification
 - ii. tourism training
 - iii. investment promotion
- d. marketing program

The waterfront plan is a priority and should be managed by the CBJ with a strong role for the JTP. An initial summer events program for 2002 – building on current plans – is recommended for development by the Downtown Business Association, with support from the Parks and Recreation Department. The approach recommended for the JTP is to establish industry working groups to assist it in developing detailed programs for the following areas:

JTP Responsibility Area	Industry working group
Priority Projects	Signature annual event for Juneau
	Heritage and cultural interpretation (fixed roof facilities)
	Heritage and cultural interpretation (guided tours)
	Destination product
Priority Programs	Standards/certification & training

This provides a mechanism for industry input into JTP programs and will help to ensure commitment to the projects and programs for tourism. The general schedule for both project and program development is to engage the working groups in the fall, 2002 with preliminary findings and recommendations to be available for the annual tourism sector review in November, 2002. The conference called for as part of the preparation for implementing tourism thus becomes the venue for presenting the deliberations of the JTP working groups for input by industry.

The schedule for putting the priority projects and plans in place is generally as follows:

- Fall 2002 to develop detailed action plans for JTP projects and programs
- November 2002 to gather industry input (beyond the input provided through the working groups)
- Jan – Feb 2003 to finalize projects and programs as appropriate.

The JCVB will set its marketing advisory group into motion in May, 2002.

The JTP will contract for the development of a marketing plan, with completion needed by November 1, 2002.

Exhibit 10.1 Implementation Plan and Schedule

No.	Area	Action	Plan Reference	Responsibility	Timing
<i>Preparing for Implementation</i>					
Enabling the Policy Framework					
1		Adopt this Tourism Management Plan	Entire Document	CBJ Assembly	May, '02
2		Amend the tourism planning provisions of the CBJ Comprehensive Plan	Section 3.5 for recommended changes	Director of Community Development prepares formal amendment for Assembly	May, '02
Enabling the Budgetary Framework and Resources					
3	Establish Budget for JTP	Confirm the budgetary recommendations for the JTP	Section 5	Assembly through resolution	May, '02
4		Explore increasing the bed tax	Section 5	JCVB, JTP, Assembly	Spring, '03
5		Negotiate partner budgets (cash and in-kind)	Section 5	JTP Board, with transitional support from City Manager's office (see 6 below)	May – June, '02

Establish the Institutional Framework					
6	Create the Juneau Tourism Partnership	Establish the non-profit corporation	Section 5 for the JTP structure and intent and the draft charter guidelines in "Technical Addenda" for the legal entity	City Manager's office with assistance from Legal Services	May, '02
7		Establish transitional advisory support for JTP	Section 5	City Manager's office contracts part-time Advisory support including set-up and first year of operations	May, '02
8		Appoint the JTP members	Section 5	Assembly to ratify first appointees	May, '02
9		Hold members first meeting and briefing sessions	Section 5	City Manager's office with JTP Advisor	May, '02
10		Hold briefing sessions with tourism partners	Section 5	JTP Board, Advisor and City Managers office	May – June, '02 (and ongoing)
11		Finalize the budget & fiscal management systems	Section 5	Budget approved as part of Plan approval in April. City Manager's office and Advisor work with JTP to set up support systems	May, '02

12		Recruit staff for the JTP	Section 5	JTP with support from City Manager's office	May - June, '02
13		Close the CBJ tourism unit and convert remaining staff functions to project management duties under the direction of the City Manager's office	Section 4	Assembly and City Manager's office	June 30, '02
14		Prepare operational plan for JTP for 02-03	Section 5	JTP Board, staff members, Advisor and with input from City Manager's office	July
15		Set-up office space and support services, logos and other operational infrastructure, communications infrastructure including web site	Section 5	JTP Board, Staff and Advisor with City Manager's office input	July
16	Set-Up the Destination Marketing Structure	Establish the JCVB marketing Advisory committee	Section 5	JCVB	May
17		Hold marketing strategy meeting between JTP, JCVB Marketing Advisory Committee & JCVB	Section 8	JTP, Marketing Advisory Committee and JCVB	May
18		Prepare marketing plan scope and terms of reference	Section 8	JCVB, Marketing Advisory Committee	May

19		Prepare for performance based approach and associated data capture	Section 8	JCVB, JTP, City Manager's office, Parks and Recreation	June
20		Contract tourism marketing specialist to prepare JTP Marketing Plan	Section 8	JTP Board, Advisor and JCVB CEO	July
21		Hold a conference in Fall '02 to unveil destination marketing plan and tourism standards, certification and training programs	Sections 7,8	JTP Board, staff, Advisor , JCVB, with input from industry	Nov, '02 (start planning in July)
22	Set-Up Performance Monitoring System Structure (monitoring plan and JTP performance)	Design annual November reporting system for the Tourism Management Plan review process	Section 5	JTP Board, Staff and Advisor, with transitional support from City Manager's office	July, '02
23		Based on review process requirements, design performance monitoring system objectives and scope incorporating web-based data capture where possible, agree on partners and roles	Section 9	JTP Board and Staff, Advisor - and with input from partners	June – September, '02
24		Contract Tourism Advisor to initially refine design, manage data capture and reporting	Section 9	JTP Board and Staff, Advisor and input from partners	July, '02 - ongoing

25	Establish Impact Management Structure	Set up for, assemble data for, and conduct fall tourism forum sessions on impact	Section 6	JTP Board and Staff, with input from industry, resource management, the public, and CBJ	July – November, '02, repeated each year
26		Implement Best Management Practices and take community feedback on operations	Section 6	Juneau Tourism Industry and CBJ	Until June 30, '02
27		Implement Best Management Practices and take community feedback on operations, input feedback into fall community forum	Section 6	Juneau Tourism Industry in partnership with the JTP	Ongoing after July 1, '02
28		Phase one of heliport relocation, ERA moves south	Section 6	CBJ and JTP in partnership with ERA and community	Desirable completion by April 15, '04
29		Phase two of heliport relocation, northern heliport developed	Section 6	CBJ and JTP in partnership with operators and community	Desirable completion by April 15, '05
30		Determine float plane noise reduction plan	Section 6	JTP with potential collaboration by Wings of Alaska	By November, '04
31		Develop marine wharf convertible space loading and community use area	Section 6	CBJ staff and Assembly	By April, '03

32		Consider transfer of management of street-side passenger loading from Harbor Board to Parks and Recreation Department	Section 6	Assembly	May – June, '02 for implementation in '03
33		Adopt regulations encouraging use of smaller commercial passenger vehicles for smaller loads	Section 6	Area manager, with input from operators	By July, '02
34		Implement park and ride options	Section 6	CBJ staff and Assembly	By April, '03
35		Begin process for adopting downtown delivery restrictions during cruise ship hours	Section 6	CBJ staff and Assembly with input from DBA	June, '02
36		Work with DOT to improve pedestrian crossings on Egan Drive, Marine Way, and South Franklin	Section 6	CBJ Staff and Assembly	By '03 season
37		Implement ongoing congestion management process	Section 6	JTP and CBJ, with operator input	Ongoing
38		Implement Air and Water Quality Strategy	Section 6	JTP	Ongoing
39		Implement resource health and access strategy	Section 6	JTP, with input from Trails Working Group	Ongoing
40		Conduct Safety Valve Indicators Review during Fall Tourism Forum	Section 9	JTP, with community-wide input	Each November

Implementing the Plan					
Initiate Tourism Product Development Projects and Programs					
41	Overall Action Plans	Prepare work plan and scheduling for implementing priority development projects in plan – based on this implementation framework	Section 7	JTP Board and Advisor, with transitional help from City Manager's office	May, '02
42		Prepare work plan and scheduling for implementing product development programs	Section 7	JTP Board, Staff and Advisor	July - ongoing
Priority Tourism Product Development Projects					
43	Waterfront Development Plan	Agree on scope, phasing for waterfront plan	Section 7	City Manager's office with Assembly approval	April, '02
44		Contract waterfront planners	Section 7	City Manager's office with Assembly approval	April, '02
45		Commence waterfront plan preparation	Section 7	City Manager's office for day to day oversight, JTP for strong input and assistance with public processes	May, '02

46	Events Program	Develop full events and activities plan for summer 02	Section 7	JTP and Downtown Business Association, with assistance from Parks and Recreation Department	May, '02
47		Review and agree on budgets, cost-sharing, etc	Section 7	JTP and DBA	May, '02
48		Commence implementation and monitor/evaluation results (attendance by audience type, spending generation, etc)	Section 7	JTP and DBA	May, '02
49		Commence investigation of potential for signature Juneau event related to float planes including setting up a working group drawn from business and community interests to advise JTP	Section 7	JTP and Advisor with City Manager's office and input from working group and Airport Board	June, '02
50		Develop ongoing events program based on 2002 program evaluation	Section 7	JTP and DBA, with assistance from Parks and Recreation Department	November, '02, ongoing

51	Visitor Center & Performing Arts Center	Integrate the current work of the visitor center team into the tourism management plan implementation program including the waterfront planning effort	Section 7	City Manager's office, JTP, JCVB	May
52		Initiate work on the Float Plane Museum concept through the Fixed Roof Heritage Working Group (see Action below)	Section 7	JTP, City Manager's office, , coordinated with the Comprehensive Waterfront Plan	Fall '02
53	Heritage and Cultural Interpretation	Form a working group review product quality for existing fixed roof product (e.g., museums) and to develop an action plan for product enhancement	Section 7	JTP, Goldbelt, SEAlaska and destination and cruise industry	Fall '02
54		Form a working group for guided experiences to review existing product, identify areas for improvement, training and certification requirements and establish action plan for product enhancement	Section 7	JTP and destination and cruise industry representatives	Fall '02

55		Develop plan for heritage and cultural interpretive product enhancement and development	Section 7	JTP, Goldbelt, Sealaska, and heritage interest groups, with input from annual November tourism sector review and working group findings	January, '03
56		Commence implementation based on plan	Section 7	JTP and industry	'03
57	Destination Product Development	Establish an industry working group to work with the JTP to establish programs including pilot testing of new packaged products in cultural, nature and sportfishing areas	Section 7	JTP, Advisor and industry	Fall '02
58		Organize a working conference with international and national specialty tour operators to assess existing product, potential, & brainstorm product development strategies including pilot testing opportunities	Section 7	JTP, Advisor and industry	Fall '02
59		Finalize the JTP destination product action plan including pilot packaging	Section 7	JTP, Advisor and input from working group	Jan – Feb '02

Priority Product Development Programs					
60	Standards Awareness & Certification and Tourism Training	Form an industry working group on standards and certification, and tourism training	Section 7	JTP and industry	Summer '02
61		Identify standards upgrading requirements for destination product (accommodation, tours, tour guides, etc) and associated training requirements	Section 7	JTP Tourism Standards and Training Working Group	Sep '02
62		Prepare preliminary action plan for industry including awareness workshops	Section 7	JTP Tourism Standards and Training Working Group	Sep – Oct '02
63		Present preliminary action plan at November industry conference and gather input	Section 7	JTP Tourism Standards and Training Working Group	Nov '02
64		Finalize JTP programs for standards awareness, certification and tourism training	Section 7	JTP with input from the JTP Tourism Standards and Training Working Group	Jan – Feb '03
65	Investment Promotion	Prepare Comprehensive Plan amendment to define areas suitable for tourism development	Section 7	Director of Community Development with input from JTP and JVCB	July – August, '02
66		Amend Comprehensive Plan	Section 7	Assembly	Fall '02

Marketing Program					
67		Review, adjust and apply the marketing plan presented at the November conference	Section 8	JCVB, JTP and Marketing Advisory Committee	Jan – Feb '03
68		Evaluate results/performance of JCVB on destination marketing	Section 8	Assembly, JTP and Marketing Advisory Committee	Mar '03
69		Evaluate results/performance of JCVB on convention marketing	Section 8	Parks and Recreation, JTP and Marketing Advisory Committee	Mar '03
Monitoring and Maintenance of the Tourism Plan					
70	Annual Fall Review of Tourism Sector	Design full annual fall review program for tourism sector incorporating action item 20 above	Section 9	JTP Board & staff, Advisor with input from all stakeholders	July, '02
71	Tourism Management Plan Updates	Design process for annual updates and amendments to Tourism Management Plan and review of role of JTP in Juneau tourism, including approval by Assembly	Section 9	JPT Board, staff, Advisor with input from City Manager's office	July, '02
72	Annual Review with Assembly	JTP will present "state of tourism" report to Assembly, with recommendations for changes to plan, changes in JTP role, foreseen Assembly actions for the upcoming year	Section 9	JTP Board, staff	Mid November – December, Annually