

# DESTINATION NEXT

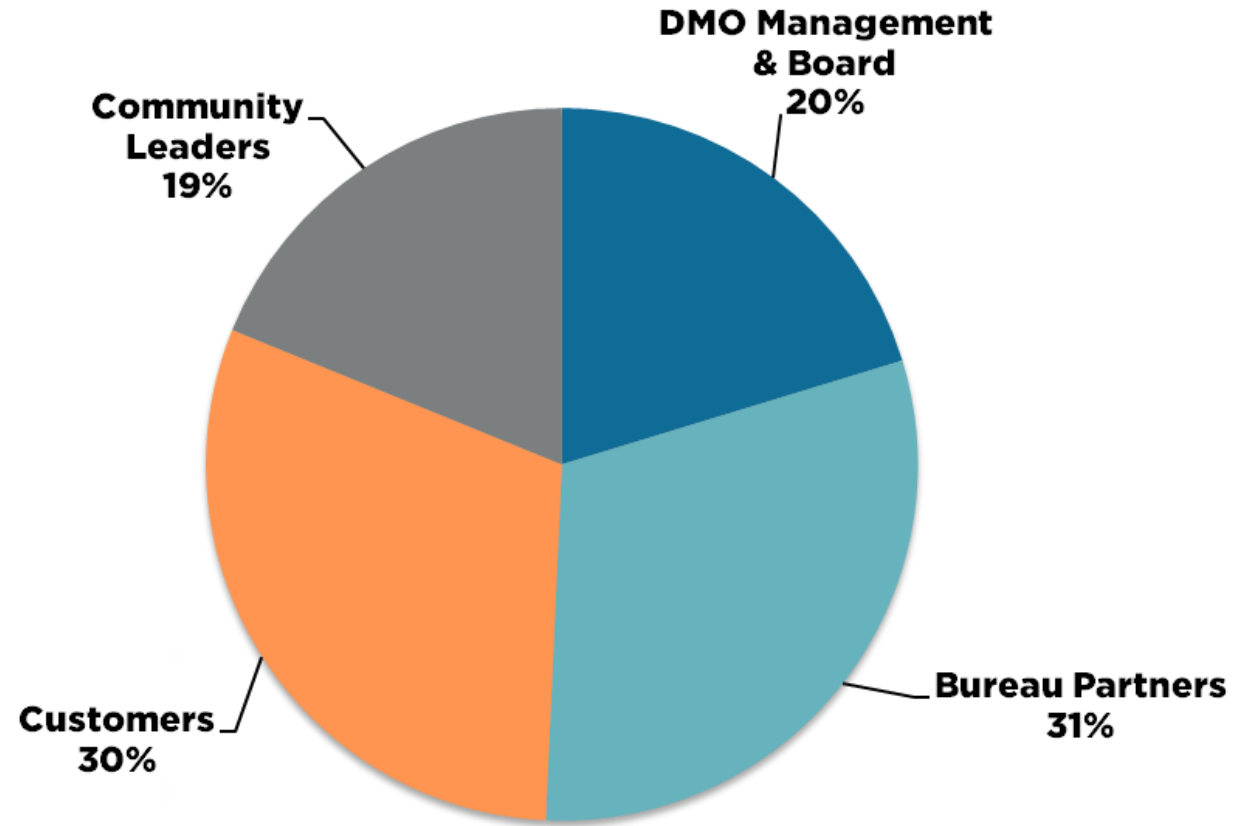
## Multi-User Online Diagnostic Tool Results: Stakeholder Survey

### Travel Juneau

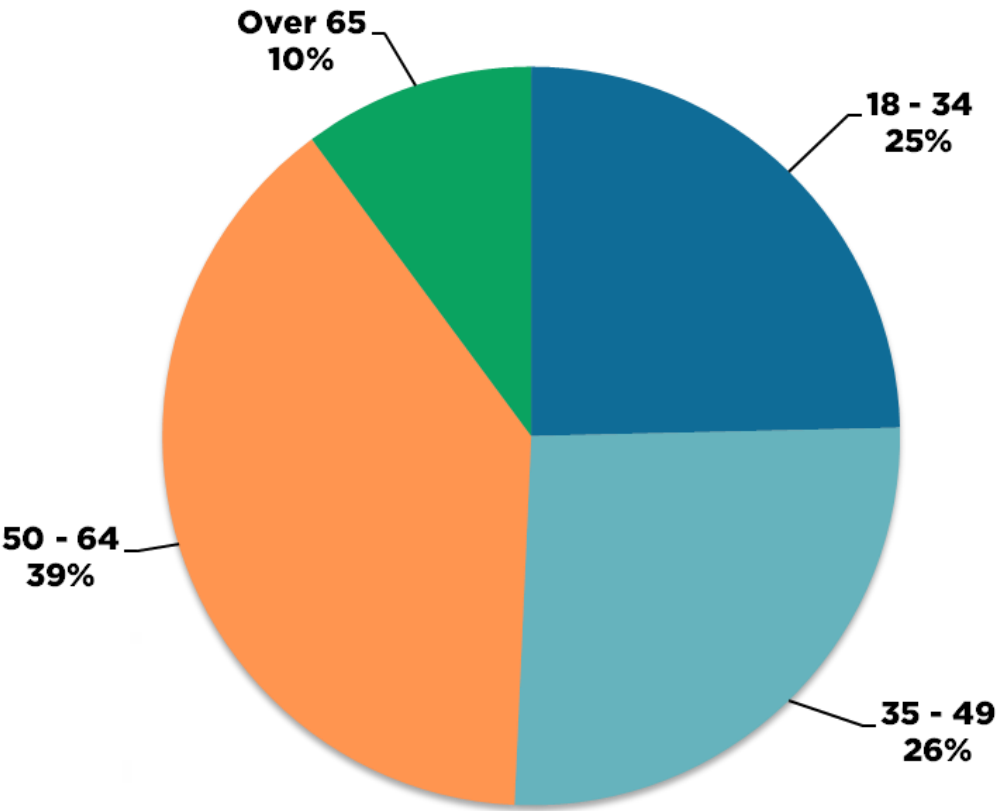
March 28, 2019



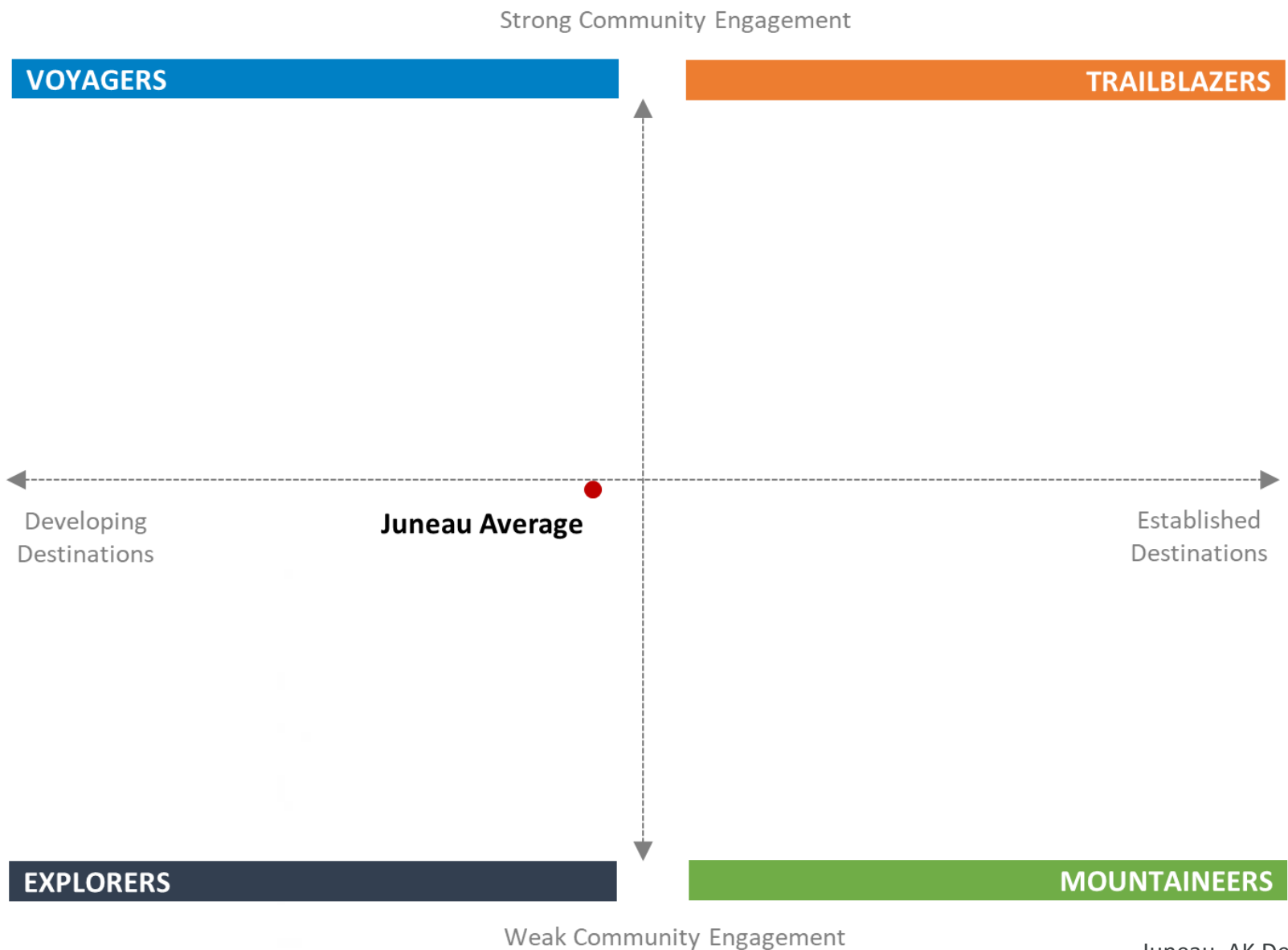
# 69 Participants



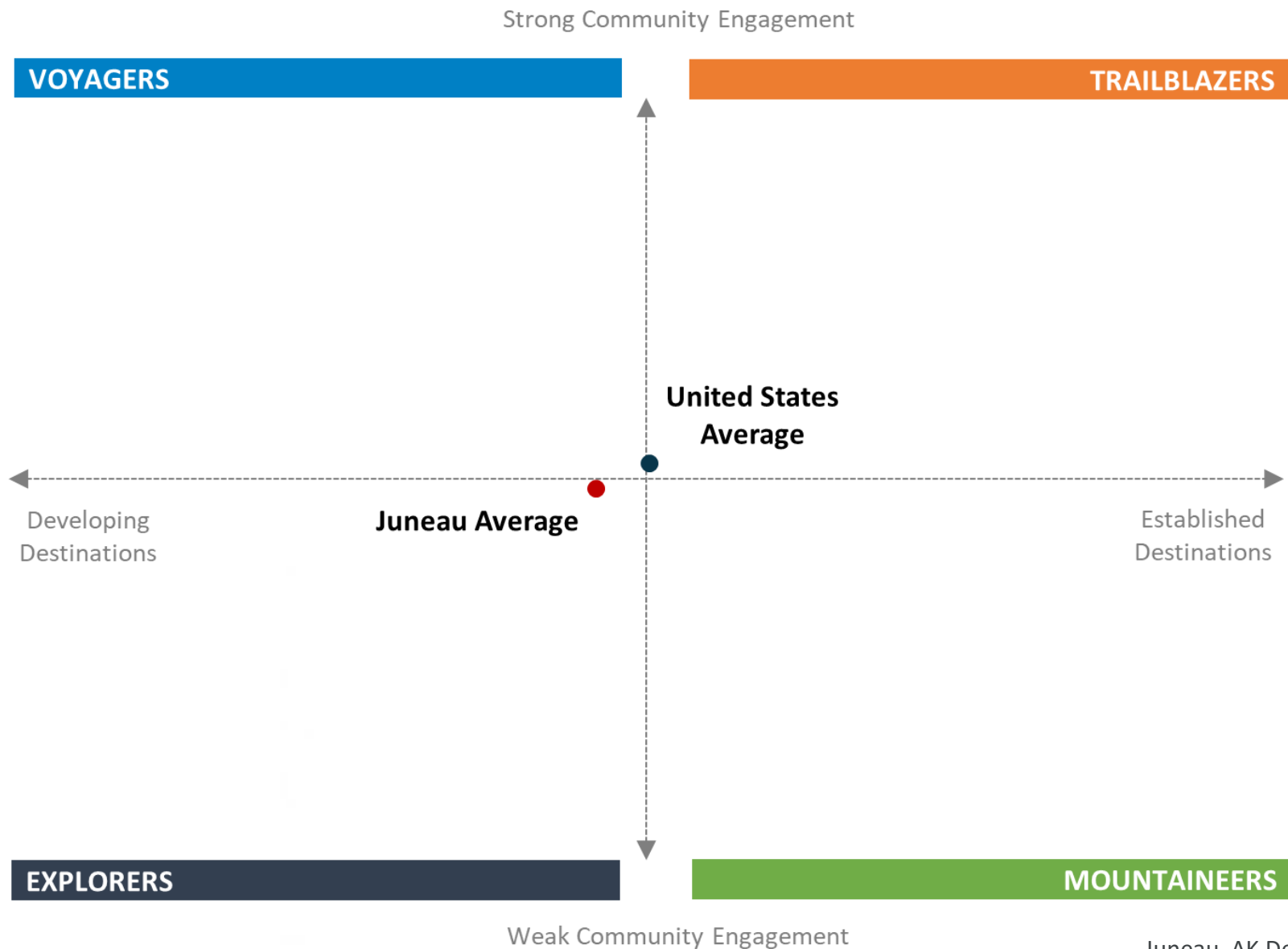
# Age Demographic



# Juneau Overall Assessment – Industry



# Juneau, AK Overall Assessment – U.S.



# Explorers

**These DMOs and destinations desire an inspired tourism vision and activated community to make it happen.**

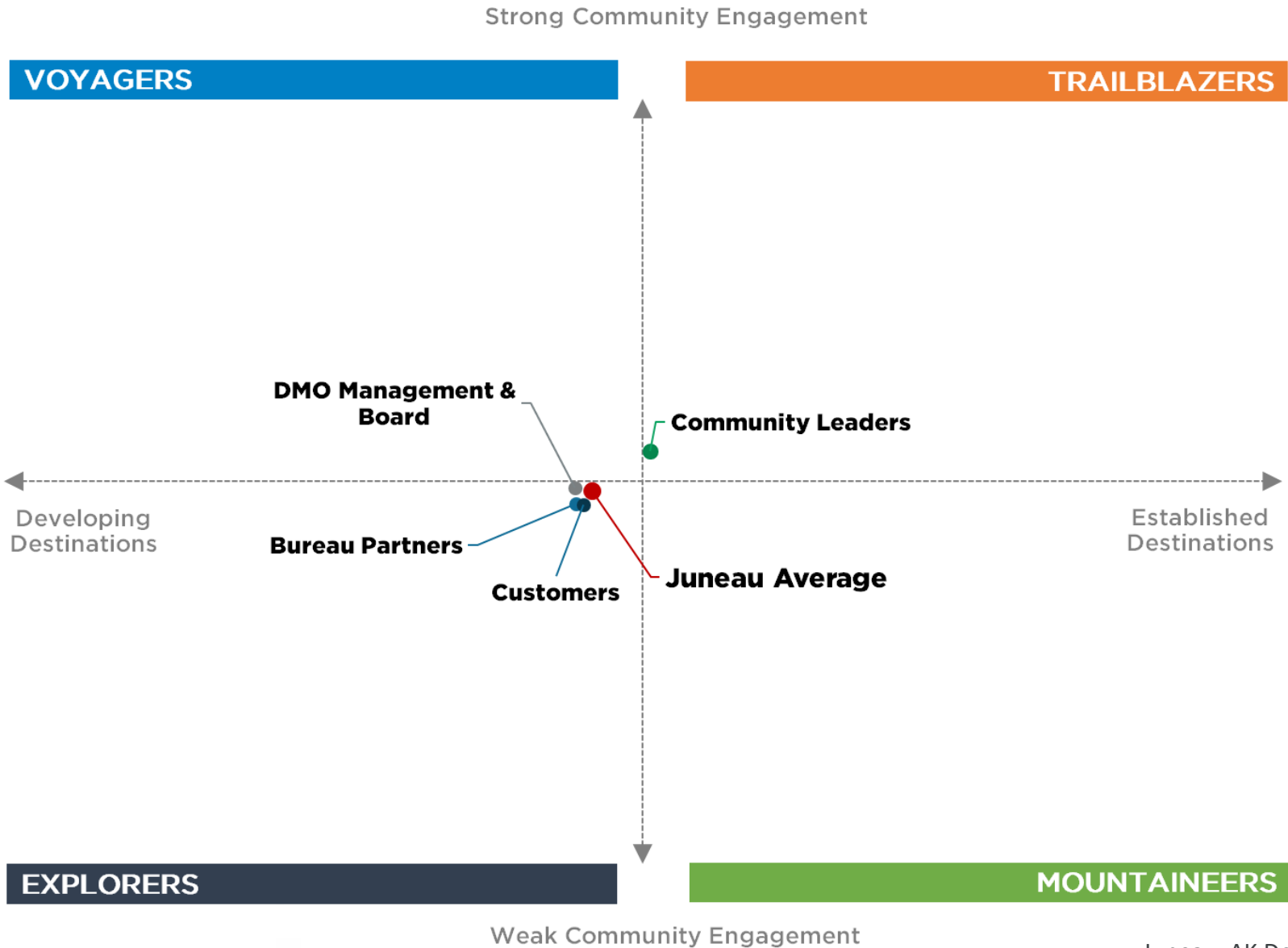
## Key Strategic Challenges

- **Rallying the community to work together towards a realistic vision and strategy**
- **Building community recognition and acceptance that transformational change is needed**
- **Implementing the strategy with limited resources**

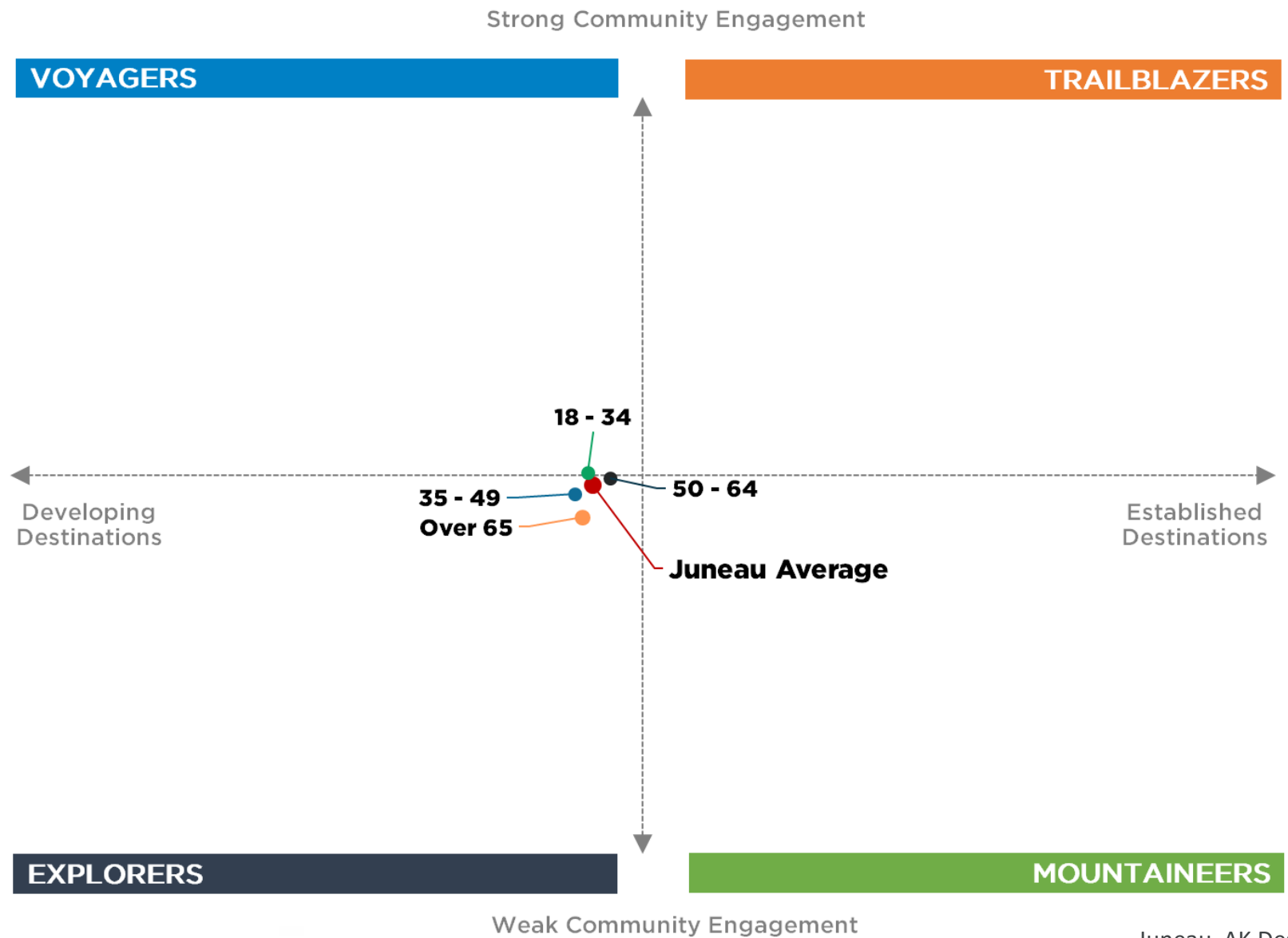
**Developing Destination**



# Juneau, AK Overall Assessment – Stakeholder Group






# Juneau, AK Overall Assessment – Age Group





# Destination Strength Rankings – Juneau, AK



		Relative Importance	Perceived Performance
	Mobility & Access	1 <sup>st</sup>	6 <sup>th</sup>
	Air Access	2 <sup>nd</sup>	9 <sup>th</sup>
	Convention & Meeting Facilities	3 <sup>rd</sup>	10 <sup>th</sup>
	Brand	4 <sup>th</sup>	1 <sup>st</sup>

# Destination Strength – Report Card



Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Juneau Average	Standard Deviation	Industry Average	Juneau Average	Standard Deviation
Mobility & Access	10.1%	10.7%	0%	3.02	3.15	0.72
Air Access	9.1%	10.6%	0%	3.10	2.60	0.64
Convention & Meeting Facilities	9.8%	10.6%	0%	3.07	2.57	0.68
Brand	10.4%	10.5%	1%	3.46	3.86	0.43
Accommodation	10.5%	10.4%	0%	3.47	2.92	0.69
Attractions & Entertainment	10.8%	10.3%	1%	3.60	3.60	0.54
Destination Performance	10.0%	10.3%	1%	3.74	3.61	0.50
Communication & Internet Infrastructure	10.0%	10.2%	0%	3.23	3.09	0.73
Events	9.8%	9.2%	1%	3.55	3.24	0.63
Outdoor Recreation & Sports Facilities	9.5%	7.1%	1%	3.19	3.51	0.45

DESTINATION STRENGTH - Juneau	3.20
INDUSTRY AVERAGE DESTINATION STRENGTH	3.36

RESULTING SCENARIO	EXPLORERS
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**Note**  
Green shading signifies that the destination outperformed the industry average by greater than 0.2.  
Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.  
Red shading signifies that the destination underperformed the industry average by greater than 0.4.

# Destination Strength – Stakeholder Report Card

Variable	Perceived Performance (1-5 scale)				
	Juneau Average	DMO Management & Board	Bureau Partners	Customers	Community Leaders
Mobility & Access	3.15	2.91	2.93	3.35	3.44
Air Access	2.60	2.57	2.52	2.54	2.87
Convention & Meeting Facilities	2.57	2.37	2.62	2.52	2.76
Brand	3.86	3.89	3.76	3.87	3.94
Accommodation	2.92	2.96	2.93	2.79	3.06
Attractions & Entertainment	3.60	3.63	3.53	3.58	3.74
Destination Performance	3.61	3.73	3.53	3.60	3.62
Communication & Internet	3.09	2.91	3.11	3.03	3.34
Events	3.24	3.18	3.27	3.07	3.55
Outdoor Recreation & Sports Facilities	3.51	3.53	3.43	3.51	3.62

DESTINATION STRENGTH - Juneau	3.20
INDUSTRY AVERAGE DESTINATION STRENGTH	3.36

RESULTING SCENARIO **EXPLORERS**

## Note

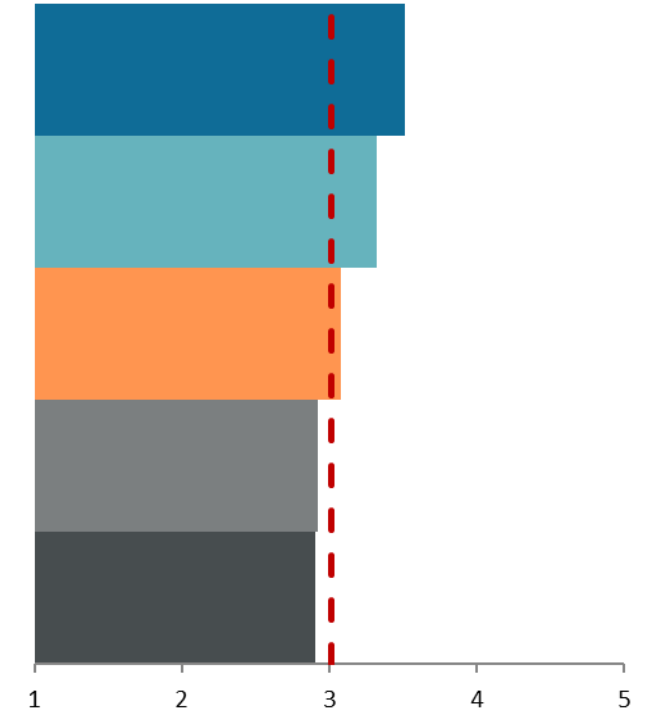
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# Mobility & Access

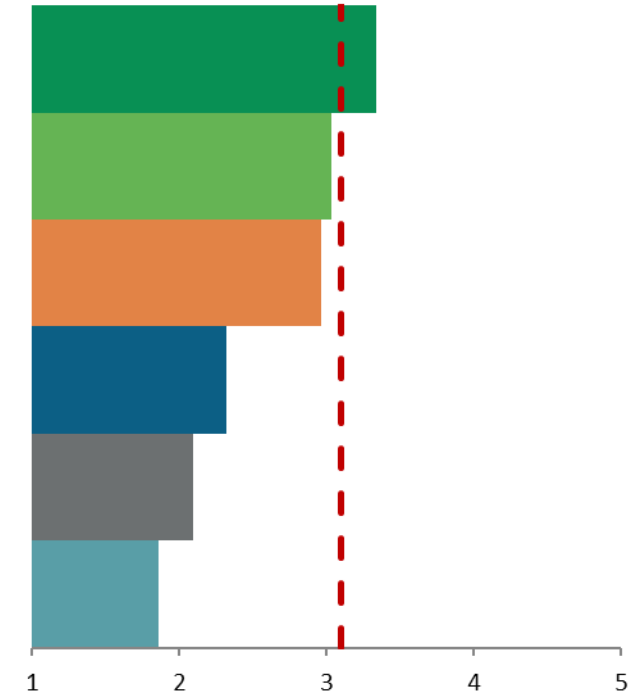
- Has great directional signage and highways that make it easy to get around
- Known as a walkable destination
- Provides good access and mobility for those with disabilities
- Has adequate public transportation that makes it easy for visitors to get around
- Is a bicycle-friendly destination with easy, well-marked bike routes





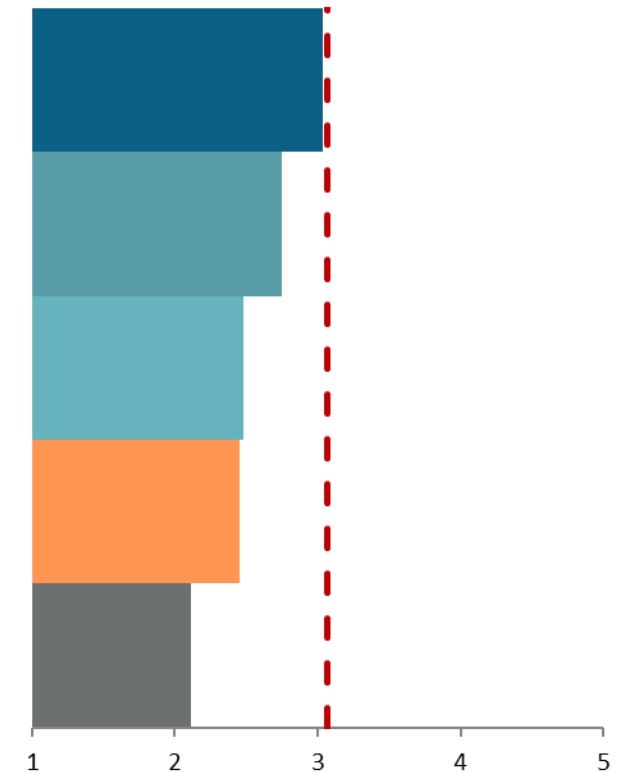
# Air Access

- Offers variety and quality domestic air access (e.g. number of flights, schedule, and capacity)
- Juneau International Airport is a state-of-the-art facility with capacity to grow
- Juneau International Airport offers a true destination “sense of place” that supports the brand
- Offers a wide variety of domestic air access (e.g. number of carriers and low-cost options)
- Offers variety and quality international air access (e.g. number of flights, schedule, and capacity)
- Offers a wide variety of international air access (e.g. number of carriers and low-cost options)



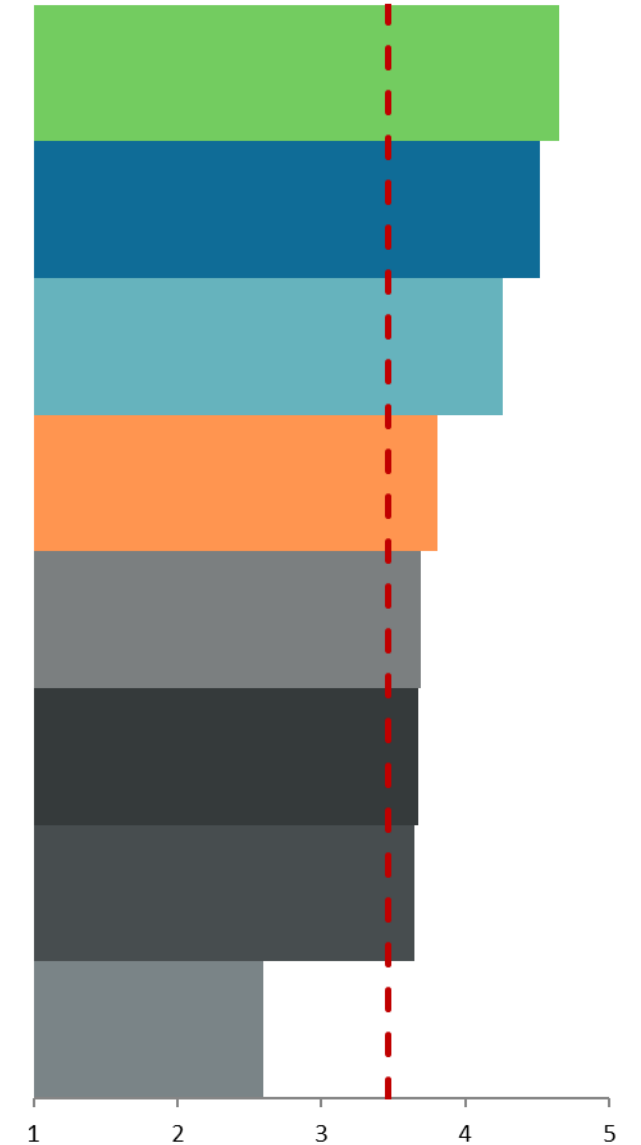
# Convention & Meeting Facilities

- Has good, unique off-site venues for special events
- Has the necessary convention, meeting, and trade show facilities to compete today
- Convention center meeting and networking space is well branded
- Offers an abundance of professional and experienced convention services suppliers
- Has the necessary convention, meeting and trade show facilities to compete for the next 10 years



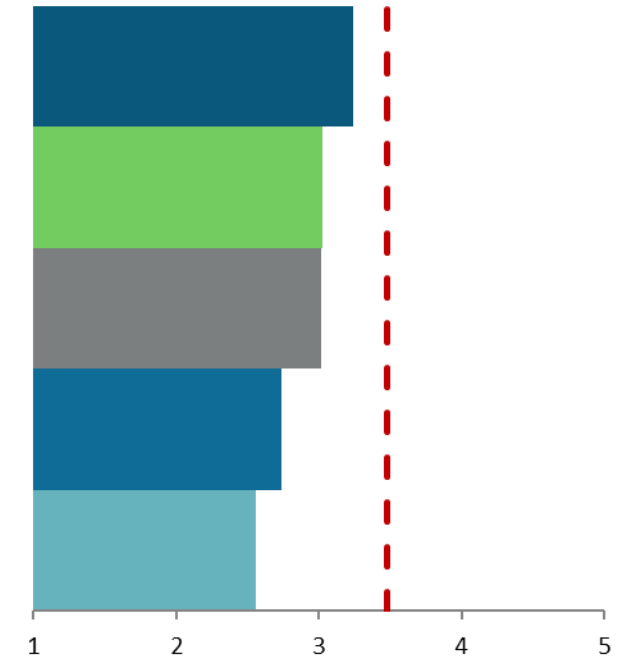
# Brand

- Known as being healthy and an outdoor, active destination
- Known for having a lot of things to see and do
- Appeals to a wide range of visitors
- Tourism industry uses and leverages social media to support the brand
- Has an established brand that is simple, memorable and market-tested
- Known for being safe, clean and secure for visitors
- Known for being an environmentally conscious and sustainable destination
- Known as a high-tech, innovative destination



# Accommodation

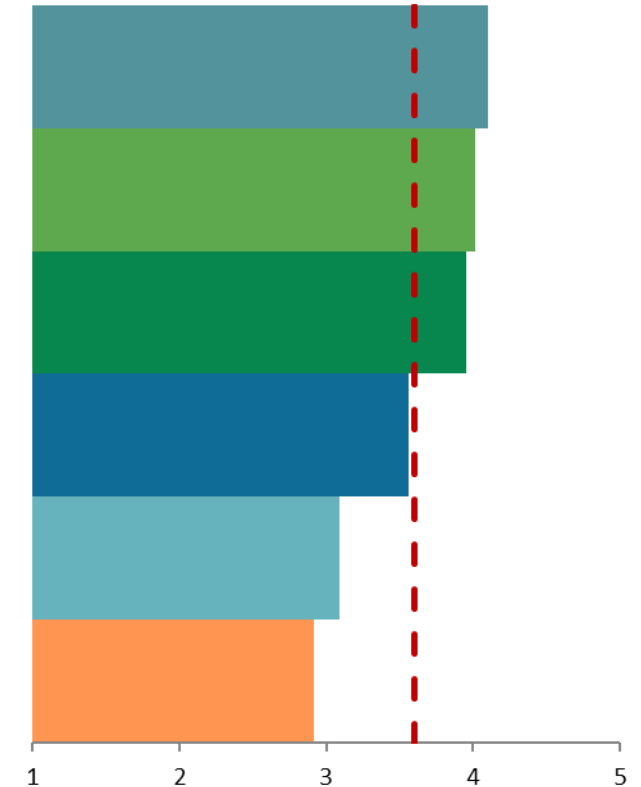
- The location and proximity of accommodation options in Juneau meets visitor needs
- Adequate supply of sharing economy accommodations to supplement current hotel capacity
- Has adequate hotel accommodations capacity
- Offers a diversity of accommodation options and has well- known brand name hotels
- Has a sufficient number of large, headquarter hotels to meet demand





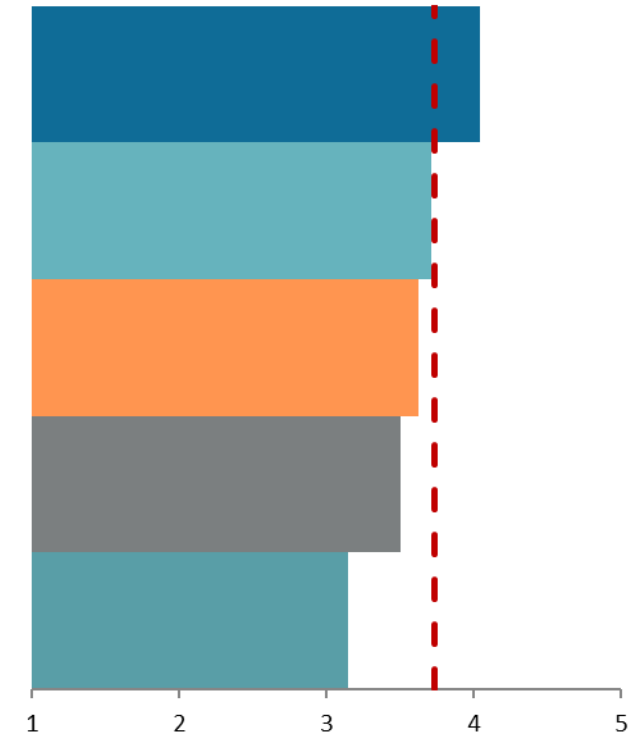
# Attractions & Entertainment

- Has the type of famous attractions that cause people to stay an extra day in the destination
- Has an assortment of authentic and unique attractions and entertainment opportunities
- Has high-quality and wide-ranging arts and cultural attractions
- Has unique and high-quality dining options
- Has unique and vibrant neighborhoods that are attractive and accommodating to visitors
- Destination offers diverse and high-quality shopping opportunities



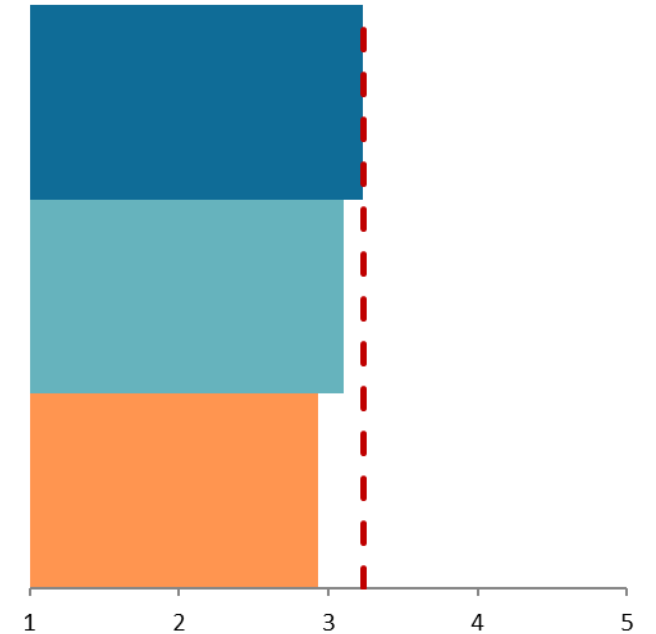
# Destination Performance

- DMO adequately measures and tracks the performance of our tourism industry
- Successfully converting leads for meetings and conventions
- DMO does a good job at communicating the economic impact of our tourism industry
- Seeing a positive growth in overnight visitation
- Hotels are performing well



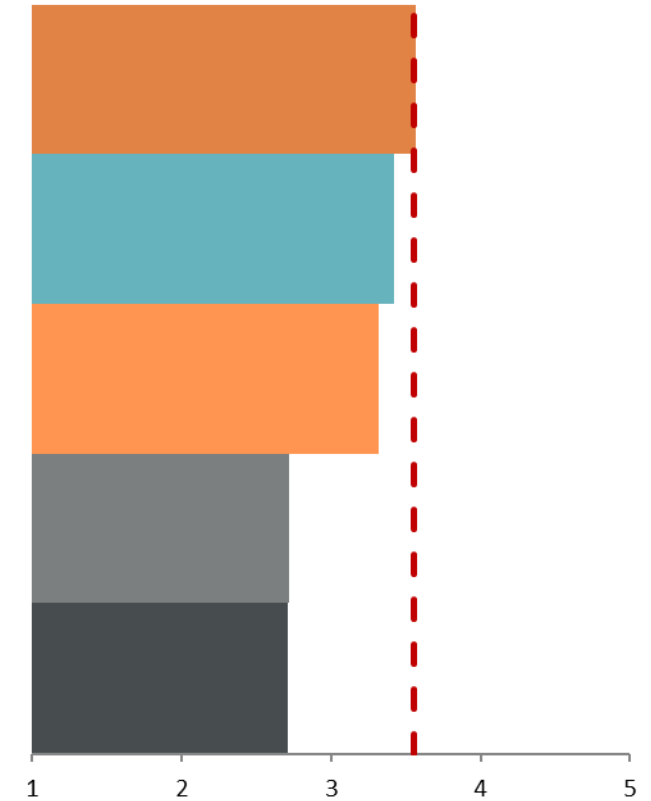
# Communication & Internet Infrastructure

- There is substantial Wi-Fi access in meeting/convention facilities
- There is good mobile coverage/availability at attractions and entertainment areas
- Offers sufficient free Wi-Fi in outdoor/public areas with high visitor traffic



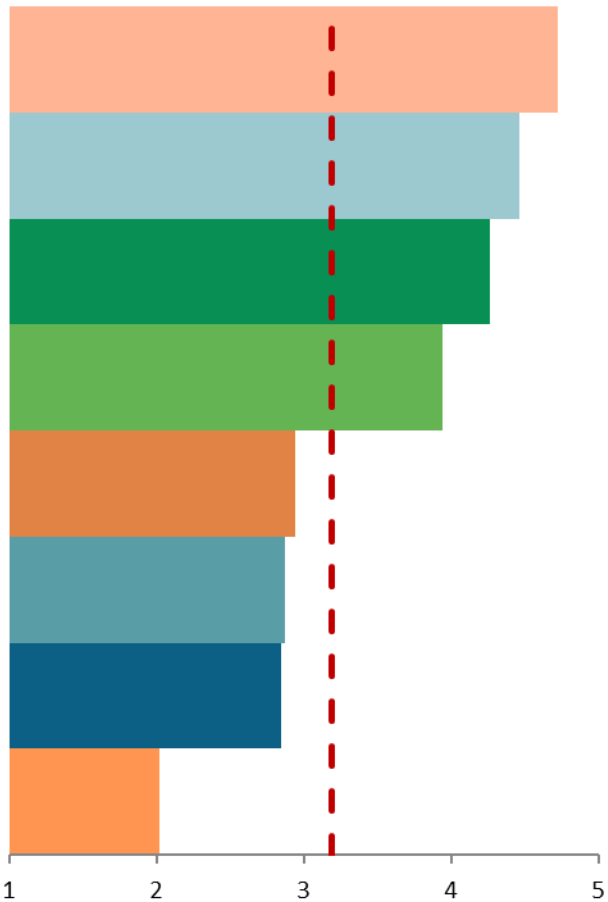
# Events

- The citizens of are supportive of hosting major sporting/national or international events
- Convention center produces numerous public and lifestyle shows throughout the year
- Local government is cooperative and supportive in attracting and hosting major events
- Has diverse and quality facilities and venues with capacity and availability to host major events
- Offers a year-long series of major events that attract visitors and drive economic impact



# Outdoor Recreation & Sports Facilities

- Provides visitors with a wide variety of outdoor experiences
- Has adequate number of tours available for outdoor enthusiasts
- Offers a wide diversity of parks and bike trails
- Has adequate suppliers that coincide with outdoor recreational offerings
- Has an adequate number of campgrounds and camping facilities
- The amateur and collegiate leadership are engaged and helpful in pursuing sporting events
- Has the venues to host sporting events
- Has the sports fields and availability to host amateur and collegiate sporting events



# Community Support & Engagement – Juneau, AK



Relative Importance

Perceived Performance



Local Community Support

1<sup>st</sup>

7<sup>th</sup>

Funding Support & Certainty

2<sup>nd</sup>

9<sup>th</sup>

Effective Advocacy Program

3<sup>rd</sup>

6<sup>th</sup>

Hospitality Culture

4<sup>th</sup>

8<sup>th</sup>

# Community Support & Engagement – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Juneau Average	Standard Deviation	Industry Average	Juneau Average	Standard Deviation
Local Community Support	10.3%	10.4%	0%	3.48	3.36	0.58
Funding Support & Certainty	10.1%	10.4%	0%	3.17	2.99	0.51
Effective Advocacy Program	10.1%	10.3%	0%	3.48	3.47	0.53
Hospitality Culture	10.3%	10.2%	0%	3.61	3.33	0.87
Industry Support	10.0%	10.2%	0%	3.69	3.57	0.45
Partnership Strength & Support	9.1%	10.2%	0%	3.50	3.79	0.55
Economic Development	10.3%	9.9%	0%	3.89	3.97	0.41
Workforce	10.2%	9.9%	0%	3.15	2.88	0.67
Regional Cooperation	10.1%	9.4%	0%	3.63	3.88	0.54
Effective DMO Governance Model	9.5%	9.3%	1%	3.67	3.81	0.50
COMMUNITY SUPPORT & ENGAGEMENT - Juneau						3.50
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT						3.55

## RESULTING SCENARIO

## EXPLORERS

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# Community Support & Engagement – Stakeholder Report Card

Variable	Perceived Performance (1-5 scale)				
	Juneau Average	DMO Management & Board	Bureau Partners	Customers	Community Leaders
Local Community Support	3.36	3.20	3.43	3.14	3.76
Funding Support & Certainty	2.99	3.00	2.83	2.95	3.30
Effective Advocacy Program	3.47	3.53	3.29	3.37	3.89
Hospitality Culture	3.33	3.52	3.31	3.11	3.50
Industry Support	3.57	3.60	3.45	3.58	3.70
Partnership Strength & Support	3.79	3.52	3.88	3.81	3.90
Economic Development	3.97	3.91	3.89	3.95	4.20
Workforce	2.88	2.86	2.91	2.83	2.93
Regional Cooperation	3.88	3.98	3.74	3.83	4.05
Effective DMO Governance Model	3.81	4.15	3.61	3.73	3.87
COMMUNITY SUPPORT & ENGAGEMENT - Juneau					3.50
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT					3.55

## RESULTING SCENARIO

## EXPLORERS

### Note

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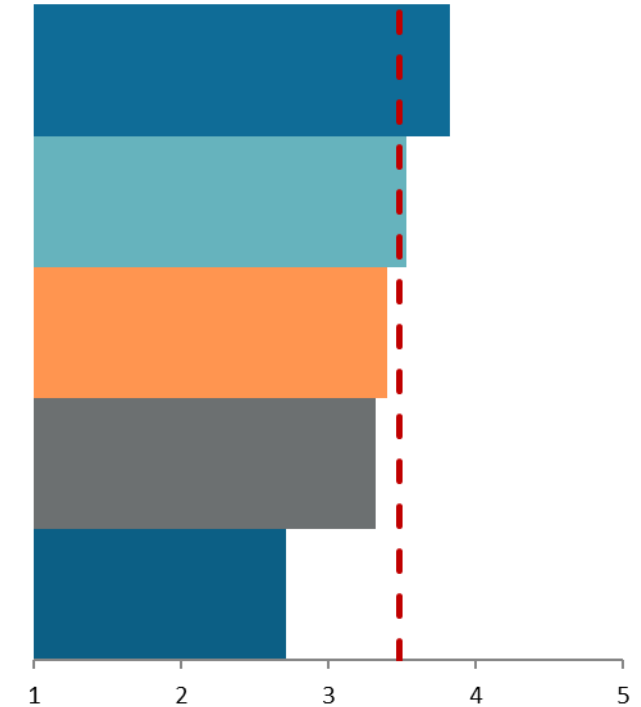
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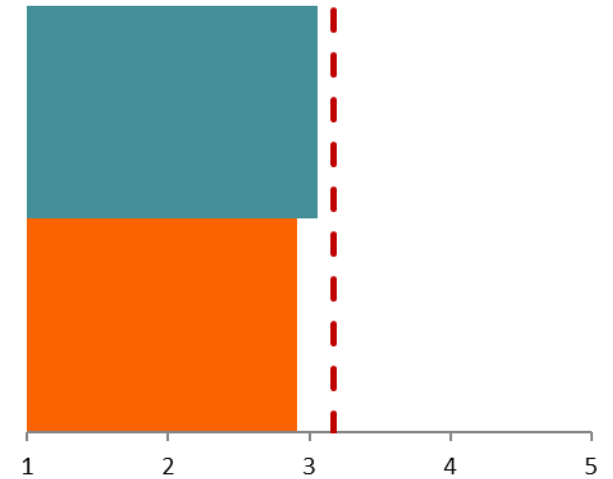
# Local Community Support

- Businesses have a general understanding and positive perception of tourism
- DMO has great corporate support
- Media have a general understanding and positive perception of tourism
- Tourism industry gets positive media coverage locally
- Residents have a general understanding and positive perception of tourism



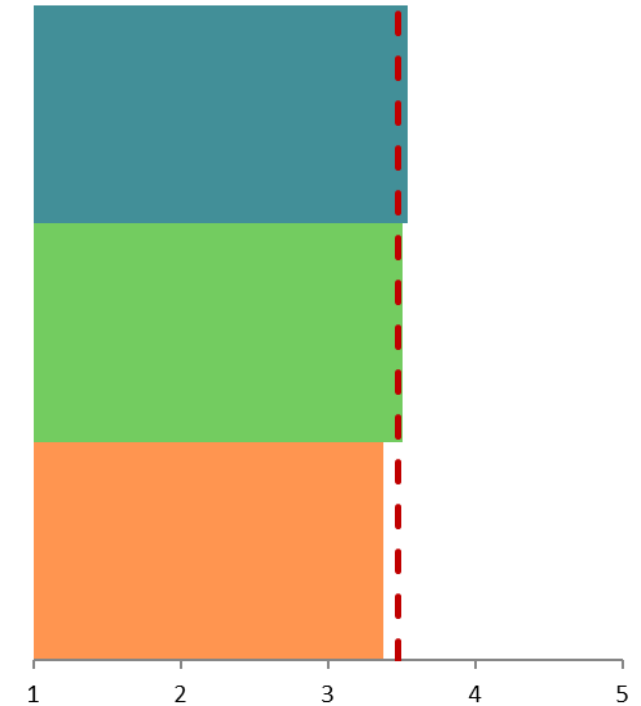
# Funding Support & Certainty

- DMO has sufficient revenue sources to fund their strategies and initiatives today
- DMO revenue sources are stable and sustainable for the future



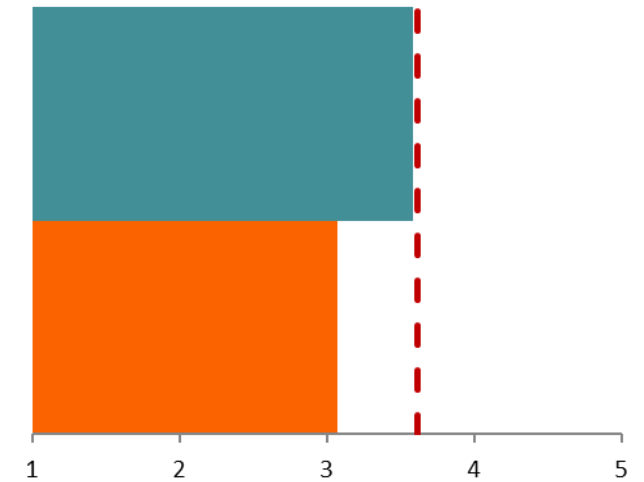
# Effective Advocacy Program

- Local government relies on DMO for input on destination management
- Local government is supportive of DMO programs and the tourism industry
- Advocacy program is successful in educating/informing government policy



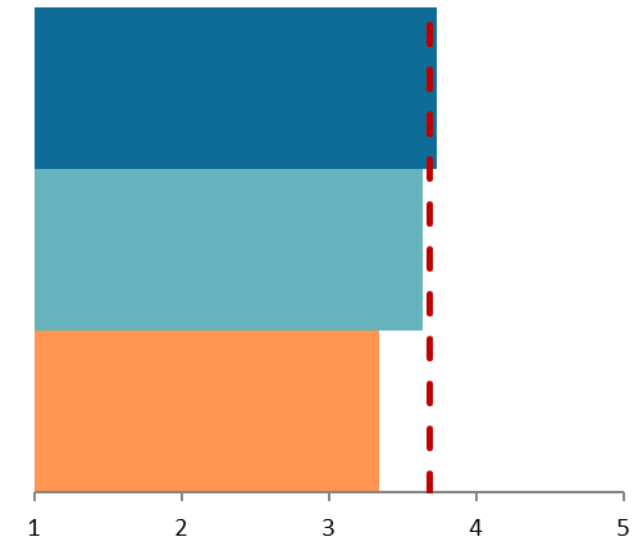
# Hospitality Culture

- Hospitality-minded culture that welcomes visitors and improves their experience
- Reputation for offering high-quality customer service



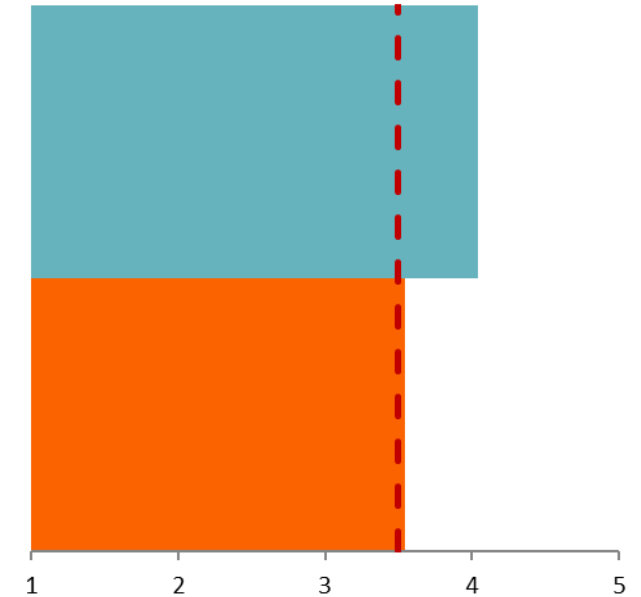
# Industry Support

- DMO is seen as a leader in the state tourism industry
- Tourism industry leaders and stakeholders are supportive of the direction
- DMO is seen as a leader in the regional tourism industry



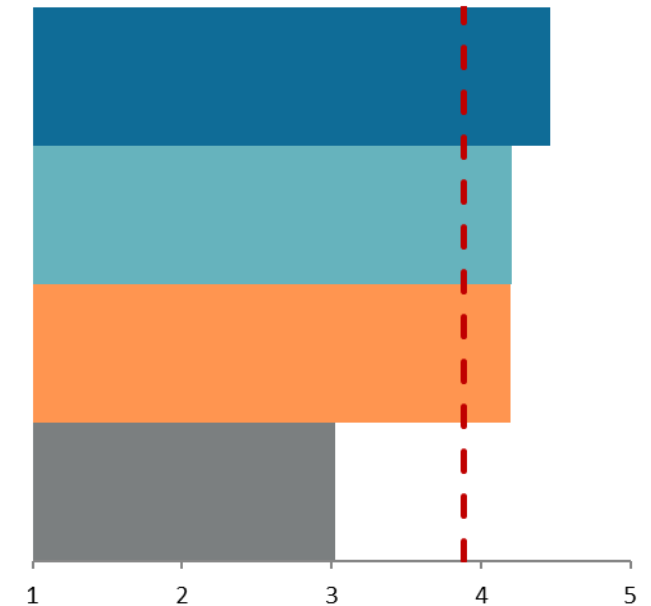
# Partnership Support & Certainty

- Businesses that benefit from tourism/conventions find value in being a partner
- Partners are active, engaged, and supportive

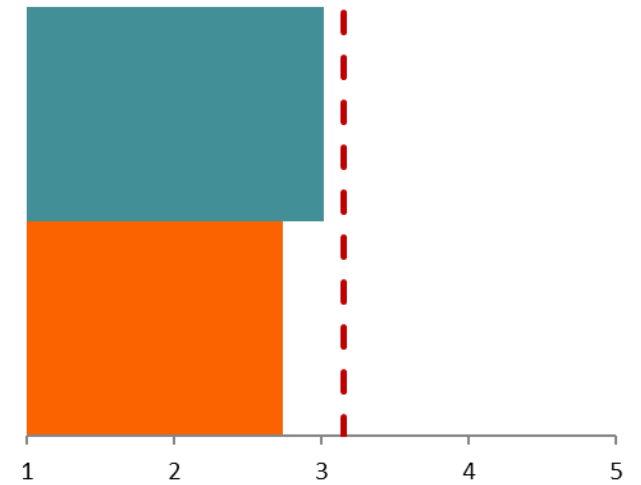


# Economic Development

- DMO and the tourism industry play an important role in our community's economic strategies
- Tourism and the meetings industry are identified as key economic drivers
- DMO has a good working relationship with local chambers and economic development agencies
- There is a tourism master plan that includes future capital investment and programming



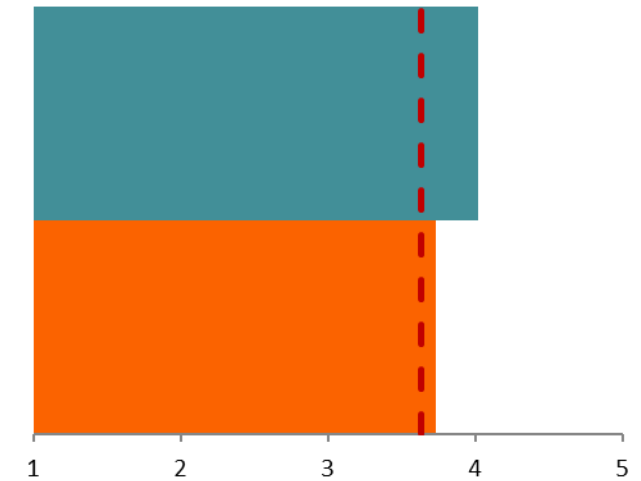
- Workforce is stable and has a positive labor relations environment
- Hospitality industry is able to attract and retain a high-quality workforce





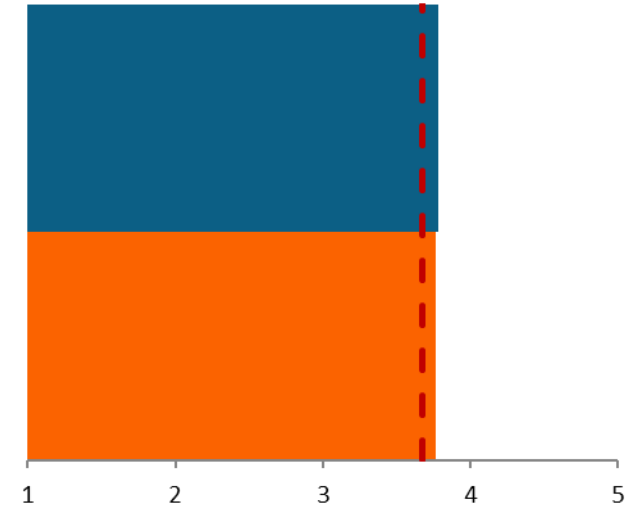
# Regional Cooperation

- Tourism marketing efforts have broad economic benefits across the region
- Broad collaboration and coordination among tourism partners



# Effective Destination Organization Governance Model

- DMO has an effective governance structure, with appropriate and effective oversight and accountability
- Local leaders are engaged in DMO's governance structure



# Key Takeaways

- 
- Currently in Explorers quadrant with below industry average destination strength and community support & engagement
  - Stakeholders are not aligned on perceptions about destination and community support

## Destination Opportunities

- Mobility & access
- International air access
- Domestic air access variety
- Convention & meeting facilities
- Convention service suppliers
- High-tech and innovative
- Accommodation options
- Shopping opportunities
- Unique neighborhoods
- Public Wi-Fi

## Community Support & Engagement Opportunities

- Residents perception of tourism
- Funding amount and stability
- high-quality customer service
- Leader in regional tourism industry
- Tourism master plan
- Workforce

# What one thing could Juneau do to become a better or world-class visitor destination?

## Attractions & Entertainment (15%)

- Better arts and convention centers
- Develop a large raptor center that is set up to host visitors
- Encourage new restaurants, food venues, micro breweries, distilleries, etc. Encourage year round local businesses, and help cultivate their growth alongside businesses that are not based in Juneau year round. Develop Juneau as a winter destination too! Develop the Juneau Sea walk. Repave the Douglas bridge intersection
- Have more options of things to do inside
- Keep improving Seawalk with vibrant outdoor cafe-style seating
- Winter Activities, casino resort

## Access and Mobility (15%)

- Downtown Circulator Shuttle and adequate shuttle or bus service to downtown from the ferry terminal
- Improved mass transit between downtown docks and glacier and Statter Harbor
- Improved transportation from the airport to downtown that is readily available, reliable and visible for visitors getting off the plane
- Provide reliable and consistent transportation options for independent travelers between the airport, ferry terminal, and downtown
- Providing more and better access to our city by supporting the road, supporting the Alaska Marine Highway, supporting our cruise industry and having more competition in our air travel

## Economic Development (10%)

- Better, cleaner public transportation. Get rid of all the diesel tour buses
- Clean up downtown from homeless or vagrants who harass visitors
- Clean up downtown, encourage building refurbishment and affordable locations for co-ops and burgeoning business start-ups
- Cleaner downtown & new convention center
- Revitalize our downtown

# Are there certain issues that DMO should specifically address?

## Access and Mobility (25%)

- Downtown Circulator Shuttle is an essential
- Future of transportation in/out of the busy downtown Juneau corridor, in light of increasing cruise ship traffic
- Roads
- The shipping corridor for goods conflicts with the visitor industry. There needs to be an alternative shipping lane for containers going to stores in the Valley

## Brand (20%)

- Branding Juneau
- Community relations, creating a brand identity for the area, and working with other communities to create SE Alaska package incentives
- Juneau is viewed by most travel agents as a cruise ship destination. A program to specifically address this situation would be helpful

## Independent Travelers (15%)

- Stop going up to convention as we can't compete-we don't have the hotel properties. Go after independent travelers but only high-end if you like for example the Jorgensen house would be a good Destination but we don't have world-class hotels for any lodges to speak of
- Potential growth in visitor numbers and emphasizing the DMO's role is in converting short term visitors into independent travelers staying longer duration
- Will the increase in cruise passengers adversely affect the independent visitor experience? How can the DMO work with businesses catering to independents to mitigate the potential impact?



# DESTINATION NEXT

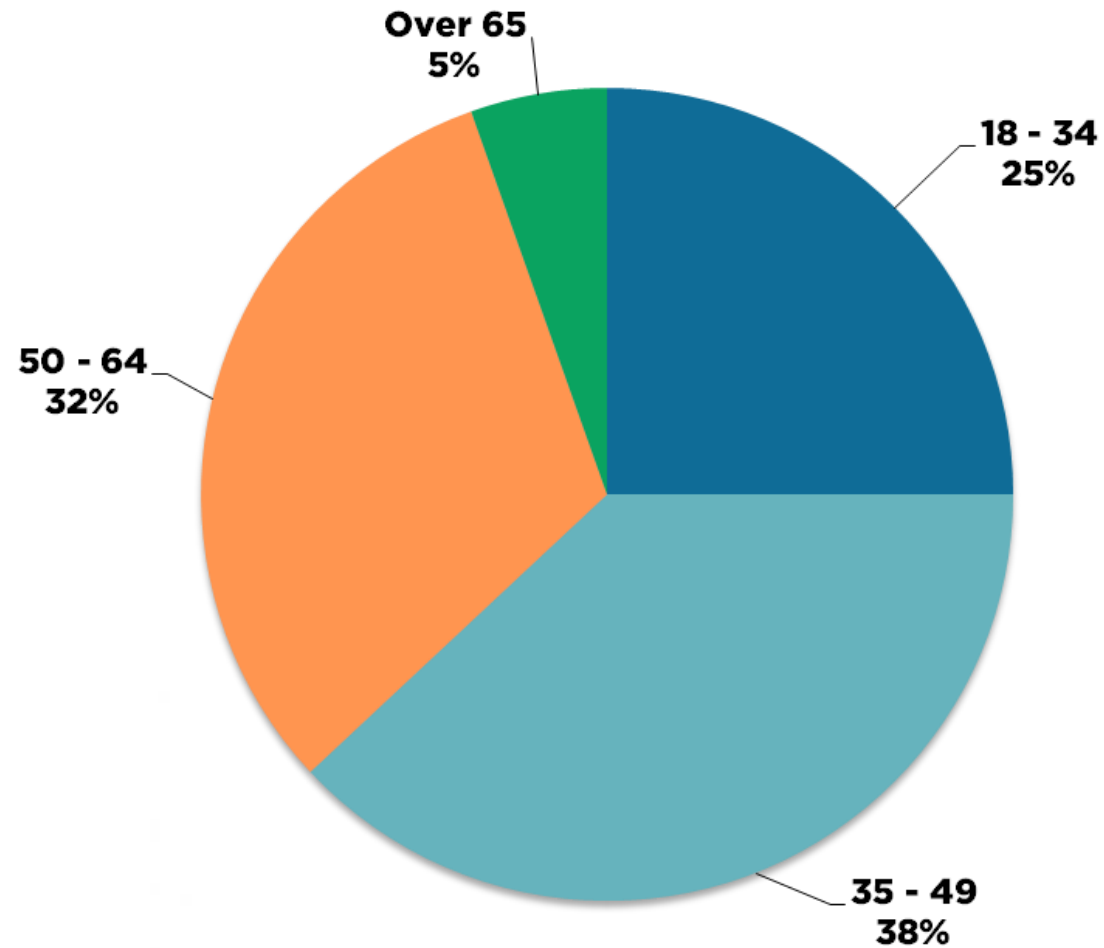
Multi-User Online Diagnostic  
Tool Results: Public Survey

**Travel Juneau**

March 22, 2019



# 92 Participants



# Destination Strength – Report Card

Variable	Perceived Performance (1-5 scale)		
	Stakeholder Average	Juneau Average	Standard Deviation
Mobility & Access	3.15	3.00	0.62
Air Access	2.60	2.51	0.71
Convention & Meeting Facilities	2.57	2.58	0.64
Brand	3.86	3.49	0.55
Accommodation	2.92	2.94	0.63
Attractions & Entertainment	3.60	3.31	0.74
Communication & Internet Infrastructure	3.09	3.03	0.58
Events	3.24	3.17	0.56
Outdoor Recreation & Sports Facilities	3.51	3.39	0.42
DESTINATION STRENGTH - Juneau			2.71
INDUSTRY AVERAGE DESTINATION STRENGTH			3.36

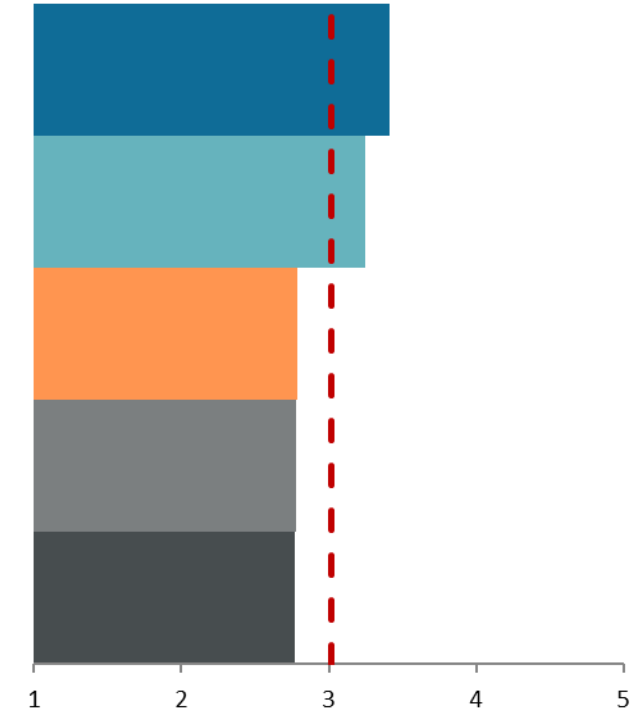
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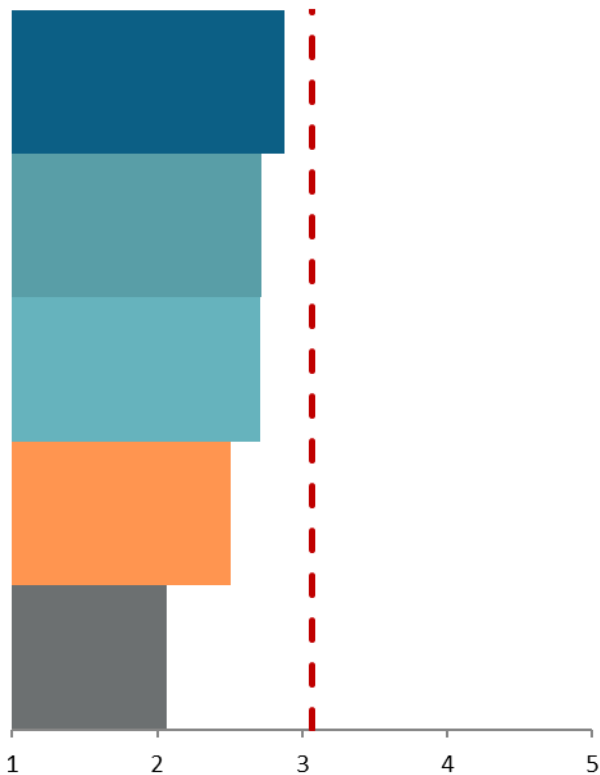
# Mobility & Access

- Great directional signage and highways that make it easy to get around the destination
- Known as a walkable destination
- Good access and mobility for those with disabilities
- Bicycle-friendly destination with easy, well-marked bike routes throughout downtown
- Adequate public transportation that makes it easy for visitors to get around the destination

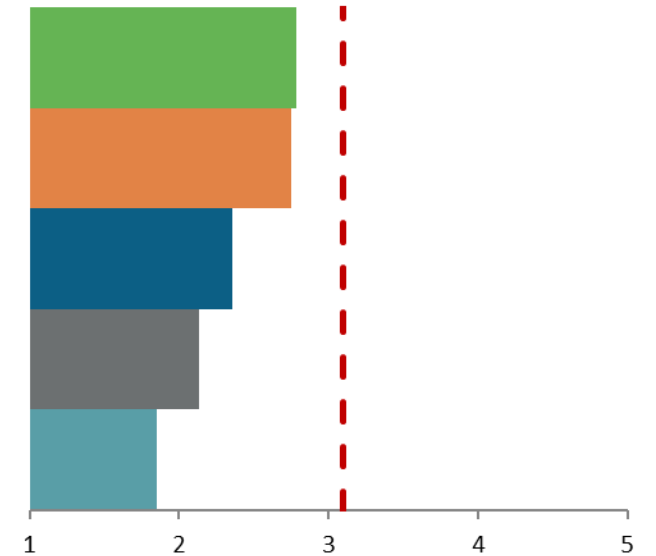


# Convention & Meeting Facilities

- Good, unique off-site venues for special events
- Necessary convention, meeting, and trade show facilities to compete today
- Abundance of professional and experienced convention services suppliers
- Convention center meeting and networking space is well branded
- Necessary convention, meeting and trade show facilities to compete for the next 10 years

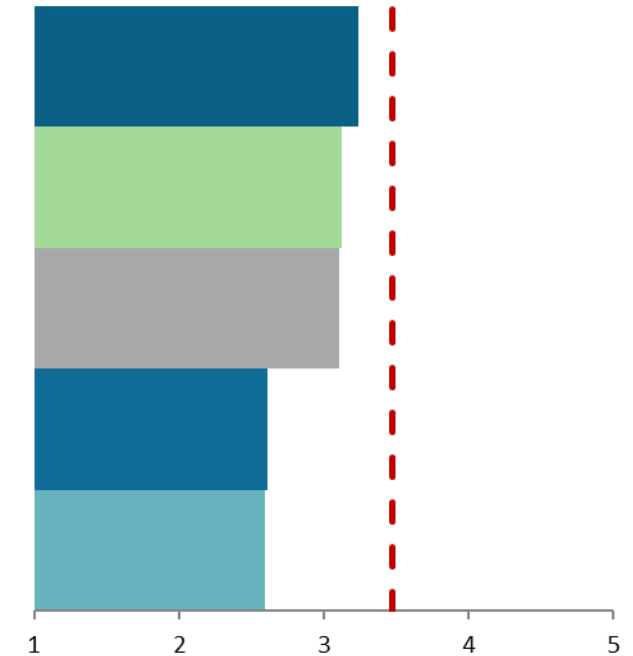


- International Airport is a state-of-the-art facility with capacity to grow
- Airport offers a true destination “sense of place” that supports the brand
- Wide variety of domestic air access
- Variety and quality international air access
- Wide variety of international air access



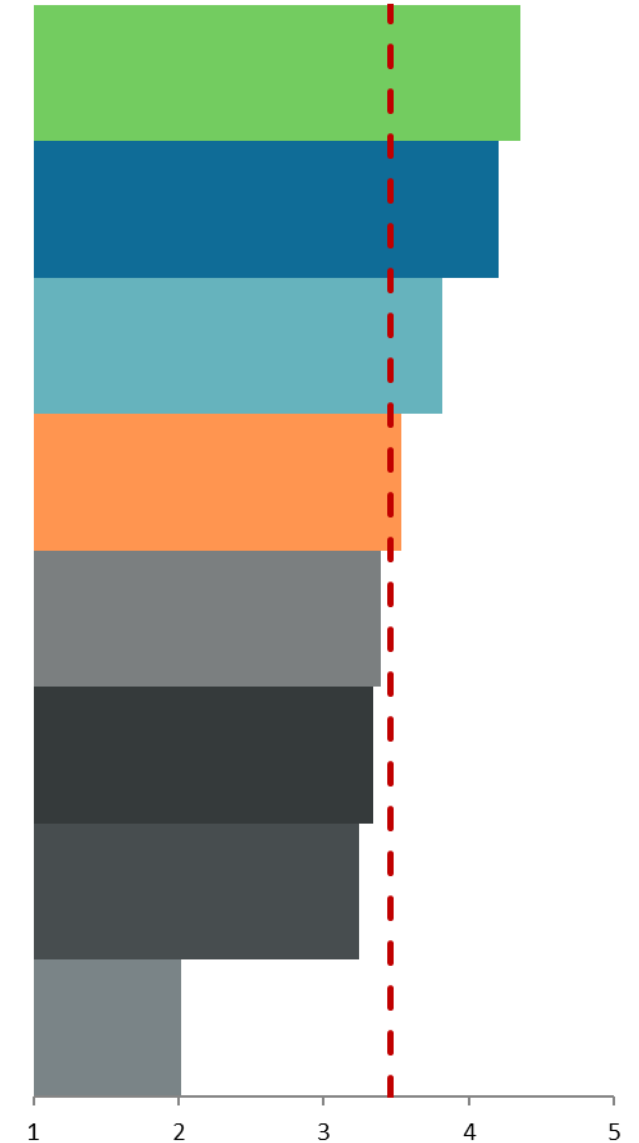
# Accommodation

- Location and proximity of accommodation options in Juneau meets visitor needs
- Adequate hotel accommodations capacity
- Adequate supply of sharing economy accommodations to supplement current hotel capacity
- Diversity of accommodation options and has the presence of well- known brand name hotels
- Has a sufficient number of large hotels to meet demand



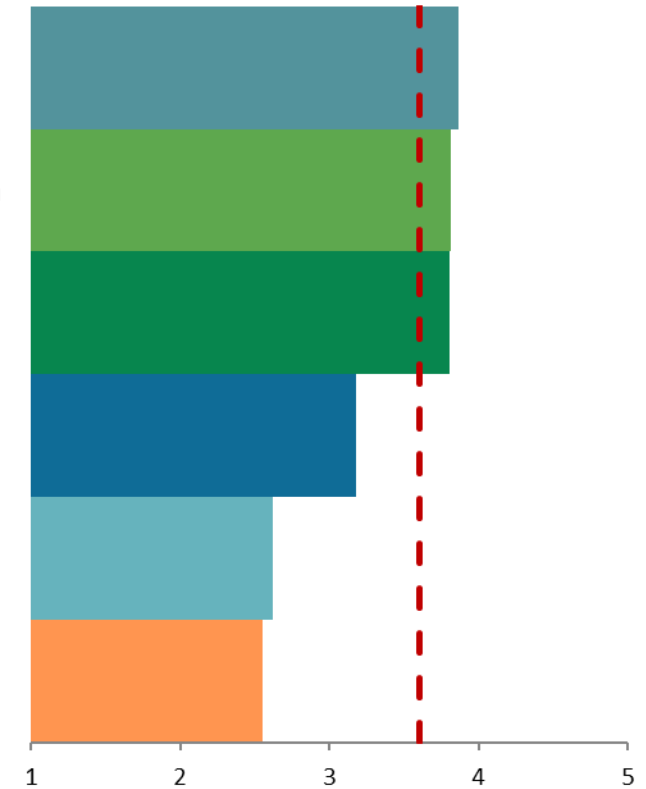
# Brand

- Known as being healthy and an outdoor, active destination
- Known for having a lot of things to see and do
- Appeals to a wide range of visitors
- Known for being safe, clean and secure for visitors
- Tourism industry uses and leverages social media to support the brand
- Has an established brand that is simple, memorable and market-tested
- Known for being an environmentally conscious and sustainable destination
- Known as a high-tech, innovative destination



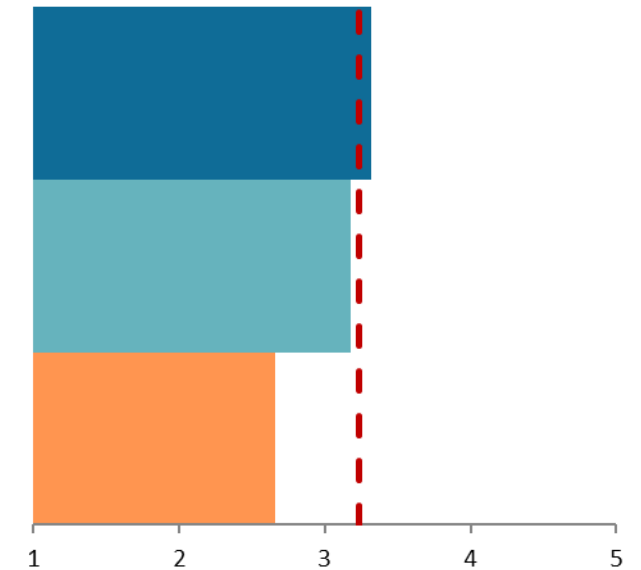
# Attractions & Entertainment

- Assortment of authentic and unique attractions and entertainment opportunities
- Famous attractions (natural or man-made) that cause people to stay an extra day in the destination
- High-quality and wide-ranging arts and cultural attractions
- Unique and high-quality dining options
- Offers diverse and high-quality shopping opportunities
- Unique and vibrant neighborhoods that are attractive and accommodating to visitors



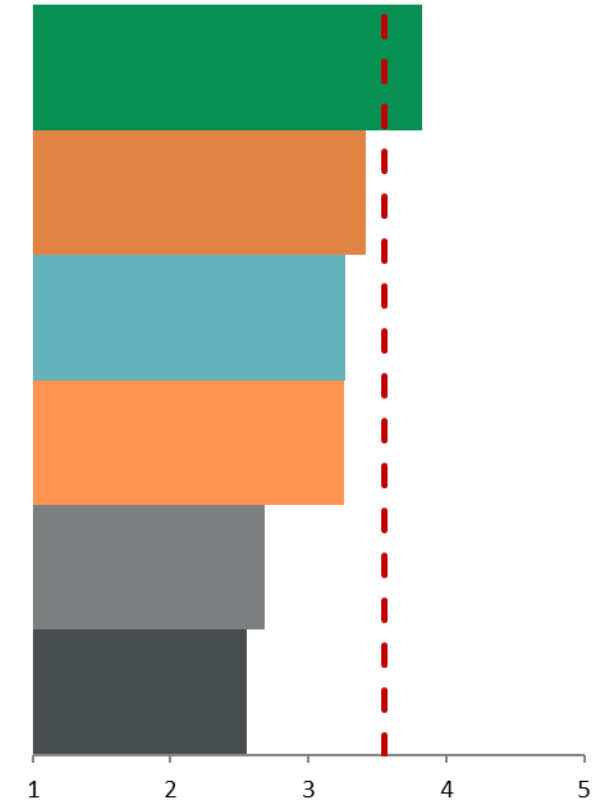
# Communication & Internet Infrastructure

- Good mobile coverage/availability at all attractions and entertainment areas
- Substantial Wi-Fi access in meeting/convention facilities
- Offers sufficient free Wi-Fi in outdoor/public areas



# Events

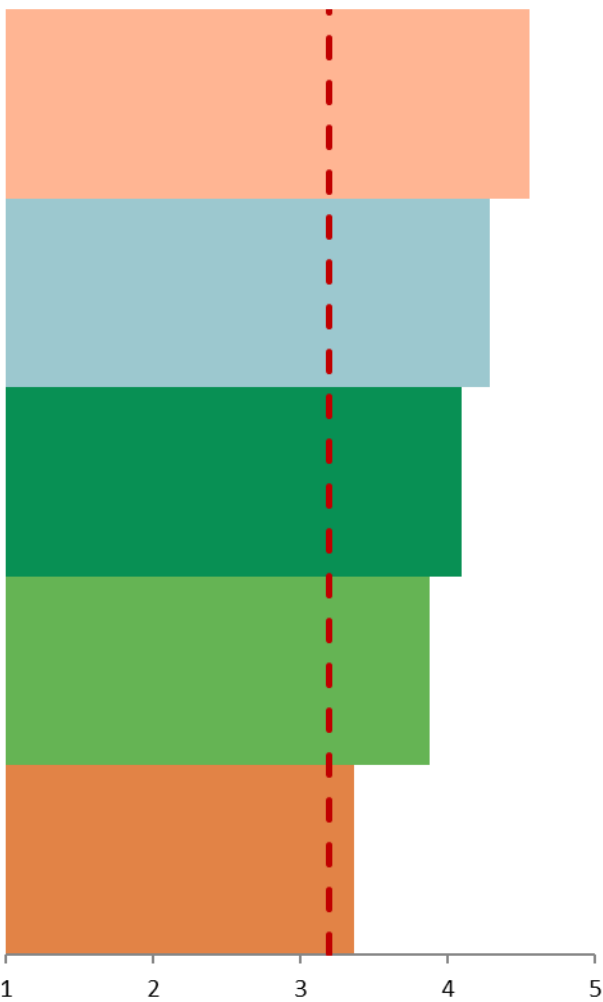
- Abundance of parks and outdoor spaces for handling special events
- Citizens of Juneau are supportive of hosting major sporting/national or international events
- Local government is cooperative and supportive in attracting and hosting major events
- Convention center produces numerous public and lifestyle shows throughout
- Diverse and quality facilities and venues with capacity and availability to host major events
- Offers a year-long series of major events that attract visitors and drive economic impact





# Outdoor Recreation & Sports Facilities

- Wide variety of outdoor experiences
- Adequate number of tours available for outdoor enthusiasts
- Offers a wide diversity of parks and bike trails
- Adequate suppliers that coincide with outdoor recreational offerin
- Adequate number of campgrounds and camping facilities in the ar



# What one thing could Juneau do to become a better or world-class visitor destination?

## Access and Mobility (20%)

- Better flow/space for ship passengers downtown - ways to divert them out of the South Franklin corridor
- Better public transportation - from the airport and ferry terminal
- Ferry access and bus to ferry
- Improve public transportation
- Improve public transportation and support the state ferries; improve hiking trails and winter walkability; more cross-country skiing; an elegant in-door wedding venue that isn't a church
- Maybe a light rail town to Auke Bay to relieve congestion downtown
- More Uber options
- Provide better transportation between the airport and downtown

## Economic Development (15%)

- Improve the homeless situation (not just downtown but as a city, pushing them out doesn't solve it), better trail and outdoor sanitation
- Address crime and bothersome behavior between some locals and tourists downtown. Control crowding.
- Balancing visitation to Juneau with equal importance on animal conservation
- Downtown continues to be troubling experience to walk through (independent of the time of year), with homeless people displaying barbaric behavior
- Focus on converting public transit and tourism transit to electric busses, with an increased number of available EV charging stations
- Homeless issue downtown. Safety is key

## Attractions & Entertainment (10%)

- Build the new JACC
- Improve and update facilities- the convention center, hotels, restaurants, airport, shopping centers are all run down, outdated, unattractive. If more money were to be invested in these spaces, they would draw in more revenue. There is limited shopping options- downtown is only tourist junk, Nugget Mall is out of the 1970's
- More brew-pubs, less bars, less taxes on Airbnb, more support of Ride Share programs
- If you're looking at a year-round destination, a lot of eateries and things to do close in October
- Waterview restaurants

# Are there certain issues that DMO should specifically address that impact tourism?

## Economic Development (25%)

- Make Juneau more environmentally friendly to match its eco-friendly branding. Fully utilize renewable energy sources for public services (EV busses, more public charging stations, etc.)
- I believe we should have more public restrooms downtown that are available year round. And we should have a constant police foot patrol presence
- Homelessness and the drug/alcohol problem
- Work on making the bus fleets electric, summer air quality is bad due to all the diesel busses operating downtown and at the Mendenhall visitor center

## Sustainability (25%)

- Fall and winter tourism marketing appears to be nonexistent. Travel Juneau should work on independent travelers - from all appearances, the exclusive focus is the cruise industry
- Creating Juneau as a year-round destination
- Developing Juneau as a winter tourism destination. Promote Northwest Coast Arts Promote sporting events, Juneau & Southeast-specific (biking, kayaking, cross country running)
- The seven months of "off season"
- Bring the cruise ships into agreeing to help fund the sustainability ideas - team effort!

## Mobility and Access (15%)

- Sustainable transport from downtown to various destinations- electric buses and perhaps a metro type train/shuttle between the valley and downtown
- Transportation and dispersal of crowds. Too many of the great things are too crowded now - we have lots of excellent opportunities to show off more but getting people there is difficult and ship tourists are typically time-limited
- Congestion downtown

# Breakout Groups



# Questions:

1. What are the 3 most important issues facing the destination?
2. What is the most important action for Travel Juneau in the next year?





# Questions:

## 1. What are the 3 most important issues facing the destination?

- Increase marketing to attract more independent and off-season travelers
- Develop new infrastructure for independent travelers
- Challenges with determining future of JACC/CC expansion/renovation
- Missed opportunities on waterfront
- Need more events for shoulder season
- Instability on ferry funding
- Increase stopover flights between Washington and Anchorage

# Questions:

## 2. What is the most important action for Travel Juneau in the next year?

- Develop a stronger brand identity for Juneau to differentiate against comp set
- Increase marketing to drive new shoulder season business and attract more independent, overnight travelers
- Increase communication with local residents so the community better understands the issues facing the local visitor economy, and how Travel Juneau is addressing those and developing new strategies

# DESTINATION NEXT

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**Thank You**

