

COMMUNITY TOURISM VISIONING EVENT

October 14, 2014

Independence Event Center, Independence, Oregon

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Rural Tourism Studio – Travel Oregon

Scenario Planning Workshop – Polk County

Report from regional Scenario Planning workshop conducted on Oct 14 and 15, 2014



Prepared by:



Oregon's Rural Tourism Studio is a robust training program designed to assist rural communities in sustainable tourism development. Travel Oregon hopes the program will increase high-value, authentic



experiences for travelers, thereby strengthening Oregon’s position as a premiere North American tourism destination.

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1.0 Introduction

The regional planning work presented in this report was conducted as part of the Rural Tourism Studio conducted by Travel Oregon for the Polk County region of Oregon.

The components of this planning work included regional surveys, long-term Scenario Planning, and discussion about preferred futures.

- **Surveys** – A survey was sent to key stakeholders and registered participants of the scenario-planning workshop, and helped guide the workshop discussions.
- **Scenario Planning Workshop** - The planning workshop held on Oct 14 and 15, 2014, provided an important opportunity to engage local and regional leadership in a critical dialogue about the future of tourism in the region.

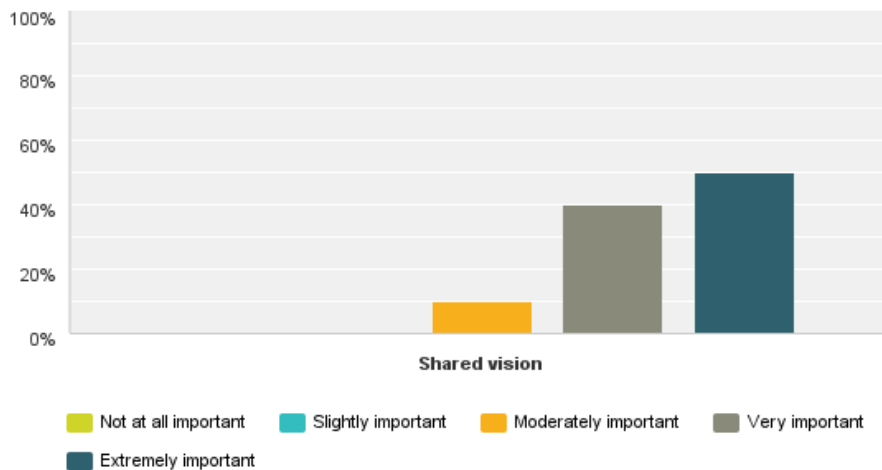


2.0 Regional Surveys

Prior to the planning workshop, surveys were conducted. The workshop participants were asked about their views on having a shared vision for the region. The following graph shows a high level of importance placed on the concept of a shared tourism vision.

Q5 How important is it to have a shared vision for tourism in Polk County?

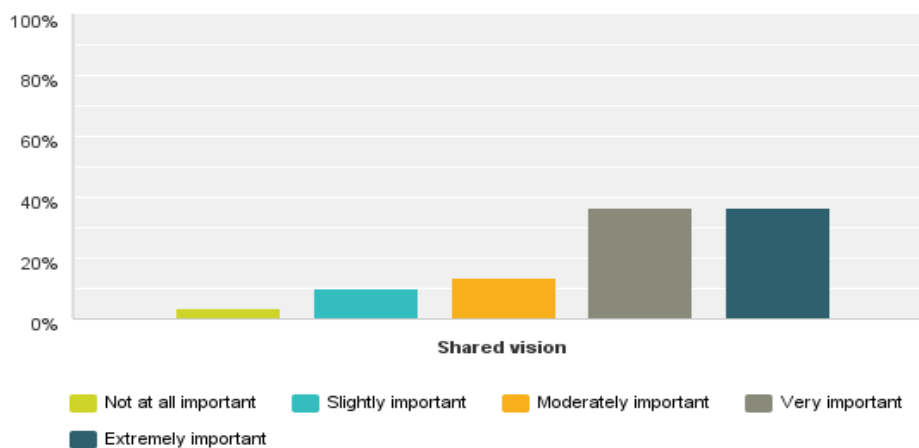
Answered: 30 Skipped: 1



Whilst having a shared vision is seen as very important, the connection to using the vision in decision-making is not as strong

Q6 How important is it to have a shared vision for tourism in Polk County when MAKING DECISIONS in your work?

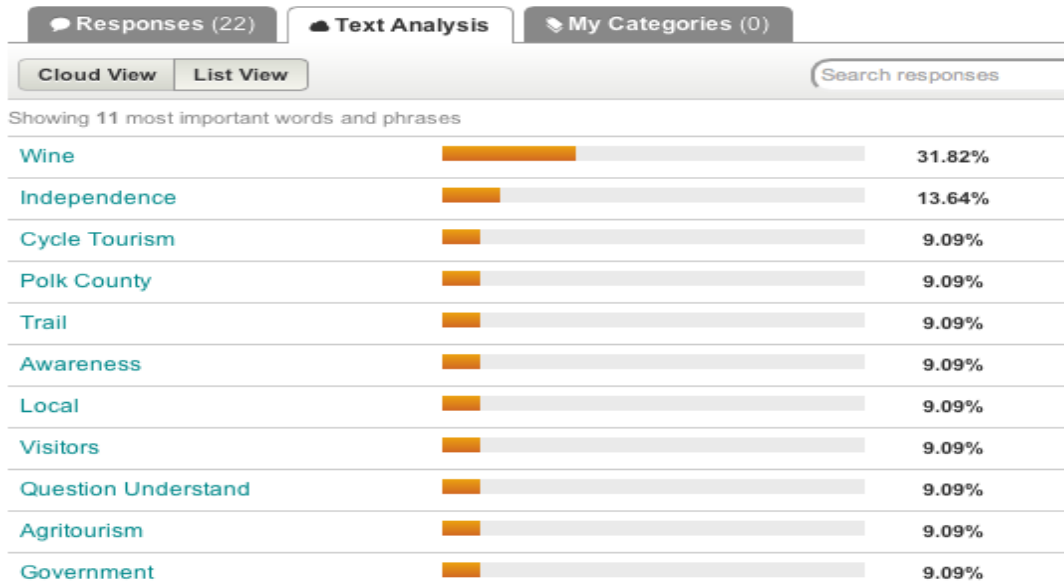
Answered: 30 Skipped: 1



Additional questions explored where people perceived where there were future opportunities and challenges.

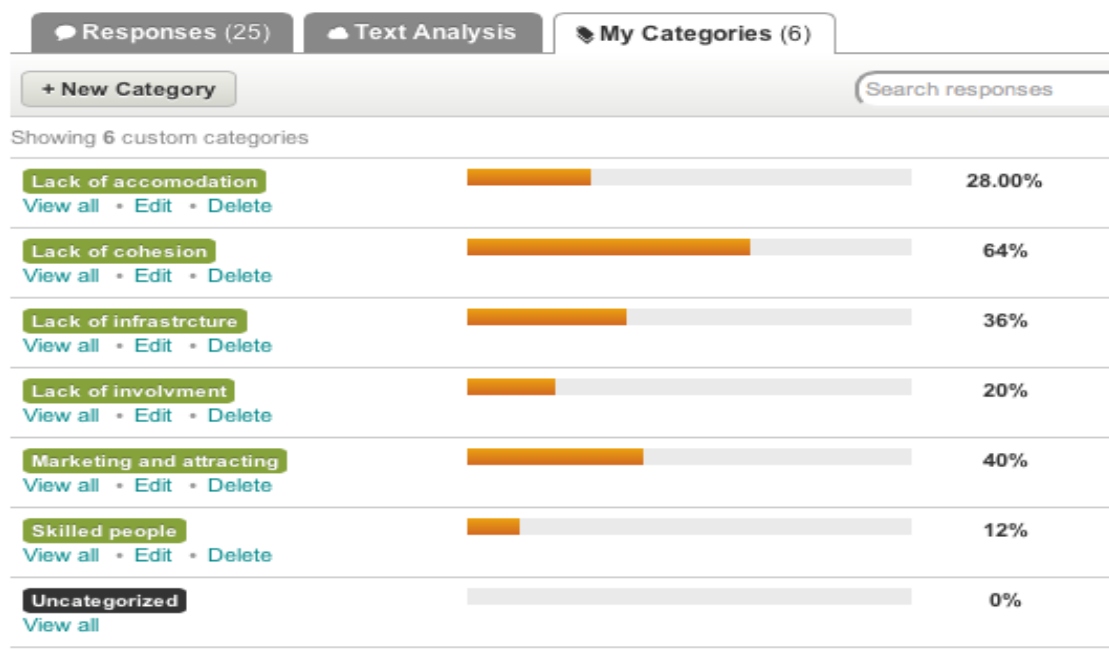
What opportunities could be leveraging in the ultimate Tourism Action Plan?

Answered: 22 Skipped: 9



What challenges would the ultimate Tourism Action Plan address?

Answered: 25 Skipped: 6



3.0 Setting the stage – Scenario Planning

To begin planning for the future of the region, and commence the process of defining a shared vision, over 30 regional leaders and stakeholders working together on Oct 14 and 15, 2014. The objectives of this planning workshop was to:

- Create and describe four plausible long-term scenarios for the region; and,
- Begin exploring alignment around a shared regional vision.

The scenarios developed during this Scenario Planning Process and outlined in this report are important to provide a “vehicle” to be used in the process of building a shared vision for the future of the region. In addition, the workshop deliberations can assist in identifying key actions for the region and assist in identifying how various groups might best contribute to future developments.

The Scenario Planning process as applied in the region, offered an excellent opportunity for the regional community to examine the future in a thoughtful and structured manner. The design of the workshop included:

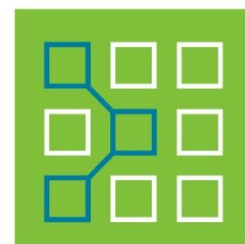
- Playing the Pacific Northwest Future Game, to explore scenario thinking and future shaping decisions.
- Development of four plausible scenarios for the future of the region.

These exercises and work were aimed to build a robust basis for the scenario formulation.

What is The Future Game?

The Future Game is a simulation tool designed to explore how regional and local decisions can shape long-term economic, environmental, and community well-being. It is a great way to stimulate meaningful discussion and debate about future regional and community scenarios, and to explore decision pathways.

The highly interactive and participatory game provides an enjoyable and accessible way for citizens and community leaders to engage in robust discussions about contemporary challenges of community and economic development. Over 98% of people who play the game report it as a challenging and enjoyable experience which provides real benefit to critical thinking about the future and local decision making.

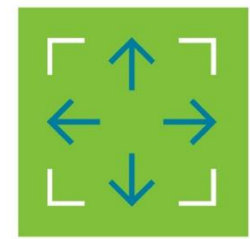


FutureGame

| SIMULATION
| LEARNING |

3.1 Scenario Planning Process

This report presents the background, results, and recommendations from the Regional Planning process. This process aimed to explore the future directions and opportunities for the region, and commence work on creating a regional vision for tourism. This process has been applied by Future iQ Partners in regional Scenario Planning events in numerous settings across North America, Australia and Europe.



DecisionPath

SCENARIO
PLANNING

The process, which is described in detail below, involves exploration and discussion of local trends and forces of change; identification and ranking of drivers and influences that will likely shape the future of the region; development of a scenario matrix defining four plausible scenarios spaces for the future; and the development of descriptive narratives of each scenario. The event concluded with discussion of the scenarios and their desirability in contributing to a regional vision of the future. An important part of the Scenario Planning process is that it aims not merely to develop plausible scenarios for the future, but to identify how they may be turned into tangible actions in the region and compiled in a regional planning strategy.

3.1.1 Why Scenario Planning?

Scenario Planning is a method that is used to develop plausible scenarios for the future. Scenarios are not predictions, but are a way of exploring plausible futures. The method differs from traditional strategic planning as it allows for the exploration of many factors, or drivers of the future, concurrently. It does so by using local knowledge and expectations about the drivers to produce a framework that defines and explores a range of plausible futures. In this manner the approach enables people to explore the impacts and consequences of a range of different future pathways.

Generally, Scenario Planning processes are run over several days, weeks, or even months. A condensed form of Scenario Planning, developed by Future iQ Partners, was used in this project so that the scenario session was completed in a two days. This design is intended to allow otherwise busy and committed people to contribute and participate in a future planning process in an effective and efficient manner.

This design relies on sufficient background information being presented to enable realistic and informed evaluation by the participants. It also requires participants who are broad-minded and freethinking, and who collectively and individually can bring their experience to the identification of the key drivers and to the development of the scenarios.

3.2 Developing Four Plausible Scenarios for the Future

The regional stakeholders explored the future and developed plausible future scenarios, looking out as far as 2030.

3.2.1 Drivers shaping the future

The participants were invited to participate in a survey prior to the workshop. They were presented with 20 key drivers that are considered most likely to shape the future of the region.

Key drivers shaping the future of the region, as presented in the survey

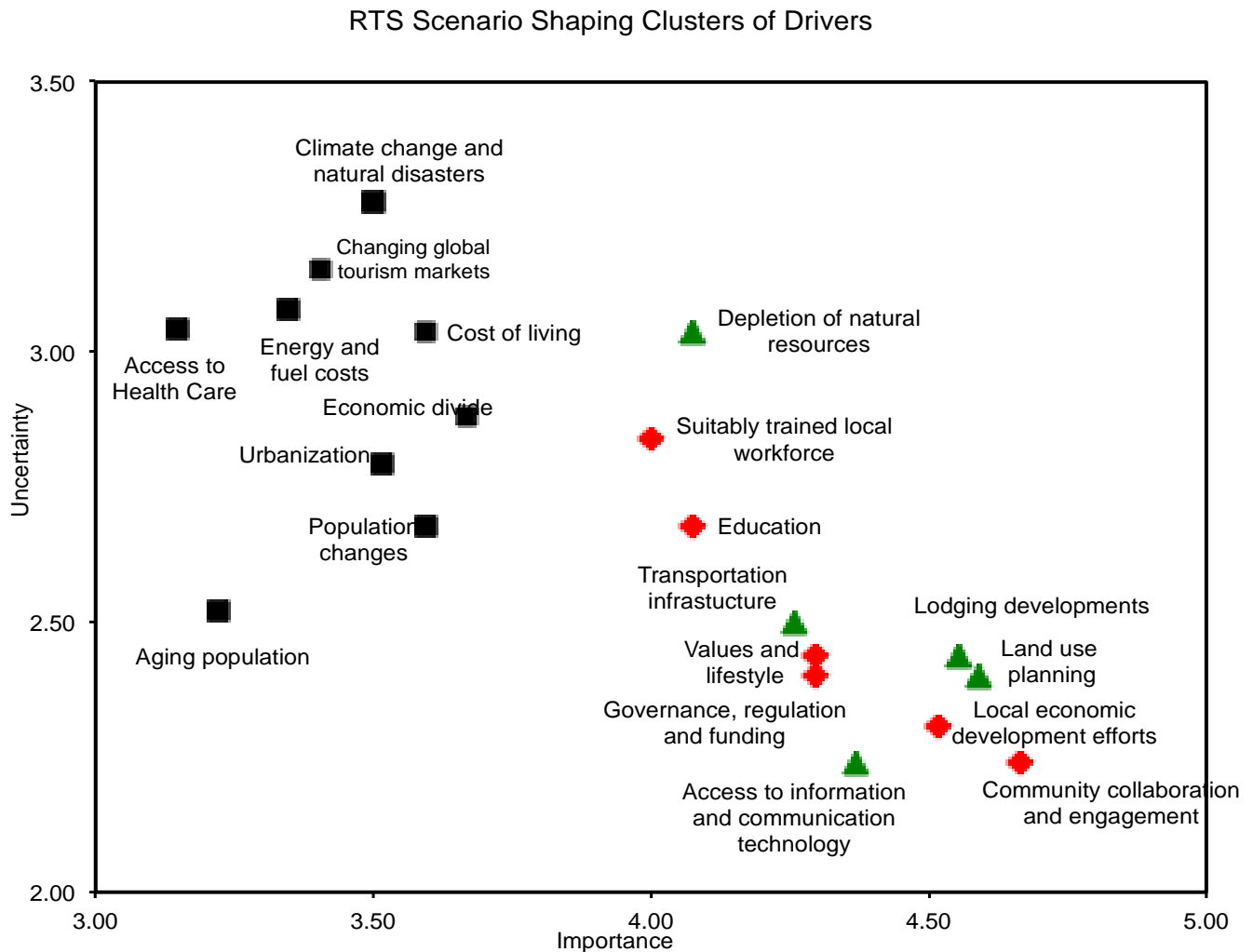
1. Changing global tourism markets
2. Local economic development efforts
3. Energy and fuel costs
4. Cost of living
5. Suitably trained local workforce
6. Population changes
7. Aging population
8. Community collaboration and engagement
9. Urbanization
10. Access to Health Care
11. Values and lifestyle
12. The economic divide
13. Education
14. Governance, regulation and funding
15. Climate change and natural disasters
16. Depletion of natural resources
17. Land use planning
18. Lodging developments
19. Transportation infrastructure
20. Access to information and communication technology

3.2.2 Identifying scenario shaping clusters of drivers

The survey participants rated each of the key drivers for its "Importance" and "Uncertainty." "Importance" refers to how important the participant considers the driver will be in shaping the future of the region. "Uncertainty" refers to the degree of uncertainty associated with the driver in terms of its future level of uncertainty, impact, or both. The individual ratings by each participant were pooled and averaged, providing an overall rating for each driver by the entire group of stakeholders. Then, a scatter diagram of the drivers, based on importance and uncertainty, was developed. The scatter diagram allows the identification of clusters of which are relatively high in "Importance" and

“Uncertainty”. This process illustrates the clusters of the drivers that were seen as critical in shaping the future – these clusters were termed "Scenario shaping clusters of drivers."

3.2.3 Creating scenario spaces – four plausible scenarios for the future



The process involves grouping similar drivers in two categories, and then adding a name that represented a general theme linking the drivers in the clusters, identifying the clusters of drivers. These themes became the basis for two axes on the scenario matrix that define four scenario ‘spaces’, with quadrants either towards or away for each driver cluster. These quadrants were used to formulate four plausible scenarios.

Regional scenario shaping clusters of drivers

Ability to leverage our human capacity

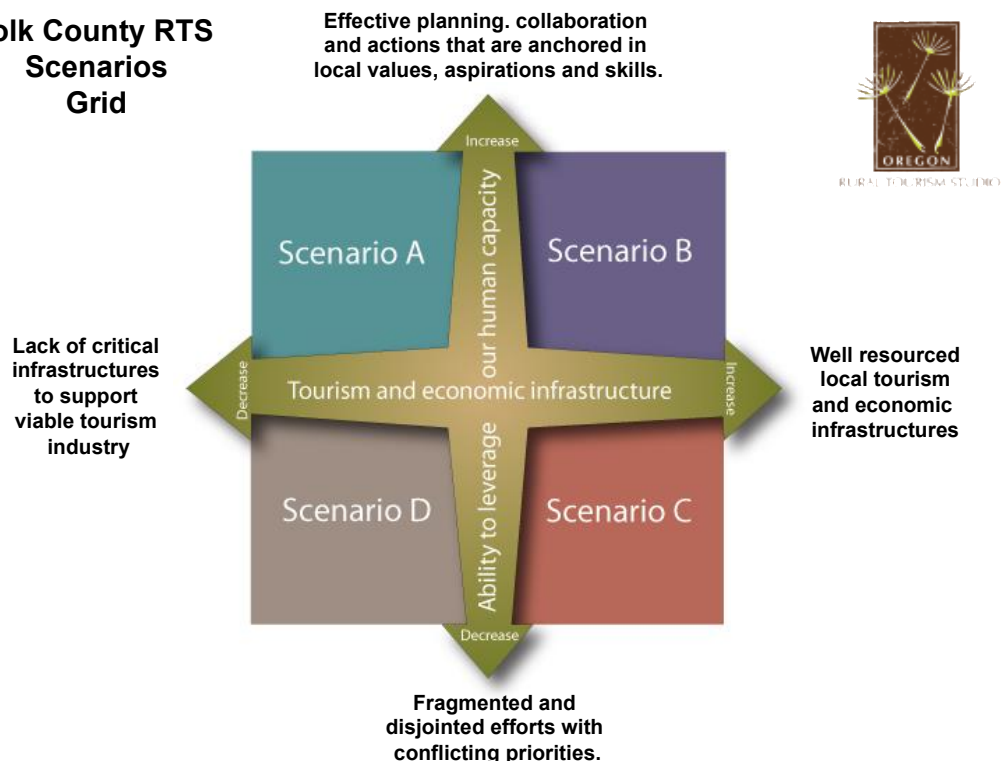
- Community collaboration and engagement
- Local economic development efforts
- Governance, regulation and funding
- Values and lifestyle
- Suitably trained local workforce
- Education

Tourism and economic infrastructure

- Land use planning
- Lodging developments
- Access to information and communication technology
- Transport infrastructure
- Depletion of natural resources

The four quadrants (scenario spaces), based on increase and decrease directions of the two cluster themes, were reviewed and discussed with the participants. This discussion explored the drivers included in each scenario-shaping cluster, the scope of each cluster, and how they formed the axes that defined the four scenario spaces. The participants were asked to consider the main attributes of each of the quadrants and to begin to speculate about how the region would look in a future based on each of the quadrants.

Polk County RTS Scenarios Grid

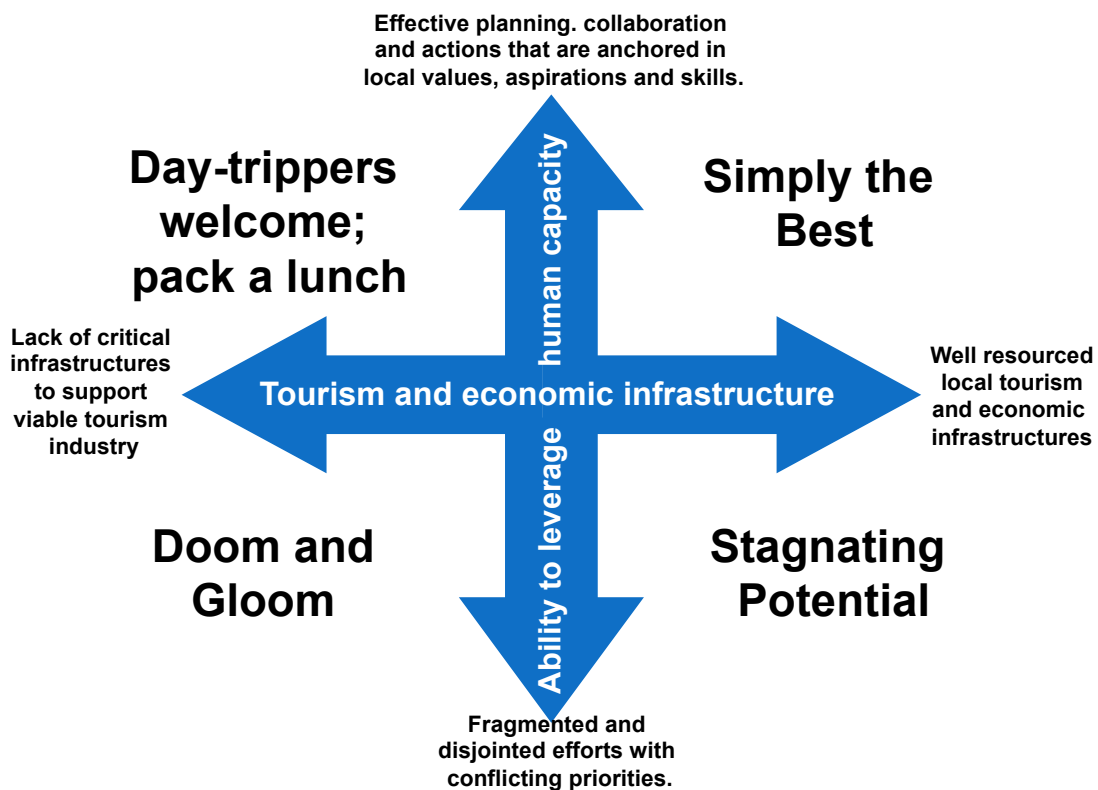


3.2 Creating narratives for each scenario quadrant

Event participants were randomly allocated to one of four groups and asked to formulate a scenario for their respective quadrant. Each group was facilitated by local facilitators to describe The Region in 2030 under the conditions of the scenario quadrant that they had been given in terms of the triple-bottom line of social, economic, and environmental characteristics. Once the scenarios had been developed, each group reported back, describing their scenario to the workshop participants.

The scenario quadrants defined by the cluster themes showing the names of each scenario as created by the participants.

Regional Scenarios based on two scenario shaping clusters



These four scenarios paint very different plausible futures for the region. The workshop participants considered them all as plausible futures, as in, they could actually happen. Narratives and descriptions of each scenario, as developed by the workshop participants, are included in the following section.

Each scenario has its subsequent consequences and impacts on the regions fabric of the region – impacting the economic, society and environment in different ways. No one future is the ‘perfect’ future, as each comes with its attendant challenges and implications. The process, however, does provide a way to tease out the future scenarios and examine them from a speculative standpoint. They represent different possibilities for the future, and are not predictions.

4.0 Descriptions of the scenarios

4.1 Scenario A – Day trippers welcome; pack a lunch

Community / social

- Resistance to change
- Narrow focus
- Lack of awareness of existing opportunities
- Few choices for retail, restaurants, etc.

Environmental

- Desirable place to live
- Poverty with a view is ok to some
- Lack of government coordination to refuse, reuse, recycle – so can't market as green place
- Great spectrum of wildlife, viewing and fauna/flora

Economy

- High rent discourages new or continued retail
- Economic characteristics are not ideal
- No umbrella to coordinate, package and market activities

Headline news for the following years...

- **2015** Willamette Wines get increased market share due to drought and lower production in CA Earthquake, Equestrian dog show opens in Willamina, and marijuana passes in Polk County
- **2020** Large hotel built in Polk; continued drought in CA drives investors to purchase land and invest in wine businesses, immigration reform = less workers for agricultural businesses and local farms.
- **2030** Big earthquake takes down the Salem bridge, I 5 access is cut off, Van Duzer corridor becomes major production of wind power

4.2 Scenario B – Simply the Best

Community / social

- Everything is a collaborative effort, nothing cookie cutter,
- People value authenticity
- Embrace change while retaining heritage, old buildings
- Open minded people, Enhanced gratification and community pride
- Open to best ideas and best practices
- Increased quality of life and workforce development
- Creating new opportunities for businesses in tourism industry
- Opportunities for advancement in growth business

Environmental

- People are buying local, Limited poverty
- Historical aspects of community are vibrant, Retain small town charm
- Increase in number of small farms and farm products/ more diverse farm products
- No empty store fronts and preserving the aesthetics (business, homes, roads)
- Perseveration of enhancements of main streets and counties – no cars up on blocks in yards or maybe less 😊
- City and county enforcement codes

Economy

- Limited poverty, Increased economy, increased employment
- Good buy-in and support from local government and agencies
- Increased tourism and new business development
- Quality, effective branding
- Working with current and new businesses
- Incubator (teaching resources, connecting business)

Downsides of this scenario – is the big tourism places: Jackson, Aspen, etc – where the rich people live in the town, the actual workers move out and travel in to work, disparity of wealth is large, ideal scenario are that people are embracing change and doing new things, but not everyone will embrace this – this will be a challenge

Headline news for the following years...

- **2015** Polk County partners with Chemeketa College to create workforce programs! Shocking agreement between all parties in regional tourism plan. Informal business assistance group helps business ride the wave.
- **2020** Increased tourism demand creates new lodging in county, food hub opens in county, new tourism committee forms to create and market businesses and tourism in county
- **2030** Cold storage and distribution center created for organic crops. Quality of life improves. Polk County is the destination site for an authentic experience.

4.3 Scenario C – Stagnating Potential

Community / social

- Move fragmented groups – people moving forward, lack of trust
- Competition vs collaboration
- Spirit of haves and have nots
- Work job duties and pay scales are increasingly disparate and people move out of area

Environmental

- It comes in last as there are other things to worry about/economics
- Place of “not enough”

Economy

- Fragmented groups being successful
- Higher highs and lower lows
- Small guys lose b/c big guys have the money
- Tourism starts to lag – even though we have tourism industry the fragmentation with the locals and no collaboration – there are pockets of tourism and not so good other pockets – so it’s not working well

Headline news for the following years...

- **2015** Global markets for Polk County grass seed and hazelnuts at all-time high; Worldwide oil glut lowers fuel prices, increasing tourist travel to Polk Co. ; Record number of farmer’s markets in Pacific Northwest; Increased demand from China for Polk Co for agricultural products.
- **2020** Worldwide consumption of wine continues to increase, Oregon winters have record sales – Polk County included; Global warming increases water restrictions in CA, affecting demand for Polk Co farm product; Market for hazelnuts falls by 25%, affecting Polk Co. producers.
- **2030** Land prices increase and drives out local farmers/families; California wine giants buy up Willamette Valley wineries; Mechanization replaces farm workers

4.4 Scenario D – Doom and Gloom

Community / social

- Lack of progress
- No collaboration
- Education looking bad
- Local apathy
- Increased drug and crime use
- Very insular, not a positive vibe to community
- When tourists come – they leave because of bad experience
- Lose population

Environmental

- Lack land use planning
- Overuse and poor use of natural resources
- Deferred maintenance for example: the falls

Economy

- Poor local econ developments
- No job opportunities
- No youth opportunities
- No affordable housing
- No local tax base
- Large outside businesses are benefiting from absentee landowners
- Proliferation of for sale and for rent signs
- Property values declining
- No capital attracted
- No money to support growth/infrastructure

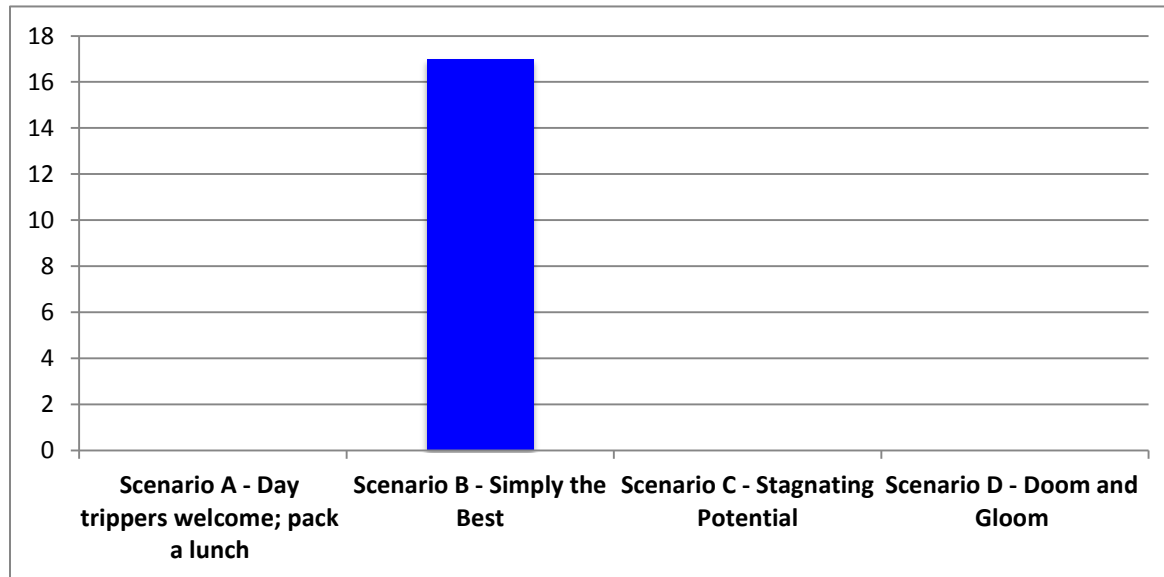
Headline news for the following years...

- **2015** Local businesses decline, long time anchor business leaves town, library has reduced hours, school lunch assistance program is no longer funded
- **2020** Grocery store closes, one big industry biz closes and lots of people lose jobs, homeless increase, contentious City council meetings and planning commission resigns Property prices are at an all-time low
- **2030** Local university closes, county bankrupt, undisclosed land use purchased by big business for nuclear site on the river, Property values at all time low

5.0 Workshop participant feedback

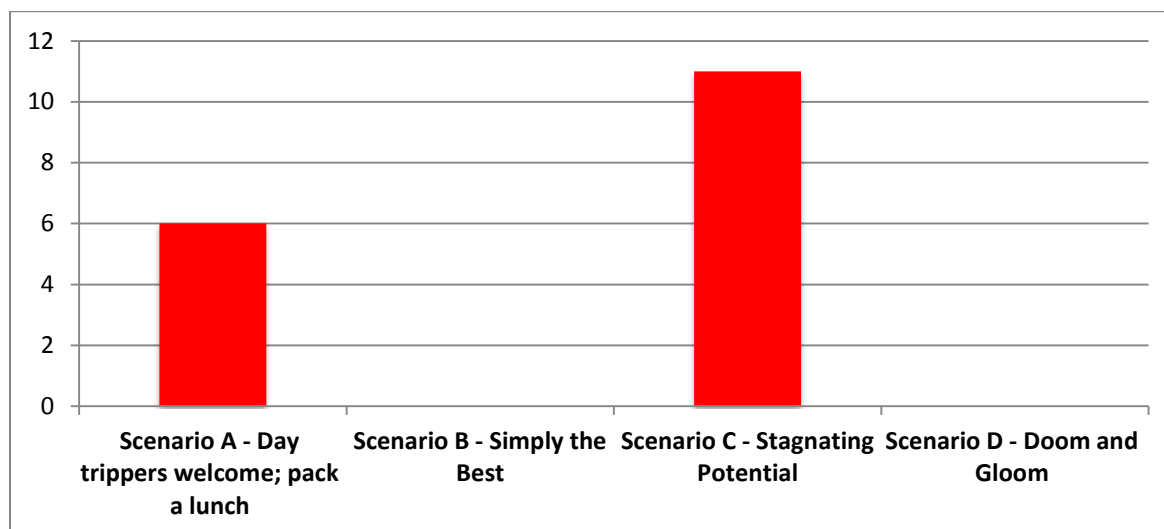
Following the Scenario Planning work, participants were asked which scenario represented their aspirational future.

5.1 Preferred Scenario - workshop participants



The workshop participants unanimously agreed that Scenario B best represented the preferred future scenario – ‘Simply the Best’.

5.2 Which scenario most represents where the region is currently headed?



The workshop participants indicated which scenario they believed most represented the current direction of the region. Scenario C – ‘Stagnating Potential’, was the highest rated, followed by Scenario A– ‘Day Trippers welcome; pack a lunch’.

6.0 How could the preferred future eventuate?

The preferred future ‘Simply the Best’ outlines the basis of a shared vision for the region. In addition, it gives an indication of the focus areas of action that will begin to see this vision become a reality.

The axes that shape this future are increasing **‘Tourism and economic infrastructure’** and increasing **‘Ability to leverage our human resources’**. Because of the long-term nature of the Scenario Planning methodology, stakeholders can often see the ‘distant future vision (2030)’ as unattainable and unrealistic. However, this often underestimates the progress that can be made of the intervening years, and the cumulative positive impacts of change. As an example, some of the existing work in the region is already significantly shaping the future directions and actions.

Some examples of the work already supporting the elements of the preferred future include:

- The Rural Tourism Studio, and the opportunity it represents to leverage the enthusiasm and interest of the local industry and communities;
- The existing winery trails and co-operative marketing ventures already beginning;
- The immediate potential for unique tourism accommodation to be developed in Independence;
- Various community based groups and Tourism Centers that are building community cohesion and recognition for the quality of the tourism experience on the Polk County.
- Development of a scenic cycle ways and unique food and agri-tourism products such as hops.

The scenario framework also can help guide additional actions to guide the future, especially in the importance of building regional infrastructure, collaboration and capacity. The challenge will be to connect the region to existing efforts and harness the depth of research and development already occurring in the broader regional context.



6.1 Key Strategic Focus Areas

Participants were asked to identify key strategic focus areas that need to be addressed in order to fulfill on the vision.

- **Organizational capacity and structure**
- **Communications Strategy**
- **Accommodation Plan**
- **Destination Development**
- **5-Year Strategic Plan**

The region has an abundance of high quality natural resources and world-class outdoor tourism experiences. The challenge will be to optimize the use of these resources, while retaining the intrinsic beauty of the region, which is an important factor to the tourism potential. Continuing to build regional collaboration and capacity will be vital. This will include the ability to own the regional vision, and be willing to reach across traditional barriers and territorial lines to form partnerships, share resources and build critical scale.

7.0 Draft Polk County Tourism Vision Statement

Polk County – DRAFT Tourism Vision - 2030

Polk County offers ‘Simply the Best’. The region has a vibrant social and economic fabric, and retains its authentic rural roots. It offers surprising, unique and natural tourism experiences. The numerous small town centers offer a touch of the old, and a touch of the new. Boutique hotel options draws and holds tourists, as they enjoy the renowned and distinctive local wine, beer, food and recreation offerings. The region is highly networked and connected, with trails and scenic routes that make the traveller stop; and breathe in the scenery, heritage and the way of life. Hidden around corners, there is adventure to be found. This is coupled with world-class agricultural and eco-tourism, that provide delight for a wide cross section of tourists.

The local tourism industry has worked hard to build and foster a collaborative approach. The industry works in a highly collaborative manner, and builds strong partnerships with Salem to east, and counties to the north and south. This has resulted in local recognition of the positive economic and societal benefits of a robust tourism industry.

8.0 Report and Scenario Planning workshop author

Future iQ Partners specializes in assisting communities, regions and organizations to plan and prepare for their future. With staff in Australia, USA and Europe, the company develops the tools and approaches to allow regional communities to think about their future in a new way and to respond to a rapidly changing world. Future iQ Partners is a market leader in the field of regional Scenario Planning and has undertaken projects across Australia, USA, Canada and Europe.

About The Author:

David Beurle holds a degree in Agricultural Science from Sydney University and has worked in industry, organizational and regional Scenario Planning projects across USA, Canada, Australia and Europe.



He specializes in creating innovative future planning approaches for use in regional and organizational settings. He developed the groundbreaking Future Game as a widely used planning and workshop tool, which has been successfully used across the world in community, regional, industry, corporate and governmental settings. He pioneered the application of Scenario Planning to regions and rural industries around the world. Having worked in the field of regional and community planning/ revitalization for over 20 years, he is a leader in the field of regional and organizational development.

In 2012, David brought his experience, knowledge and ideas to an even wider audience. He ran a global consultation entitled, 'Building Sustainable Regions in Today's World', at St Georges House, Windsor Castle, UK. This involved 34 experts from 11 countries across the world to discuss the opportunities and challenges we are all going to face in the future.

He has held a position on the Board of the Western Australian Community Foundation, and his work in community and economic development has earned his work international, national and state awards; including twice being awarded the International Community Development Society's 'Innovative Project Award'.

For more information on the Scenario Planning Process, please contact:

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