



Photo: Tiffany Woods

2019 Evaluation of Online Presence and Pricing of Oregon Coast Tour Operators

This report describes results of the third year of an evaluation of the online presence and prices of companies on the Oregon coast that offer tours for kayaking, salmon fishing and whale watching. It also compares those 2019 results with findings from 2017 and 2018. Our aim was to see which businesses appeared in location-specific Google searches and better understand prices for these three types of recreational activities. To view the results for 2017, go to bit.ly/2YYC0BE; for 2018, visit bit.ly/2EARzp7.

DATA COLLECTION METHOD

Full details on how we conducted the searches are in this publication: bit.ly/2sBls6E. Below is a summary:

We designed the data collection process to mirror that of a potential customer's Google search. We conducted searches in an incognito browser using the terms "Salmon Charter Fishing near [Town] Oregon," "Kayaking Tour near [Town] Oregon" and "Whale Watching Tour near [Town] Oregon" for each of 15 coastal towns.

For a result to be considered relevant, it had to link to a business's website or Facebook page and be based in or near the town we searched for. We recorded all relevant listings within the first 12 Google results.

After the initial 12, we documented relevant listings until three consecutive, nonrelevant results appeared, at which point we stopped collecting data.

For example, if the 13th and 14th results were not relevant but the 15th was, then we included the 15th. If we deemed all three to be irrelevant, the search ended there, regardless of whether subsequent results fit the criteria for relevance. We considered results that were prominently displayed in a "featured snippet" box to be relevant, but we did not include them in the initial 12 results.

We noted details on tours and prices for each relevant result. We evaluated hourly rates as well as the price of the most standard tour offered for a single adult (for example, no package deals or demographic discounts).

It's important to recognize that businesses' online marketing and Google's search algorithms may have changed during the course of the three years that we conducted these searches. Additionally, we made some modifications to the data-gathering process in 2018 and 2019.

This is not a definitive list of all guide businesses on the Oregon coast, but it does reflect those that a customer searching online would likely encounter. A list of licensed guides in Oregon is available through the Oregon State Marine Board.

RESULTS FOR 2019

We identified 54 relevant businesses (see Appendix, List A). An additional 13 had to be left out of our pricing analysis for various reasons (see Appendix, List B). Of the 54 relevant results, 40 were salmon fishing charters, six were guided kayaking services, and eight were whale watching operations. Of the 13 excluded results, nine were salmon charters that didn't list their prices. Two were salmon charters that shared identical prices and contact information with other businesses already included in the analysis. Two were guided kayaking services that had primary operations outside of Oregon and only offered guided services at nonstandard rates and trip lengths.

KAYAKING

- Companies only renting kayaks but not offering guided tours were excluded from the analysis.
- We identified six relevant guided kayaking operations. They were in Tillamook, Lincoln City, Depoe Bay, Newport and Gold Beach (Fig. 1). Each town had only one operator except for Newport, which had two.

Depoe Bay, Newport and Gold Beach (Fig. 1). Each town had only one operator except for Newport, which had two.

- Only one of the six offered amenities: thermoses of organic hot apple cider during colder months.
- Four (67%) offered trips that were two-hours long, and two (33%) led excursions that were three hours (Fig. 2).
- Prices for a complete tour ranged from \$40 to \$100 and averaged \$73 (Fig. 3). Price per hour ranged from \$13 to \$50 and averaged \$34.

Fig. 1: Guided kayaking services found online

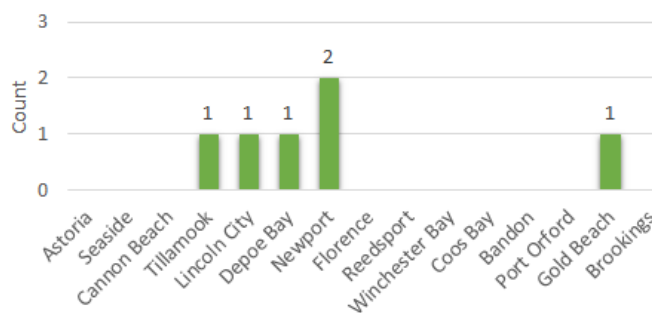


Fig. 2: Guided kayaking standard tour lengths

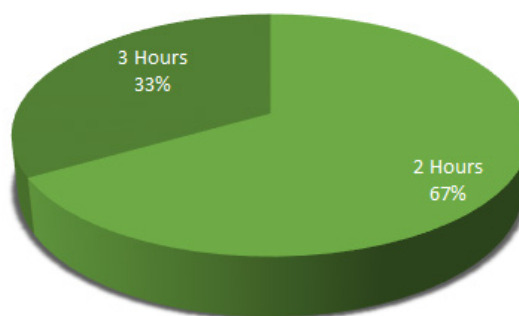


Photo: Justin Myers

Fig. 3: Guided kayaking standard experience rates and rates per hour

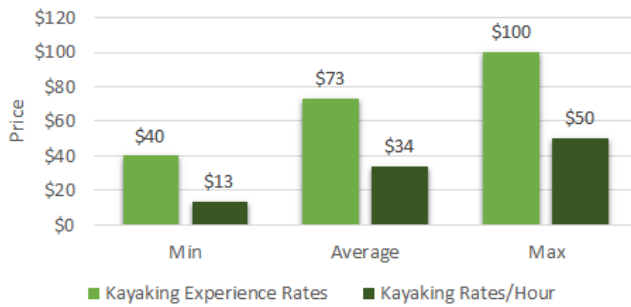
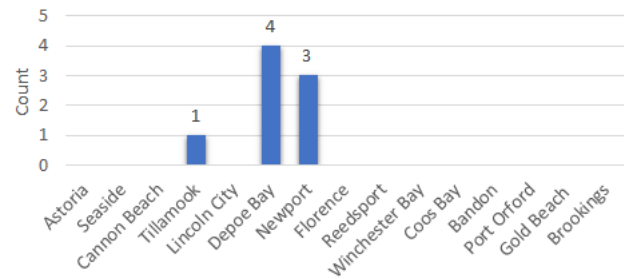


Fig. 4: Whale watching services found online



WHALE WATCHING

- We identified eight relevant whale watching operations: four in Depoe Bay, three in Newport and one in Tillamook. (Fig. 4).
- The majority didn't advertise amenities. The few that did offered heated indoor cabins, blankets, and clothes for cold weather and rain. Half of the tours were 1.5 hours and the other half were two hours.
- The town with the highest average price was Newport at \$44; the lowest was Depoe Bay at \$36 (Fig. 5).
- Prices ranged from \$25 to \$60 and averaged \$40 (Fig. 6). Hourly rates ranged from \$17 to \$30, with an average of \$23.

Fig. 5: Average price of whale watching tours

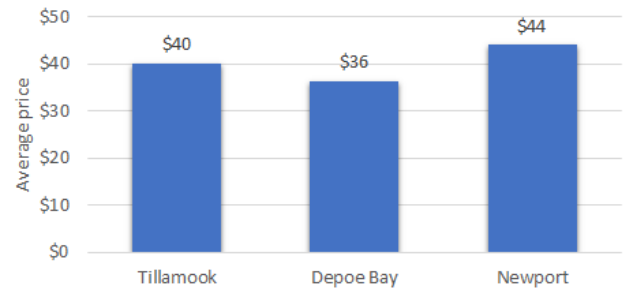


Fig. 6: Whale watching standard experience rates and rates per hour

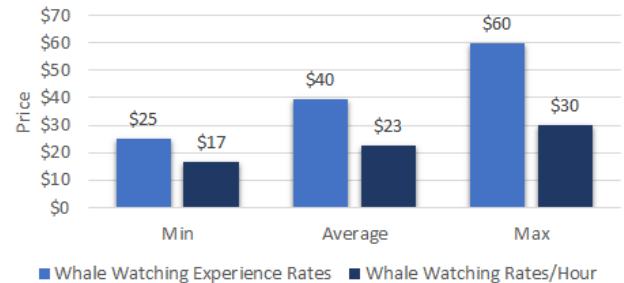


Photo: Leigh Torres under NOAA/NMFS research permit 16111.

SALMON FISHING

To calculate hourly rates, we interpreted “full-day” tours to be eight hours and “half-day” tours to be four hours. We split ranges down the middle (e.g., six to eight hours was evaluated as seven hours). Services that did not provide trip lengths were excluded from price-per-hour calculations, as was a single service that vaguely defined its trip length as a “daytrip.” Some charters only offered a standard price in accordance with a two-person minimum. In such cases, we divided the price by two to calculate it for one adult.

- We detected 49 salmon fishing charters in 12 towns. Gold Beach had the highest count with nine operations (Fig. 7).
- Nine of the charters didn’t list prices.
- The most common trip lengths were what businesses described as “full-day” or eight-hour trips, accounting for 25 of the 49 charters (Fig. 8). Of the remaining 24 charters, half had lengths ranging from a half day to nine to 10 hours. The other half lacked or had unclear information on trip lengths.
- The towns with the highest average prices were Gold Beach at \$263 and Lincoln City at \$225 (Fig. 9). The lowest average prices belonged to Bandon at \$100 and Newport at \$129.
- Prices ranged from \$100 to \$400 and averaged \$193 (Fig. 10). Price per hour ranged from \$15 to \$50, with an average of \$27.
- All of the charters offered fishing tackle, bait and equipment. Some provided lunch and beverages, and some offered to clean, fillet or preserve the catch. One offered to film the customers’ experiences.

Fig. 7: Salmon charters found online

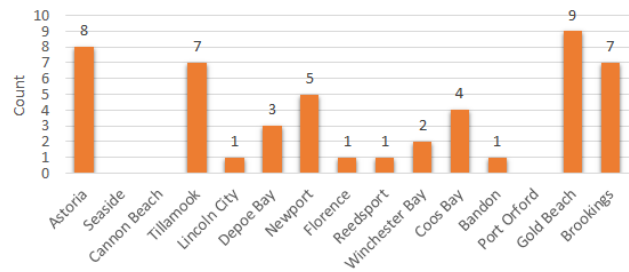


Fig. 8: Standard fishing trip lengths

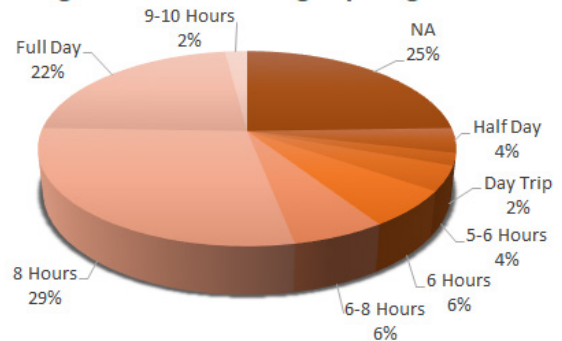


Fig. 9: Average salmon charter price listed online for Oregon coastal towns

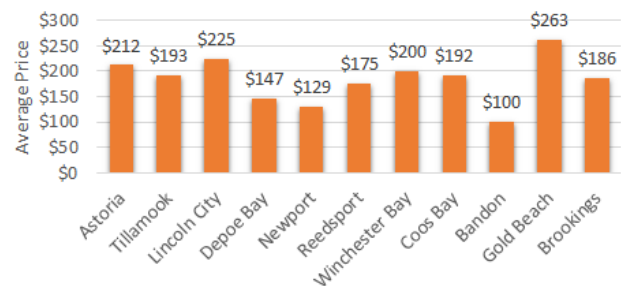
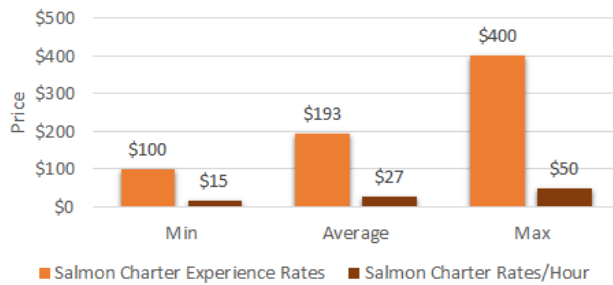


Photo: Susan Dimock

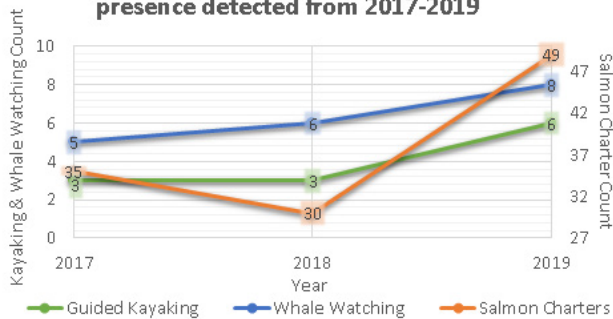
Fig. 10: Salmon charter standard experience rates and rates per hour



COMPARING 2017 AND 2019

- The number of operators offering guided kayaking, whale watching and salmon fishing tours we detected online increased 47% from 43 to 63 (Fig. 11).

Fig. 11: Guided tour operators with online presence detected from 2017-2019



- The number of guided kayaking services we detected doubled from three to six, with one debuting in Depoe Bay and two opening up in Newport. (Fig. 12)
- Prices for kayaking stayed the same in Tillamook and Lincoln City at \$65 and \$99, respectively. Gold Beach decreased from \$90 to \$80 (Fig. 13).
- The number of whale watching services detected increased by 60%, from five to eight (Fig. 14).
- In Depoe Bay and Newport, whale watching tours saw increases in the average price (Fig. 15).
- The number of salmon fishing charters detected increased by 40%, from 35 to 49 (Fig. 16).
- Average prices of salmon fishing charters dropped in six towns (Fig. 17).

- Average prices decreased from \$85 to \$73 for kayaking, increased from \$29 to \$40 for whale watching, and rose from \$189 to \$193 for salmon fishing (Fig. 18).
- Average hourly rates decreased from \$39 to \$34 for kayaking, dropped from \$24 to \$23 for whale watching, and increased from \$24 to \$27 for salmon fishing (Fig. 19).

Fig. 12: Guided kayaking tour operators from 2017-2019

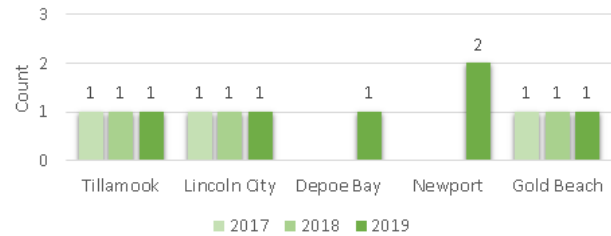


Fig. 13: Average guided kayaking tour price from 2017-2019

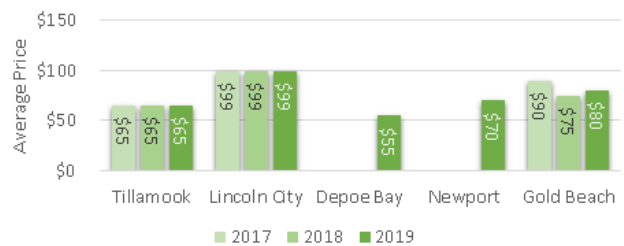


Fig. 14: Whale watching operators from 2017-2019

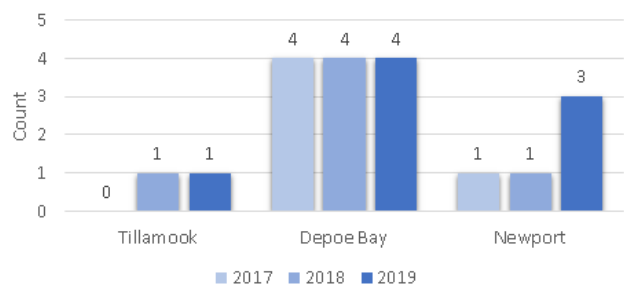
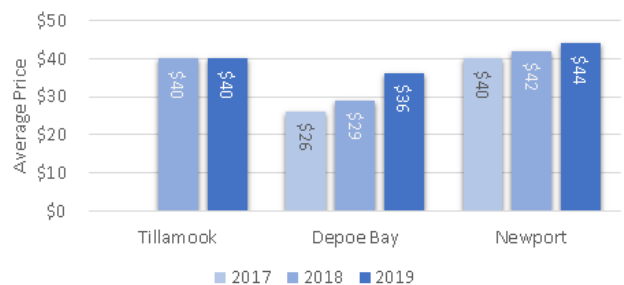


Fig. 15: Average whale watching tour price from 2017-2019



COMPARING 2017 AND 2019 cont.

Fig. 16: Salmon charters detected from 2017-2019

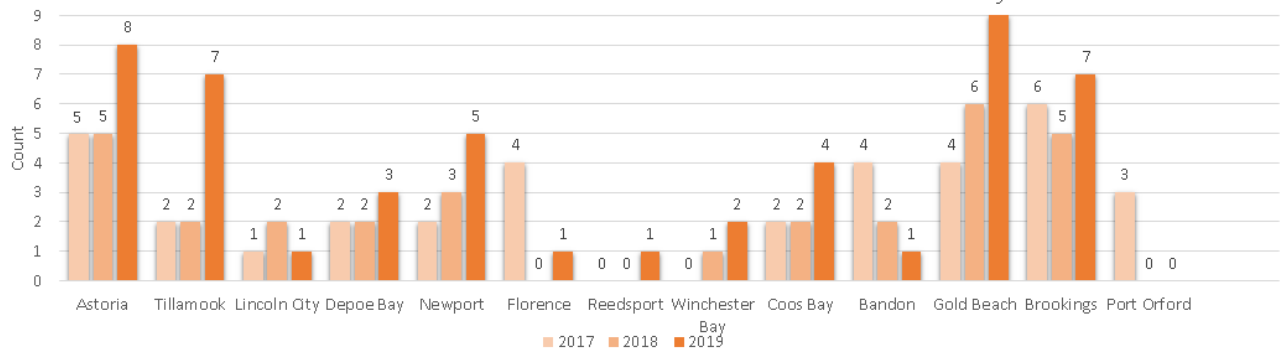


Fig. 17: Average prices of salmon charters from 2017-2019

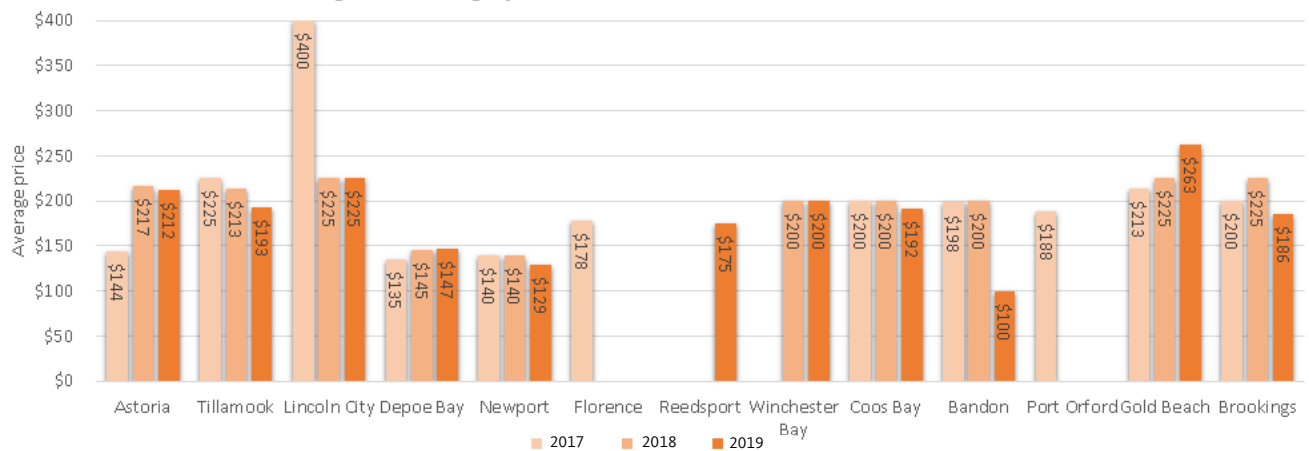


Fig. 18: Average standard experience rates from 2017-2019

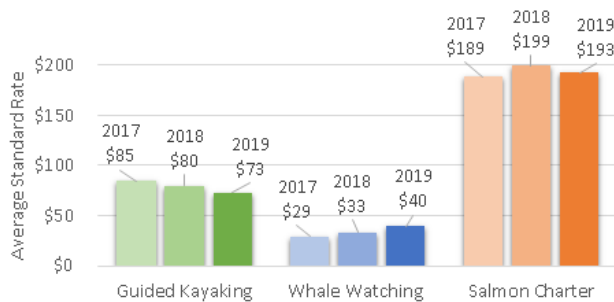


Fig. 19: Average hourly rates from 2017-2019

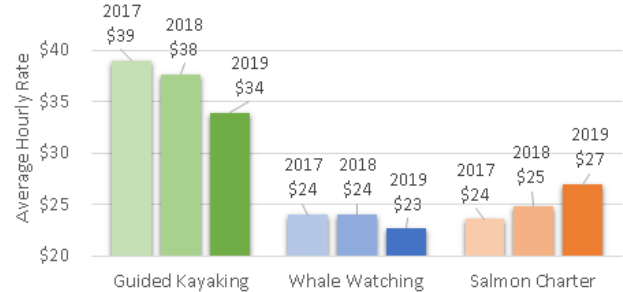


Photo taken by Leigh Torres under NOAA/NMFS research permit 21678.

APPENDIX

List A - Relevant Business Listings (Information reflects active business at time of study)

Salmon Fishing Charters		
Office Base	Business Name	Website
Astoria	Astoria Fishing Charters & Guide Service	astoriafishing.com
Astoria	First Pass Outfitters	firstpassoutfitters.com
Astoria	It's All Good Guide Service	itsallgoodguideservice.com
Astoria	Lance Fisher Fishing	lancefisherfishing.com
Astoria	Total Fisherman Guide Service	totalfisherman.com
Tillamook	Big Dave's Fishing Adventures	bigdavesfishing.com
Tillamook	Firefighters Guide Service	oregoncoastfishingguide.com
Tillamook	Garibaldi Charters Deep Sea Fishing	garibaldicharters.com
Tillamook	Pastime Fishing Adventures/Newport Oregon Fishing Charters (new name)	pastimefishingadventures.com newportoregonfishingcharter.com
Tillamook	Siggi-G Ocean Charters	siggig.com
Lincoln City	Riverhawk Fishing Guide Service	riverhawkguideserviceonline.net
Depoe Bay	Depoe Bay Mariner	depoebaycharters.com
Depoe Bay	Dockside Charters, Inc	docksidedepoebay.com
Depoe Bay	Tradewinds Charters Whale Watching & Fishing	tradewindscharters.com
Newport	Captain's Reel Deep Sea Fishing	captainsreel.com
Newport	Charter Fishing Newport Oregon	charterfishingnewportoregon.com
Newport	Newport Tradewinds	newporttradewinds.com
Newport	NMS Charters	nmscharters.com
Newport	Yaquina Bay Charters LLC	yaquinabaycharters.com
Reedsport	River's End Guide Service	umpquaifishing.com
Winchester Bay	Winchester Bay Charters	winchesterbaycharters.com
Coos Bay	Fishin' Trips Charters	fishintripscharters.com
Coos Bay	Pacific Charter Services	pacificcharterservices.com
Coos Bay	Sharky's Charters	sharkyscharterfishing.com
Bandon	Prowler Charters	prowlercharters.com
Gold Beach	Five Star Charters	5starcharters.com
Gold Beach	Helen's Guide Service	helensguideservice.net
Gold Beach	J. Taylor Guide Services, LLC	fishchinook.com
Gold Beach	John Carl Guide Service	johncarlosguideservice.com
Gold Beach	Memory Makers Guide Service	memorymakersrogueriverguideservice.com
Gold Beach	Rogue River Guide Service	rogueguide.com
Gold Beach	Sportfishing Oregon	sportfishingoregon.com
Gold Beach	Tyson Crumley Guide Service	fishgoldbeach.com
Brookings	Brookings Fishing Charters	brookingsfishing.com
Brookings	Charthouse Sportfishing	charthousesportfish.com
Brookings	Chetco River Fishing	chetcoriverfishing.com
Brookings	Old Dog Sportfishing	olddogsportfishing.com
Brookings	Oregon Fishing Adventure	oregonfishingadventure.com
Brookings	Tidewinds Sportfishing	tidewindsportfishing.com
Brookings	Wild Rivers Fishing	wildriversfishing.com

APPENDIX - List A - Relevant Business Listings cont.

Guided Kayaking		
Office Base	Business Name	Website
Tillamook	Kayak Tillamook	kayaktillamook.com
Lincoln City	Safari Town Surf Shop	safari townsurf.com
Depoe Bay	Whale Research EcoExcursions, LLC	oregonwhales.com
Newport	Oregon Boating Foundation	oregonboatingfoundation.org
Newport	Ossies Surf Shop	ossiessurfshop.com
Gold Beach	South Coast Tours	southcoasttours.net

Whale Watching		
Office Base	Business Name	Website
Tillamook	Garibaldi Charters	garibaldicharters.com
Depoe Bay	Dockside Charters	dockside depoebay.com
Depoe Bay	Tradewinds Charters Whale Watching and Fishing	tradewindscharters.com
Depoe Bay	Whale Research EcoExcursions, LLC	oregonwhales.com
Depoe Bay	Whale's Tail Charters, LLC	whalestail depoebay.com
Newport	Marine Discovery Tours	marinediscoverytours.com
Newport	Newport Tradewinds	newporttradewinds.com
Newport	Yaquina Bay Carters LLC	yaquinabaycharters.com

List B - Excluded Business Listings

Excluded from price analysis due to a lack of online pricing		
Office Base	Business Name	Website
Astoria	Gale Force Guides	galeforceguides.com
Astoria	RBV Adventures	charterfishingastoria.com
Astoria	Skookum Fishing Charters	facebook.com/Skookum-Fishing-Charters
Tillamook	Mulkey's Guide Service	mulkeysguideservice.com
Tillamook	Tillamook Bay Fishing Guides	tillamookfishingguide.com
Florence	Hunting Fish Charters	facebook.com/Huntingfishcharters
Winchester Bay	Casey's Guide Service	caseysguideservice.com
Coos Bay	Betty Kay Charters	bettykaycharters.com
Brookings	Brookings River & Ocean Fishing	chetcoriverfishing.com
Excluded from price analysis due to matching contact and pricing information with a business already being assessed		
Newport	Osprey Fishing Adventures Oregon	ospreyfishingadventuresoregon.com
Gold Beach	Rogue Coast Sport Fishing	roguecoastsportfishing.com
Excluded from price analysis due to having primary operations based out of state		
Astoria	Columbia River Kayaking, LLC	columbiariverkayaking.com
Brookings	Smith River Kayaks	smithriverkayaks.net



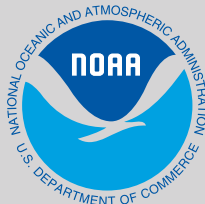
Photo: Justin Myers

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Published by Oregon Sea Grant, 1600 SW Western Blvd., Suite 350, Corvallis, OR 97333 Phone: 541-737-2714
seagrants.oregonstate.edu

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This report was prepared by Oregon Sea Grant under award number NA14OAR4170064 (project number M/A-21) from the National Oceanic and Atmospheric Administration's Sea Grant College Program, U.S. Department of Commerce, and by appropriations made by the Oregon Legislature. The statements, findings, conclusions and recommendations are those of the authors and do not necessarily reflect the views of these funders. ORESU-S-20-001.



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