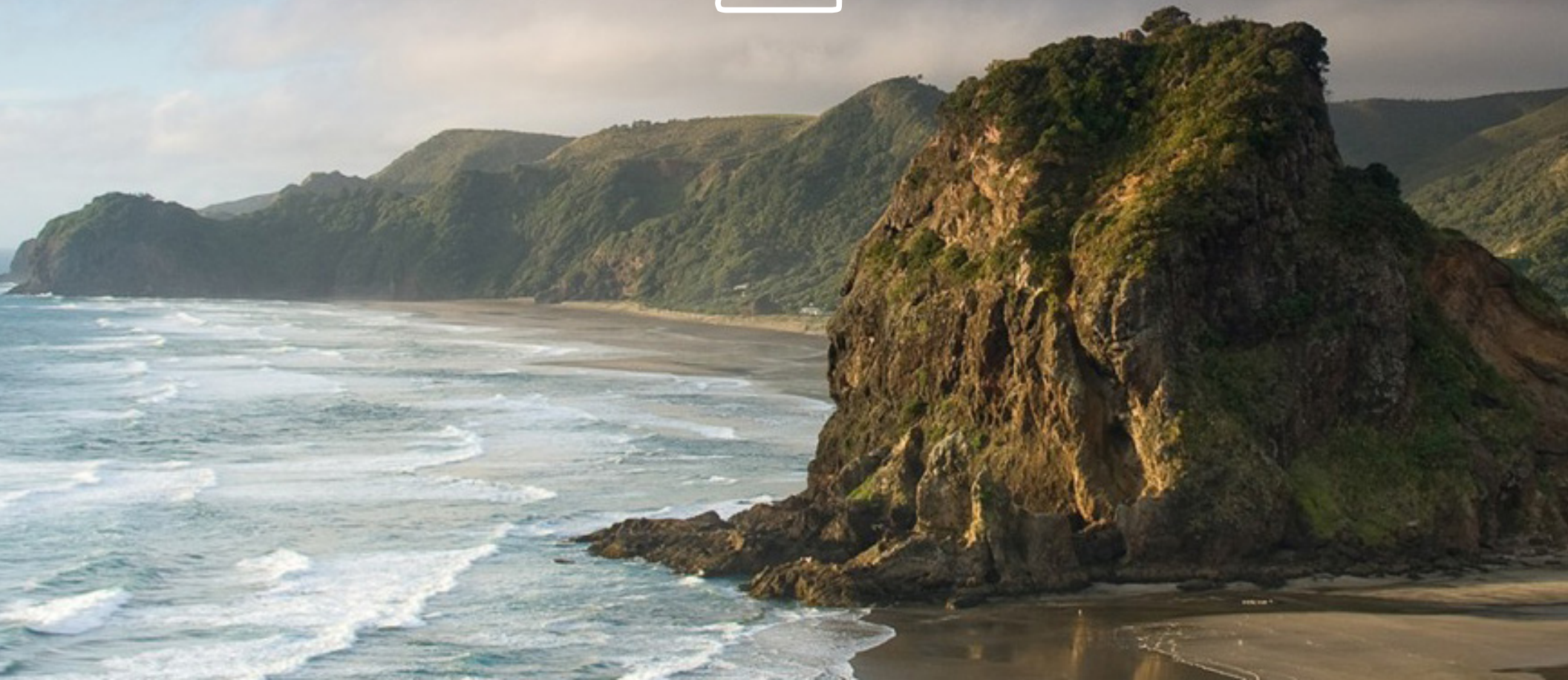


NORTH COAST TOURISM SUMMIT

Visioning and Planning Think Tank – North Coast Tourism Industry

Report from the visioning and planning think-tank conducted on 25 September 2018.



NORTH COAST TOURISM SUMMIT

Visioning and Planning Think Tank – North Coast Tourism Industry

Report from the visioning and planning think-tank conducted on 25 September 2018.

This report summarizes the scenario-based planning Think Tank session held in Garibaldi on the North Coast Region of Oregon on September 25, 2018. Approximately 100 North Coast stakeholders participated in the Think Tank session and developed the scenarios presented in this report. This report has been produced as part of Travel Oregon's North Coast Tourism Studio, a part of the broader sustainable destination development program.

Report Prepared by:



The North Coast Tourism Summit was Hosted by Travel Oregon and the North Coast Steering Committee



TABLE OF CONTENTS

1.0 North Coast Tourism Summit	4
1.1 Summit Program Agenda	5
1.2 North Coast Tourism Studio Steering Committee	6
1.3 Steering Committee Statement of Intent	7
2.0 Scenario Planning for the Future	8
3.0 Scenario Framework and Descriptions	9
3.1 Scenario A: Shared Identity Crisis	10
3.2 Scenario B: North Coast United	12
3.3 Scenario C: Keep it Beautiful; Keep it Local.....	14
3.4 Scenario D: Rise and Fall; Chaos on the North Coast	16
4.0 Expected and Preferred Futures	18
4.1 Expected Future: Scenario D – Rise and Fall; Chaos on the North Coast.....	18
4.2 Preferred Future: Scenario B – North Coast United.....	19

5.0 Closing the Gap – Getting to the Preferred Future	20
6.1 Transportation Solutions	21
6.2 Visitor Communications to Encourage Stewardship	23
6.3 Protect Natural Wonders	26
6.4 Inspire Stewardship Best Practices	28
6.5 Promote the Value of Tourism	29
6.6 Leadership Network	31
7.0 Critical Insights	33
8.0 Acknowledgments	34
9.0 More Information	35



SECTION 1.0

NORTH COAST TOURISM SUMMIT

The North Coast Region's Tourism Summit was an exciting opportunity for area stakeholders to take a 'deep-dive' into regional tourism development.

THIS SCENARIO-BASED THINK TANK REPORT SUMMARIZES THE NORTH COAST TOURISM SUMMIT, HELD ON 25 SEPTEMBER 2018. APPROXIMATELY 100 NORTH COAST STAKEHOLDERS PARTICIPATED IN THE THINK TANK AND DEVELOPED THE SCENARIOS PRESENTED IN THIS REPORT.

A regional community that shares a vision is stepping down a powerful pathway. The North Coast Tourism Summit will help us identify the fundamental essence and sense of place of our location. It's this essence that is the tourism motivator; that captures visitors' imaginations, and draws people to the destination. It is also the important value that helps us guide development in a way that retains the balance of our home, and the economic opportunity of tourism. This session is an opportunity to galvanize community members in working toward the fulfillment of this common purpose. The format will be a think-tank style workshop. This interactive session will set the stage for sustainable tourism development (tourism that sustains and enhances the region) and provide participants with relevant industry information for developing a sound local plan for tourism.

The purpose of the Summit was to:

- Provide an official launch occasion for the North Coast Tourism Studio.
- Introduce the Steering Committee and outline their leadership and convening role, for the duration of the North Coast Tourism Studio and beyond.
- Convene a network of key local stakeholders to begin building a shared regional vision, and increase collaboration and information flow.
- Begin organizing the regional players to find innovative solutions to some of the challenges facing the future of the North Coast Tourism industry and local communities, whilst simultaneously exploring new or expanded product opportunities.
- Engage stakeholders to participate and promote the individual 'product workshops', following the Summit.

Intended Outcomes

- Define the core elements of a shared vision for the future of the North Coast tourism industry.
- Develop innovative solutions to tackle the challenges and opportunities facing the North Coast tourism industry and its impact on local communities.
- Understand the Tourism Studio and the opportunity it offers stakeholders to convene and take collective and individual action to develop a sustainable tourism industry.



SECTION 1.1

SUMMIT PROGRAM AGENDA

THE FOLLOWING IS THE SUMMIT PROGRAM AGENDA

9:00 a.m. Official Welcome

Todd Davidson, CEO, Travel Oregon

9:15 a.m. Setting the context

- Defining the macro challenge – growing global tourism. The North Coast is not alone!
- Case studies of regions tackling the big issues
- North Coast Tourism Studio – Overview
- Presentation of Statement of Intent by representatives of the North Coast Tourism Studio Steering Committee.

10:00 a.m. Networking Break

10:30 a.m. Building our vision for the future

- Summit will break into groups to develop scenarios, exploring different plausible futures for the region.
- Plenary discussion about implications and preferred and expected futures

12:15 p.m. NETWORKING LUNCH - Building the North Coast Vision Board

1:00 p.m. Executing on vision - Best Practice Regional experience

- Case studies and speakers from the Gorge and South Coast
- Local solutions – presentations from local panelists exploring best practice innovation

2:00 p.m. Tackling the tough systemic issues

- Participants will self-select into breakout working groups to explore innovative solutions to each of the following cross-cutting systemic issues.
 - Create a leadership network structure to address destination management in the region
 - Creative transportation solutions to reduce congestion
 - Visitor communications to encourage stewardship mindset
 - Protecting local natural wonders
 - Inspiring stewardship best practices in the tourism industry
 - Promoting the value and positive local impact of tourism
 - Breakout Groups to work on innovative solutions and the report back. Whole group discussion the innovative ideas and high-level prioritization process.

3:45 p.m. Next steps

4:00 p.m. Adjourn

FACILITATORS:

- David Beurle, CEO, Future iQ (E-mail: david@future-iq.com Website: <http://future-iq.com/>)
- Kristin Dahl, VP of Destination Development, Travel Oregon (E-mail: Kristin@traveloregon.com | Phone: 971-717-6201)

The Summit was presented in partnership with Travel Oregon's Destination Development Team with support from the North Coast Tourism Studio Steering Committee, and other local industry leaders.



SECTION 1.2

NORTH COAST TOURISM STUDIO STEERING COMMITTEE

THE NORTH COAST TOURISM STUDIO IS BEING LED BY A STEERING COMMITTEE OF LOCAL STAKEHOLDERS, WORKING CLOSELY WITH TRAVEL OREGON'S DESTINATION DEVELOPMENT TEAM. THE STEERING COMMITTEE BRINGS TOGETHER PEOPLE FROM BOTH SIDES OF THE RIVER, AND FROM MANY KEY GROUPS AND ORGANIZATIONS.

They have been working over the last few months to design and refine the North Coast Tourism Studio program. As part of this work, they have created a Statement of Intent (on the following page), that aims to set the context for the Studio, the Summit and the following workshops.

Steering Committee Leads for

- Nan Devlin, Columbia River North Coast Visitor Association
- Kevan Ridgway, Minds Aligned Group

Steering Committee Members

- Arica Sears, Oregon Coast Visitors Association
- Chris Olson, Cannon Beach Chamber of Commerce
- Chrissy Smith, Friends of Cape Falcon Marine Reserve
- Claudine Rehn, Tillamook Estuaries Partnership
- Dan Haag, Manzanita Visitors Center
- Dan Goody, Oregon Department of Forestry
- Donna Quinn, Cannery Pier Hotel & Spa
- Doug Pilant, Tillamook County Transportation District

- Jeff Wong, Community Supported Fishery
- Jeremy Strober, Pacific City-Nestucca Valley Chamber
- Jim Paino, Cannon Beach Chamber of Commerce
- Jon Burpee, National Park Service
- Joshua Heineman, City of Seaside Visitors Bureau
- Justin Aufdermauer, Tillamook Area Chamber of Commerce
- Kathy Kleczek, Sunset Empire Transportation District
- Ken Heman, City of Seaside Visitors Bureau
- Ken Henson, Pelican Brewing
- Ken Shonkwiler, Oregon Department of Transportation
- Kevan Ridgway, Cannon Beach Chamber of Commerce
- Kevin Leahy, Clatsop Economic Development Resources
- Lorraine Ortiz, North Coast Land Conservancy
- Marcus Hinz, Oregon Coast Visitors Association
- Mark Ellsworth, Regional Solutions
- Melissa Keyser, City of Cannon Beach
- Regina Willkie, Astoria-Warrenton Area Chamber of Commerce
- Teri Wing, Oregon State Parks and Recreation



SECTION 1.3

STEERING COMMITTEE STATEMENT OF INTENT

The Statement of Intent lays out two main principles: sustainability and a regional approach. The regional approach allows local stakeholders to 'get their arms around' and guide their local destination development activities.

OREGON'S NORTH COAST TOURISM STUDIO STEERING COMMITTEE IS COMMITTED TO DEVELOPING THE REGION AS A PREMIER EXAMPLE OF A VIBRANT SUSTAINABLE TOURISM ECONOMY. THIS EXPLICITLY INCLUDES MAINTAINING AND PRESERVING QUALITY OF LIFE FOR RESIDENTS, AS WELL AS BUILDING LOCAL PRIDE IN THE REGION'S UNIQUE SENSE OF PLACE.

Key to future sustainability is the continued need to enhance the visitor experience while understanding and managing the impacts of tourism on local environment, economies and communities.

The North Coast Tourism Studio Steering Committee believes the immediate focus must include strategies that aim to achieve systemic change and deliver innovative solutions aimed to:

- Preserve and enhance the natural and cultural resources of the region while offering high-quality experiences.
- Encourage stewardship best practices by visitors and the industry.
- Integrate cultural heritage into the visitor experience, authentically and respectfully.
- Reduce congestion during peak seasons and in high-use areas.
- Spread the seasonality of visitation.
- Spread the positive economic benefits of tourism throughout the region and maximize the integration with other key economic drivers including fisheries, forestry, agriculture and main street retail.

- Increase local understanding and appreciation of the value of tourism, and the contribution it makes to the local economy.
- Capitalize upon the array of visionary projects already underway to bolster momentum and ensure this region remains a unique destination.

The North Coast is clearly entering a new part of its destination 'lifecycle'. Key to moving forward will be finding the right balance between the economic and social benefits of tourism, and the impacts that high visitation can have on traffic, local services, natural resources, and quality of life.



SECTION 2.0

SCENARIO PLANNING FOR THE FUTURE

The scenario planning process allowed North Coast regional stakeholders to examine the implications of choices about future direction. This method of planning helps explore implications and consequences of future pathways.

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 held as part of the North Coast Summit 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 North Coast Region over the next 10 to 15 years
- Create and describe four plausible long-term scenarios for the region
- Explore alignment around a shared preferred future for the region
- Begin initial strategy and action planning

The scenarios developed during this planning process and outlined in this report are important to provide a framework to discuss future possible outcomes and implications for tourism development in the North Coast region of Oregon. In addition, the Tourism Summit deliberations can assist in identifying key actions for the region and in exploring

how various groups might best contribute to future tourism development. The design of the Tourism Summit included a presentation and discussion about key forces shaping the future, at a global and local level. These exercises and work were aimed to build a robust basis for the scenario formulation.

The participants were then guided through a Scenario Planning process to develop four plausible scenarios for the future of the North Coast Region. The process involved exploration and discussion of global, regional, and 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 think tank concluded with discussion of the scenarios, selection of a preferred scenario and first steps to determine the strategic actions required to create the preferred scenario.



SECTION 3.0

SCENARIO

FRAMEWORK AND

DESCRIPTIONS

The scenario framework was developed based on detailed background interviews, research and surveys. The axis represent the two major future shaping themes for the North Coast in relationship to the tourism economy.

Based on the Pre-Summit survey responses and key input from the Travel Oregon Destination Development leadership team, themes were identified to become the basis for two axes on the scenario matrix. The two axes identified were Visitation and Economic Focus and Collaboration Focus.

Tourism Summit participants were presented with the scenario matrix, defined by the two major axes of 'Visitation and Economic Focus' and 'Collaboration Focus' (see diagram). Brief descriptions were also attached to the end points of each axes. Participants were divided into four groups to develop a narrative for each scenario. Each group was asked to describe the characteristics of how the North Coast Region would evolve by 2030 under the conditions of the scenario quadrant that they had been given.

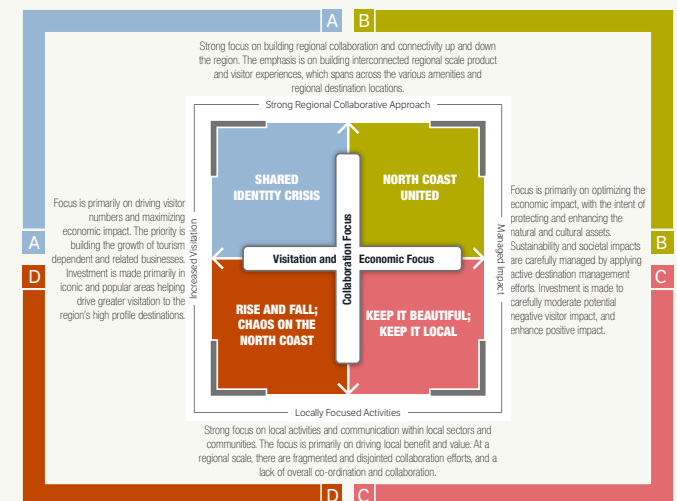
Participants were asked to consider characteristics of their future scenario, taking into account broad categories including:

- Community and Societal
- Economic and Tourism Industry
- Environment and Landscape

After the characteristics were established, Summit 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.

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 hard predictions. No one scenario future is likely to be the 'perfect' future, as each future will come with attendant challenges and implications.



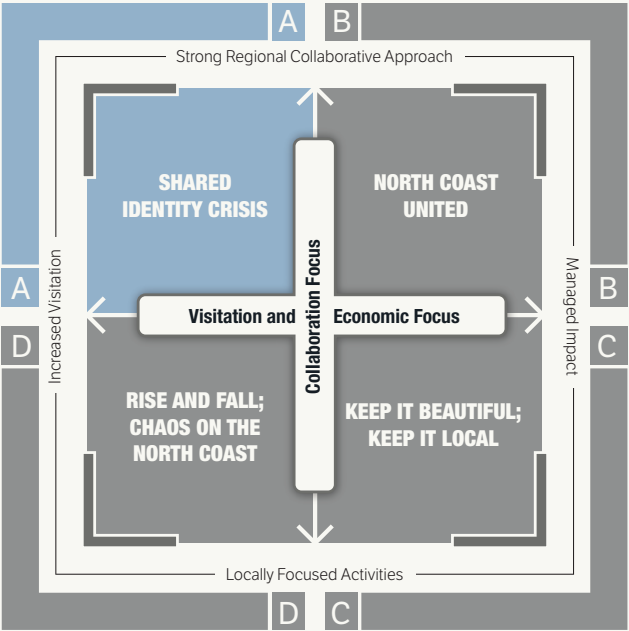


SECTION 3.1
SCENARIO A:
SHARED IDENTITY
CRISIS

THIS FUTURE IS SHAPED BY INCREASING THE INVESTMENT TO INCREASE THE VISITATION ECONOMY, AND BUILDING STRONG REGIONAL COLLABORATION. THIS APPROACH IS FORECAST TO TRIGGER A SURGE IN GROWTH IN THE INDUSTRY.

Visitation number and supporting infrastructure would increase, meaning greater resources and an uptick in growth. The regional collaboration also spurs new work on creating a regional identity and better transportation infrastructure, and a unified approach to management of land use and recreation.

This approach would likely see more iconic investments, and growth in international tourist numbers. However, after 5-10 years, there would be increasing negative impacts. The region would reach a tipping point, and the scale of the industry would begin to create a more homogenized experience and the charm of the North Coast would begin to fade. Visitor experience would begin to degrade, due to lose of character, over congestion and over capacity of iconic visitation location. This would trigger the 'identity crisis' where the North Coast would no longer feel like a unique Oregon experience.





SHARED IDENTITY CRISIS HEADLINE NEWS

Community and Societal

2020: "Happy tourists – Locals stay home!"

2025: "Changing Communities"

2030: "Long-time residents feel disconnect with new regional image"

Economy and Tourism Industry

2020: "North Coast communities start focus on smart city concepts"

2025: "Regional smart city concepts roll out"

2030: "Coastal visitation spending up: Impact to natural resources down"

Environmental and Landscape

2020: "Regional partners begin collaboration to support increased visitation at parks and greenspaces"

2025: "North Coast is building infrastructure and opportunities for increasing visitation to support quality experiences"

2030: "Iconic destinations suffer from increased visitation, even with more opportunities"

SCENARIO A CHARACTERISTICS: SHARED IDENTITY CRISIS – 2030

Community and Societal

Characteristics – 2030

- Locals pressurized, possible negative outcomes
- Increased financial resources – tax base and spending
- Less affordability and accessibility for current residents
- More investments in local infrastructure
- Homogenized culture from increased transient and new population
- New seasonal change and residency in local community
- Changing local demographics and culture
- More united event and opportunities
- Better regional preparedness for disaster management and industry
- Altered vision for what the region's core identity and industries are
- Co-ordinated action to preserve distinct characteristics of each community
- Biggest changes to largest towns and trails. May leave smaller towns unaffected
- Sprawl from larger towns leads to population growth in peripheral communities
- Strains on local resources such as housing management
- Greater political influence of region as a voting bloc, shared political values

Economic and Tourism Industry

Characteristics – 2030

- Easier to service the entire region (i.e. people can stay somewhere in the region and experience the entire region)
- People may be staying in one area, but they are aware of opportunities and events elsewhere
- Centralized hub of information that all communities can benefit from
- Co-operative marketing leading to efficiency
- Co-operative guided tours or regional transit
- Visitation = spending = businesses/jobs
 - » Shift from shoulder season. Businesses can exist year round
 - » Region wide incentive for affordable housing
 - » Development in smaller/other communities

Environment and Landscape

Characteristics – 2030

- Infrastructure capacity – increased pressure will require collaboration and funding for infrastructure
- Increased volunteerism – critical to maintain parks and services
- Increased awareness/interaction between visitors and environment
- More visitors and money – declining visitor experience





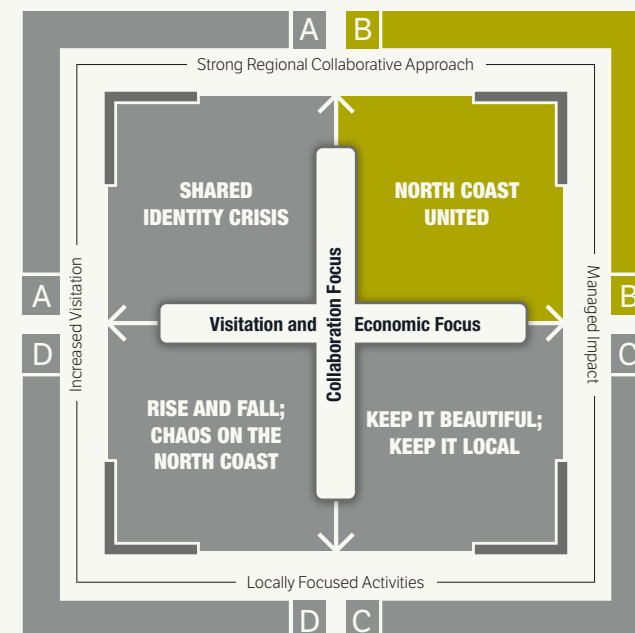
SECTION 3.2

SCENARIO B: NORTH COAST UNITED

THIS FUTURE IS SHAPED BY A FOCUS ON MANAGING IMPACT FROM VISITATION, AND TAKING A STRONG REGIONAL COLLABORATIVE APPROACH.

At first, the strong focus on managing impact challenges local assumptions and traditions. Creative approaches are brought together to moderate visitor impact, but also new voices come to the table as the regional conversation grows. This future will require significant investment in planning and initiatives that try and get ahead of the visitation wave. There is a focus on building the systems for sustainable management of local assets, waste streams, and traffic flows.

Over time this investment pays off, and the locals begin to see the potential for a sustainable tourism industry that is in harmony with the local values and culture. New amenities include integrated trail systems that connect and disperse visitor impact. Ecotourism is flourishing, and local businesses are able to leverage the visitation economy for optimal local economic impact. Larger regional issues such as houses and workforce retention are able to be addresses because of stronger reliable revenue streams, and a broader regional approach.





NORTH COAST UNITED HEADLINE NEWS

Community and Societal

- 2020: "Be Our Guest campaign begins"
- 2025: "Affordable housing employees resource emerges"
- 2030: "Transportation becomes reality"

Economy and Tourism Industry

- 2020: "North Coast adopts the 'It Takes a Village Approach' to spearhead movement to solve housing crisis, creation of regional committee to oversee all actions"
- 2025: "North Oregon Coast solves housing crisis with the 'It Takes a Village' motto, with focus on multi-family, creative and repurposing of established and historical properties"
- 2030: "North Coast solves regional transportation issues with a 'Rail, Water and Sky' campaign"

Environmental and Landscape

- 2020: "North Coast encourages 'Visit like a Local'"
- 2025: "North Coast communities get behind a trail for all seasons"
- 2030: "Residents celebrate sustainable tourism"

SCENARIO B CHARACTERISTICS: NORTH COAST UNITED – 2030

Community and

Societal Characteristics – 2030

- Less competition and more co-operation with shared events and calendars
- Locals sharing of resources, funding and transportation
- Population spreads
- Reduced traffic
- Community relationships – turn local thoughts about tourism, guests/visitors and housing issues to work together to encourage 2-3 day multi-destination
- Image and reputation – creating stewardship for locals and guests
- Easy to get in and out of each location, year round

Economic and Tourism Industry

Characteristics – 2030

- All components of housing (zoning/taxation) will be overseen by one entity that focuses on new creative ideas/areas/repurposing of older buildings and areas. Utilize bonds/measures/political policies to encourage new options
- Train/Max system with corresponding shuttles/boat taxis/extensive 24/7 services
- All trains have an express route to PDX
- Increased dedicated bike trails

- Tourism products and experiences – farms/agricultural government incentive for local educational programs and self-guided repository for information for all of the North Coast. Online portal for all information
- Increased public safety (police/fire services) taking a 'village approach'
- Increased demographic of all visitors and translations

Environment and Landscape

Characteristics – 2030

- Zero waste driven by leadership and eco-friendly businesses
- Connected transportation/trail system
- Informed community that understands best season to utilize which resources/trails
- Diverse trail resources – hiking and other uses
- Cohesive environmental plan and funding
- Co-ordination of messaging with sustainable management plan and funding
- Cross sector communication, messaging and marketing
- Destination focused on ecological sustainability (practicing what we preach) including compostable toilets and minimalizing plastics





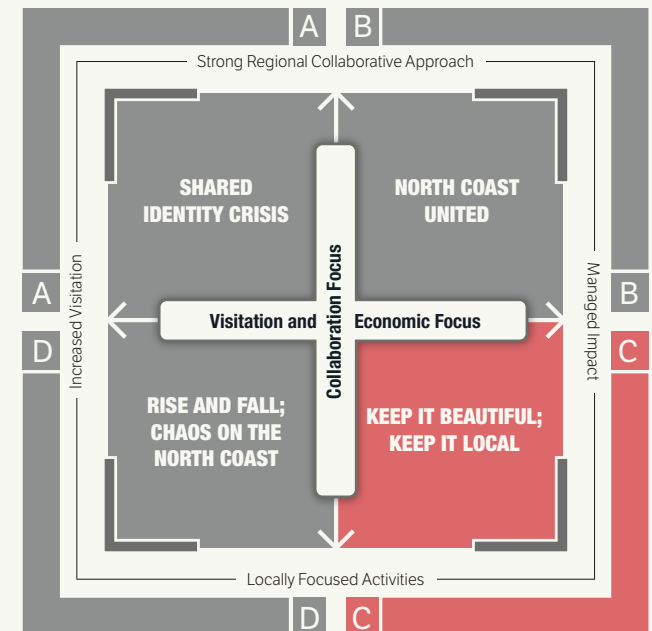
SECTION 3.3

SCENARIO C: KEEP IT BEAUTIFUL; KEEP IT LOCAL

THIS FUTURE IS DEFINED BY A FOCUS ON MANAGING VISITATION IMPACT AND LOCALLY FOCUSED ACTIVITIES. IN THIS FUTURE, LOCAL COMMUNITIES AND GROUPS FOCUS ON THEIR IMMEDIATE LOCATION AND NEEDS.

This is at first very empowering, and there is a sense of local control and the ability to manage the local destination. There is a preservation focus, to protect local character, assets and the experience of being a unique coastal community. This creates a strong sense of place; of being a locally managed and operated place that has strong identity and roots.

However, at some point this focus begins to prevent people from caring about things beyond themselves and beyond local. Regional issues are "Not my problem" and "us vs. them" mentality emerges. This lack of regional collaboration means that the macro issues of transportation congestion, over visitation and house constraints begin to overwhelm the local communities. Their response maybe to withdraw further, exacerbating issues of separation and lack of collaboration.





NORTH COAST UNITED HEADLINE NEWS

Community and Societal

2020: "Event volunteers stuck in traffic. Major events cancelled"

2025: "Local neighborhoods put up gates to entry"

2030: "Residents outraged at tollgates on 101"

Economy and Tourism Industry

2020: "Town declares its commitment to natural resources and cultural identity, visitation is limited"

2025: "Parking meters installed"

2030: "Downtown core turned into pedestrian mall"

Environmental and Landscape

2020: "Cannon Beach bans aerial drones over Haystack Rock"

2025: "Solar trash compactors hit the coast"

2030: "The cleanest streams in the state"

SCENARIO C CHARACTERISTICS: KEEP IT BEAUTIFUL; KEEP IT LOCAL – 2030

Community and

Societal Characteristics – 2030

- Pockets of communities leading to division, competition and oversaturation within these communities
- Lack of organization from an outside perspective
- Loss of integrity, history and diversity
- Locals versus Visitors – lack of management of local needs leading to gentrification, seclusion and over commercialization – accommodating only for visitors
- Lack of regional transportation, placing burdens on visitors rather than creating easy experiences
- Lack of integrated social media and websites

Economic and Tourism Industry

Characteristics – 2030

- Housing and Affordability is defined by seasonal housing fluctuations and an increase in conflicting priorities.
- Transportation Options and Connections – there are only local transportation systems, taking a step back. Taxes increase to support local transportation.
- Loss of connectivity or rise in private vehicles
- Lack of communication between communities and greater competition for funding

- Tourism Products and Experiences maintain local character, but there is a homogenized regional experience. Visitors unaware of other cities resulting in less visitation in some areas.
- Tourism Traffic and Profile is primarily one time tourist who are torn between competing events

Environment and Landscape

Characteristics – 2030

- Increased trash bins – leave no trash message
- Increased bike racks
- OTOT Transportation system
- Preservation of landscape for mixed use
- Seasonal closures to encourage environmental healing
- PDX urban to rural transport shuttles
- Permits and reservation system
- Education on invasive systems
- Stewardship programs and tourist stewardship
- Increased amenities along trails with wildlife education
- Beach erosion
- Opposition between different tourism sectors
- Mixed use of landscape, with lack of sharing resources
- Road closures due to environmental issues in off season
- Connecting trails and transportation within communities
- Compositable toilets
- Elk Herds
- Tsunami



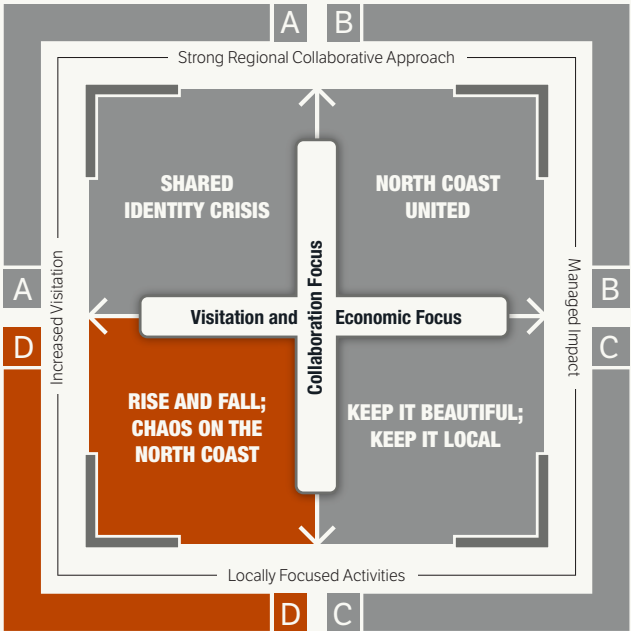


SECTION 3.4
SCENARIO D: RISE
AND FALL; CHAOS
ON THE NORTH
COAST

THIS FUTURE IS SHAPED BY A STRONG FOCUS ON DRIVING VISITATION ECONOMY AND NUMBERS, AND BY TAKING A LOCAL FOCUS. COMMUNITIES BEGIN TO COMPETE WITH EACH OTHER FOR INVESTMENT AND VISITATION APPEAL, WITH CHAMBERS AND TOWNS HOSTING CONFLICTING EVENTS AND PROMOTIONS.

This quickly leads to over congestion on the most popular places, and resources can get quickly exhausted. There will be short term success, with record numbers visiting the coast, and local revenues being boosted.

However, this quickly results in declining visitor experiences, with crowded places, bad end-user experience, and emerging negative local attitudes toward visitors. The unplanned regional scale issues include a lack of affordable housing, lack of transportation infrastructure, and poor staff retention. The industry is drawing daily workers from further away adding to the cost and congestion issues. Visitors become confused, as the locals don't have a clear sense of their identity. The main focus is on increasing dollars in this region and not looking toward the community's future. This ultimately leads to chaos as key issues remain unaddressed and the region reaches overcapacity.





RISE AND FALL; CHAOS ON THE NORTH COAST HEADLINE NEWS

Community and Societal

- 2020: "More people, more money – at a cost?"
- 2025: "North Coast electronic game soon opens to record crowds"
- 2030: "Not your Grandparent's North Coast"

Economy and Tourism Industry

- 2020: "North Coast Collaborative Alliance dissolves"
- 2025: "Local community visitor traffic down 50% in 5 years"
- 2030: "Oregon Coast small town recession hits peak decline"

Environmental and Landscape

- 2020: "Septic overflow leaks into natural features"
- 2025: "Cape Lookout shuts down for waste management"
- 2030: "Visitor counts drop as visitor experience degrades"

SCENARIO D CHARACTERISTICS: RISE AND FALL; CHAOS ON THE NORTH COAST – 2030

Community and

Societal Characteristics – 2030

- Crowded and more urban feel – visitors are confused and locals are upset
- Loss of sense of our county – the 'us'
- Life pace increases and traffic increases
- Us versus Them
- Fragmented and competitive silos with less co-operation
- Disparity with more winners and losers. More wealth to the wealthy.
- Increase in built environment and urban feel
- Emphasis on electronics
- Dirty and Gritty
- Housing development concentrated along coastline, challenging demographic visitor

Economic and Tourism Industry

Characteristics – 2030

- Lack of affordable housing, transportation, infrastructure, staff retention and volunteers
- Little focus on local attractions and experiences leading to devaluation
- Communication investment leading to contradiction of local versus popular destinations

- Overcrowding of iconic destinations resulting in poor user experience
- Shallow versus Deep experience within more under developed communities
- Community economic development declines

Environment and Landscape

Characteristics – 2030

- Congestion in irregular and uncomfortable patterns
- Select communities have larger issues
- Increased degradation of iconic locations
- Higher intensity land use
- Contamination and capacity issues
- Misuse of public lands
- Visual impacts degrade user experience



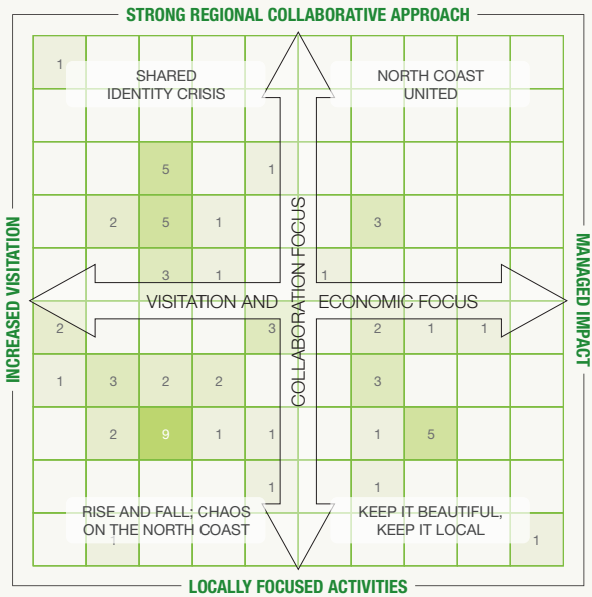


SECTION 4.0

EXPECTED AND PREFERRED FUTURES

The concept of the 'Expected Future' allows people to contemplate the default future, which is a prediction of what will happen if there is no significant change in direction.

Workshop participants were presented with a scenario matrix, with a 10 x 10 grid overly. This allows a more nuanced interpretation of scenarios, as the two axis are continuums. Therefore varying degrees of appetite or interest can be reflected by selecting cells within the grid.



4.1 EXPECTED FUTURE:

SCENARIO D – RISE AND FALL; CHAOS ON THE NORTH COAST

The expected future is the one deemed most likely to happen if there is no change in the current trajectory of North Coast tourism industry. Workshop participants indicated a strong concentration of prediction within Scenario D – Rise and Fall; Chaos on the North Coast. This indicated it is the scenario they mostly believed most represented the default direction of tourism destination development in the region.



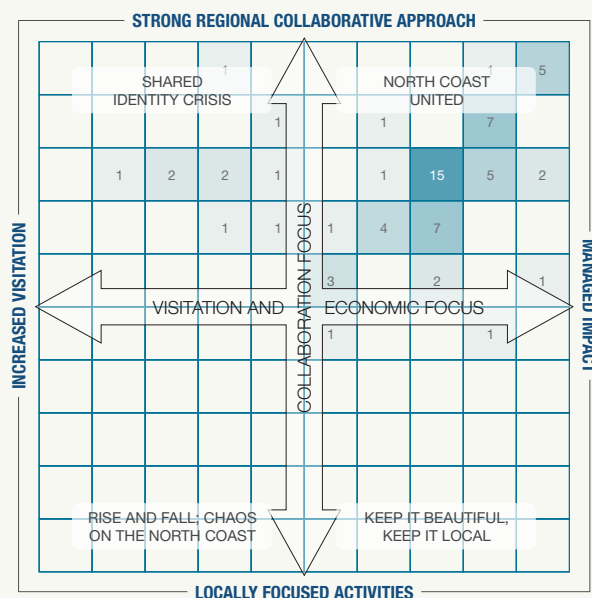
DataInsight

- KEY POINTS TO NOTE:**
- While there is a spread of responses, the majority of people believe the default (expected) future will see 'increased visitation' over 'managed impact'.
 - Participants also considered that without intervention, the expected future would be more likely be orientated around 'locally focused activities'.



A clear alignment around a preferred scenario gives a strong mandate to take the required bold actions to achieve that future. This will require deep collaboration and innovation in how to manage impact.

When considering the notion of a preferred future (one that represents optimal outcomes), Think Tank participants expressed a strong preference for one of the presented outcomes, Scenario B, "North Coast United"



- The tight concentration of color in Scenario B 'North Coast United' indicates a close alignment of thinking by participants around the preferred future.
- Think Tank stakeholders discussed the need to be proactive instead of reactive with respect to taking actions to get to the preferred future, especially in transportation planning and destination impact management.

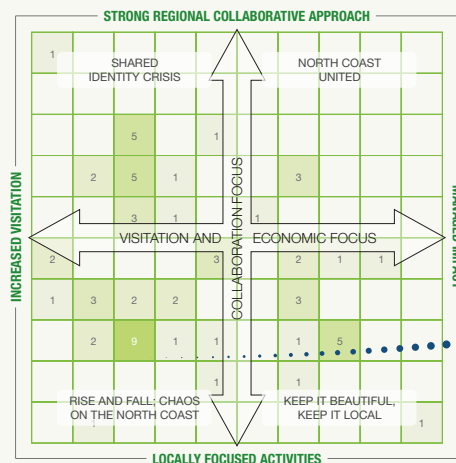


SECTION 5.0

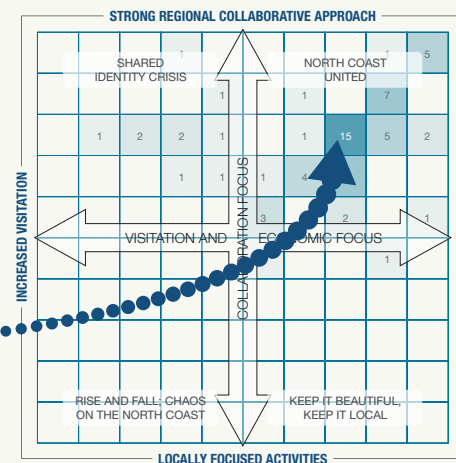
CLOSING THE GAP – GETTING TO THE PREFERRED FUTURE

Because of the long-term nature of the Scenario Planning methodology, stakeholders often see the 'distant future vision (2030)' as unattainable and unrealistic. However, this underestimates the progress that can be made during the intervening years, and the cumulative positive impacts of change.

**NORTH COAST TOURISM SUMMIT -
SCENARIO DEVELOPMENT FRAMEWORK**
EXPECTED FUTURE – 2030

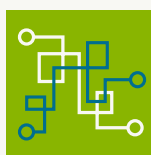


**NORTH COAST TOURISM SUMMIT -
SCENARIO DEVELOPMENT FRAMEWORK**
PREFERRED FUTURE – 2030



Think Tank participants discussed the ramifications and implications of failing to achieve the preferred future. There was strong alignment among participants that Scenario B, 'North Coast United' represented the preferred future scenario for the region, with a recognition that significant actions must be taken to change direction particularly with regards to transportation, impact and sustainability issues.

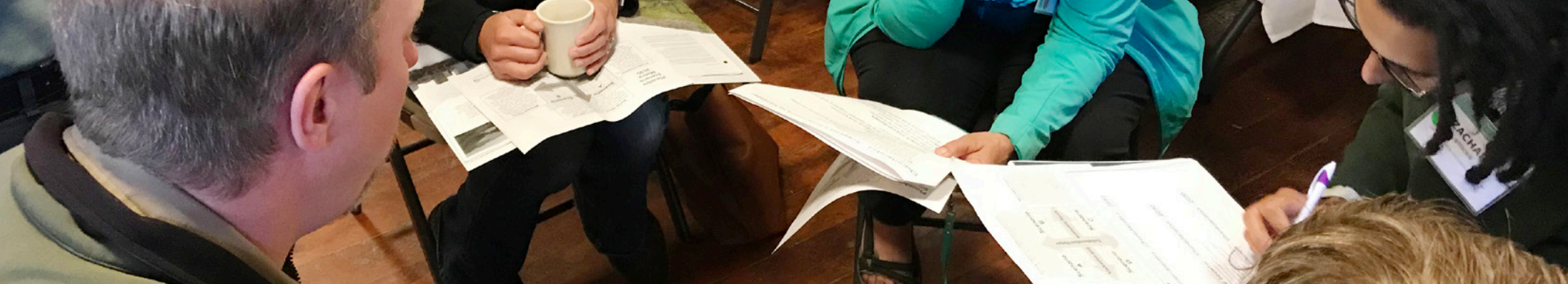
The scenario framework created by North Coast Tourism Summit participants gives voice to the strategies and actions that are priorities for the region, and helps transform the Statement of Intent into a roadmap for the future.



IDEAS TO CONSIDER:

- Shifting the region's tourism development focus from quantity to quality experiences will align with the stated desire to become better stewards of the environment.
- Getting to Scenario B, 'North Coast United' will involve a concerted effort to use new technology and connectivity as tools to manage impact and enhance the visitor experience.

FutureInsight



SECTION 6.1

TRANSPORTATION SOLUTIONS

The workshop participants self-selected into breakout groups to tackle the tough systemic issues. The summary notes from each group are presented.

Define the issue:

- Congestion – limited options.
- Other issues: Ice, flooding, pass issues (ice)
- Major attract double size of town
- Lack of options/current perception of how people travel
- Parking
- Conflicts between Modes: bike, car, etc. Bike Master Plan
- Safety: Vehicle safety, speed, driving behavior and signage
- Three roads in. One road up and down
- Congestion off 101
- Poorly lit side walks
- Downtown safety
- Lack of knowledge/marketing

Local examples of solutions being applied or tested

- Flashing side walk lights
- NW Connection/Point Bus: PDX – Cannon Beach – Astoria (2 a day)
- Astoria Trolley
- Pacific City Shuttle
- Tillamook Head Trail: Seaside to Cannon Beach. Connect OCT to NWC
- Fort to Sea Trail (not anymore)
- Drive Less Connect (<http://www.drivelessconnect.com/>)
- Get Around/Zip Car
- Taxis

Brainstorm ideas, strategic solutions and actions

- Messaging for NWC – electronic options, putting together packages with lodging operators and include itineraries. Ensure buses are comfortable, modern and with Wi-Fi. Bikes
- Add bus schedule on hiker-biker camp
- OCT passport connected to transport
- C.G.E – Speed and drive times need to be similar. Avoid transfers. X-prem routes.
- Discourage/encourage people to ride. Pay to park
- Piggy back on planning processes or Coast Bike Route.
- Bike pods/hike bike sites
- Trailhead congestion
- Facilities or/around transit routes/layover
- Safety of Bus Stops
- Itineraries for car free travel. Get media attention
- Get information into other people's channels i.e.) Hotel emails
- List taxis as well as public services
- North Coast trails - Tillamook – walking trails connecting communities. Off 101
- Rail roads
- Use existing technology
- Pacific Taxi (Tillamook County and surrounding areas)



SECTION 6.1

TRANSPORTATION SOLUTIONS

PRIORITIZE IDEAS AND ACTIONS

IDEAS	ACTIONS
Marketing and communication of existing services of all different modes	<ul style="list-style-type: none">• Tell the story. Farm and media trips.• Package: Include hotels and businesses (e.g. Pacific Taxi Services – Daniel)• Promote solutions currently available (bus) to increase usability of this modality
Very integrated Transportation plan with visitors as a focus	<ul style="list-style-type: none">• Assess current plans and understanding of baseline along the coast<ul style="list-style-type: none">• Commonalities• Themes• Gaps• Existing conditions• Opportunities
Communication of stewardship messages: 'behave like a local'	<ul style="list-style-type: none">• Signage, safety signs and lights
Pricing	<ul style="list-style-type: none">• Increase charges to help control and dictate behavior of visitors/locals; de-incentivize current behavior



SECTION 6.2

VISITOR COMMUNICATIONS TO ENCOURAGE STEWARDSHIP

Define the issue:

- 'Loved to death'
- Huge impact – garbage, over/use misuse/recycle
- Who is the target visitor? PDX Metro (day trippers) and local
- Businesses/Organizations need support network/resources to create an aligned message (cannot do it by themselves/are not the experts)
- Educate around the top actions that can make a difference (local behaviors to model)
- Safety – environmental – cultural – community impact – wide reaching
- 'Treat it like you live here' – perspectives of trees, wildlife, residents, etc
- Gaps in resources are region wide

Local examples of solutions being applied or tested

- WEBS program
- HRAP Education – champions for the cause. Many examples of passionate 'fans' teaching respect, proper use, etc
- WHALESPOKEN volunteer training and stewards
- Events – volunteer enthusiasm like SOLVE clean ups
- Seaside example of key cards at hotels in branded/messages wraps (Tsunami)
- Target visitors that are excited to be informed. What might work for those that are not reactive? Do we need fines/tickets/punishment?
- Girl Scout project about marine debris for badge
- Ecology Art Show/Cart n Trash art event

Brainstorm ideas, strategic solutions and actions

- Travel Cycle (inspire – plan – visit – after)
- Quick, short messaging – everyone is time starved
- Create a scavenger hunt/Wayfinding type of game to educate
- Tourism representation at solid waste Management/Recycle boards/Commissions
- Consumer recycle/compost bins – in addition to garbage in public areas (streets & parks)
- Make it easier to reach visitors – craft message to include in each reservation email. Lodging guide trips, etc
- Collectively create content – available to all businesses to shore up visitors and collateral in market
- Reusable tote bag – opportunity for messaging (example of visual/logo – could be branded messaging)
- Alignment through the region of TOP 5 actions and behaviors to change
- Pillars: Safety – Environment – Waste – Congestion - Respect/Appreciation
- Visit like you live it
- Seasonal calendar – positive message with timelines



SECTION 6.2
VISITOR
COMMUNICATIONS
TO ENCOURAGE
STEWARDSHIP

PRIORITIZE IDEAS AND ACTIONS

IDEAS	ACTIONS
Alignment on top priorities/messages and central source to share with local businesses, etc.	<ul style="list-style-type: none">• Make stewardship a priority in multiple
Identify opportunities to get message out to overnight and day visitors and locals alike	<ul style="list-style-type: none">• Market existing solutions more effectively – get the word out!



SECTION 6.3

PROTECT NATURAL WONDERS

Define the issue:

- Unintentional damage done due to lack of knowledge and awareness about how to interact with the natural environment
- Lack of regulation/enforcement of those regulations
- Lack of resources to enforce regulations/limitations around when can enforce
- Lack of infrastructure
- Need translated materials for non-English speaking visitors (Chinese/Cantonese/Spanish)
- Lack of knowledge about natural systems/lack of exposure
- Limited volunteer base

Local examples of solutions being applied or tested

- Bystanders can speak up with they see damaging behaviour occurring
- Trailhead ambassador model – located at key points
- Printed collateral – ways to keep people informed
- Haystack Rock Conservation Group
- Investing in infrastructure (restrooms, enforcement, signage)
- Outdoor school will soon be state-wide. Education youth to influence family behaviour.
- Yachats map of local trail system
- Use paid media to better educate and communicate with visitors
- Some successful wayfinding
- Assume good intent when it comes to enforcement

- Federal species protection
- Sons of Beaches Volunteer group
- OPRD 6-11 rangers on Coast
- Cape Kiwanda Ranger Education Efforts
- Trash collection with rewards at local businesses
- Leave no trace garbage collector guy

Brainstorm ideas, strategic solutions and actions

- Leave no Trace Garbage Pickup Day – make it memorable/a celebration
- Beach Watch Observation Group (Coast Watch Program already exists)
- Develop best practices and shared messaging for the region
- Discounts for lodging during the off season for clean-up days/trail building
- Partnerships with lodging and other businesses to help educate visitors



SECTION 6.3

PROTECT NATURAL WONDERS

PRIORITIZE IDEAS AND ACTIONS

IDEAS	ACTIONS
Consistent messaging across the region	<ul style="list-style-type: none">• 5 things you should know about how to interact with the natural environment• Set expectations both ways
Educational efforts	<ul style="list-style-type: none">• Clinics that are family friendly/outdoor school• Interactive educational experiences: these help visitors understand and see challenges first hand while contributing to the solution
Investment in infrastructure to alleviate impacts on natural resources	<ul style="list-style-type: none">• Restrooms• Cape Kiwanda Viewing Platform• Staff that are able to enforce
Printed educational collateral can be displayed with donation jar to sustain the program/ printing	<ul style="list-style-type: none">• Communicate messaging in clear terms and plain language. Print in multiple languages to reach many kinds of travelers. This also signals that we are open & welcoming to these travelers
Publicly available resources that frontline staff can be trained with and share with visitors	<ul style="list-style-type: none">• Invest in more communication platforms to offer increased options



SECTION 6.4

INSPIRE STEWARDSHIP BEST PRACTICES

Define the issue:

- Need to inspire youth from an early age; kids help to influence their parents' awareness and behaviors
- Use alternative language to normalize "stewardship" type activities

Local examples of solutions being applied or tested

- Cape Fallon Marine Reserve – sharing the story of local destination
- Volunteer organizations that are helping interpret natural areas
- SOLVE beach clean-up. Beach Bill celebration.
 - How can organizations take ownership and care for the land, water, etc?
- Coast Watch
- Beach Ambassador recognizing locals as champions of stewardship.
 - Highlight them as an example
 - How can we allow visitors to engage in volunteerism?
- Haystack Rock program is applicable throughout the coast
- Explore Nature – inspire and educate visitors
- Down by the Creekside – youth education
- North Coast Land Conservancy

Brainstorm ideas, strategic

solutions and actions

- People don't consider the collective impact
- Engage youth in stewardship – increase focus on this
 - How are we delivering this content? Apps, Social Media, etc?
 - Know before you go
- Establishing stewardship champions
- Communicating to visitors before they arrive
- Reprioritize collaboration between land managers and agencies
- Make messaging sexy
- Communicate that visitors should act respectfully
- Avoid saying 'stewardship' or buzz words – integrate sustainability into stories
- Share inspiring local stories
- Use resources that already exist to communicate with



SECTION 6.4

INSPIRE

STEWARDSHIP

BEST PRACTICES

PRIORITIZE IDEAS AND ACTIONS

IDEAS	ACTIONS
Education	<ul style="list-style-type: none">• 'Parents' Day Off' – educate children• Focus on new distribution methods for education• Spontaneous learning opportunities• Share inspiring local stories with visitors• Increase educational platforms to help communicate with modern visitors of all ages
Funding for Stewardship Inspiration	<ul style="list-style-type: none">• Foundation Grants• Leverage regional initiatives• Let businesses support and champion stewardship best practices• Bridging gap between business and non profit• Go Fund Me type campaign. Tap into people's passions
Leveraging Volunteers	<ul style="list-style-type: none">• Agencies and Local organizations can share volunteers



SECTION 6.5

PROMOTE THE VALUE OF TOURISM

Define the issue:

- Getting residential buy in/promoting value to locals
- Tourists give locals reasons for dislike
- Lack of environmental ethic
- We've all seen visitors misbehave, and we've all been on the side of feeling begrudged by their actions

Local examples of solutions being applied or tested

- OCVA Tourism Champions
- Going into schools to explain hospitality jobs/opportunities
- Using 'non-traditional tourism' job examples

Brainstorm ideas, strategic solutions and actions

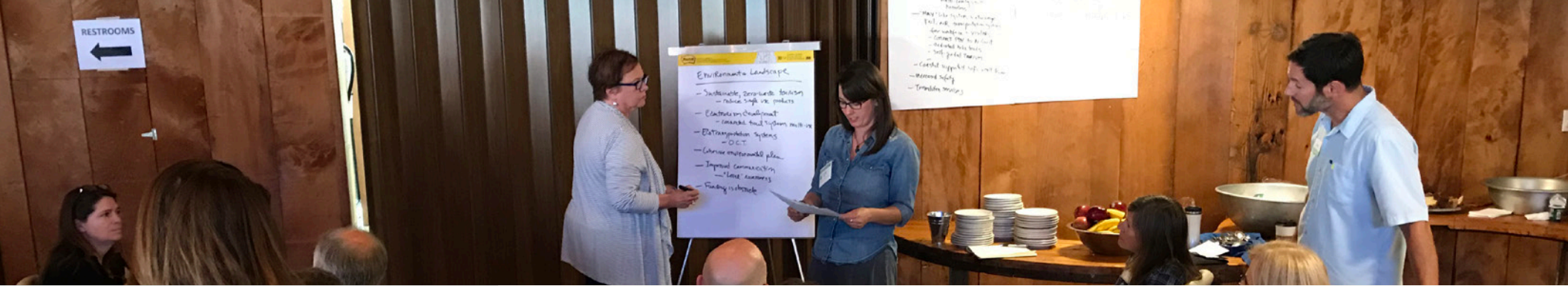
- Oregon Lottery dollars commercial example
- Tourism is here – lets manage it better
- Year round could mean better employee retention
- Traditional industries (fishing/timber) can change into outdoor recreation
 - People want to be a lumberjack for a day
- Buying 'experiences' that locals provide
- Collaboration as part of the process
- Movies – local movie theaters
- Think of visitors as guests
- Hood to Coast example – community working with bike organizations
 - Changed message to runners



SECTION 6.5
PROMOTE
THE VALUE OF
TOURISM

PRIORITIZE IDEAS AND ACTIONS

IDEAS	ACTIONS
Adopt Guest Philosophy	<ul style="list-style-type: none">• Use traditional industries as an experience for visitors to understand local way of life• Develop hospitality programs so that we show respect to visitors – we want them here, we want them to feel valued and appreciated
Promote the Value of Tourism to locals	<ul style="list-style-type: none">• Using local examples• Tourism industry keeping our communities alive and growing• Tourism gives value to the community• OCVA: Dean Runyan economic data displays positive evidence of the impact that visitors have on the economy– present this to locals in a way that is digestible and understandable from the local perspective



SECTION 6.6

LEADERSHIP NETWORK

Define the issue:

- S. Tillamook towns are unincorporated and do not have established leadership
- Promotion: VTC – Destination Management =? Who leads? Volunteers? Paid Staff?
- No structure across counties
- Lack of elected officials engaged
- City staff are engaged but not necessarily sharing information back
- S.C could be expanded to engage elected officials
- Lack of information sharing structures
- Tourism as an economic driver – lack of buy in (a network could help)
- Public entity engagement and priorities
- LOC and AOC
- Disconnect from TLT spending and impact
- Gap in understanding the value and impact of tourism
- Balancing management and marketing (hired staff, etc)
- Mitigate negative impacts of visitors
- Establish common ground of leveraging vitiation to communities, policies, etc
- Lack of collaborative solutions
- Leadership failure and/or vacuum
- No staff support
- Infrastructure gap options – low lead role for solutions
- Lack of mechanism to catch and direct information
- Cross jurisdictions and accountability
- Addressing multi-organizational infrastructure projects serving locals and visitors (especially during surge times)

Local examples of solutions being applied or tested

- Salmon Superhighway and roadway/agriculture/ fishing
- NOCO Trails Commission
 - Trails function in network and maintenance
- Workforce Housing Study and city/county engagement
- Cape Kiwanda parking area - sand removal and private investment
- Recycling initiative in S. Tillamook
 - Private collaboration
 - County – cardboard pickup at businesses
- Tillamook museums Z card collateral

Brainstorm ideas, strategic solutions and actions

- Educate communities about direct and tangible impacts of tourism
 - Especially youth, students and new residents
- Leadership to address the negative impacts and support positive impacts
- Have businesses able to share amounts made through tourism
- Adapt language from tourism – visitors/visitor economy
- Creative revenue options
- Unified collaborative destination management leadership network with communications from leadership



SECTION 6.6
LEADERSHIP
NETWORK

PRIORITIZE IDEAS AND ACTIONS

IDEAS	ACTIONS
Establish how leadership views tourism; establish a separation between this region's tourism leadership and elected leadership	<ul style="list-style-type: none">• Public outreach to discuss tourism issues and concerns with local residents• Educate communities on how tourism is a part of the whole community, give them the language to articulate/understand how tourism benefits or fits into their business or their local economy
Identify gap between tourism infrastructure and local community	<ul style="list-style-type: none">• Establish a way to report tourism related issues.• Educate locals on tourism pros and cons; get them literate in tourism.• Help community understand what the TLT tax is



SECTION 7.0

CRITICAL INSIGHTS

Collaborative destination development will involve the active participation of all regional tourism entities and stakeholders.

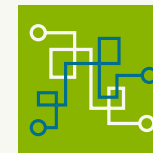
THE LESSONS LEARNED THUS FAR FROM THE NORTH COAST TOURISM SUMMIT REVEAL A SIGNIFICANT APPETITE FOR CHANGE AND DEVELOPMENT WITHIN THE TOURISM INDUSTRY.

There are also clear indications for a concerted effort to collaborate and regionally connect the region to tackle some of the big issues.

Specific insights emerging from the Summit and scenario planning process include:

- Desire to focus on managing visitor impact, as opposed to drive additional visitation. This reflects a deeper concern from stakeholders that a number of key locations are at capacity, and increased visitation will result in degradation of visitor experience and natural assets.
- There is a desire to build a strong regional collaborative approach. This recognizes that many of the solutions will require a regional framework, especially macro issues such as transportation, congestion and managing visitor flows.
- Sustainability is key underpinning philosophy and desire, as reflected in the Statement of Intent and the Preferred Future.

- There is a clear recognition for the value of tourism, and its contribution to the local economy. There is a very direct connection between the urbanized Portland metro and the visitation occurring on the coast. This connection will require a larger integrated planning approach.



FutureInsight

IDEAS TO CONSIDER:

- Global visitation numbers are increasing, and it is unlikely that visitation pressure will decline on the North Coast, given its proximity to Portland and high appeal.
- Technology may provide some future solutions, especially in a more connected digital world can be used to change visitor patterns and behavior.



SECTION 8.0

ACKNOWLEDGMENTS

The dedication and professionalism of the staff at Travel Oregon are big assets for the region's tourism industry. The commitment of the local steering committee members makes it all possible.

THE TOURISM INDUSTRY REPRESENTATIVES FROM THE NORTH COAST REGION OF OREGON ENGAGED IN THE TOURISM SUMMIT DISCUSSIONS WITH GREAT ENTHUSIASM.

Their passion and interest ensured the discussions were thoughtful, and the outcomes reflective of the region's perspectives. This dedication is reflective of the deep commitment Summit participants have to the future of their communities, local industries and North Coast Region.

Future iQ would like to acknowledge the substantial support from the staff at Travel Oregon. The team contributed outstanding support to the Tourism Summit, and helped facilitate and lead portions of important stakeholder discussions.



SECTION 9.0
MORE
INFORMATION

FOR MORE INFORMATION ON THE NORTH COAST TOURISM STUDIO, OR THIS NORTH COAST TOURISM SUMMIT REPORT, PLEASE CONTACT:



Kristin Dahl
Vice President, Destination Development
Travel Oregon
Email: Kristin@TravelOregon.com
Tel: 971-717-6201

Copies of the report and more information on the North Coast Tourism Studio is available at:

<http://industry.traveloregon.com/northcoast>

TRAVEL OREGON

INDUSTRY

resources -

SALES & MARKETING

- opportunities -

RESEARCH

- and reports -

PRESS

- room -

Governor's Conference

News

Events

SEARCH

Destination Marketing Resources

Regional Investments in Tourism

Oregon's Target Markets

Education and Training

Destination Development

Oregon Tourism Studios

Oregon Tourism Studio Communities

Oregon Tourism Studio Gathering

We Speak Oregon Program

Historic Columbia River Highway State Trail

Community Success Stories

Consulting Resources

Product Development

Destination Management

Matching Grants Programs

Toolkits


Oregon Tourism Information System (OTIS)

Oregon Tourism and Hospitality Industry Consortium

Additional Resources

DESTINATION DEVELOPMENT > OREGON TOURISM STUDIO COMMUNITIES >

North Coast Tourism Studio



Cannon Beach, Ore. Photo by Larry Geddis.

Travel Oregon, in partnership with a local steering committee, will offer a series of workshops along the North Coast of Oregon between Pacific City and Astoria from September 2018 to January 2019. The workshops will engage and empower local leaders to bolster a sustainable regional tourism economy, address critical management issues and consider how to preserve and enhance the area's natural and cultural assets.

The program will begin with an overview of the tourism industry, important trends and sustainable tourism best practices to stimulate new thinking about the destination. The role of the museum will be to participate as they

REGISTRATION REQUIRED

Space is limited. Reserve your space now.

REGISTER HERE

TRAVEL OREGON

North Coast Tourism Summit – September 2018 | 35