



TRAVEL



OREGON

**Why Guides Program Update
September 2024 Commission Meeting**

9.25.24

Toni Toreno

WHY GUIDES ARE THE BEST WAY TO EXPLORE OREGON



- Inspire and engage visitors in how to safely and responsibly visit Oregon communities/the outdoors.
- Strengthen destination management efforts by investing in tour guides, operators and outfitters.
- Give visitors access to local experts and Oregon's unique experiences and places.
- Directly market small, locally owned industry businesses as viable contributors to the state's economy.

INVENTORYING THE PRODUCT

Goal: Better information on the guided product available in Oregon = better marketing and storytelling

- 150 businesses in the Why Guides database (and growing!)
- Registry period currently open through Oct. 7 for new businesses to join
- Database is shared with regional partners
- Businesses must meet 3 requirements



Brandon Cole

PROGRAMMING PILLARS

1. Marketing & Sales Opportunities

- Inventory database
- Travel Oregon with Travel Oregon campaign opportunities & supporting content
- Domestic and international trade and consumer sales promotions

2. Business Development

- Digital Marketing Boost Program (available to 20 businesses each winter)
- Consultations (international travel trade and general business ops/support)
- Why Guides Learning Community & Networking Opportunities

3. Guide Development

- Conference Scholarships
- Subsidized Technical Trainings (e.g. first aid & CPR)
- Educational/Niche Trainings (visitor experience/interpretation focus)

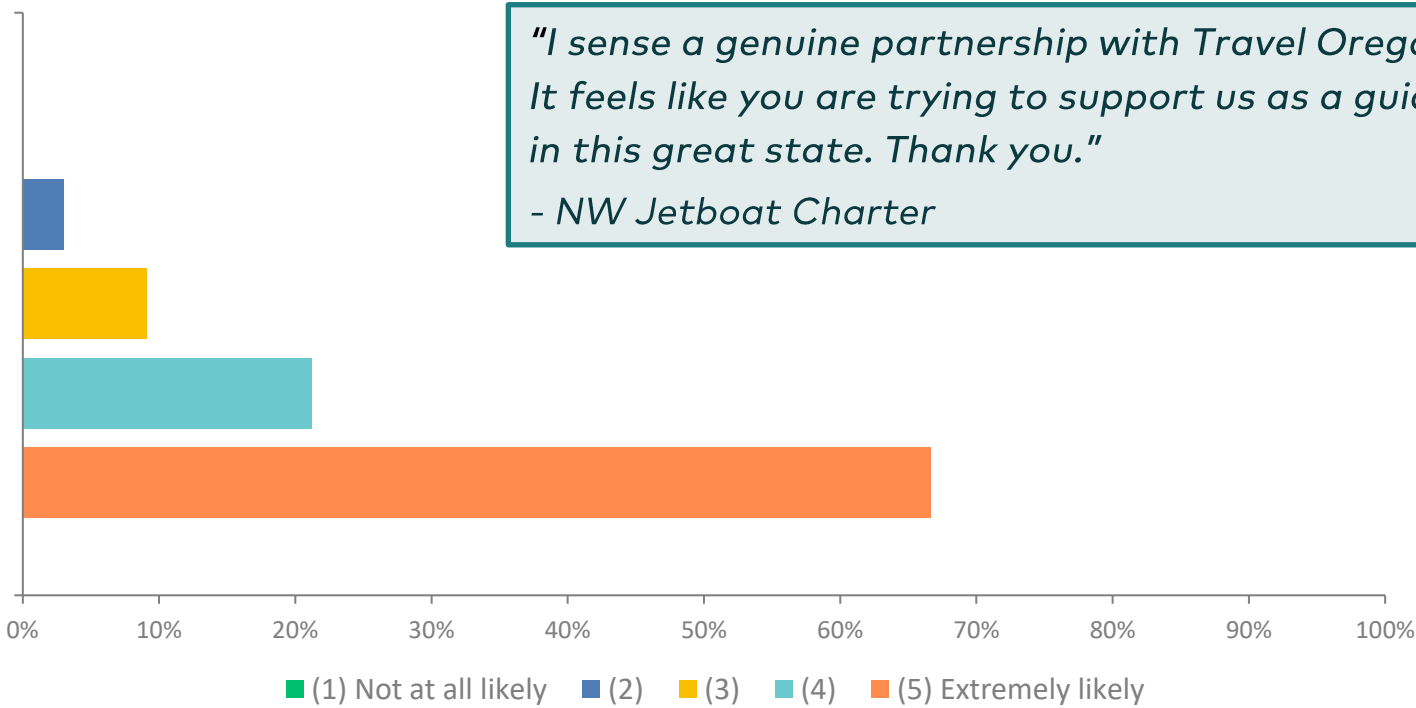
CURRENT APPROACH TO ANNUAL PROGRAMMING



2023-24 Why Guides Program Survey

Tuesday, May 28, 2024
35 responses

Based on your experience so far, how likely are you to recommend participating in the Why Guides program to another tour operator business?



VALUE OF PROGRAMMING

Most Valuable

1. Scholarship to attend Governor's Conference on Tourism
2. Sponsored First Aid & CPR training
3. Scholarship to attend Oregon Outdoor Recreation Summit
4. Lunch for Guides & Outfitters at GovCon or Summit
5. OSU Elevate Outdoors program



2024 SEASON OFFERINGS

Accessible or Inclusive Tours

- Accessible tours for guests with mobility limitations or physical disabilities (39.4%)
- Tours customized for affinity groups (39.4%)
- Accessible tours for guests with hearing disabilities (24.2%)
- Accessible tours for guests with developmental or intellectual disabilities (24.2%)
- Accessible tours for guests with visual disabilities (21.2%)
- Tours in languages other than English (18.2%)

24.2% of surveyed guides were not offering any accessible/inclusive tours this season

2024 SEASON OFFERINGS

Tours in Key Niche Areas

- Winter Tours (69.7%)
- Nighttime outdoor tours (27.3%)
- Zero-impact emissions tours (21.2%)
- Tours along Oregon Food & Farm Trails (18.2%)
- Tours along Oregon's Signature Trails (15.2%)
- Tours in partnership with Tribes (9%)
- Tours of Oregon Outback Dark Sky Sanctuary (6%)

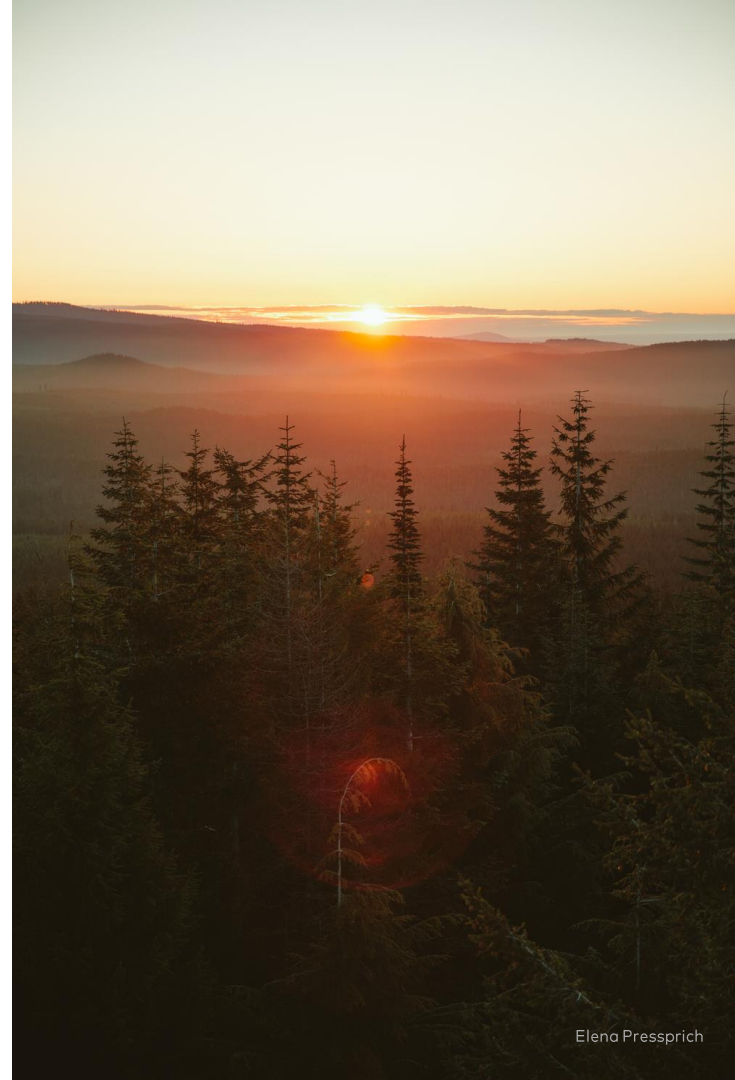
*18.2% of surveyed guides were not offering any of these types of tours this season



AREAS OF FUTURE INTEREST

Areas of Interest (if financial support was available)

1. Winter Tours
2. Tours in Partnership with Tribes
3. Tours Customized for Affinity Groups
4. Zero-impact Emissions Tours
5. Nighttime Outdoor Tours
6. Tours in Languages Other Than English
7. Accessible Tours for Guests with Hearing Disabilities



EXPERIENCE SEEKING PERMITS

1. **Variability in Agency Experience:** Permitting ease varies by agency; some, like BLM and Oregon Parks, are smoother, while others, like the USFS and Portland City, are more difficult.
2. **Inconsistent and Outdated Processes:** Permitting rules can be inconsistent within agencies, and some, such as the USFS, use outdated practices not suited for current needs.
3. **Communication and Support Issues:** Poor communication and slow responses, along with a lack of advocacy and support from tourism organizations, create frustration.
4. **Permitting Costs and Complexity:** High costs and cumbersome procedures for permits, including recurring fees and extensive reviews, impact budgets and require substantial time and resources.
5. **Impact on Business Operations:** Restrictions like user limits and outdated capacity data can hinder growth, and there's a need for better recognition of guides' contributions to tourism.



RECREATION LIABILITY BACKGROUND

- Court cases in recent years have effectively nullified liability waivers
- Protect Oregon Recreation Coalition and others have attempted to address this in previous Legislative Sessions, bringing Oregon back on par with other states across the West
- Coalition was successful in short term fix for separate but related issue of Recreational Immunity
- Attempts to fix both issues long term will likely come up again in 2025





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TRAVEL OREGON AND WHY GUIDES

- Statutory role to assess challenges the tourism industry faces and make others aware
- Why Guides annual survey opportunity to understand small business & outfitter impact
- Made questions open ended and optional noting sensitivity
- Why Guides interested to engage, 27 of the guides surveyed responded to liability questions

INSURANCE

- Began with question focused on insurance costs and canceled coverage. 24 of 27 respondents indicated this has been a major challenge for their business
- 7 of those 24 respondents had been dropped from insurance or forced to switch carriers to afford coverage
- Others said finding adequate coverage was impossible
- 17 cited major cost challenges, perspectives include:
 - 20% to 50% annual increases
 - Increases from \$600 to \$3400 annual cost
 - 4 businesses questioned if they can continue to operate at all due to insurance cost





LEGAL CHALLENGES

- Next we asked about legal challenges businesses may have faced due to waiver issues
- With a couple exceptions, respondents largely indicated that this was not something they have experienced to date
- Several businesses indicated they've taken up a bifurcated waiver process given the legal landscape
 - Those who indicated this process still indicated rising costs and operational challenges

OTHER FINDINGS

- Offered opportunity to share any other impact liability challenges posed on their business
- A few respondents noted general challenge in staying up to date on the legal landscape
- Portland area guides cited City specific challenges with PBOT categorizing them as taxis due to customer pick ups which increased insurance costs significantly
 - Shared this with Travel Portland





Katie Falkenberg

CONCLUSION

- The lack of enforceable waivers are posing major challenges to Oregon Guides and Outfitters
- Rising insurance costs and loss of coverage are largest struggles, legal challenges are more limited to date
- Travel Oregon can utilize survey findings to share challenges industry is facing with policymakers and others while mindful of State Agency role

A full-page photograph of two surfers riding ocean waves. The surfer in the foreground is crouched low on their board, creating a large splash of white water. The surfer in the background is standing more upright. The water is a deep blue-green color, and the sky is not visible. The text "Questions?" is centered in a white, serif font.

Questions?