

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

FINAL REPORT

31 July 2019

future→iQ[®]
Create Future Intelligence[®]

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

FINAL REPORT

This report has been produced as part of a larger planning process to develop a Strategic Vision and Action Plan for tourism-related facility investments services in Tillamook County. This work is intended to guide County decision-making for the next five to ten years. This report summarizes the Strategic Vision and Action Plan recommendations that were produced as part of this project. These have been developed following extensive engagement with local residents and stakeholders.

31 July 2019

Report Prepared by:

future→iQ^{*}

Create Future Intelligence[®]

Workshop Hosted by:



TABLE OF CONTENTS

1.0 Introduction – Strategic Vision and Action Plan	4
1.1 Project timeline	5
1.2 Stakeholder Driven Process	6
1.3 Objective data-driven strategy and ‘toolbox’	7
2.0 Creating shared vision and direction	8
2.1 Scenario framework	8
2.2 Alignment around preferred future	9
2.3 Recognizing the importance of tourism	10
2.4 Tillamook County Sustainable Tourism – Working Definition	11
2.5 Identifying key priorities	12
3.0 Crafting a future tourism investment strategy	13
3.1 Challenges and sensitive topic areas	14
3.2 Opportunities and upside	15
4.0 Tillamook County Tourism – Strategy and recommendations	16
4.1 Community infrastructure to support tourism industry demands	17
4.2 Tools and infrastructure to manage impact	18
4.3 Tourism product and infrastructure (e.g. trails, parking, signage)	19
4.4 Protect highly sensitive ecological areas	20
4.5 Influence visitor behavior and travel patterns	21
4.6 Regional leadership and influence	22
5.0 Next Steps – Tillamook Tourism 2.0	23
6.0 Acknowledgements	24
7.0 About Future iQ	25
8.0 For More Information	26



1.0 INTRODUCTION – STRATEGIC VISION AND ACTION PLAN

In early 2019, the Tillamook County Commissioners, in partnership with the Future's Council, initiated a stakeholder driven planning process to develop a new strategy to inform future investment priorities for the Transient Lodging Tax (TLT) funds. The County contracted Future IQ, a research and consultancy company, to design and facilitate a data-driven and innovative approach to thinking about the future of tourism in the County. This project has run from January to June 2019, with over 300 local people having detailed input. This has included a good cross-section of people from across the County and included local residents and industry representatives.

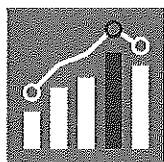
The planning process has successfully engaged a large cohort of key regional stakeholders to explore important topics and create a robust vision and action plan.

This work has produced a number of key outcomes, including:

- **Tied together previous work**, including previous community listening sessions.
- Engaged the key community members and **industry ecosystem and network**.
- **Identified a preferred future**, called 'Connected Balance'.
- Created a **sustainability framework and working definition**, that lays the foundation for a long-term balanced outcome.
- **Built a decision-making tool**, to help guide future investments.

The project has aimed to produce outcomes at two main levels:

- **Strategic vision and action plan**: The planning process was designed to identify a long-term strategic vision for tourism in the County and identify a series of key enabling recommendations.
- **Tactical investment decision-making**: The investment of the Transient Lodging Tax (TLT) funds is one of the key tools the County has to shape the future direction of the tourism industry. The project has produced a decision-making framework and tool to help the County Commissioners set priorities for investment. These priorities have been established and validated with local stakeholders.



DataInsight

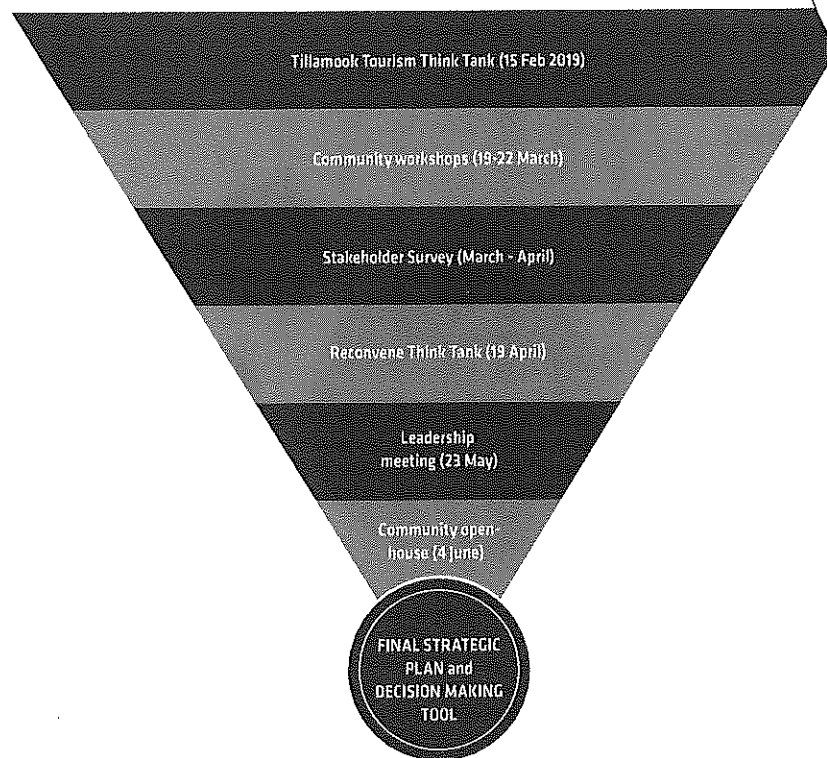
DATA INSIGHTS:

- The stakeholder planning approach allowed the issues of 'over-tourism' and sustainability to be addressed. It has resulted in deep thinking about the future of the industry and the impact on the community.
- This has been a pioneering conversation in the community, tackling the tough issues about the potential negative impacts of tourism growth. A number of participants expressed appreciation that the County was leading this discussion and was focused on finding the right balance between economic activity and community impact.

1.1 PROJECT TIMELINE

The Strategic Vision and Action Plan is the culmination of seven months of detailed stakeholder engagement and research work. This work has been defined by a strong data-driven approach combined with an extensive stakeholder engagement methodology. The Strategic Vision and Action Plan brings together the insights gained through these approaches to produce a locally-driven objective roadmap for the future, that identifies key initial action steps.

The seven-month planning process has built a long-term strategic action plan and identified key steps for the County to shape future investment in the tourism industry. A key feature has been tackling the impacts of over-tourism.



DataInsight

DATA INSIGHTS:

- The planning process included four critical streams; background research, future-oriented think tank, community engagement, and the production of a strategic action plan.
- The timeline was designed to allow sufficient time for data analysis and validation between each step. It was also timed to help shape the investment decisions for the TLT funds in 2019.



1.2 STAKEHOLDER DRIVEN PROCESS

Throughout the initiative, there has been considerable work carried out in order to engage stakeholders and provide the opportunity for robust input. This work included:

- Stakeholder surveys
- Think Tank workshop
- Community workshops
- Reconvened Think Tank workshop
- Public meetings.

Stakeholder engagement metrics

The engagement process collected input from a range of voices, including local officials, tourism industry participants, local residents, agency personnel and other key stakeholders.

RECONVENED THINK TANK
Over 40 people attended **40+**

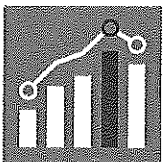
COMMUNITY OPEN HOUSE
Open house discussion **60+**

TILLAMOOK
STAKEHOLDER
ENGAGEMENT
METRICS

STAKEHOLDER SURVEY
270+ Over 270 detailed survey responses

THINK TANK WORKSHOPS
60+ Over 60 local stakeholders

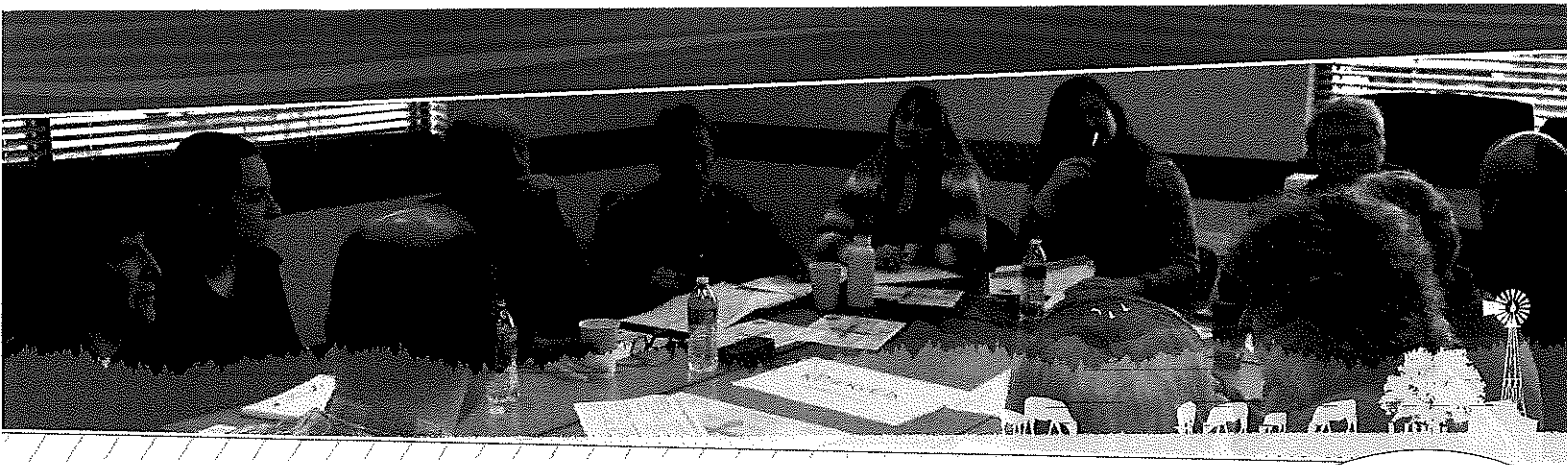
COMMUNITY ENGAGEMENT WORKSHOPS
8 Workshops held across the County



DataInsight

DATA INSIGHTS:

- The data collected from the engagement represented a good cross section of people from the County. This distribution was both geographic and interest area. Approximately 30% of respondents to the survey were not involved in the tourism industry.
- The planning process has revolved around a core group of some 50-80 stakeholders who have participated in many of the sessions, and therefore provided continuity throughout the process. This have been complemented by input from an additional 250 people who have varying degrees of involvement in the tourism sector but share an attribute of being concerned local residents.



1.3 OBJECTIVE DATA-DRIVEN STRATEGY AND 'TOOLBOX'

The extensive stakeholder-driven process was underpinned by objective data-driven analysis. This approach helps draw together the collective insight and intelligence, and then analyze and visualize the data in an objective manner. This process includes a methodical building of layers of insight and understanding which helps identify consensus-based strategic actions.

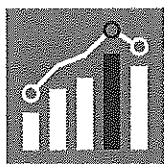
The broad steps that were followed included:

- **Background research** – examined the themes and data from previous community listening sessions, studies and reports.
- **Think-Tank workshop** – explored emerging trends and created future scenarios for the County. Examined preferred and expected futures.
- **Community workshops and online survey** – began to prioritize ideas and investment areas. This data was also reviewed and synthesized by the Future Council.
- **Reconvene of Think-Tank** – began to identify key recommendations and actions. Provided input in design of the decision-making tool.
- **Community Open House** – validated findings and provided critical input into decision making tool weightings.

The planning process has collected, synthesized and presented a substantial body of information about the future aspirations and perspective of key local stakeholders.

Throughout the project, data was collected and presented in the following manner:

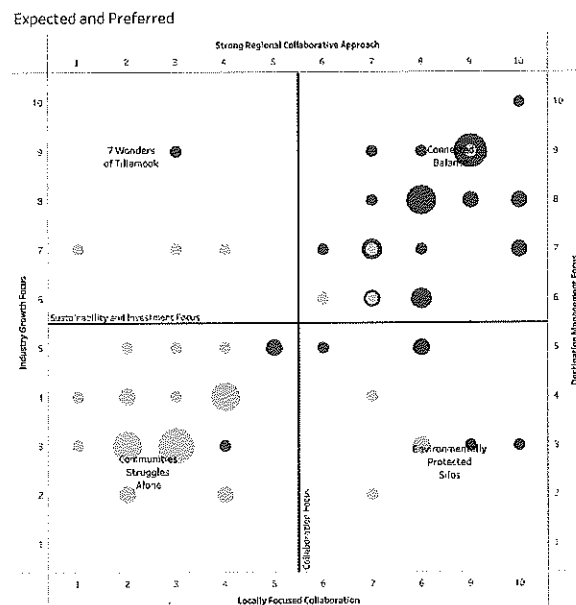
- Project web portal that allowed access to key information
- Publication of the Think-Tank report
- Workshop presentations which synthesized data
- Survey data presented in a data visualization platform on the portal

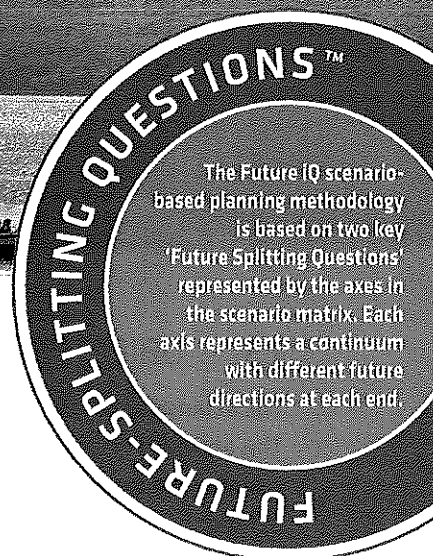
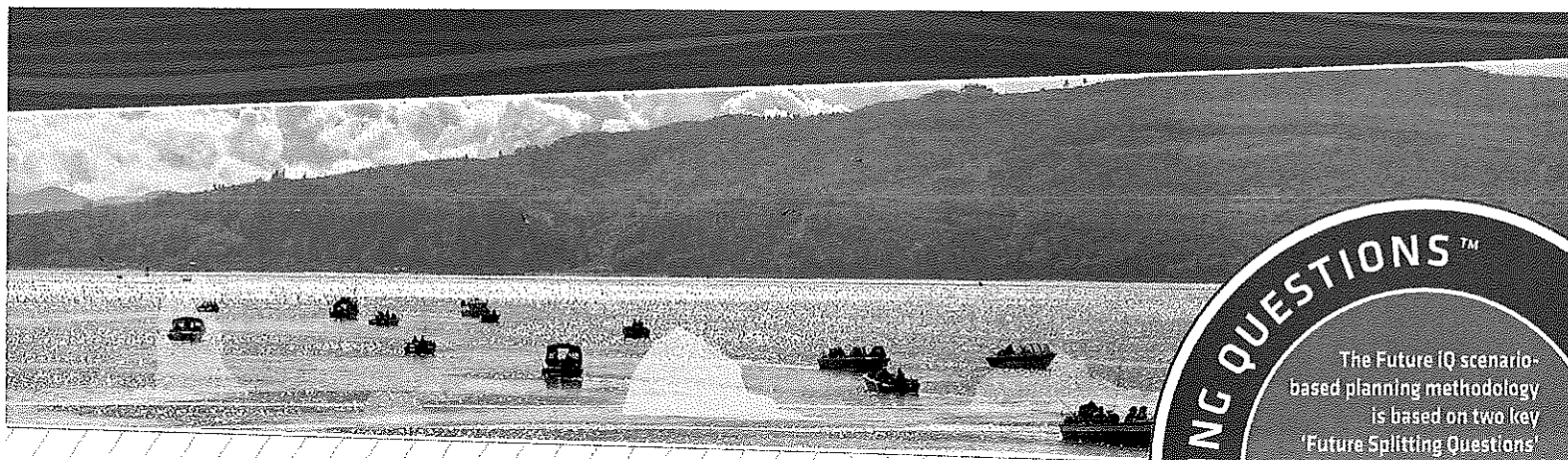


DataInsight

DATA INSIGHTS:

- The project portal can be used to access the data visualization and report. <https://lab.future-iq.com/tillamook-tourism-investment-strategic-action-plan/>
- Overall, the data suggests strong consensus about preferred future directions and investment priorities. This was validated in multiple methods, which creates a high level of confidence that it is reflective of the desires of the community. In addition, it has been reviewed and supported by the Futures Council and other local stakeholders.



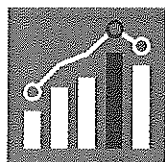
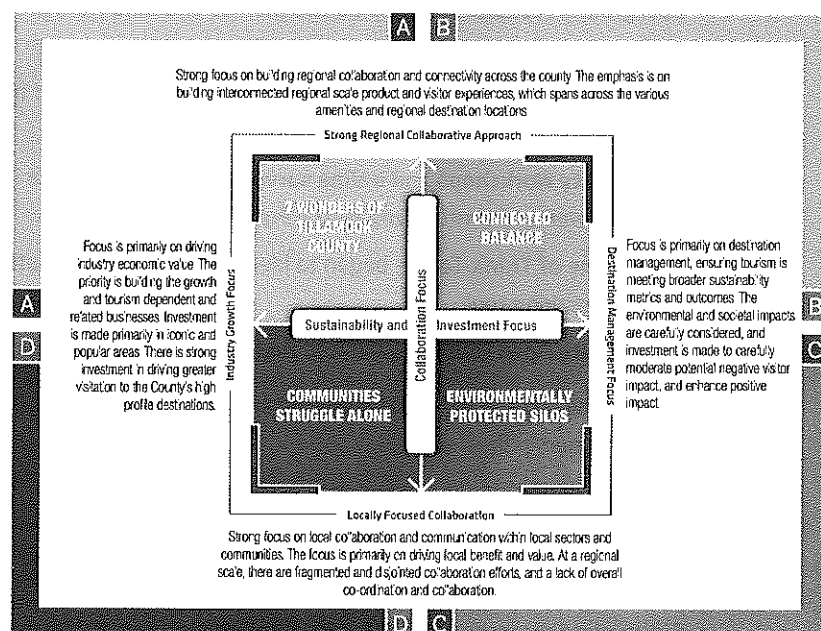


2.0 CREATING SHARED VISION AND DIRECTION

The planning process used a scenario planning methodology to explore future directions and implications. This approach helps understand the full range of impacts and consequences of various decisions.

2.1 SCENARIO FRAMEWORK

The following diagram was developed with the regional stakeholders at the Think-Tank workshop. It creates four plausible versions of the future, built around the main themes of Sustainability and Investment Focus and Collaboration Focus. (These detailed scenarios are reported in the Think-Tank report that can be accessed at: <https://lab.future-iq.com/tillamook-tourism-investment-strategic-action-plan/>). Think-Tank participants were presented with the scenario matrix, defined by the two 'Future Splitting Questions' defined by the continuum in each major axis. Brief descriptions were also attached to the end points of each driver axes. The scenarios describe the characteristics of Tillamook County in 2030 under the conditions of the each scenario.



DataInsight

DATA INSIGHTS:

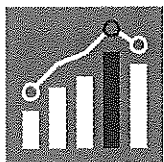
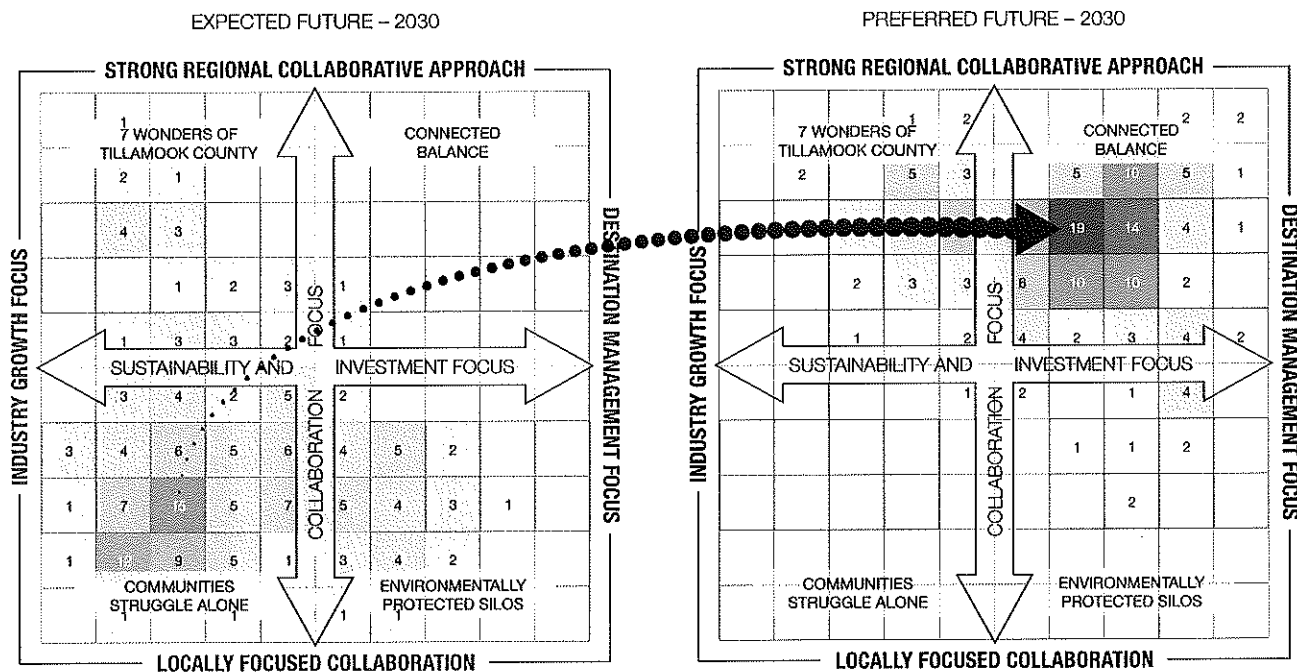
- The four scenarios provide a glimpse into the future. In this way, they allow an exploration of the potential of different future pathways, and a way to explore the impact over time.
- These scenarios were developed by the Think Tank participants. They were based on the scenario framework and participants insights about the future regional characteristics.



The Think-Tank planning process allowed regional stakeholder to align around a shared strategic vision and direction. This outcome was validated in community engagement workshops and surveys.

2.2 ALIGNMENT AROUND PREFERRED FUTURE

A key outcome of the planning process was to identify a shared vision for the future, which could then be supported by strategic actions. Using the scenario framework, participants in the Think Tank and subsequent engagement sessions were asked to identify their expected and preferred futures. These were located within the 100-cell scenario matrix. The following diagram shows the remarkable concentration of shared views about the location of the expected and preferred future. The 'Connected Balance' future is one where there is a 'Strong Regional Collaborative Approach' and a strong push towards a 'Destination Management Focus'.



DataInsight

DATA INSIGHTS:

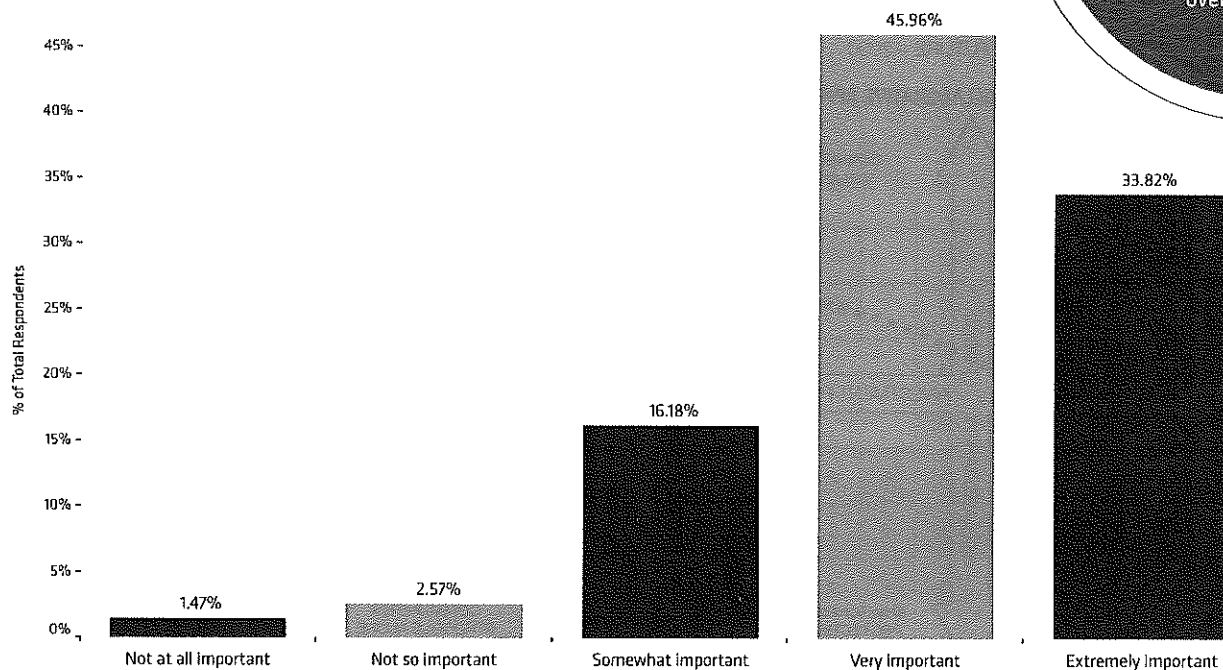
- The planning process was very successful in helping the stakeholders align around a shared vision, also called a Preferred Future. The vast majority of participants identified the scenario called 'Connected Balance' as the Preferred Future occur.
- The Connected Balance future is predicated on a significant pivot in focus towards managing the impact of tourism on the destination and finding ways to build stronger regional and County-wide approaches.
- These results were validated in the community engagement workshops, which produced an almost identical result. The broader online surveys also affirmed a strong desire to pivot towards a destination management focus.



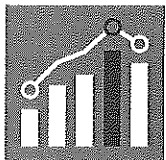
2.3 RECOGNIZING THE IMPORTANCE OF TOURISM

The tourism industry is a major local economic driver, and in 2018 employed over 2,200 people and generated over \$240 million in annual visitor spending in Tillamook County (Source: Visit Tillamook Coast). Tourism will continue to be an important economic driver, and the challenge is how to direct this industry in new ways and directions, without unintentionally reducing economic impact.

Overall, how important do you think tourism is to the future of Tillamook County?



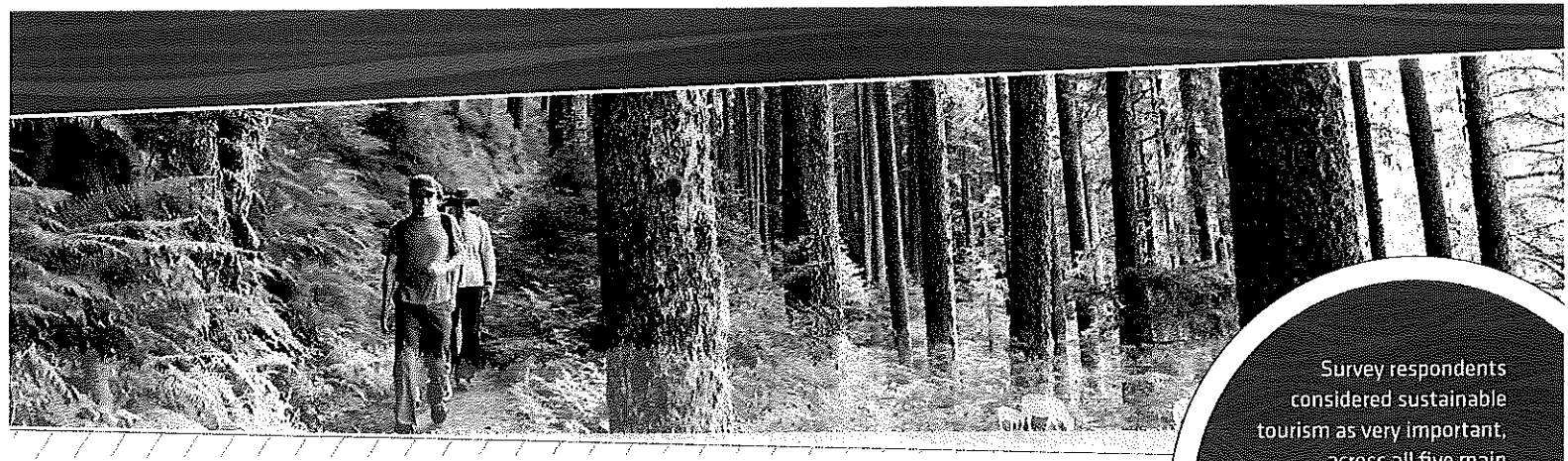
The community surveys and the community workshops highlighted the importance of tourism to the future. This is especially relevant in terms of potential impact of growth in visitation numbers over coming years.



DataInsight

DATA INSIGHTS:

- The community surveys revealed a very strong recognition of the importance of tourism, with nearly 80% of people responding that it was 'Very Important' or 'Extremely' Important to the future of Tillamook County.
- The importance rating was very similar from different parts of the County, with the South County area being slightly lower.
- This data helps highlight that the key topic and debate should be focused on how the tourism evolves, and how its impact on the communities is managed to produce a positive outcome.



Survey respondents considered sustainable tourism as very important, across all five main dimensions. A focus on sustainable development should be a foundational building block for future investments in the industry.

2.4 TILLAMOOK COUNTY SUSTAINABLE TOURISM – WORKING DEFINITION

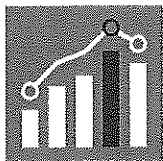
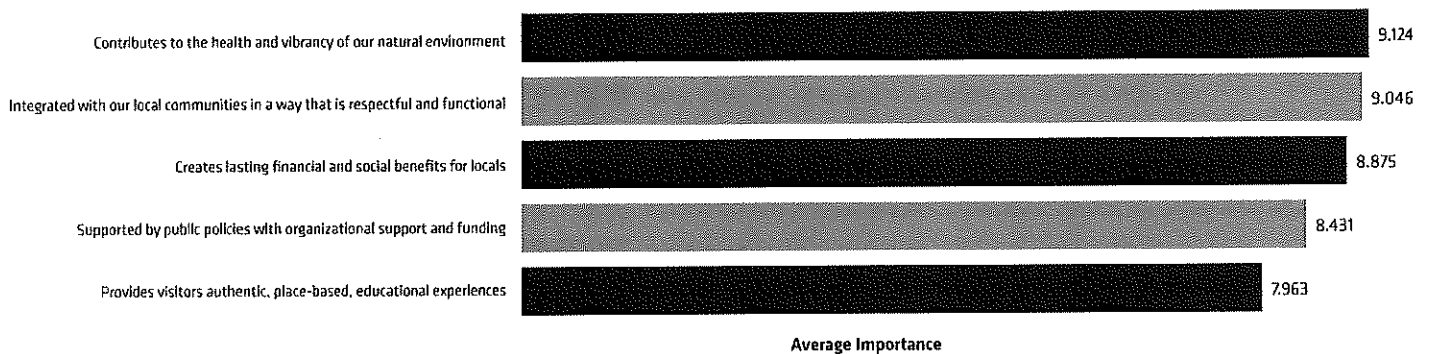
This planning process has helped define and evolve a working definition of sustainable tourism in the context of Tillamook County. This working definition was developed in collaboration with the Futures Council and was tested and validated at every community engagement session and workshop. It provides a basis to measure changes in tourism’s impact on the local communities over time.

Tillamook County Sustainable Tourism – Working Definition:

- Is integrated with our local communities in a way that is respectful and functional;
- Provides visitors with authentic, place-based educational experiences that leave them feeling enriched and inspired;
- Creates lasting year-round financial and social benefits for local residents, businesses, and communities across our County;
- Is supported by public policies with organizational support and funding; and,
- Maintains, or contributes to, the health and vibrancy of our natural environment.

How important do you think each of the dimensions of Sustainable Tourism are for Tillamook County?

Scale: 1 = Not important; 10 = Critically important



DataInsight

DATA INSIGHTS:

- Stakeholders perceived all five dimensions of sustainable tourism as critically important to the future of Tillamook County. However, people judged the Tillamook County Tourism Industry was currently only doing ‘barely okay’ in terms of performance against the dimensions of sustainable tourism.
- In general, stakeholders perceive that tourism growth might have some minor positive impacts (and some negative) and that the County is not well enough prepared for additional growth in visitation.



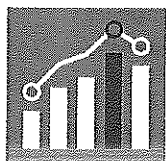
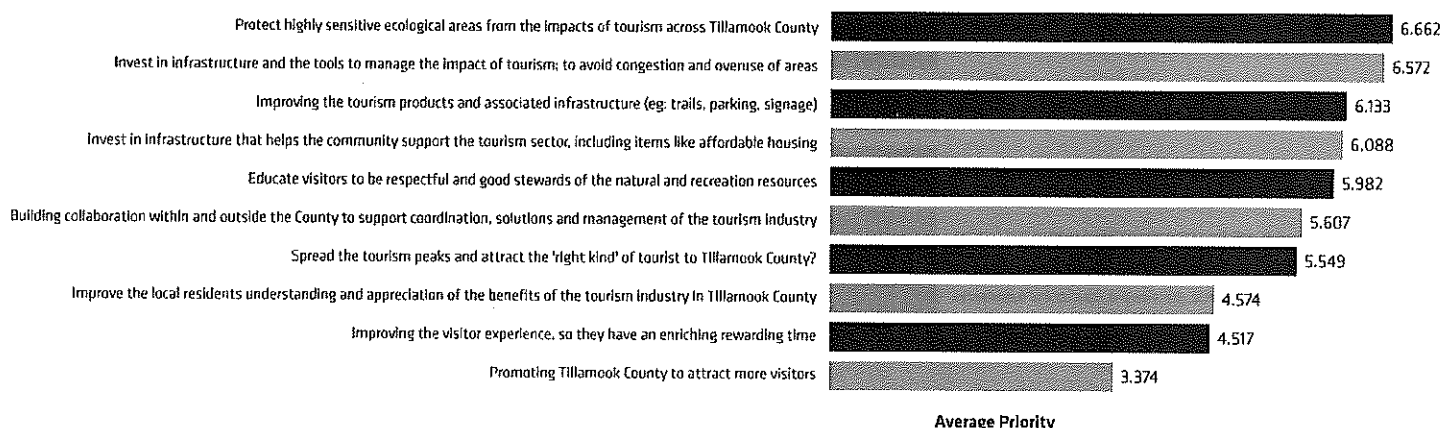
'Promoting Tillamook to Attract more visitors' was the lowest rates area in all questions. This reflects the underlying desire to pivot from industry growth to destination impact management.

2.5 IDENTIFYING KEY PRIORITIES

The community workshops and survey process included an exhaustive examination of priority areas for attention and investment. This was explored in group discussions and in written surveys. The following six topic areas continued to surface as the top priorities. The order of the first several changed marginally depending on the question (i.e. ranking, importance, investment etc.), however the top six areas remained highly consistent.

1. Invest in infrastructure that helps the community support the tourism sector, including items like affordable housing.
2. Protect highly sensitive ecological areas from the impacts of tourism across Tillamook County.
3. Invest in infrastructure and the tools to manage the impact of tourism; to avoid congestion and overuse of areas.
4. Improving the tourism products and associated infrastructure (eg: trails, parking, signage).
5. Educate visitors to be respectful and good stewards of the natural and recreation resource.
6. Building collaboration within and outside the County to support coordination, solutions and management of the tourism industry.

Please rank the following topics in terms of priority to focus on over the next 5 years. Scale: 1 = Lowest priority; 10 = Highest priority



DataInsight

DATA INSIGHTS:

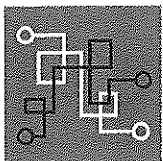
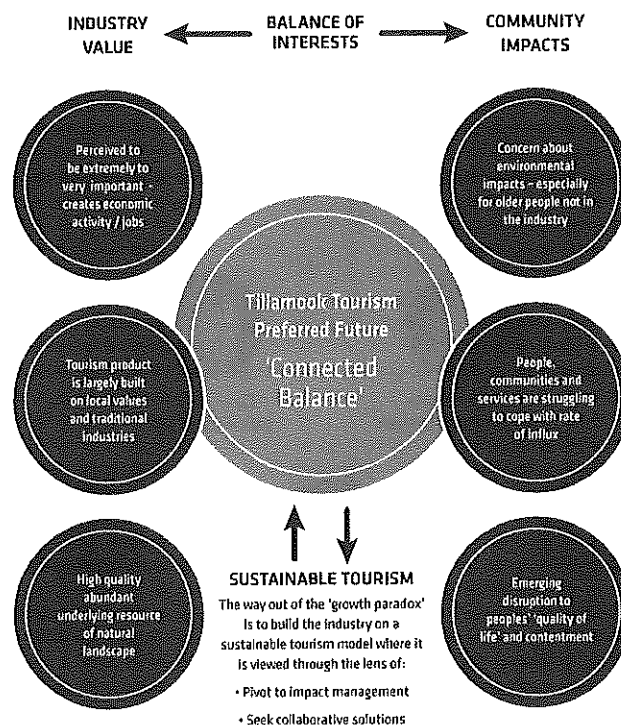
- 'Investment in infrastructure that helps the community support the tourism sector, including items like affordable housing,' was the top identified area when people were asked specifically about investment over the next 5 years. This was especially the case for people involved in tourism industry.
- People not involved in tourism (approx. 30% of respondents), rated 'Protect highly sensitive ecological areas from the impacts of tourism across Tillamook County' as the top investment area. This reflected the narrative in the community workshops.



3.0 CRAFTING A FUTURE TOURISM INVESTMENT STRATEGY

While the tourism industry is a major local economic driver, parts of the County are now experiencing what is perceived as 'over-tourism', where the negative impacts of disruption and congestion are overwhelming the local facilities. Finding the best way forward will require a careful balancing of the impacts on the community, together with the economic benefits. The planning process has facilitated extensive citizen and stakeholder engagement to identify how future investments can help the County meet the multiple goals of reducing negative impacts and congestion and deliver ongoing value to local residents. The strategic framework is built around this balancing act.

Tillamook County Tourism - A careful balancing act



FUTURE INSIGHTS

- To create the future 'Connected Balance' will require a significant pivot and refocus in the development of the tourism industry. There is a sense of urgency in this pivot, as the community is approaching a tipping point in terms of 'over-tourism'.
- Adopting a sustainable tourism approach is the only viable way out of the 'growth paradox'. The growth paradox is where the tourism industry grows because of the intrinsic appeal of a region but is then ultimately degraded and overwhelmed by that tourism, destroying the intrinsic appeal. The phenomena is often termed 'loved to death'.

FutureInsight



3.1 CHALLENGES AND SENSITIVE TOPIC AREAS

Throughout the planning process, there were discussions about the challenges that the County faces regarding tourism, and the difficulty in dealing with over-tourism impacts. These topics are charged with emotion, especially as people experience their quality of life and contentment being eroded or compromised. The planning has highlighted a clear desire for a pivot of focus from industry growth to managing the impact of tourism on the destination and community.

A significant part of the challenge is that some of necessary tools and systemic changes are not in place. In exploring ways to manage tourism, the following key challenges were identified:

- Currently, Tillamook can't control numbers of people visiting the County
- The broader tourism ecosystem around Tillamook is still driving visitation
- Potential danger of unintended consequences
- Community is close to resident 'alienation' or tipping point
- The challenge of managing change and the danger of inflammatory rhetoric
- Lack of a ready-to-deploy toolbox

Tillamook's close proximity to Portland makes it an attractive short-visit location, which creates peak congestion on weekends and holidays. This places extreme pressure on local infrastructure and amenities.



Can't stop people coming



Others are driving visitation



Danger of over-tourism



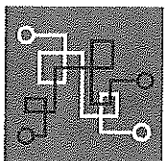
Potential to damage the environment



Locals are getting frustrated



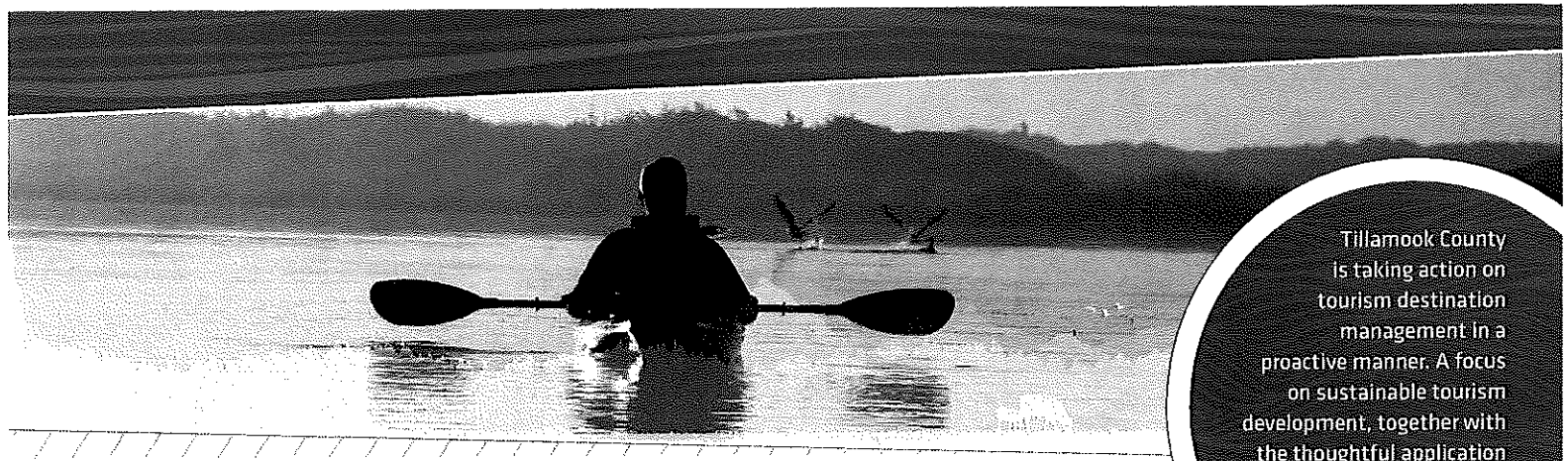
Lack of tools or solutions



FutureInsight

FUTURE INSIGHTS:

- Overtourism is now becoming recognized as a phenomenon across Europe and parts of the USA. Tillamook and the North Coast of Oregon are right at the hard edge of this trend. Dealing with these challenges is a major issue, and Tillamook County does not have the resources or system to deal with it on its own. It will require collaborative solutions with the Portland metro area, and other Counties on the North Coast.
- A critical challenge for Tillamook is to find the way to tilt the tourism industry, so that it can continue to provide strong economic benefit but is puts locals' interests and quality of life to the forefront.



Tillamook County is taking action on tourism destination management in a proactive manner. A focus on sustainable tourism development, together with the thoughtful application of TLT funds, will allow the community to make inroads on key challenges.

3.2 OPPORTUNITIES AND UPSIDE

Despite the immediate challenges that Tillamook County is facing with pressures from over-tourism, there are some opportunities and upside potential. Over the last decade, Oregon has been extremely successful in building a vibrant tourism economy, that has delivered substantial economic benefit across the State. In addition, there is a prevailing culture and philosophy that supports sustainability and environmental awareness. These aspects can be leveraged to help build a more empathetic tourism industry in Tillamook County.

Some of the immediate opportunities and upside include:

- Tillamook has a strong established tourism industry, that creates significant employment opportunity
- Travel Oregon's work on the North Coast, and the emerging North Coast Tourism network is helping find solutions to the big issues, especially centered around Highway 101.
- The broader conversation about sustainable tourism is starting to shift and has attracted the attention of institutions, organizations and policy makers. The dangers and impact of over-tourism are being recognized at State and National levels.
- There is a strong alignment within Tillamook County about the preferred future, which will help focus investment on critical solutions.
- There is an existing quality visitor communication platform (Visit Tillamook Coast), which, with some tweaking, can help drive new messages to visitors.
- There are resources to deploy via the Transient Lodging tax (TLT) funds. Tillamook County is still in the relatively early stages in 'over-tourism' and is doing something about it.



Opportunities



Strong and growing industry



Engaged local stakeholders



Emerging focus on sustainable tourism



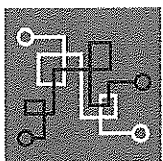
Access to funding and resources



Network forming with surrounding counties



Establishing leadership role in tackling challenges



FutureInsight

FUTURE INSIGHTS:

- Tillamook County is at the forefront of proactively tackling destination management and mitigating the negative impacts of over-tourism. This may help attract additional resources for innovative pilot projects.
- Leaders in Tillamook County will need to engage with the tourism organizations at a State and Portland level, to help craft new region-wide solutions that mitigate the threat and dangers of over-tourism.

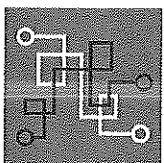
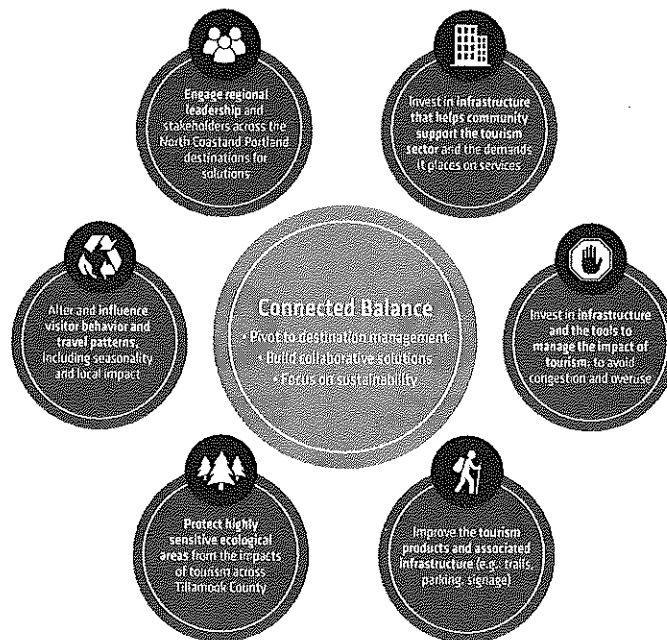


4.0 TILLAMOOK COUNTY TOURISM – STRATEGY AND RECOMMENDATIONS

The proposed strategic framework and investment priorities aim to help the County achieve the preferred future 'Connected Balance'. This will require ongoing evolution of the tourism industry, to build a sustainable industry approach and help offset the impacts on the local communities.

The framework is built around the preferred future and six strategic pillars. The strategic pillars are the key strategic areas that underpin and support the vision. These were identified and validated through the stakeholder engagement work and represent the repeated themes that emerged throughout the process. The pillars also reflect the two major themes of **Sustainability** and **Investment Focus** and **Collaboration Focus**. The specific recommendations under each of the pillars were developed at the reconvened think-tank.

The six strategic pillars were identified from the engagement work with stakeholders. These underpin the preferred future, and represent the main areas for action over the short and long term.



Future**Insight**

FUTURE INSIGHTS

- The strategic pillars represent a major refocus of priorities associated with tourism industry support in Tillamook County. There is a significant shift to investments that help manage and mitigate the impacts of tourism.
- These strategic pillars link with evolving work and direction being undertaken by Visit Tillamook Coast and the North Coast Tourism Management Network. They also link well with the outcomes of the North Coast Tourism Studio organized by Travel Oregon in 2018.



4.1 COMMUNITY INFRASTRUCTURE TO SUPPORT TOURISM INDUSTRY DEMANDS

One of the repeated issues flagged during the stakeholder engagement process, was how increasing tourism is placing strains on community infrastructure. This covers the gamut of issues from waste-water treatment, emergency services, transportation and workforce housing. Part of the concern expressed by stakeholders was that the community will be required to invest in solutions, but there is limited opportunity to source revenue from the visitor, especially for day visitors. Within the county, there are already developments underway to provide additional workforce housing. This will help avoid some affordability and shortage issues. Over the next 5 years it is expected that there will be needs to upgrade hospital facilities and enhance water and sewerage infrastructure in central Tillamook.

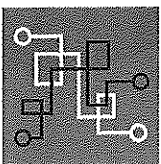
Recommended Strategic Actions: The reconvened think-tank group identified a number of useful strategic actions including:

- Continue to support community centers and facilities that allow gathering and multipurpose spaces for events, and function as response planning centers in the advent of an emergency.
- Build and support emergency services capacity, in order to be able to respond to increased visitation pressure.
- Continue to support innovative solutions for housing and transportation for tourism industry workers. This will help alleviate pressure on housing and remove some related congestion from roads.



Invest in infrastructure that helps community support the tourism sector and the demands it places on services

Infrastructure is the backbone that supports a community's capacity to manage change and growth. The rapid grow in visitation is stretching critical infrastructure. Collaborative solutions are being explored, and new funding models will emerge.



FUTURE INSIGHTS

- Understanding future trends in visitation will be critical to predict the 'right-sized' approach to community infrastructure. If visitation rates begin to plateau, that will help the community 'catch-up' in terms of investment.
- New models of public-private partnerships will be needed to support innovative transportation and housing solutions.
- The approach of seeking greater spend per visitor helps balance the economic impact and contribution of tourism, with the quality of life and capacity issues within Tillamook County.

FutureInsight



4.2 TOOLS AND INFRASTRUCTURE TO MANAGE IMPACT

One of the key downsides of over-tourism is that locals often feel ‘elbowed aside’. This is the basis of the feeling of alienation, that eventually leads to push back from locals. While Tillamook is not yet reached a critical point, the early warning signs are evident. In directing and managing the tourism industry, it is essential that local residents’ quality of life and contentment is preserved.

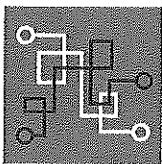
In Tillamook, and on the North Coast, the issue of congestion and localized over-use is exacerbated by the restrictive nature of the Highway 101 corridor and by the heavily seasonal visitation patterns. In recent years, the peaks and lows are becoming more even, mostly driven by increased visitation in the shoulder and winter months. There are a number of approaches that were identified as promising to reduce the key congestion points and create a more harmonious living and visitation environment.

Recommended Strategic Actions: The reconvened think-tank group identified a number of useful strategic actions including:

- Continue to aggressively support the exploration of transportation and congestion solutions. Some of these will be local solutions, and some require regional solutions. There was a desire for more concepts like centralized parking and green shuttles, aimed at taking traffic off major corridors.
- The emergence of ‘shared-economy’ accommodation has changed the intensity and duration of usage in houses in neighborhoods. This can result in localized overuse and disruption. There is a need for some forward-looking regulation of such lodging to avoid destroying neighborhood and community quality of life.
- There is the potential to explore new tools, such as surge pricing, charging for access, and voluntary visitor contributions to a local sustainability fund.

Invest in infrastructure and the tools to manage the impact of tourism; to avoid congestion and overuse

One of the most critical issues to manage will be congestion, as this significantly degrades locals and visitors experience. However, this has to be done in a way that does not just locate the problem to another location, or create unintended consequences.



FUTURE INSIGHTS

- Looking into the future, it is likely that we will see technology solutions, such as advance alerts and the ability to ‘electronically ring fence’ key areas. This is similar to current applications that can manage traffic congestion and reroute drivers.
- It is likely that new regulations and zoning will have to be considered to help manage density and intensity of lodging, such as short term stays and rentals. This will be essential to preserve living neighborhoods and to avoid large tracts becoming vacation properties.

FutureInsight



4.3 TOURISM PRODUCT AND INFRASTRUCTURE (E.G. TRAILS, PARKING, SIGNAGE)

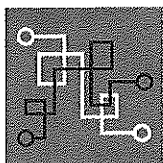
Tillamook County has vast tracts of outdoor landscapes, recreation areas, trails and areas for outdoor activities. These trails cover a wide range of experiences and locations, from coastal hiking, food trails, bike trails etc. However, these resources need to be better connected to dissipate concentrations and localized overuse. There is an urgent need to disperse impact in key 'pinch-point' areas. This is where certain locations exceed capacity, and facilities like car park, trails and restrooms become overwhelmed. These situations of localized overuse lead to negative visitor experiences, and the unintended consequences of pollution, degradation and safety issues.

Recommended Strategic Actions: The reconvened think-tank group identified a number of useful strategic actions including:

- The overarching focus in Tillamook County should be creating multi-modal networks of connectivity. This could have a dramatic impact on reducing congestion on key routes and provides safer transportation.
- The County has a potential abundance of high-quality trails; however, these need to be better connected to spread impact. Consideration should be given to a county-wide trail and multimodal masterplan, to help identify key connections.
- There is an educational opportunity at trailheads, where the principle of stewardship and responsible use can be reinforced.
- There should be a sustainability mechanism for trails, to ensure there is a way to leverage future revenue streams to support maintenance and management.

Improve the
tourism products
and associated
infrastructure (e.g.:
trails, parking, signage)

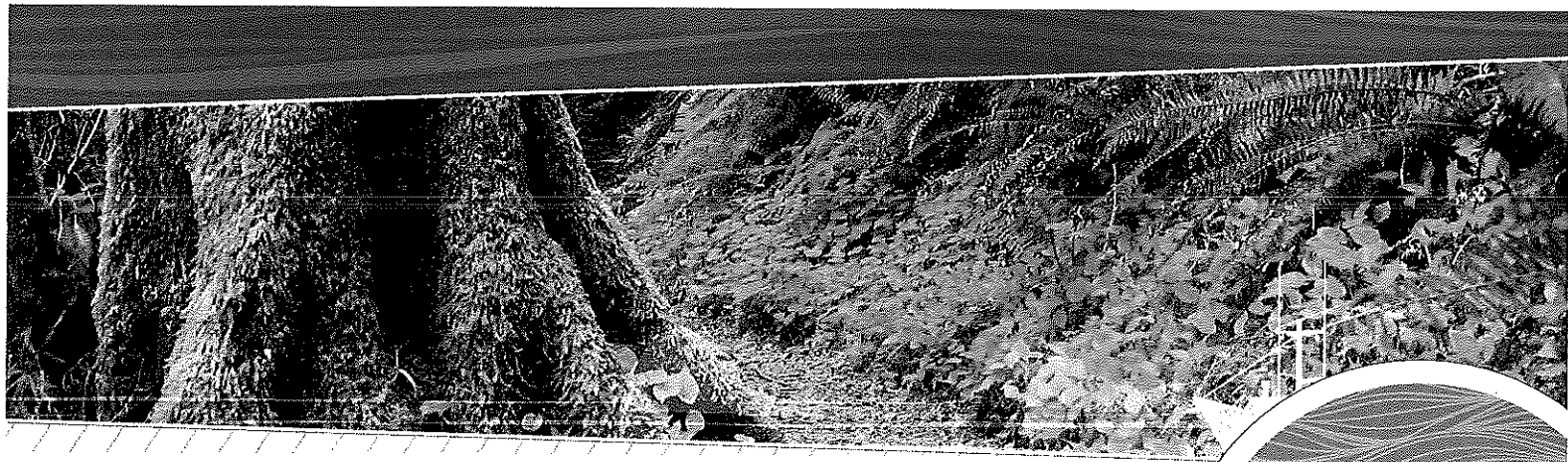
Tillamook County has
the potential to link key
trail systems to dissipate
congestion and impact.
Thoughtful trail systems
can be an invaluable asset
for locals, as well as an
amenity for visitors.



FUTURE INSIGHTS

- There is an opportunity to use TLT funds to leverage significant partner investments in large scale trail, such as Federal, State and philanthropic investment in iconic projects like the Salmonberry Trail. These iconic projects can have multiple benefits and provide great connectivity for locals as well as visitors.
- A key focus of improving the trails and signage infrastructure is to create the opportunity for safe enjoyment. Localized overuse leads to dangerous situations on roadside, access points and viewpoints.
- Innovative Ideas can be encouraged to find novel ways to move people off roads and key transportation routes. Signage and multi-modal options will spread people across different systems.

FutureInsight



4.4 PROTECT HIGHLY SENSITIVE ECOLOGICAL AREAS

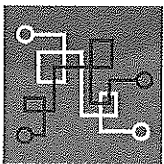
The potential negative impact of tourism on the landscape and highly sensitive ecological areas was highlighted throughout the planning process. It was one of the top concerns identified from the think-tank and throughout the engagement sessions and surveys. Local residents place a high regard on the natural beauty and healthy nature of the coastal and forest ecosystems. While much of the landscape is resilient to some levels of use, the repeated concern was that particularly sensitive areas could be degraded or destroyed with unchecked use. This includes sensitive cliff face areas, rock pools, beaches and estuarine areas. Protecting such areas from damage was consistently flagged as one of the most important priorities and investment areas. It was recognized that some of this type of work is already underway, especially for example Cape Kiwanda Management Plan.

Recommended Strategic Actions: The reconvened think-tank group identified a number of useful strategic actions including:

- Undertake a study to identify the most sensitive and immediate at-risk areas, to implement protection.
- Develop County-wide tourism use plans that map vulnerability areas, congestion areas and potential 'tourism development' areas that would be more resilient.
- Create a task-force that examines the potential for regulations and enforcement to protect key areas and influence visitor behavior.
- Initiate investment in implementing the Cape Kiwanda management plan.

Protect highly sensitive ecological areas from the impacts of tourism across Tillamook County

The protection of the environment was consistently a high priority for stakeholders. This reflects the deep underlying connection local people have to nature, and the concern that over-tourism will result in degradation of sensitive areas.



FUTURE INSIGHTS

- Tillamook County has long had a tradition of relatively free and easy access and use of resources. This includes beach driving, fishing and hiking. However, managing increasing visitation will mean increased restrictions on use, and could be a point of aggravation for locals.

FutureInsight

- In order to sensibly manage sensitive areas, it will be important to identify and develop areas that can absorb the traffic impacts of tourists. These are not necessarily 'sacrifice areas', but more areas that have greater resilience or are better suited to use.



4.5 INFLUENCE VISITOR BEHAVIOR AND TRAVEL PATTERNS

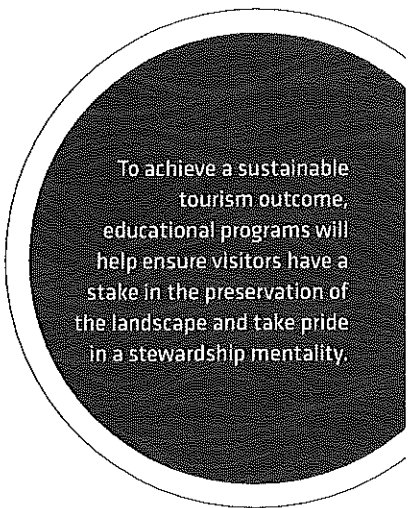
The relationship between the visitor and the local community is critical, especially in order to create a sustainable tourism industry. Tillamook County needs to enlist the visitor to be a part of the sustainability solution. This will require an effort in education, so people who are visiting understand the underlying community values and the regard for the preservation of nature and the local 'way of life'. Being able to influence visitor behavior will be a key part of future solutions for destination impact management. It is recognized that there are a number of very effective visitor education programs already in place.

Recommended Strategic Actions: The reconvened think-tank group identified a number of useful strategic actions including:

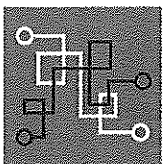
- There is an immediate potential to reframe visitor communication platforms and create new messaging about tourism in Tillamook County. Visit Tillamook Coast has already begun this, with a 'dialing-down' of promotion; and a 'dialing-up' of targeted influencer messaging.
- Pursue an approach to partner with local and state tourism establishments and businesses to push a shared message aimed at spreading peaks and valleys. Explore creative ways to collectively incentivize and disincentivize visitation patterns.
- Work with local industry and organizations to educate visitors to be respectful and good stewards of the natural and recreation resource. Examples were Trailhead and Beachhead volunteers who could help educate users and visitors.
- Support local businesses adjust and adapt to changes in the industry and begin to broadly instill the principles of sustainable tourism as part of industry metrics.



Alter and influence visitor behavior and travel patterns, including seasonality and local impact



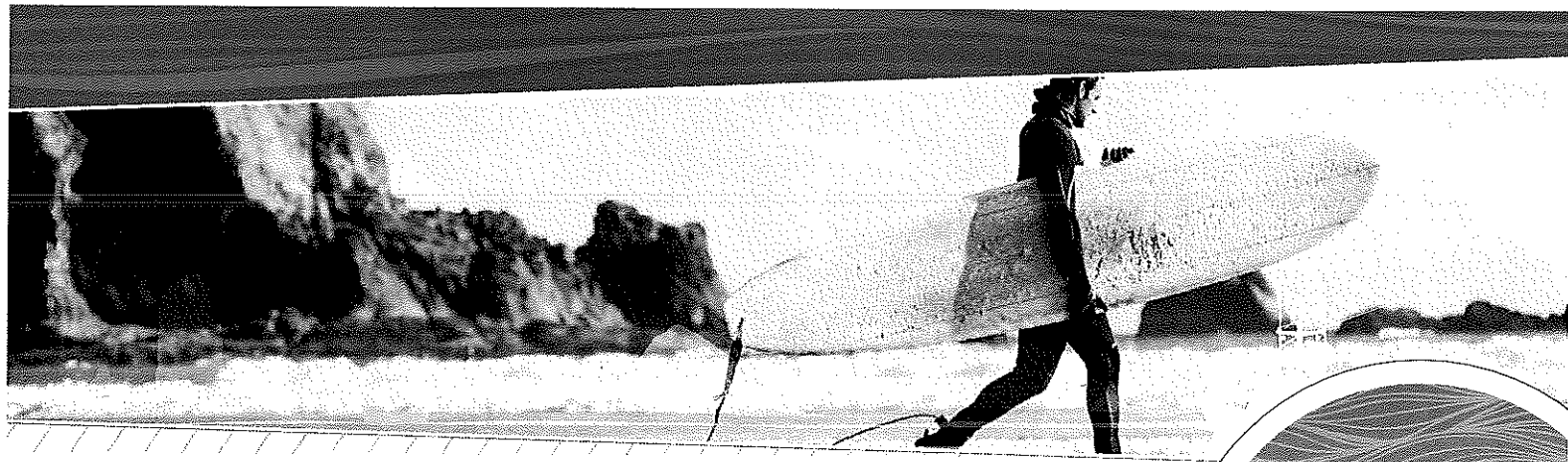
To achieve a sustainable tourism outcome, educational programs will help ensure visitors have a stake in the preservation of the landscape and take pride in a stewardship mentality.



FutureInsight

FUTURE INSIGHTS

- Visit Tillamook Coast has a key role to play in helping reshape the messages to current and potential visitors. This will require further refining of the messaging as it pivots from attraction to education.
- By embracing messaging about sustainable tourism and stewardship, Tillamook County has the potential to appeal more to visitors who may prove to be more empathetic to local values and become partners in the management.



4.6 REGIONAL LEADERSHIP AND INFLUENCE

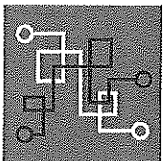
Tillamook County has taken the lead on addressing over-tourism and the impacts it has on its residents. However, the visitation is primarily being driven from the Portland metro area and along the North and Central Coasts. While Tillamook may seek to moderate visitor growth, other locations and entities may continue to drive increased visitation. Therefore, it is logical to conclude that truly lasting solutions will require a broadscale systemic approach. In addition, Tillamook County is quite large and diverse. There are differing situations at the ends of the County. There needs to be a focus to bring the whole County together on larger county-wide solutions.

Key Recommendations:

- Visit Tillamook Coast should maintain strong involvement in North Coast Tourism Management Network , as this will help build regional solutions and find collective creative solutions.
- County Commissioners should seek to convene leadership from Counties surrounding Portland and bring Travel Oregon and Travel Portland together to find solutions for unintended consequences of over-tourism emanating from the metro area.
- At a local level, efforts should continue to facilitate ongoing discussions about the need for the tourism industry to evolve and adjust. It will be important to keep the community and key stakeholders involved in the ongoing dialogue. This is a role that could be fulfilled by Visit Tillamook Coast and the Futures Council.
- The County should continue to bring together communities from across the County, to help find shared collaborative solutions. This is likely to increase the success of initiatives aimed at managing impact and will reduce the likelihood of creating unintended consequences in new locations.

Convene regional leaders and stakeholders across the North Coast and Portland destination

Tillamook County needs to be proactive in convening key tourism industry stakeholders at a broad level, to seek regional scale solutions. This leadership role will help put important local issues on the table of regional decision makers.



FUTURE INSIGHTS

- This area was rated lower in terms of investment over the next 5 years; however, a lot can be accomplished with small investment. The value of regional collaboration is that it will create shared solutions, and likely help attract additional resources to the County.
- Longer term solutions to regional over-tourism may require adjustment of State priorities and legislative amendment. Being able to exert influence will be essential to help leverage necessary change.

FutureInsight



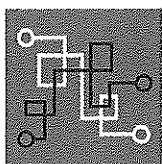
5.0 NEXT STEPS – TILLAMOOK TOURISM 2.0

Tillamook is embarking on a radically different approach to investment in the tourism industry. This planning process and the stakeholder and community engagement highlighted the need for a reset in terms of priorities and investment areas. There is no appetite for investment in directly growing the tourism industry, but instead a strong desire for investment in destination impact management. There is a recognition of the need for building collaborative approaches and solutions that are county-wide and reach out to surrounding areas, especially along the North Coast and into the Portland metro area. Some of the initial transformational next steps already underway include:

Reframing the investment in tourism industry support, as outlined in this report, is a critical first step in creating a reset for how the County manages the tourism industry and its future impacts.

- **Reset of Visit Tillamook Coast (VTC) priorities.** The Board and Executive of VTC have been actively engaged in the planning process and have begun to reshape their strategic direction. They are now focused on their 3”R”s:
 - Return on Investment: Goal is to increase visitor spending in businesses throughout the county and increase visitor appreciation for the natural resources and environment.
 - Return on Relationships: Goal is to help businesses and organizations achieve their goals and missions and upgrade services and knowledge.
 - Return on Responsibility: Goal is to establish Tillamook County as the ‘Coast that cares’.
- **Updating the Transient Lodging Tax (TLT) priorities.** The County Commissioners initiated this planning work to help inform how the growing TLT funding resource should be best deployed across the County. This is resulting in:
 - Reframed priorities for investment: The 2019 call for proposals will include a radically revised set of priorities, which will reflect the outcomes of this planning work, and will focus on projects that manage destination impact and collaboration.
 - Decision-making tool: As part of this planning work, a decision-making tool has been developed to help assess TLT applications based on a four-dimensional scoring related to Sustainability, Destination Management, Collaboration and Return on Investment.

In addition, County leadership including Visit Tillamook Coast, Futures Council and County Commissioners, are exploring how to better collaborate and influence other tourism entities and the State legislature, in order to help Tillamook County manage the impacts of excessive tourism.



FutureInsight

FUTURE INSIGHTS

- While the initial steps will significantly change the focus of investments in tourism, there is a long way to go. The longer terms trends suggest tourism visitation pressures will continue to grow, especially from the Portland metro region.
- Over the next 5 years, it is anticipated that new and novel tools will emerge. Technology offers the promise of greater ability to influence visit behavior and travel patterns. Tillamook should be actively seeking to apply innovation as it evolves and proves viable.



6.0 ACKNOWLEDGEMENTS

The tourism industry representatives from Tillamook County engaged in the Think-Tank workshop, community engagement workshops 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.

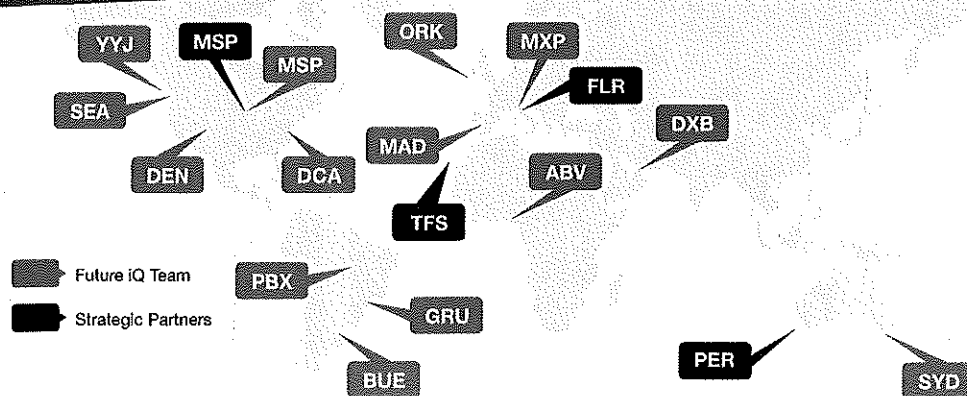
Future IQ would like to acknowledge the substantial support from the Tillamook County Futures Council. Members of the Council met monthly to direct this project and their support of the planning process is greatly appreciated.

Tillamook County Futures Council Members

- Rick Kneeland (Co-chair)
- Lisa Greiner
- Dusti Linnell
- Jennifer Purcell (Co-chair)
- Mary Groves
- Douglas Montgomery
- Bill Baertlein
- Marie Heimburg
- Ross Tomlin
- Michele Bradley
- John Holloway
- Misty Wharton

In addition, the County staff Rachel Hagerty and Susan Corbisiero provided valuable insight and feedback throughout the course of the planning process. Nan Devlin from Visit Tillamook Coast also contributed her expertise and knowledge of the local industry and the regional context.

The Futures Council, Tillamook County Board and Visit Tillamook Coast collaborated to produce the Strategic Vision and Action Plan. This represents a significant 'reset' of local priorities and direction, in regards investments in the tourism industry.



7.0 ABOUT FUTURE IQ

Future IQ was contracted to design and facilitate the planning process to create the Strategic Vision and Action Plan for Tourism-related Facility Investments. Future IQ works in a number of sector areas, including tourism planning and development, primarily in regional locations. Future IQ specializes in applying innovative tools and approaches to assist municipalities, 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 or by email at info@future-iq.com

REPORT PREPARED BY:



David Beurle
CEO, Future IQ



Celine Beurle
Chief Operating Officer



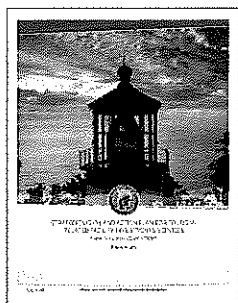
Heather Branigin
VP Foresight Research



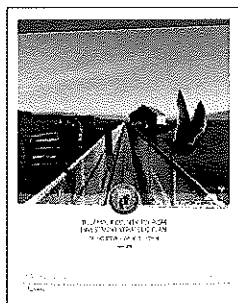
Marc Rassel
Creative Director

Additional Resources and Information:

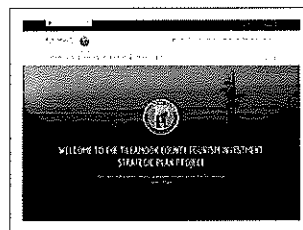
<https://lab.future-iq.com/tillamook-tourism-investment-strategic-action-plan/>



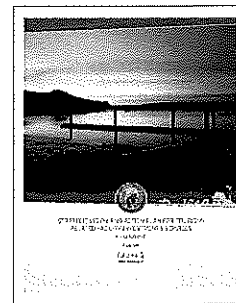
Strategic Vision and Action
Plan for Tourism-related Facility
Investments services
Think-Tank Workshop Report
February 2019



Tillamook County Tourism
Investment Strategic Plan
Taking Stock - What is Known
March 2019



Tillamook County Tourism
Investment Strategic Plan
Project Portal
March 2019



Strategic Vision and Action
Plan for Tourism-related Facility
Investments Services
Final Report
July 2019



8.0 FOR MORE INFORMATION

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

Rachel Hagerty, Chief of Staff
Tillamook County Commissioners
201 Laurel Ave, Tillamook OR 97141
Email: rhagerty@co.tillamook.or.us
Phone: 503 842 3404 office

For more information on the community engagement work as part of the planning process, or for more information about the Futures Council, please contact:

Jennifer Purcell, Chair
Tillamook County Futures Council
Email: tillamookcountyfuturescouncil@gmail.com
Phone: 503 812 8377

For more information on the planning process, recommendations and data visualization, please contact:

David Beurle, CEO
Future IQ
Email: david@future-iq.com
Phone: 612 757 9190