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## 2018 Evaluation of Pricing and Online Presence of Oregon Coast Tour Operators

**T**his report is for companies along the Oregon coast that provide guided kayaking, salmon fishing, and whale-watching tours. It aims to help them better understand the effectiveness of their online marketing and see how their prices compare to those of their competitors.

The information in this report comes from a replication of a study that was first conducted in 2017 ([bit.ly/2QK6Kof](http://bit.ly/2QK6Kof)). The 2018 study uses the same methodology, with some revisions to the data collection process and adaptations to accommodate Google's changing presentation of search results.

The three main goals of the 2017 and 2018 studies were to:

- identify businesses that offer kayaking, whale watching, and salmon fishing
- document the products and prices offered by these businesses
- measure the efficacy of these businesses' marketing by their presence in Google search results

The 2018 study found the following:

- Thirty salmon charter businesses were found online in 2018 versus 29 in 2017.
- In Astoria, Gold Beach, and Lincoln City, more salmon charter businesses were found in 2018; however, in Brookings, Newport, and Tillamook, fewer businesses were recorded in 2018.

This fluctuation may be because businesses had recently opened/closed, or because they did not appear in the top 12 results and were therefore not recorded.

- Overall, the price of salmon charter tours has slightly increased from 2017. There was one big price drop in Lincoln City, but, generally speaking, prices are on the rise.
- The number of kayak tours per city have stayed the same at three main businesses along the coast. The prices in two of the three businesses have stayed the same, with one \$15 price drop in Gold Beach.
- The number of whale-watching tours offered in Depoe Bay and Newport has remained the same since 2017. One new whale-watching business was recorded in Tillamook in 2018.
- In Depoe Bay and Newport, there was a \$3 and \$2 average price increase, respectively, in whale-watching tours.

This project was designed to serve the Oregon coast, but may potentially be implemented in regions across the country using the same methodology and a modified survey (see Additional Information, page 13.) This can help other communities gauge the same type of information to help advance economic development through sustainable outdoor recreation. Prior to the



*The 2017 study found 29 salmon charter businesses online; the 2018 study found 30. Overall, prices for salmon charter tours have increased slightly or stayed the same. (Photo by Susan Dimock)*

2017 study, data on the number and type of operators, how well businesses marketed themselves online, the services offered by businesses, and the price of services were not readily available.

The design of this project allows it to be redone over the years, following the same methodology. The third round of data collection will take place in 2019.

This research may help with the development of a program to teach operators of guided tours how to better market themselves. This would attract more tourists looking to pay for professionally guided experiences on the coast, thereby increasing jobs and helping local economies.

More information, including publications, videos and training opportunities, can be found on the Sustainable Tourism and Outdoor Recreation program's website at <http://tourism.oregonstate.edu>.

### How the Online Search was Conducted

This project used a Google search process that would mirror a potential customer's online search. A search was conducted using the terms "salmon fishing near [TOWN NAME], Oregon"; "guided kayaking near [TOWN NAME], Oregon"; and "guided whale watching near [TOWN NAME], Oregon" for each of the 15 selected coastal communities.

The towns were chosen because they are the most populous and prominent towns along the Oregon coast and are the most likely to be visited by tourists. Small-

er towns near these 15 are associated with the closest larger town and are indicated on the data collection survey.

Businesses used in the price analyses were those based in one of the 15 towns and their neighboring communities that offered the target product and listed their prices online. Some towns also include nearby communities, such as Coos Bay including North Bend and Charleston. These are listed in the data collection sheet.

Below are the 15 towns (listed north to south), and the smaller communities associated with them:

- Astoria (Navy Heights, Miles Crossing, Warrenton)
- Seaside (Gearhart, Surf Pines)
- Cannon Beach
- Tillamook (Idaville, Bay City, Garibaldi, Barview, Oceanside)
- Lincoln City (Roads End, Three Rocks, Kernville)
- Depoe Bay
- Newport
- Florence (Heceta Bay, Glenada)
- Reedsport (Gardiner)
- Winchester Bay
- Coos Bay (North Bend, Charleston)
- Bandon
- Port Orford
- Gold Beach (Wedderburn)
- Brookings

All of the relevant results within the first 12 Google results were recorded. If relevant results continued beyond the top 12 results, up to 12 results were recorded but data collection stopped after three consecutive, irrelevant results were encountered. Results found in the featured snippets box of a Google search, a box with Google's business suggestions, were also recorded and this difference is indicated.

The data were collected through Google searches in an incognito browser, not signed into an account or

location. This was done to reduce the potential bias of search results based on a specific user. Relevant results include those that link directly to a website for a business that offers the targeted guided experience, regardless of the business's location.

The nature of guided experiences means that the products offered by different companies can vary greatly in the amount of time per experience, how pricing is determined, amenities offered, etc. To standardize the results for a comparison of pricing and products across companies and locations, this research process used a defined product and the price for the most standard tour for a single adult.

## Results

The research resulted in a list (List A) of businesses that met the search criteria and appeared within the top 12 search results. The research resulted in 35 listings for salmon charters (per the research protocol, 25 met the requirements to be included in the price analysis), 3 listings for guided kayak tours, and 6 listings for guided

whale watching tours. It should be noted that this represents only a small fraction of the guide businesses operating on the coast, limited by the scope of this study.

Businesses not used in the price analysis, because they have addresses outside of the 15 towns and/or do not list prices online, are described in Appendix A, List B.

Additionally, charts were created for the geographic results and include all businesses based in the 15 towns; a separate chart was made for businesses not in those 15 areas. The charts describe the location of each business, the rank of the search results, and which targeted communities the result appeared under. These charts show a business's efficacy in online marketing for the communities in which they do business.

Analysis of this data provides the number of companies based in a community that offer the targeted service, in addition to the minimum, average, and maximum prices, as well as the Google search ranking. The data collected from this study is presented in tables and charts to communicate the results.



*Since 2017, the number of kayak tours per city have stayed the same at three main businesses along the coast. The prices in two of the three businesses have stayed the same, with one \$15 price drop in Gold Beach. (Photo by Erik Urdahl)*

## Charter Fishing

Results were gathered by using the search term “salmon fishing near [TOWN NAME], Oregon.” Due to some variation with the tours, a few adjustments had to be made. The tour had to be specifically for a salmon charter, not another type of fish. Additionally, various businesses offered tours of varying length. Eight-hour tours were the most common, so that was the standard used. If a website said “full-day tour,” it was assumed to be eight hours long, and if a range was offered, such as “6–8 hours,” then the longer length was recorded. As a result of these variations, tour prices were adjusted to an hourly rate to allow a direct and fair comparison of prices with a common unit (price/hour/adult).

Businesses offered different amenities, but all provided equipment, bait, and tackle, while some also offered filleting of catch and minor amenities, such as hot coffee or drinking water.

Figure 1 shows the total number of salmon fishing charter businesses within the 15 coastal Oregon communities. A total of 35 salmon fishing charter guides were encountered during the online research survey, but only 30 are within the 15 selected towns.

Figure 2 includes data from List A (businesses used in the price analyses). These include businesses within the 15 targeted coastal communities that list their prices online. Of the 35 encountered salmon charters, 25 met these criteria and are used in the price analyses. This figure demonstrates the average prices for a salmon fishing tour for one person. This chart indicates not an hourly rate, but rather the price for the experience. These experi-

ences were described as being from 6 to 10 hours long. For the purpose of comparison, if a business described a price for two people, that price was divided by two to provide the price for one adult.

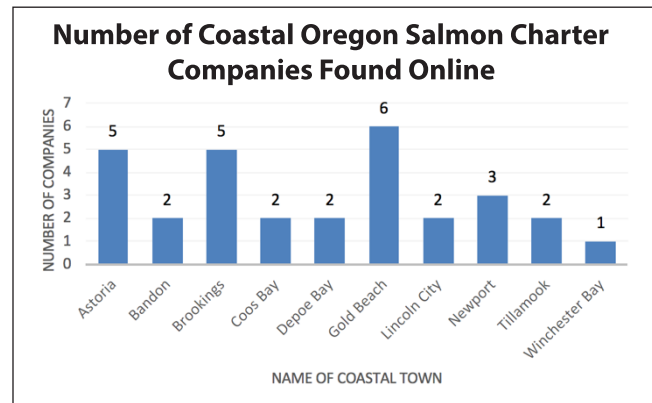


Figure 1. Number of salmon fishing charter guide results in 15 coastal Oregon communities.

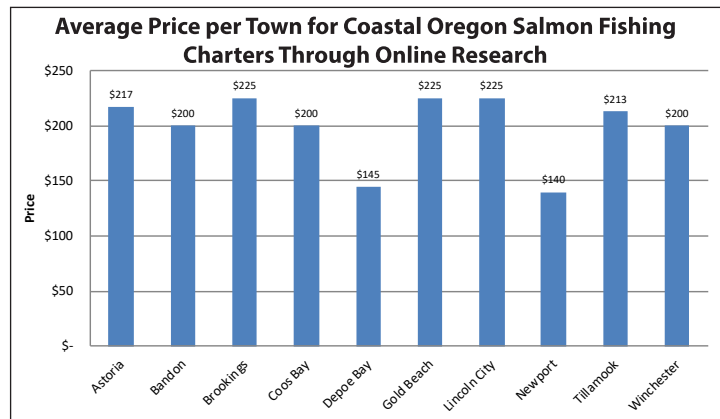


Figure 2. Experience prices of guided salmon fishing trips.

Total Results:	Maximum Overall Price:	Average Overall Price:	Minimum Overall Price:
25	\$400	\$199	\$100

Figure 3. Breakdown of guided salmon charter prices.

Total Results:	Maximum Overall Price:	Average Overall Price:	Minimum Overall Price:
25	\$50/hour	\$24.85/hour	\$12.50/hour

Figure 4. Breakdown of guided salmon charter prices per hour.

**Kayak Tours**

These results were obtained by using the search term “guided kayaking tour near [TOWN NAME], Oregon.” Due to variations in tour lengths, the prices were calculated to include an hourly rate to allow direct comparisons between products (price/hour/adult), in addition to listing the overall prices per experience.

Amenities included kayaks and lifejackets.

Kayak rental companies were not included in these results; rather, only companies that offered guided tours were included.

Figure 5 shows the number of kayak tour guide results; three communities offer such services in the 15 targeted areas. Companies also offered services in multiple communities; however, a full listing of all the locations of provided services was beyond the scope of this project.

A two-hour tour was the most common, but the business in Tillamook offered a 2.5-hour tour. Some of the businesses offer a variety of tours, with varying lengths and types of excursions (ocean vs. river kayaking); the company’s primary tour was chosen for comparisons. By necessity, this was a somewhat subjective selection based on how the company website described each tour.

Total Results:	Maximum Overall Price:	Average Overall Price:	Minimum Overall Price:
3	\$99	\$80	\$65

Figure 7. Breakdown of guided kayak tour prices for tour lengths, as listed on operator websites.

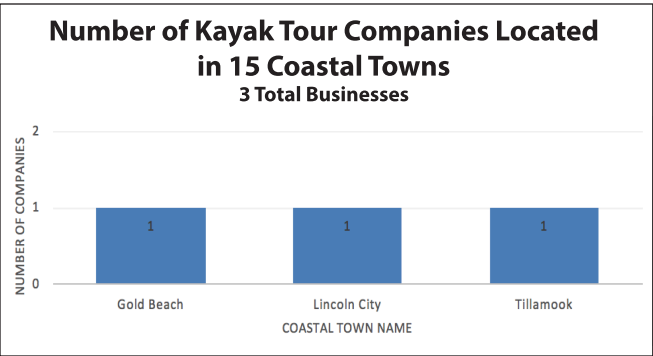


Figure 5. Number of kayak tours in 15 coastal Oregon communities.

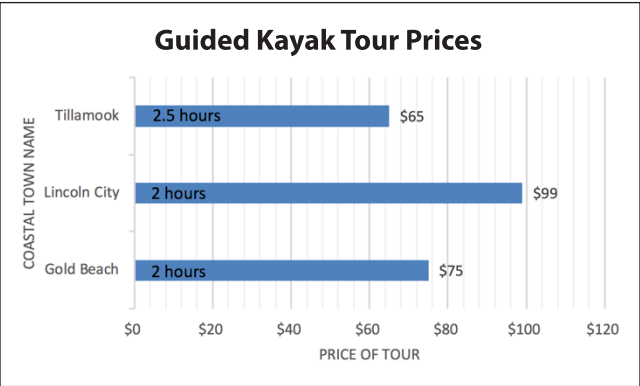


Figure 6. Length and price of guided kayak tours.

Total Results:	Maximum Overall Price:	Average Overall Price:	Minimum Overall Price:
3	\$49.50/hour	\$37.67/hour	\$26/hour

Figure 8. Breakdown of guided kayak tour prices per hour.

Whale-Watching Tours

These results were gathered by using the search term “whale watching tour near [TOWN NAME], Oregon.” The prices were adjusted to include an hourly rate (price/hour/adult).

Amenities were not included in these products.

Figure 9 shows the total number of guided whale-watching tour guide results (six) within the 15 communities; three towns host whale-watching tour companies. Two of these tours (Dockside Charters and Tradewinds Charters) also offer salmon-fishing tours.

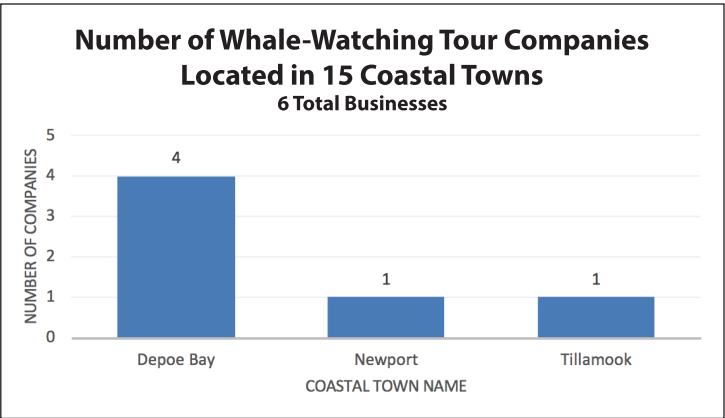


Figure 9. Number of guided whale-watching tour guide results in 15 coastal Oregon communities.

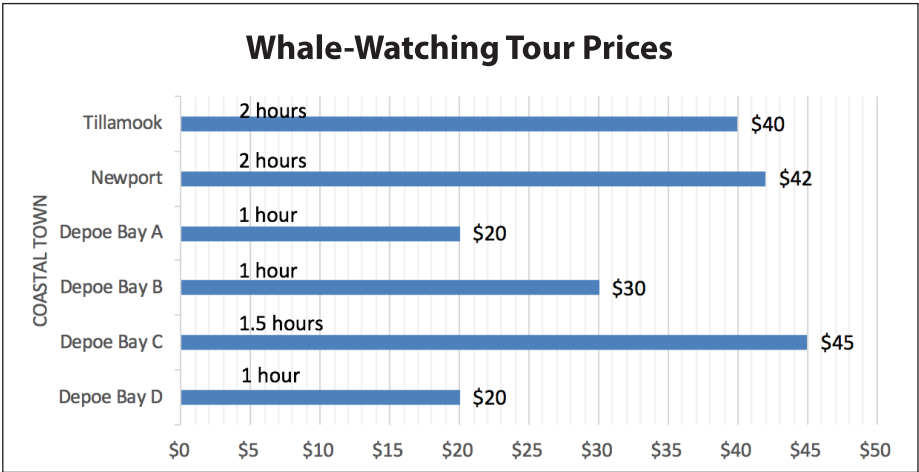


Figure 10. Experience prices of guided whale-watching tours. Price and lengths of tours are as listed on website.

Total Results:	Maximum Overall Price:	Average Overall Price:	Minimum Overall Price:
6	\$45	\$33	\$20

Figure 11. Breakdown of guided whale-watching tours. Price and lengths of tours are as listed online.

Total Results:	Maximum Overall Price:	Average Overall Price:	Minimum Overall Price:
6	\$30/hour	\$24/hour	\$20

Figure 12. Breakdown of guided whale-watching tour prices per hour.

## Comparison of Prices across Products

Figures 13 and 14 present a comparison of the per-person experience price for charter salmon fishing, kayaking, and whale watching.

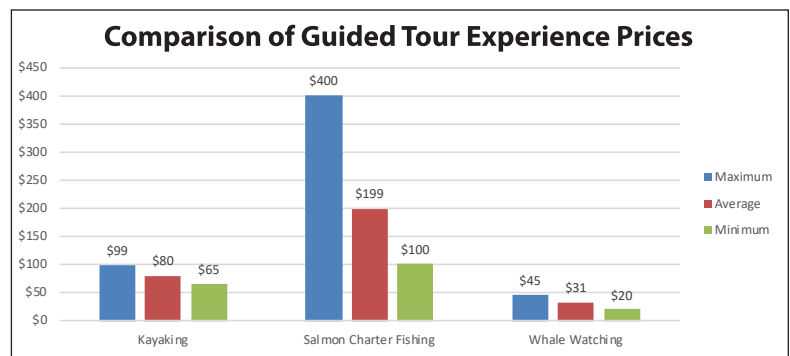


Figure 13. Comparison of guided tour experience prices, as listed on operator's websites.

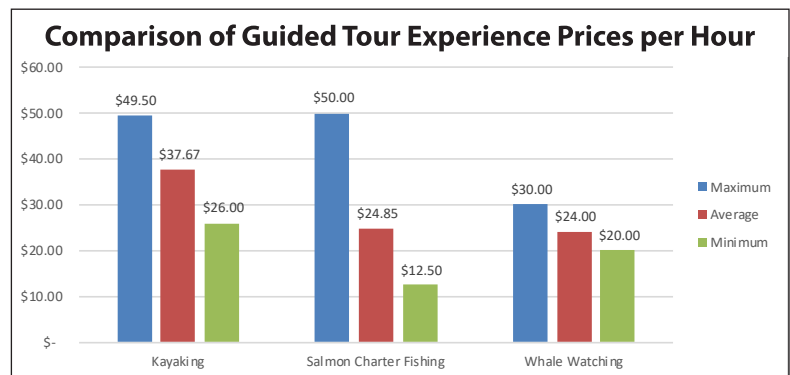


Figure 14. Comparison of guided tour experience prices per hour, as listed on the operator's website.



Since 2017, the number of whale-watching tours offered in Depoe Bay and Newport has remained the same, with one new business in Tillamook that was not recorded in 2017. In Depoe Bay and Newport, there was a \$3 and \$2 average price increase, respectively. (Photo by Rowland Willis)

## Comparisons between 2017 and 2018

The following figures are comparisons between the data collected in 2017 and 2018. The charts that count the number of guided tours include only businesses with registered addresses in one of the 15 communities. The price comparison charts are comprised of data collected

from businesses from List A, those only used during price analyses. Thus, businesses outside of the 15 communities or businesses without prices on their websites were not included. Empty spaces in the graphs indicate that a particular business was not included in 2017 or 2018.

Figures 15 and 16 refer to salmon charter businesses.

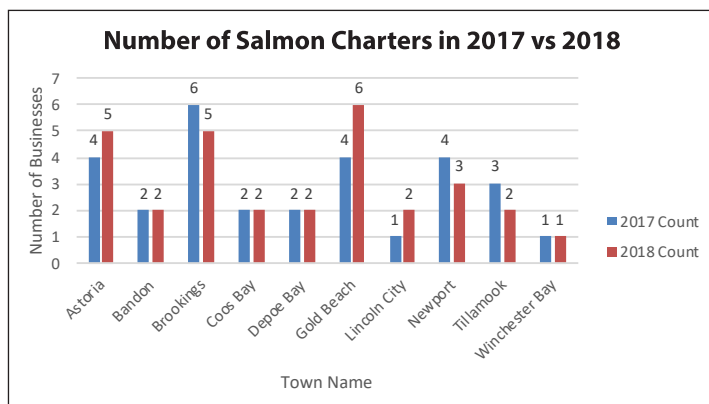


Figure 15. Number of salmon charters in 2017 vs 2018.

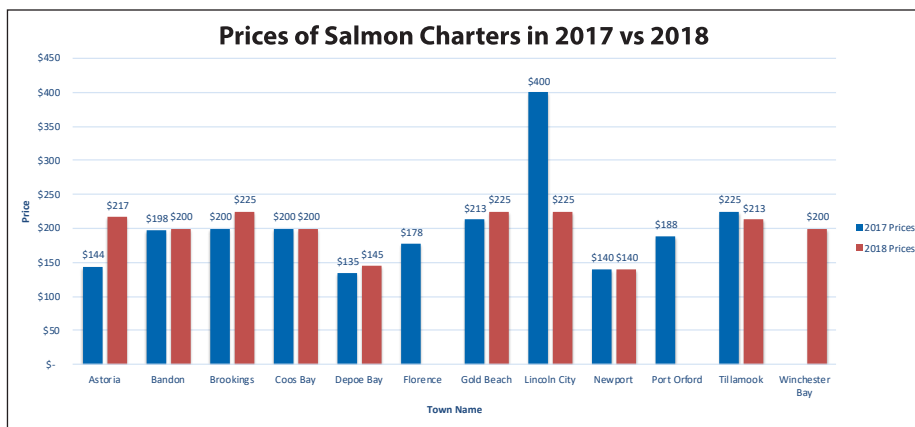


Figure 16. Prices of salmon charters in 2017 vs 2018.

Figures 17 and 18 include information from businesses that offer guided kayak tours.

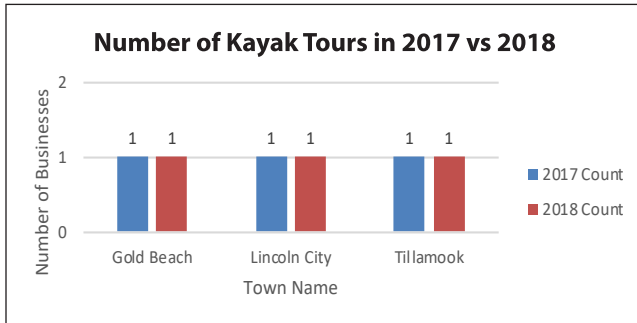


Figure 17. Number of kayak tours in 2017 vs 2018.

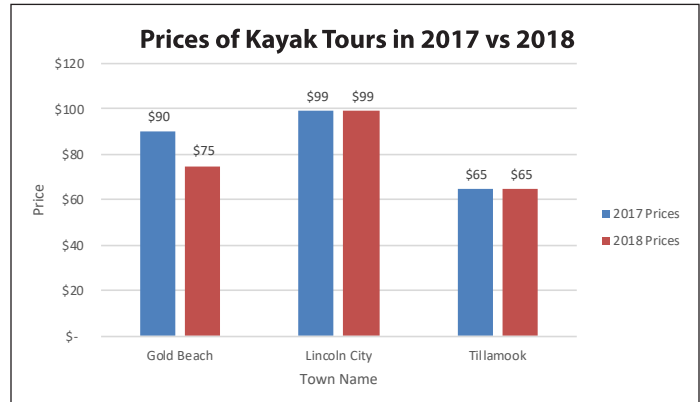


Figure 18. Prices of kayak tours in 2017 vs 2018.

Figures 19 and 20 refer to the whale watching tours offered in the 15 coastal communities.

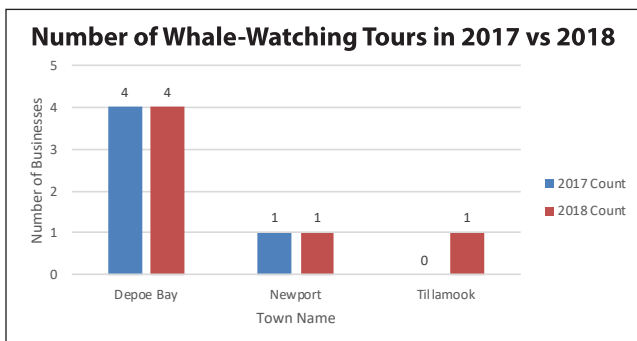


Figure 19. Number of whale watching tours in 2017 vs 2018.

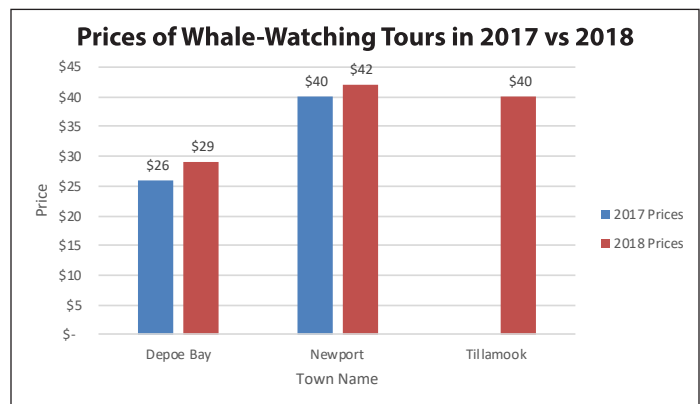


Figure 20. Prices of whale watching tours in 2017 vs 2018.

## Geographic Strength of Online Search Results

Geographic Table 1, 2, 3, and 4 show the results of online searches for the given guided experience by town name used in the search. The colored cells match the town where the business's registered address is. The letter/number combination indicate where in the Google search result the company's website appeared. "F" denotes Google's featured snippets box. "R" denotes a regular search result. The number associated with the letter signifies where the website appeared. For example, Dockside Charters is based in Depoe Bay, and appeared in the search for Depoe Bay (first result in featured snippets box; second regular result) and Lincoln City (ninth regular result). No rank is listed if the search did not return a listing in the top 12.

The businesses used in this data set are not the exact same as the businesses used in the price analyses. All

businesses encountered for all three searched tours in all 15 communities are included here.

The Geographic Results Table is intended to demonstrate a business's online marketing success. A more well-marketed and more frequently visited business website will appear higher in Google's search results. Some businesses appeared in the search results list for 10 of the 15 searched towns; businesses like this have a very strong online presence and are more likely to be contacted by people seeking their products. Furthermore, some businesses did not appear in the search list of the town they are based in. This may indicate that there is high competition and/or that the business is not marketing itself well enough to appear in Google's results. It is important to address the issue of poor marketing, because visitors and tourists will be unable to find a business if it is not as well-marketed as its competing businesses.



*Charter fishing businesses offered different amenities, but all provided equipment, bait, and tackle, while some also offered filleting of catch and minor amenities, such as hot coffee or drinking water. (Photo by Erik Urdahl)*

## Appendix A – Business Listings

### List A: Businesses Used for Price Analyses

Number	Office Base	Business Name	Website
1	Coos Bay	Astoria Fishing Charters and Guide Service	<a href="http://www.astoriafishing.com/">http://www.astoriafishing.com/</a>
2	Brookings	Brookings Fishing Charters	<a href="http://brookingsfishing.com/">http://brookingsfishing.com/</a>
3	Brookings	Brookings River and Ocean Fishing	<a href="http://brookingsfishing.com/">http://brookingsfishing.com/</a>
4	Newport	Captain's Reel Deep Sea Fishing	<a href="http://www.captainsreel.com/">http://www.captainsreel.com/</a>
5	Depoe Bay	Dockside Charters	<a href="http://www.docksidepoebay.com/">http://www.docksidepoebay.com/</a>
6	Tillamook	Firefighters Guide Service	<a href="http://oregoncoastfishingguide.com/">http://oregoncoastfishingguide.com/</a>
7	Astoria	First Pass Outfitters	<a href="http://firstpassoutfitters.com/">http://firstpassoutfitters.com/</a>
8	Bandon	Fish Oregon Guide Service	<a href="http://fishoregon.com/">http://fishoregon.com/</a>
9	Gold Beach	Five Star Charters	<a href="http://5starcharters.com/">http://5starcharters.com/</a>
10	Tillamook (Garibaldi)	Garibaldi Charters	<a href="https://garibaldicharters.com/">https://garibaldicharters.com/</a>
11	Gold Beach	Helen's Guide Service	<a href="http://www.helensguideservice.net/">http://www.helensguideservice.net/</a>
12	Gold Beach	J Taylor Guide Services	<a href="http://fishchinook.com/">http://fishchinook.com/</a>
13	Tillamook	Kayak Tillamook	<a href="https://kayaktillamook.com/content/pages/home">https://kayaktillamook.com/content/pages/home</a>
14	Newport	Marine Discovery Tours	<a href="http://marinediscoverytours.com/">http://marinediscoverytours.com/</a>
15	Brookings	Oregon Fishing Adventure	<a href="http://www.oregonfishingadventure.com/brooking-ocean-fishing.htm">http://www.oregonfishingadventure.com/brooking-ocean-fishing.htm</a>
16	Bandon	Prowler Charters	<a href="https://www.prowlercharters.com/">https://www.prowlercharters.com/</a>
17	Lincoln City	Riverhawk Guide Service	<a href="http://riverhawkguideserviceonline.net/">http://riverhawkguideserviceonline.net/</a>
18	Gold Beach	Rogue River Guide Service	<a href="http://www.rogueguide.com/">http://www.rogueguide.com/</a>
19	Gold Beach	Rogue River Guided Fishing with Tyson Crumley	<a href="http://fishgoldbeach.com/">http://fishgoldbeach.com/</a>
20	Lincoln City	Safari Town Surf	<a href="https://safaritownsurf.com/">https://safaritownsurf.com/</a>
21	Brookings	Salmon King Lodge Guide Service	<a href="http://www.salmonkinglodge.com/OceanSalmon.html">http://www.salmonkinglodge.com/OceanSalmon.html</a>
22	Coos Bay	Sharky's Charters	<a href="https://sharkyscharterfishing.com/">https://sharkyscharterfishing.com/</a>
23	Gold Beach	South Coast Tours	<a href="https://www.southcoasttours.net/">https://www.southcoasttours.net/</a>
24	Gold Beach	Sportfishing Oregon	<a href="http://sportfishingoregon.com/">http://sportfishingoregon.com/</a>
25	Depoe Bay	The Whale's Tail LLC	<a href="https://www.whalestaildepoebay.com/">https://www.whalestaildepoebay.com/</a>
26	Astoria	Total Fisherman	<a href="http://www.totalfisherman.com/">http://www.totalfisherman.com/</a>
27	Depoe Bay	Tradewinds Charters	<a href="https://www.tradewindscharters.com/">https://www.tradewindscharters.com/</a>
28	Depoe Bay	Whale Research Eco Excursions	<a href="http://www.oregonwhales.com/">http://www.oregonwhales.com/</a>
29	Brookings	Wild Rivers Fishing	<a href="http://wildriversfishing.com/">http://wildriversfishing.com/</a>
30	Winchester Bay	Winchester Bay Charters	<a href="https://www.winchesterbaycharters.com/">https://www.winchesterbaycharters.com/</a>
31	Newport	Yaquina Bay Charters	<a href="http://yaquinabaycharters.com/fishingblogs/">http://yaquinabaycharters.com/fishingblogs/</a>

### List B: Businesses Excluded from Price Analyses

Number	Office Base	Business Name	Website
1	Coos Bay (Charleston)	Betty Kay Charters	<a href="http://www.bettykaycharters.com/index.php">http://www.bettykaycharters.com/index.php</a>
2	Roseburg	Casey's Guide Service	<a href="http://caseysguideservice.com/#">http://caseysguideservice.com/#</a>
3	Lincoln City	Coyote Rock	<a href="http://www.coyote-rock.com/">http://www.coyote-rock.com/</a>
4	Astoria (Warrenton)	Gale Force Guides	<a href="http://www.galeforceguides.com/">http://www.galeforceguides.com/</a>
5	Elmira	Grey Ghost Guide Service	<a href="http://greyghostguideservice.com/">http://greyghostguideservice.com/</a>
6	Roseburg	JD Angling Adventures	<a href="http://jd-anglingadventures.com/">http://jd-anglingadventures.com/</a>
7	Astoria	Lance Fisher Fishing	<a href="https://lancefisherfishing.com/locations/astoria/">https://lancefisherfishing.com/locations/astoria/</a>
8	Newport	Newport Tradewinds Deep Sea Fishing	<a href="http://www.newporttradewinds.com/">http://www.newporttradewinds.com/</a>
9	Eugene	O2 Fish Guide Service	<a href="http://www.o2fish.com/">http://www.o2fish.com/</a>
10	Clackamas	Oregon Fishing Guide Bob Rees	<a href="http://www.northwestguides.com/fishing/">http://www.northwestguides.com/fishing/</a>

Office Location	Salmon Charters	Astoria	Bandon	Brookings	Cannon Beach	Coos Bay	Depoe Bay	Florence	Gold Beach	Lincoln City	Newport	Port Orford	Reedsport	Seaside	Tillamook	Winchester Bay
Astoria	Astoria Fishing Charters and Guide Service	1F, 2R			1F, 4R									1F, 6R		
Astoria	First Pass Outfitters	8R														
Astoria	Lance Fisher Fishing	3F, 1R											1R	12R	2R	1R
Astoria	Total Fisherman	7R			6R									4R		
Astoria	Gale Force Guides LLC													3F		
Bandon	Fish Oregon Guide Service		1R	8R					1R							
Bandon	Prowler Charters		9R													
Brookings	Brookings Fishing Charters			3F												
Brookings	Brookings River and Ocean Fishing			2F, 4R												
Brookings	Oregon Fishing Adventure			12R												
Brookings	Salmon King Lodge Guide Service			9R		8R							5R			4R
Brookings	Wild Rivers Fishing		6R	1F, 1R		3R						8R			11R	
Coos Bay	Sharky's Charters					2F, 5R										
Coos Bay	Betty Kay Charters					1F										
Depoe Bay	Dockside Charters						1F, 2R			9R						
Depoe Bay	Tradewinds Charters						2F, 3R			3F						
Gold Beach	Five Star Charters								1F, 6R			9R				
Gold Beach	Helen's Guide Service								2R							
Gold Beach	J Taylor Guide Services								8R							
Gold Beach	Rogue River Guide Service								2F, 4R			7R				
Gold Beach	Rogue River Guided Fishing with Tyson Crumley								3F, 7R							
Gold Beach	Sportfishing Oregon								12R							
Lincoln City	Coyote Rock RV Resort and Marina									7R						
Lincoln City	Riverhawk Guide Service									4R						
Newport	Captain's Reel Deep Sea Fishing										3F, 9R					
Newport	Newport Tradewinds Deep Sea Fishing										2F					
Newport	Yaquina Bay Charters										1F, 5R				8R	
Tillamook	Firefighters Guide Service														2F	
Tillamook	Garibaldi Charters					3F										
Winchester Bay	Winchester Bay Charters												2F			2F, 11R

Geographic Table 1. The quality and breadth of the online presence of guided salmon-fishing operators.

Office Location	Kayak Tours	Astoria	Bandon	Brookings	Cannon Beach	Coos Bay	Depoe Bay	Florence	Gold Beach	Lincoln City	Newport	Port Orford	Reedsport	Seaside	Tillamook	Winchester Bay
Gold Beach	South Coast Tours		2F, 1R	1F, 1R	12R	1R	3F		1R			1R	5R	9R		4R
Lincoln City	Safari Town Surf						8R			1F, 1R	5R			8R		
Tillamook	Kayak Tillamook	8R			1R	9R					8R			10R	1R	

Geographic Table 2. The quality and breadth of the online presence of guided kayak tour operators.

Office Location	Whale Watching Tours	Astoria	Bandon	Brookings	Cannon Beach	Coos Bay	Depoe Bay	Florence	Gold Beach	Lincoln City	Newport	Port Orford	Reedsport	Seaside	Tillamook	Winchester Bay
Depoe Bay	The Whale's Tail LLC		11R		11R	7R	3F, 5R	8R		8R	5R		8R	3F, 10R	11R	6R
Depoe Bay	Whale Research Eco Excursions					11R	2F, 8R			3F	10R				3F	
Depoe Bay	Dockside Charters		6R	8R	7R	4R	4R			2F, 6R	7R			6R		
Depoe Bay	Tradewinds Charters					12R	1F, 1R			1F, 7R	8R		3F	2F, 12R		
Newport	Marine Discovery Tours	8R		12R		10R	9R	10R		10R	2R		1F, 7R	1F, 9R		7R
Tillamook	Garibaldi Charters														1F, 10R	

Geographic Table 3. The quality and breadth of the online presence of guided whale watching tour operators.

Office Location	Salmon Charters	Astoria	Bandon	Brookings	Cannon Beach	Coos Bay	Depoe Bay	Florence	Gold Beach	Lincoln City	Newport	Port Orford	Reedsport	Seaside	Tillamook	Winchester Bay
Elmira	Grey Ghost Guide Service							12R								
Eugene	O2 Fish							5R								
Clackamas	Oregon Fishing Guide Bob Rees														1F	
Roseburg	Jack Duncan Angling Adventures															
	Casey's Guide Service							4R								5R

Geographic Table 4. The online presence of businesses that are not listed in the 15 coastal Oregon communities, but appear to offer services in the region.

## Additional Information

- To find this and related publications from Oregon State University Extension's Sustainable Tourism Program (including one that describes a low-cost method for conducting a similar study), visit [tourism.oregonstate.edu](http://tourism.oregonstate.edu)
- For more information about Oregon Sea Grant, the publisher of this study, visit [seagrants.oregonstate.edu](http://seagrants.oregonstate.edu)

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