

STRATEGIC VISION AND ACTION PLAN FOR TOURISM-RELATED FACILITY INVESTMENTS SERVICES

THINK-TANK WORKSHOP REPORT

February 15, 2019

STRATEGIC VISION AND ACTION PLAN FOR TOURISM-RELATED FACILITY INVESTMENTS SERVICES

THINK-TANK WORKSHOP REPORT

This report summarizes the strategic vision and planning session held in Tillamook, Oregon on February 15, 2019. Approximately 61 Tillamook County stakeholders participated in the Think-Tank and developed the scenarios presented in this report. This report has been produced as part of the Tillamook County strategic vision and action planning process, which aims to develop a Strategic Vision and Action Plan for tourism-related facility investments services that will guide County decision-making for the next five to ten years.

February 15, 2019

Report Prepared by:



Workshop Hosted by:



TABLE OF CONTENTS

1.0	Introduction	4
2.0	Key Building Blocks of the Tillamook County Tourism Industry	5
3.0	Survey Results - Key Stakeholder Input	6
3.1	Importance of Improving Local Residents' Relationship to Tourism	6
3.2	Importance of a Collaborative Approach	7
3.3	Importance of Promoting Tillamook County to Attract More Visitors.....	8
3.4	Importance of Tourism Destination Management.....	9
3.5	Most Impactful Dimensions of Sustainable Tourism Development	10
3.6	Current Performance on Sustainable Tourism	11
4.0	Think-Tank Workshop	12
5.0	Creating the Scenario Framework.....	13
5.1	Scenario A: 7 Wonders of Tillamook County.....	14
5.2	Scenario B: Connected Balance.....	16
5.3	Scenario C: Environmentally Protected Silos.....	18
5.4	Scenario D: Communities Struggle Alone.....	20
6.0	Expected and Preferred Futures	22
6.1	Expected Future: Scenario D – Communities Struggle Alone	22
6.2	Preferred Future: Scenario B – Connected Balance.....	23
7.0	Next Steps – Getting to the Preferred Future	24
8.0	Acknowledgements	25
9.0	Contact Details.....	26
10.0	About Future iQ	27



1.0 INTRODUCTION

This scenario-based Think-Tank report summarizes the Tillamook County strategic visioning and planning workshop that took place on February 15, 2019. The Think-Tank Workshop was conducted as part of a project to develop a Strategic Vision and Action Plan for tourism-related facility investments services that will guide County decision-making for the next ten to twenty years. The components of planning work thus far have included pre Think-Tank surveys, long-term Scenario Planning as part of the strategic visioning workshop, and discussion about preferred and expected futures.

- **Pre Think-Tank Surveys** – A survey was sent to invited participants of the Think-Tank before the workshop. This input, along with assistance from the Tillamook Futures Council, helped to create the axes of the scenario matrix and guide the Think-Tank discussions.
- **Tillamook County Think-Tank Workshop** – The scenario-based planning Think-Tank held on February 15, 2019, provided an important opportunity to engage Tillamook County stakeholders in a critical dialogue about the future and impacts of changing visitation dynamics on the Tillamook County tourism industry.

The Tillamook County Think-Tank Workshop was an exciting opportunity for County stakeholders to take a 'deep-dive' into local and regional tourism development.

"To travel is to live."

– Hans Christian Andersen, Danish Author





2.0 KEY BUILDING BLOCKS OF THE TILLAMOOK COUNTY TOURISM INDUSTRY

Tillamook County's Strategic Vision and Action Plan for Tourism-related Facility Investments will be built on significant previous tourism industry study. In January 2015, Tillamook County's Tourism Advisory Committee (TAC) developed four tourism priorities to drive both facilities and promotions in the County. These priorities were adopted by the Board of County Commissioners and will be incorporated into this planning process. Those priorities are:

1. Develop the tourism industry in ways that are socially, culturally and ecologically responsible, particularly in support of nature-based activities and complementary interests, which differentiate our region for visitors.
2. Prioritize growth in tourism that improves economic conditions in the shoulder and off-seasons (i.e. non-peak tourist months, generally late May through mid-September), and supports the economic stability of the workforce.
3. Improve communities' abilities to better accommodate tourists and the visitor experience with new, enhanced or better utilization of tourism-related facilities for increased year-round use.
4. Inspire growth in new and traditional industries to support the long-term priorities of county tourism.

Some highlights of recent County work that informs the county's tourism needs, goals, and priorities include:

- 2020 Strategic Vision (2007)
- Tillamook Coast Tourism 2025 Report (2014)
- Tillamook Coast Asset Mapping Report (2014)
- Salmonberry Trail Concept Plan (2015)
- Cape Kiwanda Master Plan (2016)
- Tillamook County Housing Study Report (2017)
- Salmonberry Trail Coast Segment Planning Study Plan Report (2017)
- Futures Council Community Listening Summary Report (2017)
- Tillamook County Fairgrounds Strategic Plan (2018)

A summary compilation of this significant work may be found in this project's 2019 report, *Tillamook County Tourism Investment Strategic Plan: Taking Stock – What is Known*.

The strategic visioning and action planning of this project is built on significant County studies and stakeholder input.



3.0 SURVEY RESULTS - KEY STAKEHOLDER INPUT

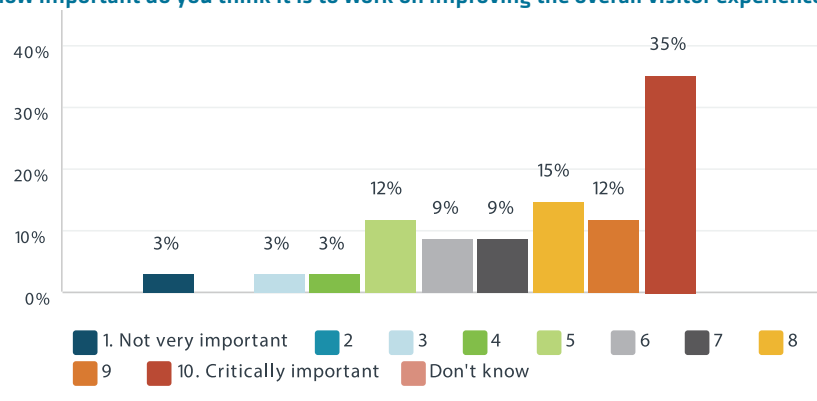
Prior to the Think-Tank, a pre Think-Tank survey was conducted, and participation was encouraged through the Think-Tank workshop. Participants were asked about their views on having a shared vision for the future of Tillamook County, particularly in terms of investment strategies. A total of 41 individuals responded to the survey. The majority of respondents were related to the tourism industry through either lodging or public agencies/government. Almost half of the respondents were from North County Tillamook and 60% were local residents. Below are the compiled results of the pre Think-Tank survey.

3.1 IMPORTANCE OF IMPROVING LOCAL RESIDENTS' RELATIONSHIP TO TOURISM

It is generally understood that visitor experience is an important aspect of tourism development. Think-Tank participants were asked how important they thought improving the overall visitor experience is to the future of Tillamook County. The respondents considered improving the overall visitor experience as critically important.

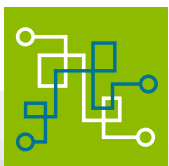
The strategic visioning and action planning of this project is built on significant County studies and stakeholder input.

Over the next 5 years, how important do you think it is to work on improving the overall visitor experience in Tillamook County?



“The visitor experience is what provides long term relationships with our guests and our communities which in turn support a sustainable year-round economy.”

– Think-Tank Survey Respondent



FutureInsight

DATA INSIGHTS:

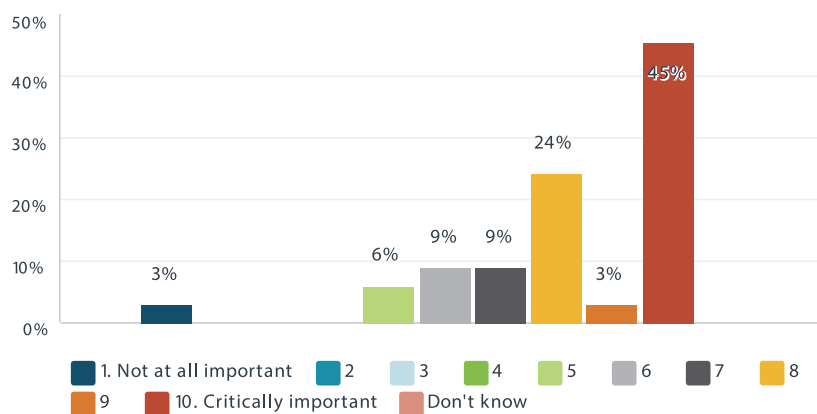
- Stakeholders understand that a more diverse economy with an emphasis on quality experiences and attractions will enhance the overall visitor experience.
- Travelers are increasingly making decisions based on the impact of tourism on the local environment, cultures, and communities.



3.2 IMPORTANCE OF A COLLABORATIVE APPROACH

To gauge how important respondents considered taking a collaborative approach is to support coordination in the tourism industry across the County, Think-Tank survey respondents were asked to rank its importance. A collaborative approach is clearly supported.

Over the next 5 years, how important do you think it is to work on building collaboration across the County to support coordination in the tourism industry?



A collaborative approach to tourism management and development builds a connected tourism ecosystem.

“Collaboration is going to be critical to success. Small rural and decentralized groups can’t do it alone.”

– Think-Tank Survey Respondents



DataInsight

DATA INSIGHTS:

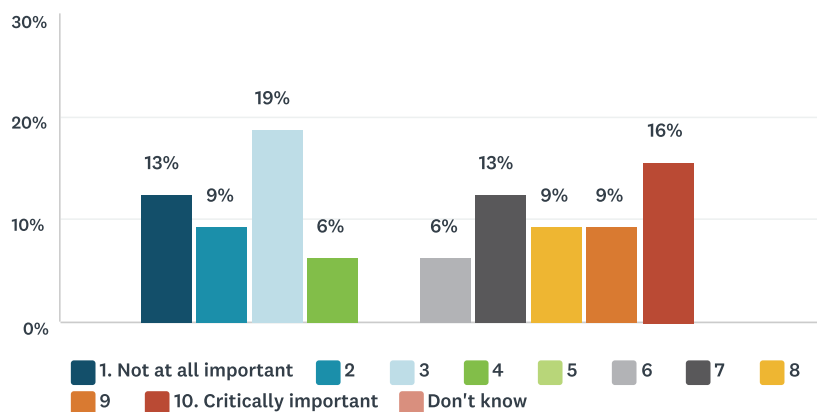
- The survey respondents considered a collaborative approach as critical to tourism development in Tillamook County.
- It will be important for industry leaders to build collaboration through consensus on methodology, language definitions and desired outcomes.



3.3 IMPORTANCE OF PROMOTING TILLAMOOK COUNTY TO ATTRACT MORE VISITORS

At this stage of the visioning process, the issue of promoting Tillamook County to attract more visitors appears to be a future-splitting question. Opinions were divided on how the County should promote itself and this will require further investigation into local industry sentiment and public opinion in subsequent project engagement activities.

Over the next 5 years, how important do you think it is to work on promoting Tillamook County to attract more visitors?



Promotional activities are key to tourism management and destination development.

“It’s not about promotion. Tourists will come to the coast. It’s about distinguishing and differentiating communities and creating and elevating better experiences to keep them returning and experiencing all aspects of a community - not just lodging and dining.”

– Think-Tank Survey Respondent



DataInsight

DATA INSIGHTS:

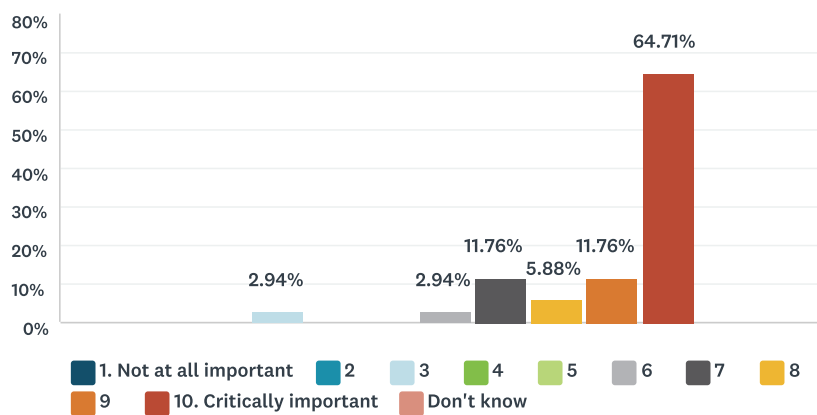
- The divergence in opinion on how to approach tourism promotional activities in the County points to a diversity of interests at stake.
- Industry leadership will need to adopt a strong consensus on County messaging in tourism promotion in order to gain active support of local entities.



3.4 IMPORTANCE OF TOURISM DESTINATION MANAGEMENT

A growing tourism industry along the North Coast of Oregon is prompting the question of how tourism destination locations should be managed, both for visitor experience and for local residents. Think-Tank survey respondents were asked how important they think it is to manage the impact of tourism to avoid congestion and overuse of areas. Respondents indicated overwhelmingly that the issue was of critical importance.

Over the next 5 years, how important do you think it is to manage the impact of tourism, to avoid congestion and overuse of areas?



Tourism destination management has become a critical necessity for locations experiencing overuse and overcrowding.

“We must do this before attracting more visitors. This is the only way tourism can be sustainable.”

– Think-Tank Survey Respondent



DataInsight

DATA INSIGHTS:

- Given the strong support for tourism destination management by Tillamook County individuals, County leaders have been given a mandate to pursue policies that reflect this support.
- Cape Kiwanda was identified by stakeholders as an area experiencing congestion and overuse.

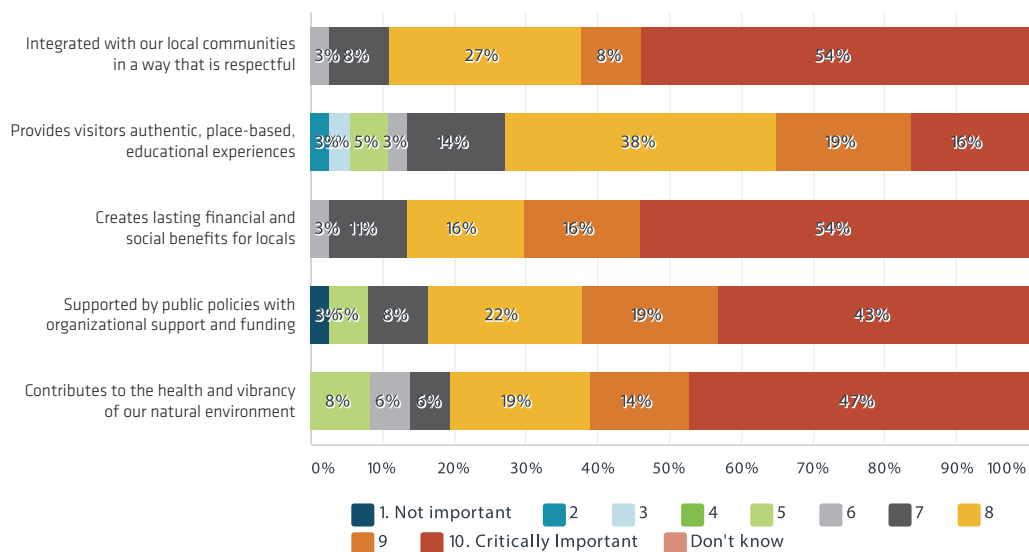


Careful destination management builds resiliency and long-term sustainability into tourism development.

3.5 MOST IMPACTFUL DIMENSIONS OF SUSTAINABLE TOURISM DEVELOPMENT

In considering how to develop a sustainable tourism industry, it is important to measure what dimensions are considered most impactful. Think-Tank participants were asked about the importance of five dimensions specific to Tillamook County. Results indicate that all five dimensions were viewed as largely impactful.

Over the next 5 years, how important do you think each of the dimensions of Sustainable Tourism are for Tillamook County?



“Programs that support and build tourism and business for locals and improve experiences for tourists are critical. Innovation is needed in a big way.”

– Think-Tank Survey Respondent



DataInsight

DATA INSIGHTS:

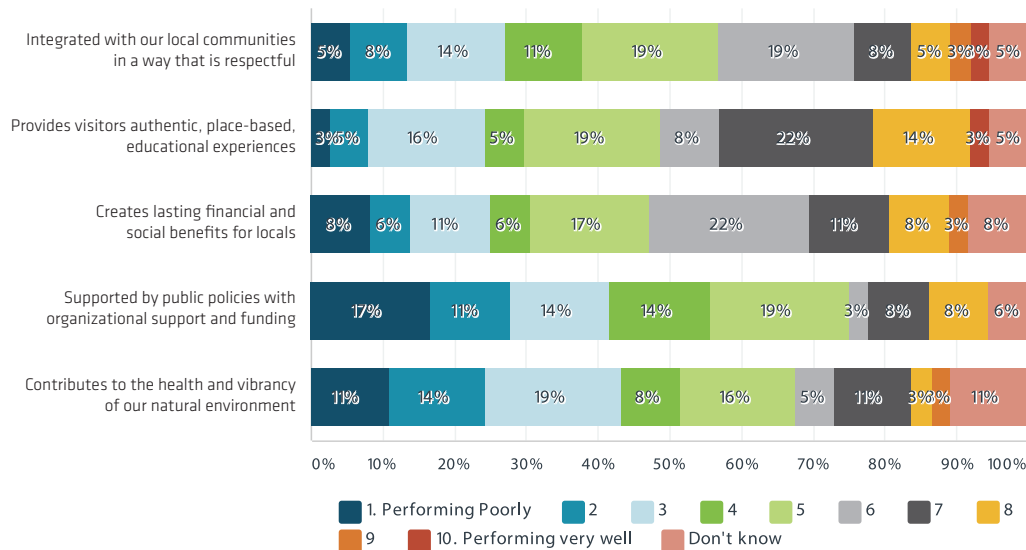
- Clear and consistent messaging and education about tourism development in Tillamook County is necessary for both visitors and locals in order to fully appreciate the impacts of the industry on the environment and local economies.
- Such strong support for sustainable tourism values gives Tillamook County officials the power to enact policies that lead the County towards sustainability.



3.6 CURRENT PERFORMANCE ON SUSTAINABLE TOURISM

Think-Tank participants were asked how well the County was currently performing in agreed upon dimensions of sustainable tourism. Significantly, almost 20% of all respondents did not know if the Tillamook County tourism industry is supported by public policies with organizational support and funding.

How well do you think the Tillamook County Tourism industry is CURRENTLY performing for each of these dimensions of Sustainable Tourism?



Clear and consistent communication about County progress on sustainable tourism development will educate industry leaders on progress in this area.

“We have under invested in managing tourism for many years and we are beginning to pay the price with unhappy local citizens and disappointed visitors that look to other areas that are more user friendly.”

– Think-Tank Survey Respondent



DataInsight

DATA INSIGHTS:

- Survey results indicate that there is a lack of understanding about public policies providing organizational support and funding in the area of sustainable tourism.
- Trends would suggest that Tillamook County destinations are well-suited for sustainable tourism development. Avoiding the pitfalls of overcrowding and over-tourism will require detailed and collaborative planning.



4.0 THINK-TANK WORKSHOP

The scenario-based Think-Tank was conducted on February 15, 2019 and included Tillamook County stakeholders including Futures Council members, private citizens, County public officials and hospitality and tourism industry representatives. Approximately 61 people attended this five-hour session. The session was intended to build coherency around initial future planning for a sustainable strategic vision and action plan that will guide Tillamook County tourism decision-making over the next ten years and beyond.

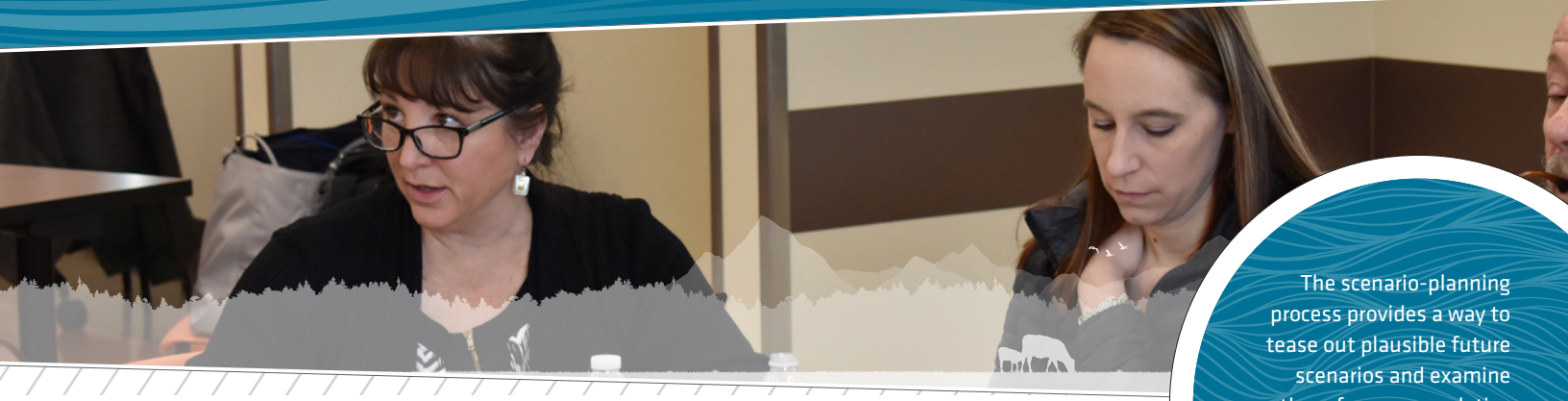
Future IQ's Scenario Planning process provides a method to explore plausible futures and consider the implications of various future scenarios. The Think-Tank workshop aimed to:

- Deepen the understanding and examination of how external events and local conditions could shape decision-making
- Identify and understand the key influences, trends, and dynamics that will shape the County over the next 10 to 20 years
- Create and describe four plausible long-term scenarios for the region
- Explore alignment around a shared future vision for the region

The scenarios developed during this Scenario Planning process and outlined in this report are important to provide a framework to discuss future possible outcomes and implications for tourism development. In addition, the Think-Tank deliberations can assist in identifying key actions for the region and in exploring how various groups might best contribute to future tourism development.

Think-Tank participants were guided through a Scenario Planning process to develop four plausible scenarios for the future of Tillamook County. The process involved exploration of local trends and forces of change; development of a scenario matrix defining four plausible scenario spaces for the future; and, the development of descriptive narratives of each scenario. The event concluded with discussion of the scenarios, selection of a preferred scenario and the consequences of inaction.

The scenario planning process allows Tillamook County stakeholders to examine the implications of choices about future direction.



The scenario-planning process provides a way to tease out plausible future scenarios and examine them from a speculative standpoint. They represent different possibilities for the future and are not predictions.

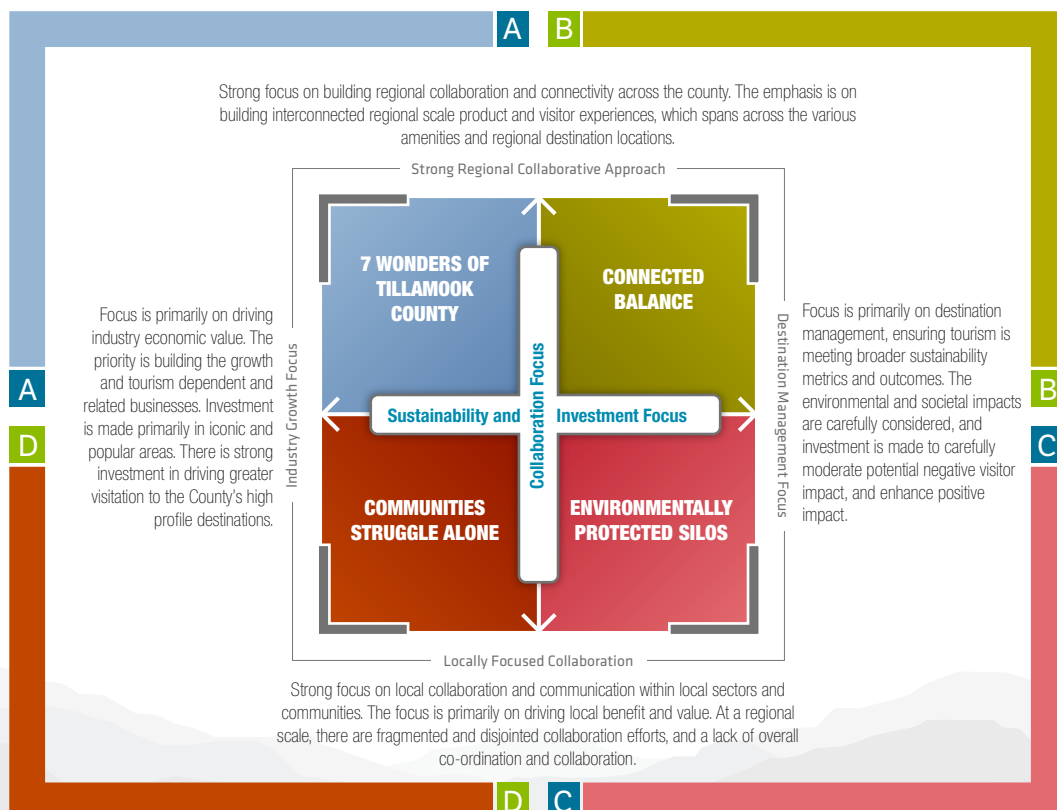
5.0 CREATING THE SCENARIO FRAMEWORK

Based on the Pre Think-Tank survey responses and key input from the Futures Council, themes were identified to become the basis for two axes on the scenario matrix. The two axes identified were **Sustainability and Investment Focus** and **Collaboration Focus**.

Think-Tank participants were presented with the scenario matrix, defined by the two major axes of 'Sustainability and Investment Focus' and 'Collaboration Focus' (see diagram). Brief descriptions were also attached to the end points of each driver axes. Participants were divided into four groups to develop a narrative for each scenario. Each group was asked to describe the characteristics of Tillamook County in 2030 under the conditions of the scenario quadrant that they had been given:

- Community impacts
- Visitor experience impacts
- Local economic impacts
- Environmental impacts

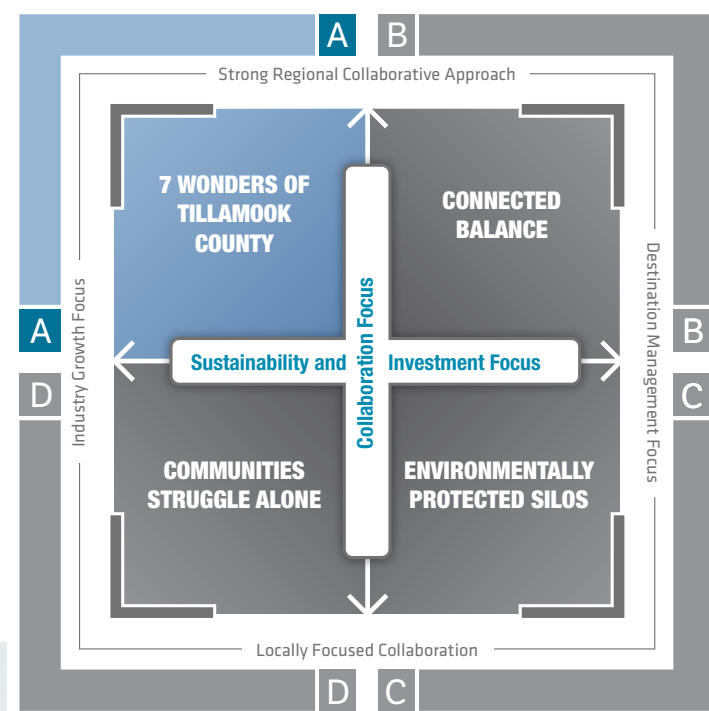
After the characteristics were established, Think-Tank participants were asked to devise major events or headlines of how the scenario occurred using the years 2020, 2025, and 2030, and to give their scenario a descriptive name. Narratives and descriptions of each scenario as developed by the workshop participants are included in the following sections.

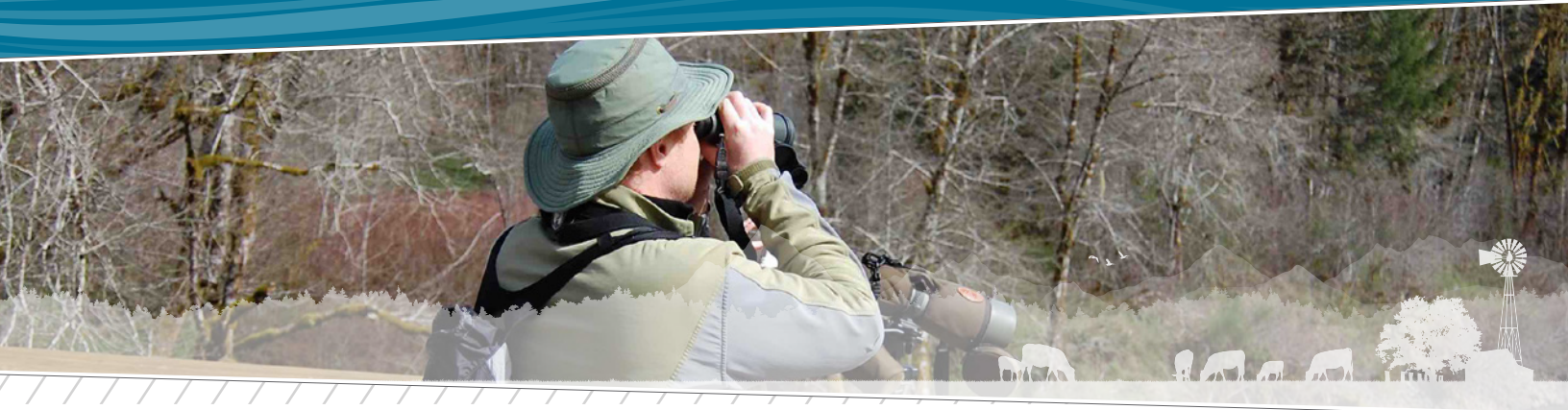




5.1 SCENARIO A: 7 WONDERS OF TILLAMOOK COUNTY

In summary this scenario forecasts a future where tourism industry growth at iconic sites is booming. Local economies hosting iconic sites prosper and tourism jobs are plentiful. A strong regional collaborative approach to tourism development connects the iconic sites with county-wide infrastructural projects causing excessive traffic and congestion in those areas. Peak visits increase requiring a transient workforce from other areas. Affordable housing in populated areas becomes an issue and disparities in incomes grow. There are definite winners and losers in the County as areas without iconic sites are ignored and economies stagnate, particularly in the off-season. The typical visitor comes for day visits, and their experience is more generic than special. Heavily toured areas suffer environmentally, with waste management a growing issue.





POTENTIAL SCENARIO CHARACTERISTICS - 2030

Community impacts / Characteristics

- Iconic Areas
 - » Much more traffic
 - » More tourism-based jobs
 - » Vibe is conflicted (winners and losers)
 - » STRS/hotel development impacts
 - » Peak visits increase
 - » Workers driving from other areas
 - » Tourism industry in driver's seat
 - » ROI vs. Balanced Scorecard

Visitor experience impacts / Characteristics

- High density tourism / Low impacts
- More generic experience
- Targeted experiences
- Lodging near iconic area
- Visitor satisfaction could be high w/managed landscape
- May miss some types of visitors
- Day time mass visitation

Local economic impacts / Characteristics

- Tourism impacts are localized
- More tourism jobs
- Disparities increase
 - » Income
 - » Housing
- Increased transient workforce
- Workers drive from other areas
- Winners and losers

Environmental impacts / Characteristics

- Large impacts in tourist zones; less impacts in non-tourist zones
- More garbage
- Bigger parking lots
- Winners and losers



7 WONDERS OF TILLAMOOK COUNTY - HEADLINE NEWS

2020

2025

2030

Community Impacts

"7 Wonder Areas begin community planning"

"Parking structures open in key locations"

"Census shows Tillamook County residents at all time high and demographics shift away from retirees"

Visitor Experience Impacts

"7 Wonders of Tillamook County"

"Gridlock on highways indicates desperate need for transportation improvements and creative solutions"

"Tillamook County wins National integrated tourism plan"

Local Economic Impacts

"Pressure on workforce housing continue"

"Regional Transportation plan approved"

"Tourism dollars at all time high"

Environmental Impacts

"Record number of attendees at Public Hearing on sensitive areas development"

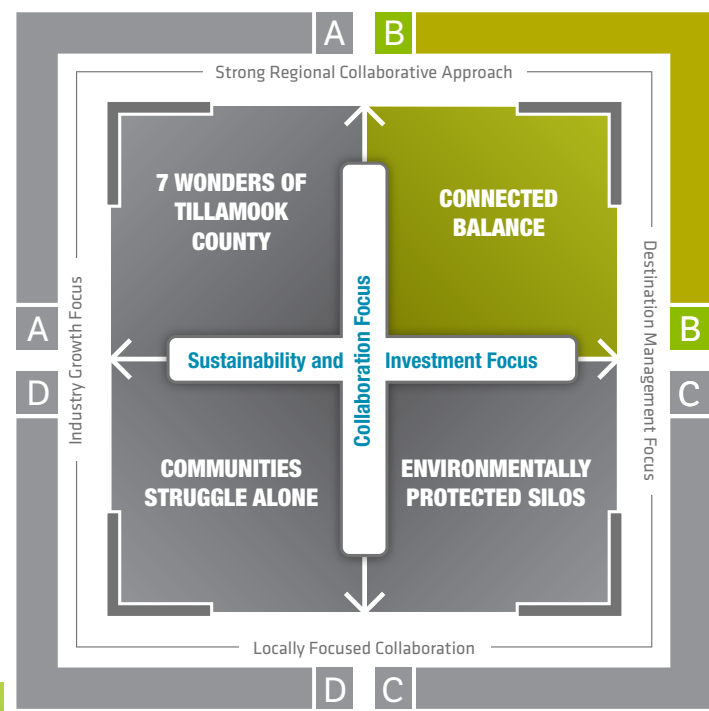
"Tillamook County rolls out new trail systems with amenities"

"Increased tourism affecting local watersheds negatively"



5.2 SCENARIO B: CONNECTED BALANCE

In summary this scenario forecasts a future where the motto for the scenario is 'Come as a Guest, Leave as a Friend'. Tourism growth is closely managed by the County with a strong regional collaborative approach. Stays are diverse and curated with an eye to regional sustainable growth and protection of the environment. County communities are connected by a network of seamless multi-modal transportation systems along with a county-wide wayfinding system. Emphasis is placed on policies that encourage collaboration among industry stakeholders and are respectful of the Tillamook County tourism ecosystem, cultural heritage and community values. Regional investments focus on workforce housing, regional connectivity, and natural resource tourism. Targeted promotional activities develop a broad range of integrated attractions and events with expanded advertising for smaller localized events that encourage longer stays and off-season visitation.





POTENTIAL SCENARIO CHARACTERISTICS - 2030

Community impacts / Characteristics

- Community awareness and civic leadership
- Vibrant but well managed community
- Adequate government staffing/ funding
- Not feast or famine, more level economy and living experience
- 30,000 – an increase of 5,000 driven by tourism related employment
- Year round, less adversarial with appreciation for benefits of tourism
- Easy, fun, comfortable, safe and you enjoy diverse experiences
- Respectful of tourism ecosystem and community values

Visitor experience impacts / Characteristics

- Cultural heritage experiences – 2025 headlines
- Diverse county itinerary for entire family
- Workforce/volunteer as local ambassadors
- Longer stays/trips
- ‘Come as a guest, leave as a friend’
- Unique off-shoulder winter experience
 - » Santa train
 - » Waterfalls, hikes
 - » Fat-tire biking
- Wayfinding to guide tourists
- Educate visitors how to visit in Cape Kiwanda (signage, links, websites for those who plan ahead)

Local economic impacts / Characteristics

- Regional investment in workforce housing, including maximizing existing inventory (solve to have year-round workforce)
- Buses, shuttles, and alternative modes (horses and carts) between parking and destinations
- Development of broad integrated attractions and events with expanded advertising for smaller localized events that entice visitors to stay longer and explore what our county has to offer
- Tourism combines with fishing, forestry and agriculture, fairgrounds and food/beverage (natural resource tourism)
- Parking lot management (application for parking, fees, road rage)

Environmental impacts / Characteristics

- Eco-tourism focus
 - » Trail builders – help spread use and visitors to more diverse places
 - » Collaborative and focus on informing solution and communicate options between regions
 - » Think of solutions that don’t exist yet
- Need regional/government support with consistency and funded support; collaboration with governments
- Need a much more proactive approach to infrastructure and tourism readiness
- Change legislation to guide environmentally friendly choices
 - » Like fishing industry/hunting
 - » Physically limit sensitive areas
 - » Identify regional areas that can sustain higher use
 - » Garbage, recycling, sanitation
- Balanced protection = regional sustainable growth and protection



CONNECTED BALANCE - HEADLINE NEWS

2020

2025

2030

Community Impacts

“Community leaders embrace year-round tourism management”

“Tourism management is a success”

“Employees enjoy year-round living and working on the Tillamook Coast”

Visitor Experience Impacts

“Come as a guest, leave as a friend”

“Families explore Tillamook cultural heritage”

“Tillamook County: a premier destination for explorers”

Local Economic Impacts

“County-wide parking shuttles system launched”

“Workforce housing solutions implemented”

“Bus/rail pass connects all areas of County”

Environmental Impacts

“Community-wide Trails map released”

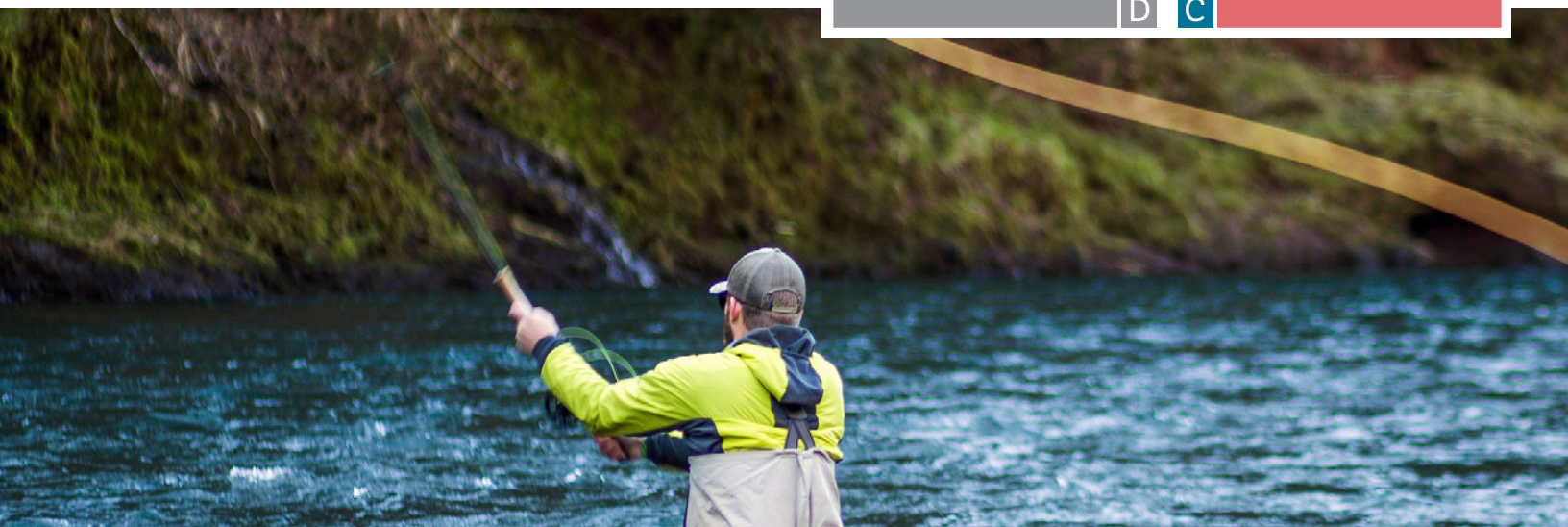
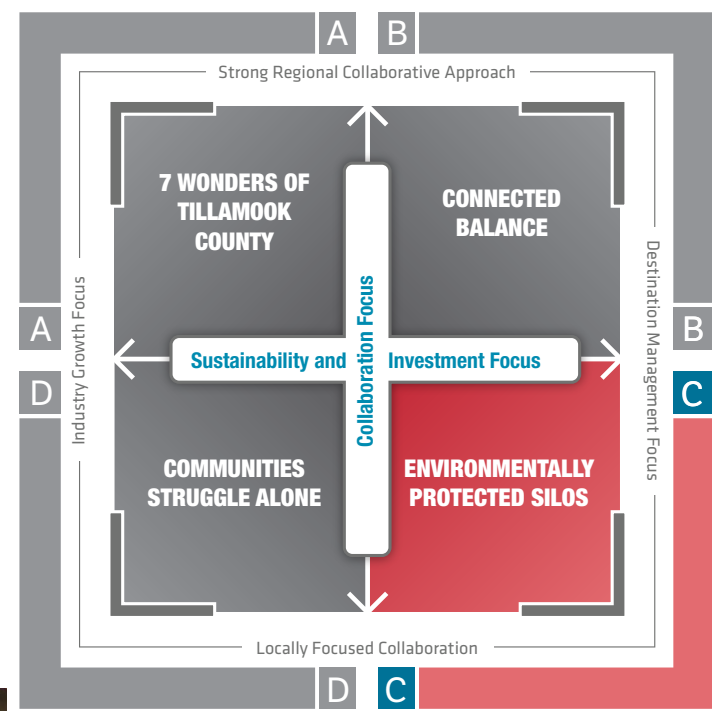
“Funding for County-wide curb-side recycling; Smoot roads and clean restrooms for all”

“Summer visitor quotas established”



5.3 SCENARIO C: ENVIRONMENTALLY PROTECTED SILOS

In summary this scenario forecasts a future where tourism destination development is managed under the priority of sustainability on a locally focused basis. Localities are subject to seasonal swings due to lack of connection to the rest of the County and an attitude of 'protect my backyard' prevails. Lack of county-wide collaboration and coordination creates a redundancy of services that don't align and cause for inconsistent visitor experiences. Visitors are often confused at the differences in services that exist across the County and do not venture to other areas. Business suffers and growth falters in areas without the focused silos of services. Additional revenue streams including increased local support is needed to pay for services and programming. Promotional activities are reoriented and based strictly on localized tourism numbers, thereby threatening the long-term resiliency of the county-wide tourism ecosystem.





POTENTIAL SCENARIO CHARACTERISTICS - 2030

Community impacts / Characteristics

- Need centralized parking
- Increase police/fire presence
- Affordable housing becomes a greater issue
- Locals are frustrated with lack of access/overburden
- Businesses may move locations based on tourism trends
- Businesses may change their focus based on competition
- Increase in manpower and management of services by community
- Well-developed comprehensive community plans for success

Visitor experience impacts / Characteristics

- Can't access direct destination - no private vehicles
- Inconsistent visitor experience
- Visitors may not feel welcome
- More desirable because of less congestion, exclusivity could increase visitors experience and revenue generation
- Visitors may have to plan ahead instead of spur of the moment
- Experiences may feel different

Local economic impacts / Characteristics

- Additional revenue streams needed to provide services
- Destinations/businesses may have added costs
- Each destination may not be equal in charging for experience
- Cannot forecast potential pitfalls
- Create jobs in the off season
- Because of seasonal opportunities, you may spread the tourism to benefit all communities
- Individual communities need to find other revenue streams - more local support
- Visitors may not venture in to other areas to shop
- Visitors may have to go to other destinations. This may limit growth and opportunity/new business
- Large infrastructure (convention center)

Environmental impacts / Characteristics

- Individual controls on impact locally
- Enforce environmental areas - access
- Preserve natural resources for a longer life
- Natural resources are being more respected by visitors
- Wild areas are reducing/limiting all access



ENVIRONMENTALLY PROTECTED SILOS - HEADLINE NEWS

2020

2025

2030

Community Impacts

"Residents push back on tourism"

"Local access denied for residents / Voters reverse TLT ordinance"

"Local community receives award for nature preserves"

Visitor Experience Impacts

"Hiker mauled by mountain lion"

"Communities requiring lottery for beach access"

"Cape Kwanda named international world heritage site"

Local Economic Impacts

"Small business struggle in off season"

"Outside corporation purchase local businesses and property"

"Businesses Newsweek establish top 10 economic businesses opportunities on the coast"

Environmental Impacts

"Planning started for environmental protection"

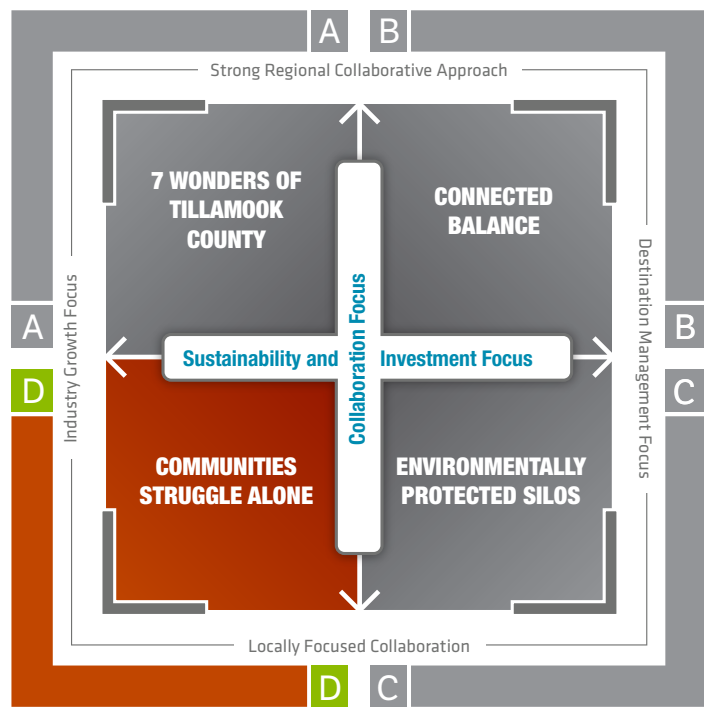
"State recognition on environmental protection"

"Federal recognition on environmental protection"



5.4 SCENARIO D: COMMUNITIES STRUGGLE ALONE

In summary this scenario forecasts a future that is specifically focused on local tourism industry growth of iconic sites and popular areas. No attempt is made to coordinate county-wide collaboration on transportation or infrastructure projects. Some communities struggle on their own without the services that are dedicated to the iconic areas. In popular areas, visitor numbers increase and traffic overruns busy roadways causing locals to become resentful towards tourists. Visitors stays are local, which boosts some businesses and communities but not others. Definite winners and losers emerge and many residents decide to leave the County for better managed locales. Environmentally, heavily trafficked communities are overburdened with sanitation and waste management issues and some localities lose access to clean water.





POTENTIAL SCENARIO CHARACTERISTICS - 2030

Community impacts / Characteristics

- Positive feelings of community enhance local identity
- Disproportionate growth across the County
- Traffic overrun causing resentment
- Local community is able to define tourism; not a 'top down' approach

Visitor experience impacts / Characteristics

- Draws in certain people that are drawn to specific identity
- Visitor frustration
- Overrun roads and supply of natural resources
- If focus on local, visitors don't have to leave if community plans for everything like Sun River
- Some visitors will like to stay in one place

Local economic impacts / Characteristics

- Visitors stay local; only economic impact locally
- Local identity development with distinct character
- Some communities impacted more than others - related to housing and affordability (rents increase, home values increase, workforce lives outside of County)
- Traffic congestion
- Tourism employment at lower end of economic pay scale
- Store closures
- With only locally focused tourism, transportation will not be as inclusive
- Transportation/more money into the communities
- Existing businesses will be positively impacted

Environmental impacts / Characteristics

- Increased impacts on solid waste, trash services County-wide; issues of communication between cities and County solid waste becomes complicated
- Hiking trails in some places overcrowded while some only locally used
- Exacerbated impacts on services like sanitation, water, and over popular trails
- Local focus drives people to over-use
- Water, drinking water; some local areas don't have water
- Regionally organized tourism strains infrastructure and overtakes natural resources
- More traffic, more cars because no regional transportation system



COMMUNITIES STRUGGLE ALONE - HEADLINE NEWS

2020

2025

2030

Community Impacts

"Individual towns struggle with tourism"

"Local writers can't afford to live here"

"County communities further segregated due to tourism"

Visitor Experience Impacts

"Visitors frustrated with parking"

"Frustrated tourist look elsewhere"

Local Economic Impacts

"Businesses can't keep employees"

"Uneven economic benefits"

"Tour buses bypass multiple communities"

Environmental Impacts

"Trails overrun in Pacific City while not in Neskowin; Residents complain about trash on trails"

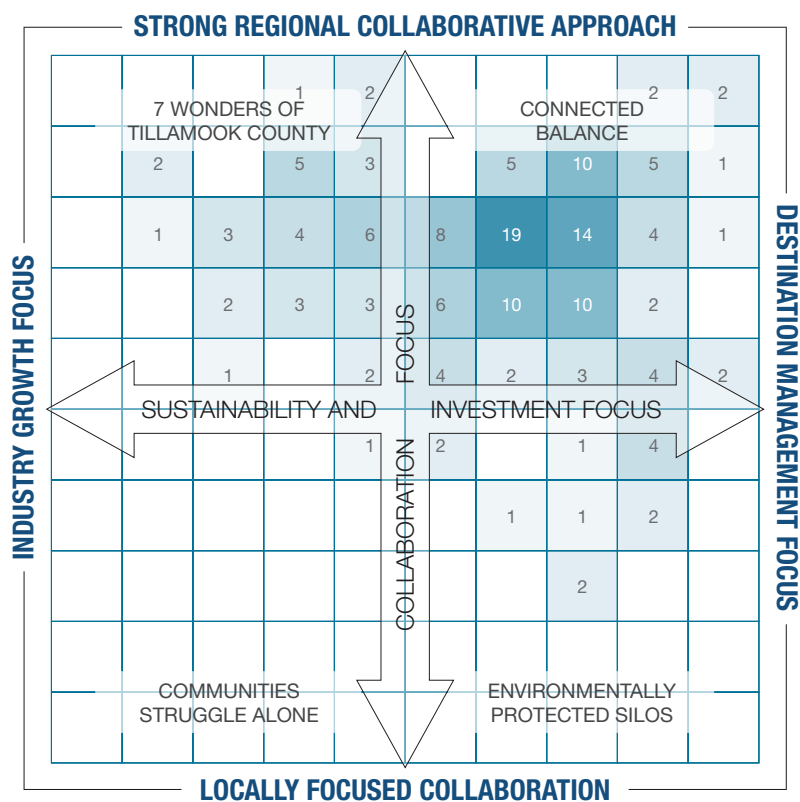
"Pacific City experiences dog poop deluge"

"Aquifer threatened; Local utilities overwhelmed by use; Popular trails must close due to overuse"





6.2 PREFERRED FUTURE: SCENARIO B – CONNECTED BALANCE



Tillamook County Think-Tank Workshop, February 15, 2019

While each of the scenarios were viewed as plausible, Think Tank participants expressed a preference for one of the presented outcomes, Scenario B, “Connected Balance”. Participants discussed the need for the Tillamook County tourism industry leadership to act definitively and quickly to move the County towards the preferred future. It was noted that significant background research and study had been done on regional tourism and now was the time to put collective energies into the process of changing direction.

A definite preference for one scenario indicates a clear mandate for leadership to take actions that support that vision for the future.



DataInsight

DATA INSIGHTS:

- The tight concentration of color in Scenario B, ‘Connected Balance’ indicates a close alignment of thinking among industry leaders.
- Tillamook County will need to rally strong collaborative action to move the County towards the preferred future.



8.0 ACKNOWLEDGEMENTS

The participants from Tillamook County engaged in the Think-Tank workshop and discussions with great enthusiasm. Their passion and interest ensured the discussions were thoughtful, and the outcomes reflective of the County's perspectives. This dedication is reflective of the deep commitment Think-Tank participants have to the future of their communities and local industries.

Think-Tank participants attended from across the whole of Tillamook County, representing diverse communities.

Think-Tank Participants

Mary Jones	Jared Gardner	Mark Roberts	Dusti Linnell	Mary Groves
Jeremy Strober	Kristen Penner	Arica Sears	John Coopersmith	Ross Tomlin
Michele Bradley	Jon Wehage	Tom Bender	Stacy Nuttal	Arlene Soto
Garry Link	Paul Wyntergreen	Suzanne Weber	Camy VonSeggern	Kristi Foster
Bill Gerken	Shaena Peterson	Nicole Twigg	Kylie Poklikuha	Susan Corbisiero
Carol Elms	Jeff Schons	Erin Skaar	Bill Baertlein	Kaylan Sisco
Nan Devlin	Rachel Hagerty	Karen Reddick Yurka	Chris Knutsen	Tiffany Mitchell
Linda Buell	Lisa Greiner	Rick Kneeland	Rebecca Sukanen	
Misty Wharton	David Graves	Gus Meyer	Ayreann Colombo	

Future iQ would like to acknowledge the substantial support from the Tillamook County Futures Council. Members of the Council meet monthly to direct this project and their outstanding support at the Think-Tank was greatly appreciated.

Tillamook County Futures Council Members

Michele Bradley	John Holloway	Jennifer Purcell
Lisa Greiner	Rick Kneeland	Ross Tomlin
Mary Groves	Dusti Linnell	Misty Wharton
Marie Heimburg	Douglas Montgomery	

The dedication and professionalism of the Tillamook County Board and the Futures Council are big assets for the County's tourism industry.



9.0 CONTACT DETAILS

For more information on the Tillamook County Strategic Vision and Action Plan for Tourism-related Facility Investments Services please contact:

Rachel Hagerty, Chief of Staff

Tillamook County Board of Commissioners

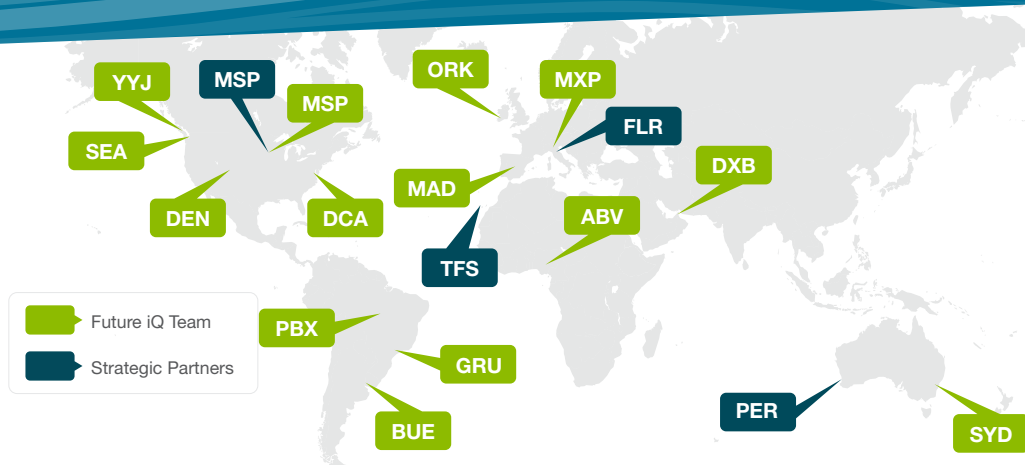
Email: rhagerty@co.tillamook.or.us

Jennifer Purcell, Chair

Tillamook County Futures Council

Email: tillamookcountyfuturescouncil@gmail.com





10.0 ABOUT FUTURE IQ

Future iQ specializes in applying innovative tools and approaches to assist cities, organizations, regions and industries shape their economic and community futures. With nearly two decades of experience, the company has a global clientele spanning three continents. To learn more about Future iQ, and our recent projects [visit www.future-iq.com](http://www.future-iq.com) or by email at info@future-iq.com

REPORT PREPARED BY:



David Beurle

CEO, Future iQ



Heather Branigin

VP Foresight Research



Celine Beurle

Chief Operating Officer

