WHAT IS SCENARIO PLANNING?

TODAY

POINT FORECAST
Planning for a short-term point in time based on current trends.

PLAUSIBLE FUTURE SCENARIOS
Letting the future drive planning by identifying a range of plausible alternative futures and linking futures with responsive strategies and signposts of change.

TOMORROW

ALTERNATIVE FUTURE
ALTERNATIVE FUTURE
ALTERNATIVE FUTURE

Access Ohio 2045
TESTING 4 SCENARIOS

Based on these drivers of change

- Population
- Development
- Economy
- Technology
SCENARIO PLANNING STEPS

Where Are We Now?
- Historic trends
- Current conditions

Where Could We Go?
- Indicators, signs of change
- Plausible alternative futures

How Could We Prepare?
- Impacts and ideas
- Indicators to watch
- Possible responses

What’s Our Path Forward?
- Goal
- Strategies
- Policies
- Investments
MODEST GAINS CONTINUE?

8% growth to 12.6m residents by 2045
CONTINUED SUBURBAN GROWTH?

- Outer suburbs growing
- Some urban infill
- ¼ of counties could lose population by 2045
DIVERSE INDUSTRY MIX?

Continuing industry diversification key to growth

Ohio's GDP by Sector (2015)

- Manufacturing: 17%
- Transportation and Trade: 16%
- Finance and Insurance: 10%
- Real Estate: 10%
- Business Services: 12%
- Education and Health: 10%
- Other Services: 9%
- Government: 11%
- Ag, Mining, Construction, and Utilities: 7%
- Other: 9%

Access Ohio 2045

Total Employment


US

OH
TECHNOLOGY USE EXPANDS?

The Hyperloop
1200km/h. San Francisco to LA in 35 mins.
#1 CURRENT TRENDS (BASELINE) - ASSUMPTIONS

**Population**
Ohio’s population continues to grow slowly, while becoming older and more diverse; more people with disabilities and living in poverty.

**Economy**
Ohio’s economy remains diverse, with long-term growth in services, distribution, energy.

**Development**
Population growth continues to be concentrated in outer suburbs of existing major metro areas, with some urban infill.

**Technology**
Use of existing and new technologies; adoption varies across demographic groups and industries.
Population
Millennial and GenZ talent moves to or stays in Ohio; increasing longevity and mobility for older adults, disabled residents

Economy
Job growth shifts toward advanced manufacturing, technology, logistics; some disruption from automation and workforce shortages

Development
More dispersed and specialized economic activity; more urban infill and mixed-use development

Technology
Technology use accelerates: automated/connected vehicles, drones, alternative fuels, Internet of Things, 3D printing, telepresence, big data
#3 GLOBAL MARKETS - ASSUMPTIONS

**Population**
Ohio’s population becomes more diverse; more workers; more immigration, especially in urban areas.

**Economy**
Increasing global ties and volatility; growth in manufacturing, agriculture, energy, tourism, logistics, related services.

**Development**
Concentration of distribution activity around ports and industrial centers; dispersion of specialized production including rural business opportunities.

**Technology**
New logistics and freight technologies: smaller (on-demand delivery, drones) and larger (truck platooning, larger trains and ships).
#4 OHIO RENAISSANCE - ASSUMPTIONS

**Population**
Increasing growth: retention of younger residents, return of former residents, appeal of lower cost of living, available water, stable climate

**Economy**
Resurgence in manufacturing and continued growth in logistics, technology, energy, tourism, health care, other services

**Development**
Growth focused in centers connected by corridors; importance of unique community and environmental assets

**Technology**
Use of existing and new technologies; adoption varies across demographic groups and industries
RISK OF TRADITIONAL PLANNING

Plan Tailored to “Most Likely” Future

Success!

“Most Likely” Future

Failure!

Unanticipated Future

Plausible Future

Plausible Future

Plausible Future
EXPLICITLY DESIGNED TO ADDRESS UNCERTAINTY

Robust Decision-making

Plan Performs at Least Reasonably Well

Plausible Future
Plausible Future
Plausible Future
Plausible Future
Plausible Future
**ROBUST DECISION MAKING**

- Robust: Effective at achieving objectives in all futures, regardless of risk
- Hedging: Riskier, but hedge against a future that you absolutely seek to avoid
- Shaping: Riskier, but with the potential to promote desirable future
- Deferred Adaptive: Can be safely deferred to later time