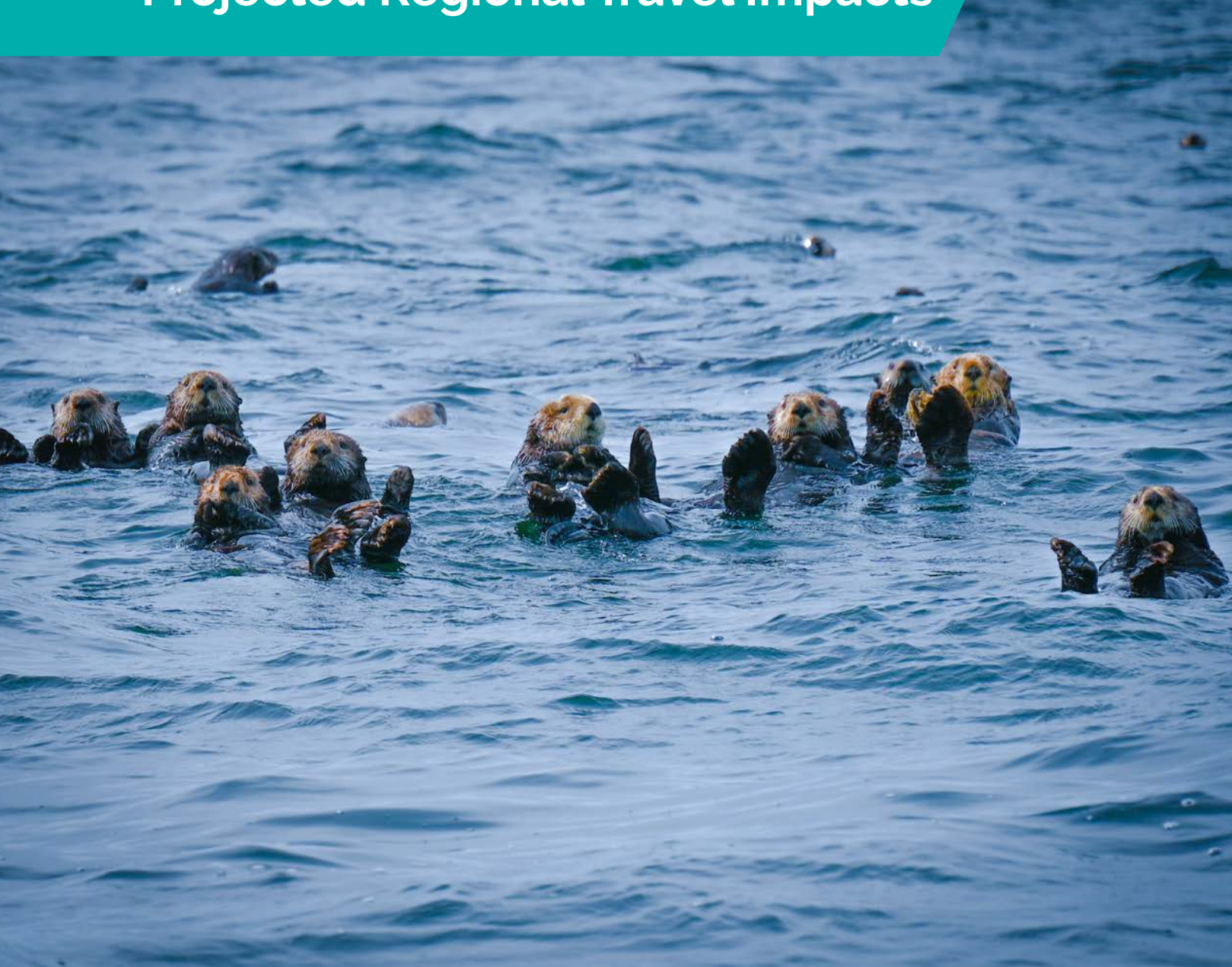


Sea Otter Reintroduction to the Southern Oregon Coast

Projected Regional Travel Impacts



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Projected Regional Travel Impacts

March 31, 2023

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Executive Summary

Elakha Alliance is a non-profit organization whose mission is to "restore a healthy population of sea otters to the Oregon Coast and to thereby make Oregon's marine and coastal ecosystem more robust and resilient." The organization and other key stakeholders have commissioned several studies to understand the implications and outcomes of reintroducing sea otters. Among them, a scientific feasibility study was conducted to assess potential reintroduction sites, identify source populations, and review other important factors to achieve a successful reintroduction (Tinker et al., 2022). A follow-up economic study was then commissioned to examine the broad economic impacts of sea otter reintroduction (The Research Group LLC, 2022).

The research by Dean Runyan Associates (DRA) presented in this report provides an additional economic analysis that focuses more specifically on the potential impact that sea otter reintroduction may have on the travel and tourism industries along the Southern Oregon Coast. We present our findings in five primary sections:

- Methodology
- Southern Oregon Coast Visitor Industry Overview
- Comparable Destinations with Sea Otter or Other Marine Wildlife Viewing Services and Their Regional Economies
- Projected Economic Impacts of Sea Otter Reintroduction
- Sustainability and Wildlife Viewing Guidelines

Throughout this report, the "travel industry" refers to economic activity associated with travel and tourism and is generally defined as being comprised by these sectors: accommodations; food and beverage; arts, entertainment; and recreation; transportation; and retail industries. Of note, travel is considered an export-oriented industry because money spent by travelers on goods or services comes from outside the region, generating revenues that would not otherwise appear in the local economy. Export-oriented industries are essential for small communities because they grow economies rather than circulate existing resources.

Methodology

Our methodology for this research utilized existing data from public and private sources as well as new data collected through interviews, surveys, and an analysis of mobile device geolocation patterns.

To estimate the economic impacts of travel and tourism to the Southern Oregon Coast and comparable coastal destinations, DRA employed the company's proprietary Regional Travel Impact Model (RTIM). The RTIM models each accommodation type (hotel/motel/STVR, private home, second home, camping, and day) individually, allowing us to segment the economic contributions of various categories of visitors. We also used the U.S. Cluster Mapping Project to evaluate Industry employment clusters in the Southern Oregon Coast and Comparable Destinations. The Project's algorithm defines cluster categories that consider the entire U.S. economy and provides a location quotient ranking the specialization of each region's industry cluster compared to other regional clusters throughout the country.

To evaluate recent travel trends and perception of the Southern Oregon Coast, DRA partnered with Destination Analysts (DA), a market research firm specializing in travel and tourism. DA surveyed 822 recent and potential travelers to the region between October 28 and November 9, 2022. Included were 301 who had visited the Southern Oregon Coast in the past 5 years ('recent visitors'), 121 who had visited more than 5 years before the survey fielding dates ('lapsed visitors'), and 400 respondents who had never visited the region ('non-visitor'). Specific travel patterns to and within the region were also measured using cell phone geolocation data from Near, a data intelligence company that tracks movements of GPS signals. Travel patterns in Coos Bay, Brookings, Bandon, Gold Beach, and Port Orford, as well as Cape Blanco State Park—a site with the potential for ideal sea otter viewing— were evaluated for calendar year 2021. Only devices from outside its 50-mile home radius staying within the city or park limits for at least 30 minutes, but no longer than 30 days, were included in the dataset.

DRA also conducted interviews with the Convention & Visitors Bureaus representing each of the Comparable Destinations to understand the value of wildlife viewing to how they promote their destinations. Additionally, we conducted extensive Internet research to gather an inventory of the businesses and services that cater to oceanic wildlife viewing in both the Southern Oregon Coast and Comparable Destinations.

Each of the 39 businesses identified in the above step were then contacted by e-mail or phone. Business owners or managers were asked to complete a digital survey asking about business operations, annual revenue, and experience providing wildlife viewing tours. We collected surveys from 11 businesses and while the sample was small, it represents all Comparable Destinations.

To estimate the economic impact that sea otter reintroduction could generate to the travel and tourism industries along the Southern Oregon Coast, we focused on two paths for revenue increases: increased visitation and increased usage of wildlife viewing services. To project increased tourism expenditures to the region, we first considered the visitor behaviors and intentions as determined by the Destination Analysts survey. Applying the proportions of past leisure visitors with a desire for visiting a destination with wildlife viewing activities and who are highly interested in sea otters, we identified the target audience to which we assigned a factor for estimating likely new visitation. Average visitor expenditures for Coos and Curry counties as reported in our *Oregon Travel Impacts: 2003-2021* report were then applied to calculate the projected economic impact of these new travelers. To estimate the impact of reintroduction on the regional businesses that currently cater to wildlife viewing, we utilized employment and payroll data for the scenic and sightseeing transportation industry (NAICS 487) in Coos and Curry Counties and ran several scenarios by which sea otters could increase usage of tours conducted in the region. Results from one of the intermediate scenarios were chosen for the impacts estimation based both on quantitative and qualitative assessments.

Finally, to help understand the potential impact visitor recreation can have on sea otters, DRA conducted interviews with two conservationist experts. Heather Barrett is the founder of Sea Otter Savvy, a non-profit agency that fosters wildlife-viewing awareness and stewardship along the Central California coast. Jessica Fujii is the Manager of the Monterey Bay Aquarium's Sea Otter Program, which is committed to the rescue, rehabilitation, and ongoing research of California's sea otter populations.

Southern Oregon Coast

In this report, we defined the Southern Oregon Coast as the coastal region spanning Coos County and Curry County, including the cities of Coos Bay, Bandon, Port Orford, Gold Beach, and Brookings. Of these cities, Port Orford and Coos Bay are being considered by The Elakha Alliance as potential sites for reintroducing sea otters (Tinker et al., 2022).

DRA estimated the annual economic impact of travel to the Southern Oregon Coast in the 2021 *Economic Impact Report for the State of Oregon* as \$385.7 million, approximately \$228 million in Coos County and \$157 million in Curry County. Travel-related spending along the Southern Oregon Coast has grown by 2% each year since 2001, approximately 70% of the growth rate for Oregon's travel industry as a whole (2.9% avg. annual growth since 2003).

Table 1. Travel Impacts of the Southern Oregon Coast

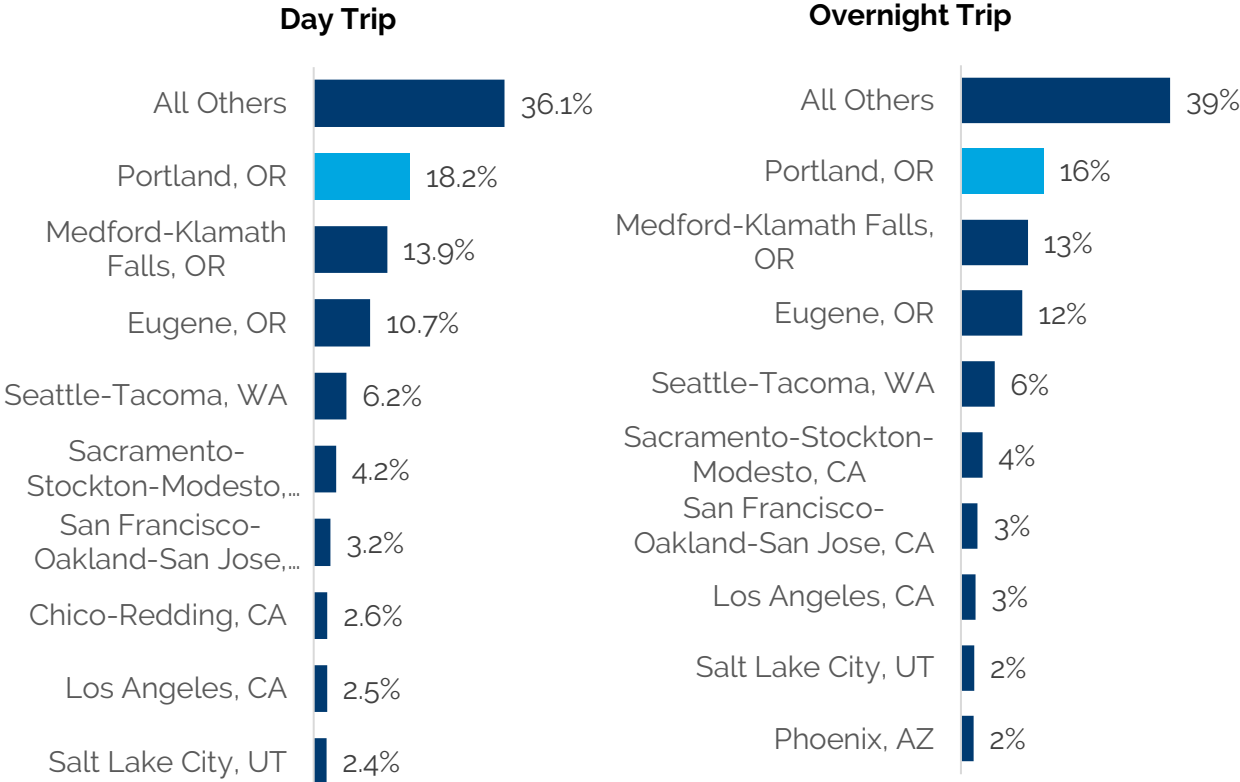
	2001	2017	2018	2019	2020	2021	Avg. Annual % Change	
							2001-2019	2001-2021
Spending (\$Mil)								
Total (Current \$)	252	403.6	416.1	431.5	296.3	385.7	2.9%	2.0%
Earnings (\$Mil)								
Earnings (Current \$)	72.9	130.5	138.7	147.8	139.5	163.2	3.8%	3.9%
Employment (Jobs)								
Employment	4,763	5,330	5,434	5,562	5,007	5,465	0.8%	0.7%
Tax Revenue (\$Mil)								
Total (Current \$)	7.8	14.4	14.9	15.5	13.4	16.2	3.7%	3.5%
Local	1.5	2.1	2.2	2.2	2.2	2.8	1.9%	3.0%
State	6.3	12.2	12.7	13.3	11.2	13.4	4.0%	3.7%

Note: Southern Oregon Coast defined as Coos County and Curry County

According to Near data from 2021, the top origin markets for both overnight and day visitation to the Southern Oregon Coast are Portland, Medford-Klamath, and Eugene, with other top markets located in western U.S. states (Figure 1).

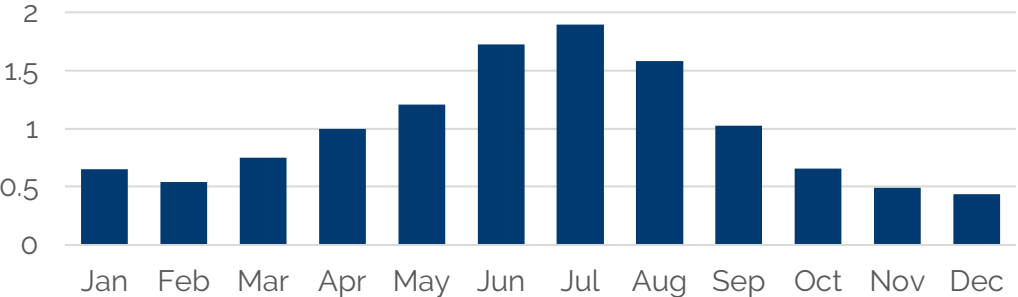
The region is visited for both overnight and day travel, with the seasonality of day travel heavily skewed toward summer. The number of visitors on an average day in July was almost double the average number of visitors for the rest of the year and more than four times the number of visitors in December. The majority of day visitation occurred on Fridays, Saturdays, and Sundays.

Figure 1. Top Markets



Source: Dean Runyan Associates; NEAR, 2021

Figure 2. Seasonality of Day Visitation



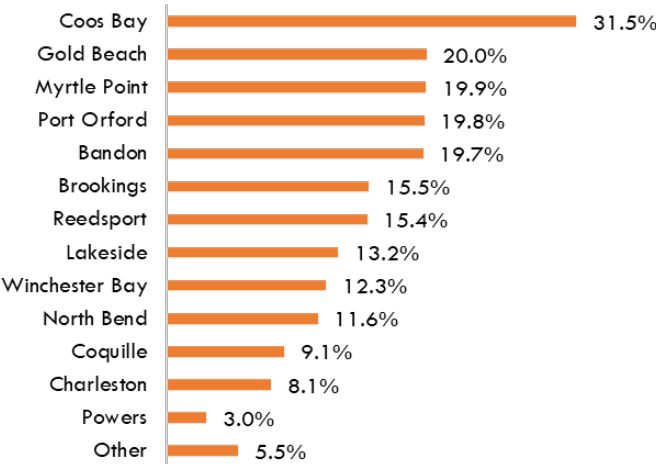
Source: Dean Runyan Associates; NEAR, 2021

Sea Otter Viewing on the Southern Oregon Coast

To evaluate recent traveler behaviors and perceptions of the Southern Oregon Coast, market research firm Destination Analysts facilitated a survey of both past and potential visitors. In their survey, they also included questions that helped inform how the presence of sea otters in the future may impact a visitor’s decision to travel to the region.

Half of recent visitors' last trip to the Southern Oregon Coast took place in the past two years (49.9%), with timing tending to cluster around the spring and summer months. Recent visitors were most likely to have gone to Coos Bay (31.5%), followed by Gold Beach (20.0%), Myrtle Point (19.9%), Port Orford (19.8%), and Bandon (19.7%) (Figure 3).

Figure 3. Southern Oregon Coast Cities Visited



Source: Destination Analysts

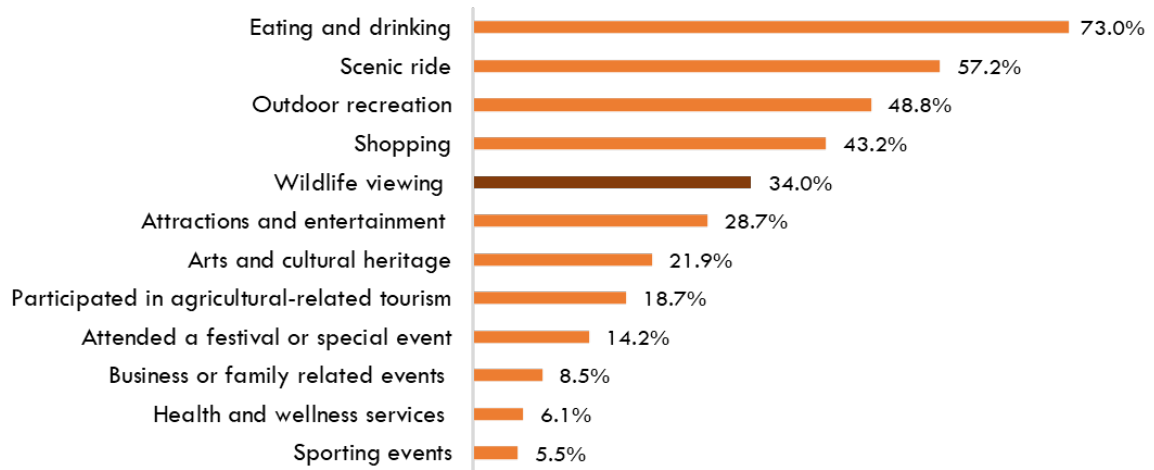
Trips to the Southern Oregon Coast averaged 4.1 days and 3.6 nights, with travel parties spending an average of \$559.28 per day during their stays (Table 2). One third (34%) of recent visitors participated in a wildlife viewing activity on their most recent trip (Figure 4), spending an average of \$207 on wildlife viewing activities.

Table 2. Average Daily Trip Spend by Party

Category	Average Daily Spend
Lodging/Accommodations	\$156.92
Restaurants/dining out	\$104.40
Rental car	\$67.52
Shopping	\$66.11
Entertainment/attractions	\$52.58
Gasoline	\$51.55
Outdoor recreation activities	\$49.07
Ground transportation	\$11.16
Total	\$559.28

Source: Destination Analysts

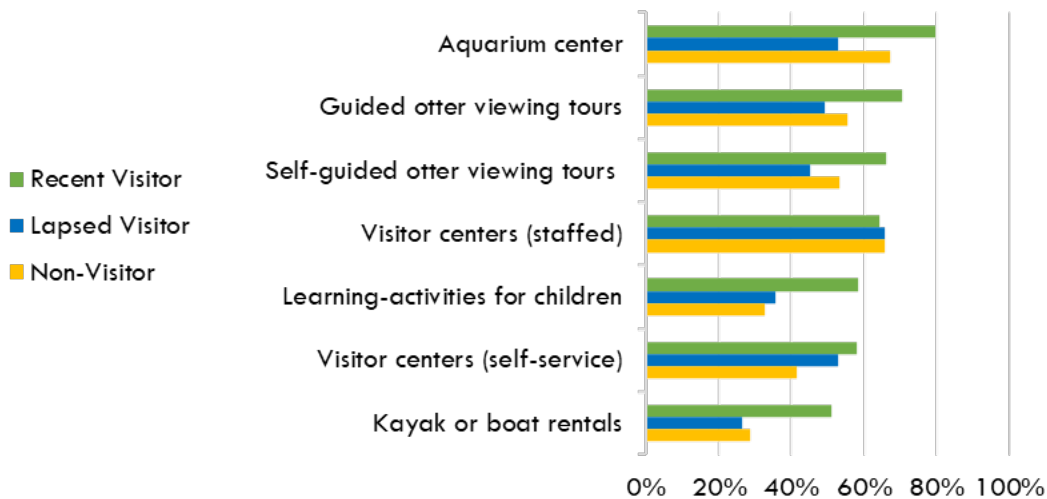
Figure 4. Activities Participated in on Most Recent Southern Oregon Coast Trip



Source: Destination Analysts

When respondents were asked to imagine that sea otters had been reintroduced to the region prior to their most recent trip and to indicate how likely they would have been to visit the harbor to see the animals, more than half responded, "extremely likely," and over a quarter answered, "somewhat likely". The most popular reasons to visit the harbor included "to engage in a family-friendly activity" (31%), "to learn about sea otters in general" (30%), and "to learn about the marine wildlife on the Southern Oregon Coast" (30%). When asked about the importance of sea otter-related businesses or services when visiting the Southern Oregon Coast, respondents indicated that the availability of an aquarium is the most important, followed by staffed visitor centers, and guided otter-viewing tours (Figure 5).

Figure 5. Important Services for Sea Otter Activities



Source: Destination Analysts

Comparable Destinations

DRA identified five coastal destinations in the Western U.S. (referred to as “comparable destinations” in the remainder of the report) that attract visitors interested in wildlife viewing (Figure 6). The criteria used to select comparable destinations included the presence of oceanic wildlife, the presence of commercial activities servicing the viewing of wildlife in and near the ocean, and proximity to larger cities with established visitor activity. Our research focused on evaluating the availability of businesses and services related to wildlife viewing or appreciation within these communities, as well as how the regional destination marketing organizations (DMOs) leverage the presence of marine wildlife to promote travel and tourism within their destination.

Figure 6. Comparable Destinations



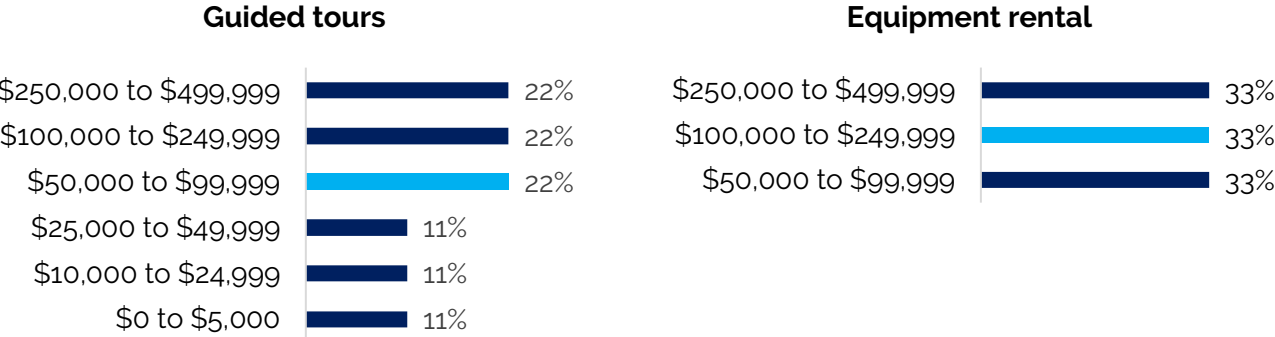
Among the comparable destinations, Sitka, Monterey, and Morro Bay all have established sea otter populations. Newport offers a sea otter exhibit in the Oregon Coast Aquarium, a popular attraction in the area. Port Angeles does not have a resident sea otter population, but there are other types of marine wildlife including orcas, minke, gray, and humpback whales that can be viewed by boat or from the shore. Sea otters are present approximately 40 miles west of Port Angeles in Pillar Point County Park and Cape Flattery.

All five comparable destination DMO's promote wildlife viewing in their marketing initiatives, and all but Port Angeles promote sea otters. Four of the five rated wildlife viewing in general as an important factor that attracts visitors, rating it a "5" (on a five-point scale) in terms of drawing travelers to their destination, with three of the four destinations that feature sea otter populations also rating their value as a visitor draw as a "5". Respondents reported "images" as the most popular form of wildlife viewing promotion followed by "wildlife viewing guidelines", "educational content", and "video".

DRA also utilized DMO websites and other Internet sources to compile a comprehensive list of businesses and services related to wildlife tourism in the comparable destinations and potential reintroduction sites. Wildlife viewing tours constitute the largest business category, with most businesses using motorized boats for their services. Still, approximately a quarter of businesses utilize non-motorized boats such as kayaks, canoes, and stand-up paddleboards (SUPs), and two operators facilitate hiking tours while one facilitates a biking tour with a marine wildlife viewing component. Only a few tour operators offer a sea otter-specific tour, but sea otters are often mentioned in the description of wildlife that might be viewed during a given trip.

Of the 11 businesses who completed our survey, 78% offer tours all year—152 on average in 2019. The most common tour size is six passengers, with prices ranging from \$20 to \$995 (\$152 average across all destinations).

Figure 7. Revenue Generated by Tours or Equipment Rental (2019)

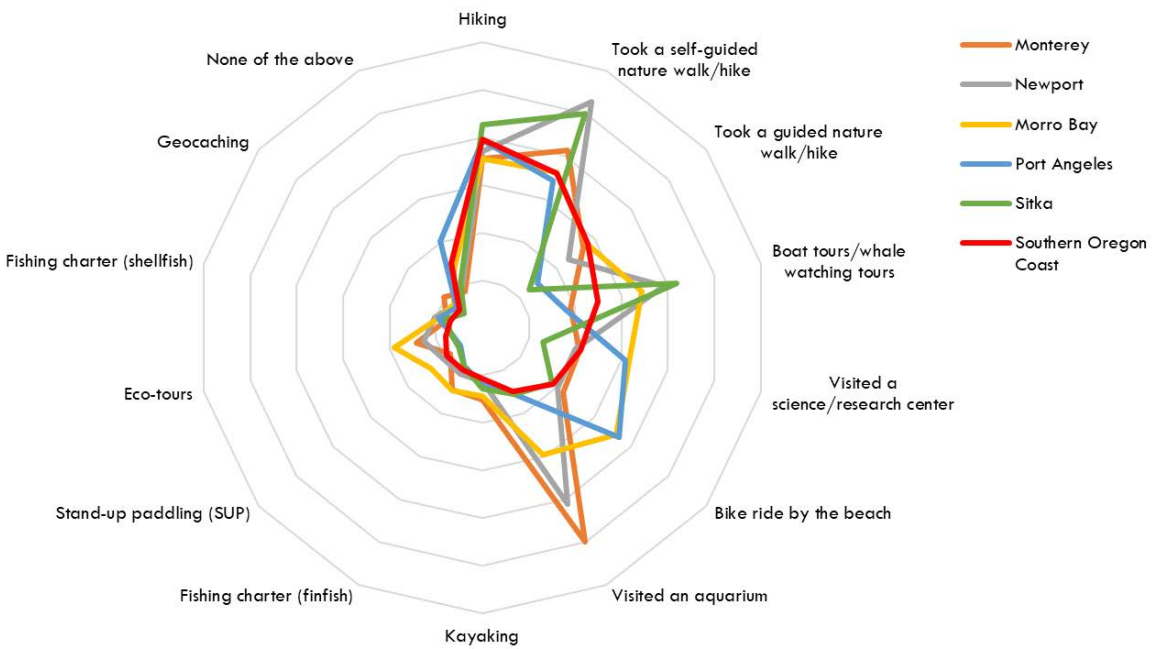


Source: Dean Runyan Associates Business Survey

Seventy-three percent of respondents rated the typical customer's level of interest in sea otters, 73% 5 out of 5, with 73% also indicating that sea otters impact the demand for tours and equipment rental positively. All but one of the businesses provide wildlife viewing guidelines through verbal instruction during their tours, while half also provide printed materials.

The Destination Analysts' survey also included questions about wildlife viewing in the comparable destinations. As shown in Figure 8, past visitors to each destination engaged in related activities to varying degrees, with Newport indexing most highly for self-guided nature walks & hikes, Sitka indexing most highly for boat tours & whale watching tours, and Monterey indexing most highly for visiting an aquarium.

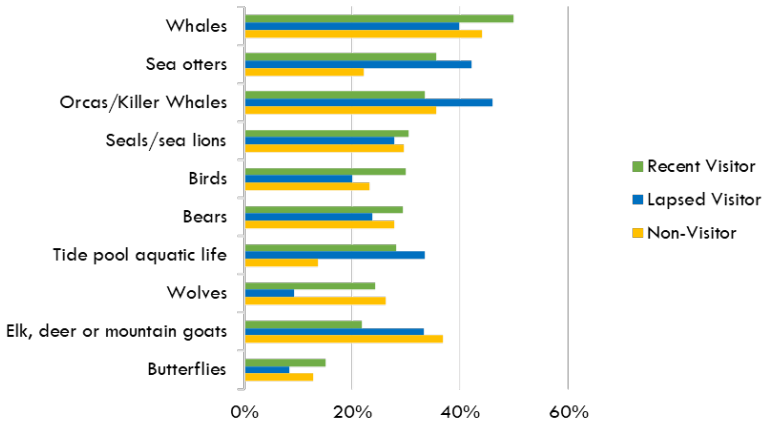
Figure 8. Activities Participated in on Most Recent Trip



Source: Destination Analysts

Respondents were also asked to rank their interest in viewing various types of wildlife when considering a trip to the Pacific Northwest. Sea otters were listed third of ten, behind whales and orcas, among Southern Oregon's recent and lapsed visitors (Figure 9).

Figure 9. Top Three Wildlife Types of Interest for A PNW Trip



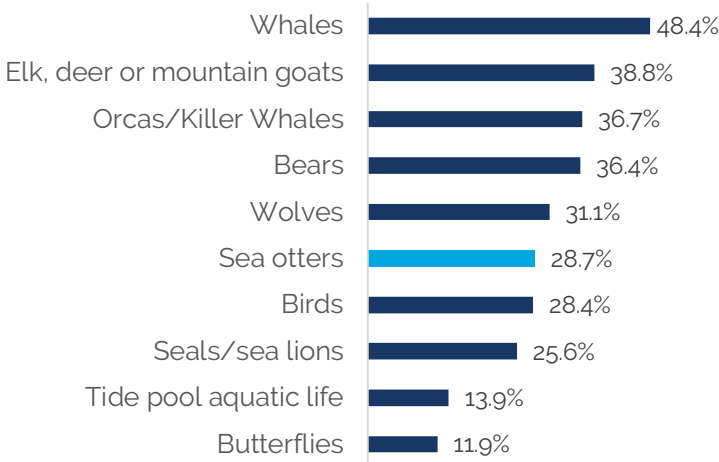
Source: Destination Analysts

Economic Impact

Our approach to estimating the economic impact of sea otter reintroduction focused on the impact that a newly established population would have on drawing additional visitors to the region, as well as how existing wildlife viewing and educational services may benefit from increased usage by visitors and locals alike.

As outlined in the methodology section, we estimated revenue increases attributable to new visitors by identifying the population of past visitors with a high degree of interest in both viewing wildlife and in sea otters as a species (Figure 10). We then calculated their expected rate of growth based on visitor volumes to comparable destinations, as well as previous research conducted on the impacts of sea otter population expansion in California's Santa Barbara and Ventura counties (Loomis, 2005). Applying average visitor expenditures data from our Regional Travel Impacts Model for Coos and Curry Counties to this additional visitor base yielded over \$3.4 million in expected revenue.

Figure 10. "Wildlife Viewers" Rating of Top 3 Species



Source: Destination Analysts

Our calculations of increased revenue for current businesses serving wildlife viewing along the Southern Oregon Coast considered payroll and receipts data for the scenic and sightseeing transportation industry (NAICS 487) in Coos and Curry counties as well as operational data from the tour operator survey, including average number of tours and average people on each tour. Based on several scenarios for potential increases in service usage by both visitors and locals that could be attributable to reintroduction, we calculated an additional 1.1% in new revenue to the area.

Given these two potential revenue sources, we estimate that **the Southern Oregon Coast could realize approximately \$3.5 million in increased spending** once a sea otter population is established. This projection would amount to a 1% increase in travel-related spending to the region, a figure that aligns with the research by Loomis.

Role of Wildlife Viewing and Appreciation in the Travel Industry

In addition to the economic value that wildlife viewing can provide to a community, our research indicated that proper management of wildlife tourism is critical to achieving sustainable outcomes. To better understand this aspect of wildlife tourism, DRA conducted two informational interviews with experts in the field of sea otter behavior, Heather Barrett of Sea Otter Savvy and Jessica Fujii of the Monterey Bay Aquarium.

Key learnings from our interview with Ms. Barrett included the level of negative impact that recreational activity could have on sea otters' health and habituation. Sea Otter Savvy estimated that otters in Morro Bay are disturbed an average of six times during a 12-hour period and that 85% of disturbances are caused by recreational activity, typically non-motorized boats. Ms. Barrett shared that guidelines offered to businesses and visitors engaged in wildlife tourism can dramatically benefit the social ecosystem in otters' ocean habitats. Sea Otter Savvy has a variety of educational materials on their website, <https://www.seaottersavvy.org/>. Ms. Barrett also suggested that the National Oceanic and Atmospheric Association (NOAA) is a credible source for such guidelines.

In our interview with Ms. Fujii, she acknowledged there are both potential positive and negative impacts to sea otter reintroduction. Sea otters have a generally positive impact on the marine ecosystem in that they consume sea urchins and thus help kelp forests thrive, however their considerable appetites lead to a reduction in the population of benthic species (such as clams, crabs, and urchins)--in turn impacting both commercial and recreational fishing. Sea otters can also be considered a nuisance by some visitors and boat owners, particularly after they have become habituated to humans. Ms. Fujii shared that along California's Central Coast, the Monterey Bay Aquarium and California Department of Fish and Wildlife work collaboratively to facilitate problematic interventions with otters, a model we recommend be considered should sea otters be reintroduced to the Oregon coast.



Photo Credit: Erik McLean via Pexels

Introduction

Sea otters are a keystone species currently absent from Oregon's coastal ecosystem. As a keystone species, sea otters are known to affect their environment profoundly, even with a relatively small population. Given that sea otters consume benthic kelp-grazing species such as sea urchins, crabs, and clams, their presence in an ecosystem leads to thriving kelp forests. Kelp forests have several known benefits to marine ecosystems, including providing shelter and nutrients, leading to abundance and biodiversity in nearshore waters. The Monterey Bay Aquarium (MBA) refers to sea otters as "aquatic environmentalists" because of their ability to revitalize "urchin barrens," which are regions of nearshore waters with uncontrolled populations of kelp-grazing species.

Research has demonstrated that sea otters can impact the environment and local economies. This study aimed to estimate how reintroducing sea otters to the Southern Oregon Coast could impact travel and tourism within the region. For this report, we defined the Southern Oregon Coast as the combined region of Coos and Curry County. Our research considered two potential reintroduction sites in the region: Coos Bay and Port Orford.

Table 3. Sea Otter Reintroduction Sites of Interest

Reintroduction site	City	County
Coos Bay	Coos Bay	Coos
Simpson Reef, Cape Arago	Coos Bay	Coos
Blanco Reef, Orford Reef, and Redfish Rocks	Port Orford	Curry

Source: Elakha Alliance



Photo credit: Stephen Pierce via Pexels

Methodology

Travel and Industry Analysis

Regional Travel Impact Model (RTIM)

To estimate the economic impacts of travel and tourism to the Southern Oregon Coast and comparable coastal destinations, DRA employed the company's proprietary Regional Travel Impact Model (RTIM). The RTIM models each *accommodation* type (hotel/motel/STVR, private home, second home, camping, and day) individually, allowing us to segment the economic contributions of various categories of visitors. Findings on travel-generated earnings and employment are derived from the relationship between business income and employee expenses and average wages for job types within those industries.

Trade-Oriented Industry Clusters

Industry employment of the Southern Oregon Coast and comparable destinations was reported using US Cluster Mapping Project data. The research team from Harvard Business School, MIT Sloan, and Temple Fox School of Business used the latest census and industry data to develop an algorithm that defines cluster categories covering the entire US economy. This standardization allows us to compare industry employment of any region in the US. Strong clusters are defined as those where the location quotient (the cluster's relative employment specialization) puts them into the leading 25% of regions across the US in their respective cluster category. Observing the top trade-oriented industries gives us a high-level view of the economic drivers for the Southern Oregon Coast and comparable destinations.

Visitation Trends on the Southern Oregon Coast

Geolocation Data (Near)

Near is a data intelligence company that utilizes cell phone geolocation data to uncover insights related to consumer behavior. Using cell phone geolocation data purchased from Near, we present various trends associated with travelers to the Southern Oregon Coast. For this analysis section, we review five cities and one park in the region where sea otter viewing could occur. A device must be outside its 50-mile home radius and remain within the city or park limits for at least 30 minutes but no longer than 30 days to be included in the following dataset. All devices fitting these specifications in 2021 were considered potential day or overnight visitors. If the device remained in the target area for less than 12 hours, then we conclude it belongs to a day visitor. Otherwise, we assume it belongs to an overnight visitor.

Visitor Survey

DRA partnered with Destination Analysts to commission a traveler survey of potential visitors. The survey aimed to understand the sentiment around the Southern Oregon Coast and wildlife viewing and estimate the potential proportion of visitors who would be highly motivated to visit the Southern Oregon Coast if sea otters are reintroduced. Destination Analysts facilitated an online survey using a panel of adult US travelers that targeted past visitors and non-visitors to the Southern Oregon Coast. Travelers were defined as adults who have taken at least one leisure trip (50 miles or more from home) in the past two years and are not residents of the Southern Oregon Coast. The sample included 301 visitors who had traveled to the Southern Oregon Coast in the past 5 years, 121 lapsed visitors (any travelers

who visited the Southern Oregon Coast more than 5 years before the survey fielding dates), and 400 non-visitors (any traveler who had never visited the Southern Oregon Coast). A total of 822 completed surveys were collected between October 28 and November 9, 2022. Insights from the visitor survey were integrated throughout this report. A summary of Destination Analysts' findings is presented in the Appendix.

Wildlife/Sea Otter Viewing Industry

Comparable Destinations

DRA researched five coastal destinations to evaluate how sea otters might impact wildlife tourism. These destinations will be referred to collectively as “comparable destinations” throughout the report. The destinations researched for this study include Monterey Bay and Morro Bay, California; Newport, Oregon; Port Angeles, Washington; and Sitka, Alaska. These destinations were selected based on their reputation for marine wildlife and proximity to the Southern Oregon Coast.

Convention and Visitor Bureau (CVB) and Business Questionnaire

DRA contacted each comparable destination to ask how wildlife viewing and sea otters impact visitation and marketing of the destination. Information from CVBs was collected through a digital questionnaire. To evaluate the businesses and services that contribute to wildlife tourism, we made an inventory of the businesses established in the two potential reintroduction sites (Coos Bay and Port Orford) and the five comparable destinations. After determining that guided tours constitute many businesses in comparable destinations, DRA contacted business owners to ask about their business operations (revenue, seasonality, etc.) and their perspective on viewing sea otters. Approximately a quarter of wildlife viewing tour businesses across all five comparable destinations completed an online questionnaire.

Economic Impact of Sea Otter Viewing

To estimate the economic impact that sea otter reintroduction could provide to tourism along the Southern Oregon Coast, we focused on two paths for revenue increases: increased visitation and increased usage of wildlife viewing services.

To project increased tourism expenditures to the region, we first considered the visitor behaviors and intentions as determined by the Destination Analysts survey. Applying the proportions of past leisure visitors with a desire for visiting a destination with wildlife viewing activities and who are highly interested in sea otters, we created a target audience to which we assigned a factor for estimating likely new visitation. Average visitor expenditures for Coos and Curry counties as reported in our *Oregon Travel Impacts: 2003-2021* report were then applied to calculate the projected economic impact of these new travelers.

To estimate the impact of reintroduction on the regional businesses that currently cater to wildlife viewing, we utilized employment and payroll data for the scenic and sightseeing transportation industry (NAICS 487) in Coos and Curry Counties and ran several scenarios by which sea otters could increase usage of tours conducted in the region. Results from one of the intermediate scenarios were chosen for the impacts estimation based both on quantitative and qualitative assessments.

Wildlife Viewing Guidelines

The potential economic and environmental impacts of reintroducing sea otters depend on successful reintroduction and supporting the sea otter population once it is established. To understand the potential impact visitor recreation can have on sea otters, DRA conducted interviews with conservationist experts. We first spoke with the conservation organization Sea Otter Savvy, a non-profit organization based out of Moss Landing, California, whose mission is to reduce human-caused disturbance of sea otters and educate the public through community outreach. The second interview was with the manager of Monterey Bay Aquarium's Sea Otter Program, Jessica Fujii. The Sea Otter Program is involved with rescue, rehabilitation, and ongoing research of California's sea otter populations.



Photo credit: Patrick Boyer via Pexels

Defining the Travel Industry

The "travel industry" refers to economic activity associated with travel and tourism. The travel industry comprises accommodation; food and beverage; arts, entertainment, and recreation; transportation; and retail industries. The money spent by a traveler on goods or services provided by these industries is considered "travel-related spending."

The following industries constitute the core or primary segments of the travel industry:

- Accommodations (hotels, motels, resorts, campgrounds, B&Bs, private lodging)
- Food and beverage (restaurants, fast food, lounges)
- Transportation (air, taxi, rental car, bus tour)
- Art, entertainment, and recreation (golf, music/theater, charter fishing, museums)
- Retail (shopping, food/convenience stores, gifts)

Travel-related spending is important to the Southern Oregon Coast because each dollar a traveler spends constitutes an injection of "outside money," expanding the local economy. In contrast, a dollar spent by a resident of the Southern Oregon Coast within their local community only circulates within the local economy. Given that travel-related spending involves an injection of money into a local economy, the travel industry is considered an "export-oriented industry."

Export-oriented industries are particularly important to the economy of the Southern Oregon Coast because the injection of "outside money" often supports various industries within the region that are more oriented to serving residents. Examples of important export-oriented businesses other than the travel industry in the Southern Oregon Coast include fishing and fishing products, water transportation, forestry, wood products, and downstream metal products.

Other businesses throughout the Southern Oregon Coast economy benefit indirectly from travel-related expenditures. Mostly, these businesses provide goods and services to the businesses in the core or primary segments of the travel industry that provide products or services directly to travelers.

Examples of businesses that benefit indirectly from travel include:

- Businesses services (legal, accounting, marketing)
- Construction and maintenance
- Financial services and real estate
- Service-related goods (wholesale food, linens, service equipment)

In addition, ancillary businesses and organizations on the Southern Oregon Coast are almost entirely dependent upon travel and tourism through their services. However, services from these businesses are generally not purchased directly by visitors during their travel. Purchasing of services takes place in conjunction with travel activity but not directly by the traveler, as with non-ancillary travel activity.

Examples of these businesses include:

- Travel agencies primarily provide services to residents traveling to other destinations throughout Oregon, the nation, and other countries.

- Tour operators bundle travel goods and services for visitors and resident travelers.
- Ticketing and reservation services provide services to visitors and resident travelers.
- CVBs provide numerous services to visitors and resident businesses that depend on visitor spending.
- Convention and trade show organizers and businesses provide logistical and other support for conventions and trade shows dependent on visitor activity.



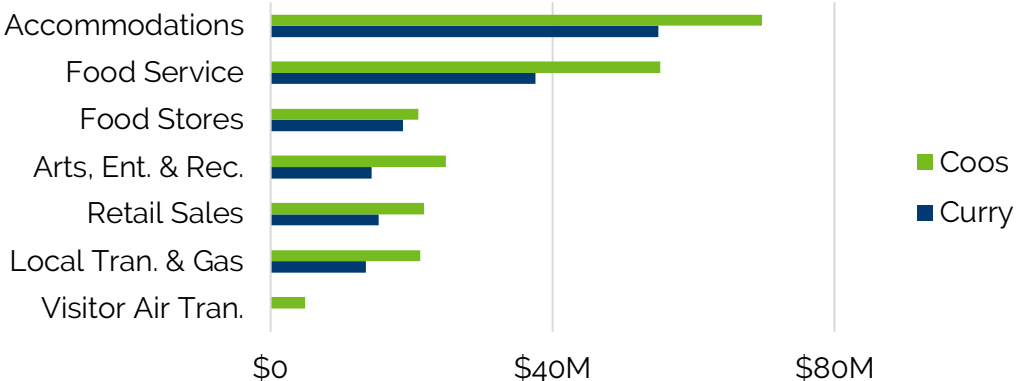
Photo credit: Robert Bailey; Newport

Southern Oregon Coast

Travel Impacts

The Southern Oregon Coast was defined as Curry County and Coos County for this report. The primary visitor groups to the Southern Oregon Coast were residents of Northern California, nearby cities in Southern and Central Oregon, and the Portland metropolitan area. DRA estimated the annual economic impact of travel to Curry County and Coos County in the 2021 Economic Impact Report for Oregon. As shown in the graph below, the size of the travel industry was roughly comparable between the two counties. Most travel spending was related to lodging costs and food services (eating out).

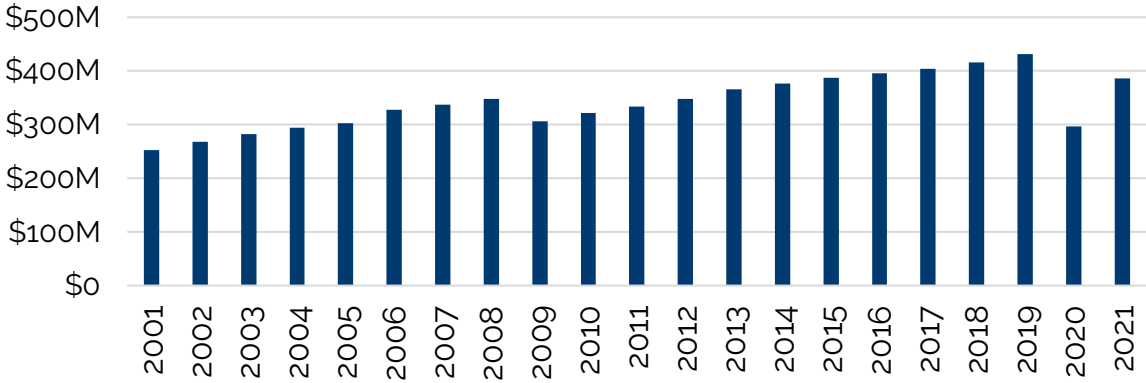
Figure 11. Travel-Related Spending 2021



Source: Dean Runyan Associates

Spending by travelers to the Southern Oregon Coast has grown steadily over the last 20 years. Despite the effect of the COVID-19 pandemic on travel to the region in 2020 and 2021, the travel industry grew on average by 2% every year between 2001 and 2021.

Figure 12. Historical Travel-Related Spending



Source: Dean Runyan Associates

The table below shows the annual growth in the Southern Oregon Coast travel industry since 2001. Taxes associated with travel spending grew at an average rate of 3.5% per year, and local taxes had significant growth in 2021, increasing from \$2.2 million to \$2.8 million.

Table 4. Southern Oregon Coast Travel Impacts

	2001	2017	2018	2019	2020	2021	Avg. Annual % Ch.	
							2001-19	2001-21
Spending (\$Mil)								
Total (Current \$)	252	403.6	416.1	431.5	296.3	385.7	2.90%	2.00%
Earnings (\$Mil)								
Earnings (Current \$)	72.9	130.5	138.7	147.8	139.5	163.2	3.80%	3.90%
Employment (Jobs)								
Employment	4,763	5,330	5,434	5,562	5,007	5,465	0.80%	0.70%
Tax Revenue (\$Mil)								
Total (Current \$)	7.8	14.4	14.9	15.5	13.4	16.2	3.70%	3.50%
Local	1.5	2.1	2.2	2.2	2.2	2.8	1.90%	3.00%
State	6.3	12.2	12.7	13.3	11.2	13.4	4.00%	3.70%

Source: Dean Runyan Associates

Visitation Trends

This section of the report presents trends in visitation to the Southern Oregon Coast using geolocation data and the most recent economic impact data on the Southern Oregon Coast travel industry, including the lodging, spending, tax, and employment impacts that can be attributed to overnight visitors. Understanding the broad economic impacts of travel to the Southern Oregon Coast is a necessary first step before focusing on the role of wildlife viewing and the potential impact of sea otter reintroduction to the region.

Using cell phone geolocation data purchased from Near, we observed various trends associated with travelers to the Southern Oregon Coast. We observed trends for five cities within the Southern Oregon Coast: Coos Bay, Brookings, Bandon, Gold Beach, and Port Orford. We also included a breakout of visitation trends for Cape Blanco State Park, as this site will provide ideal sea otter viewing. Table 5 presents the list of locations studied and their respective resident populations.

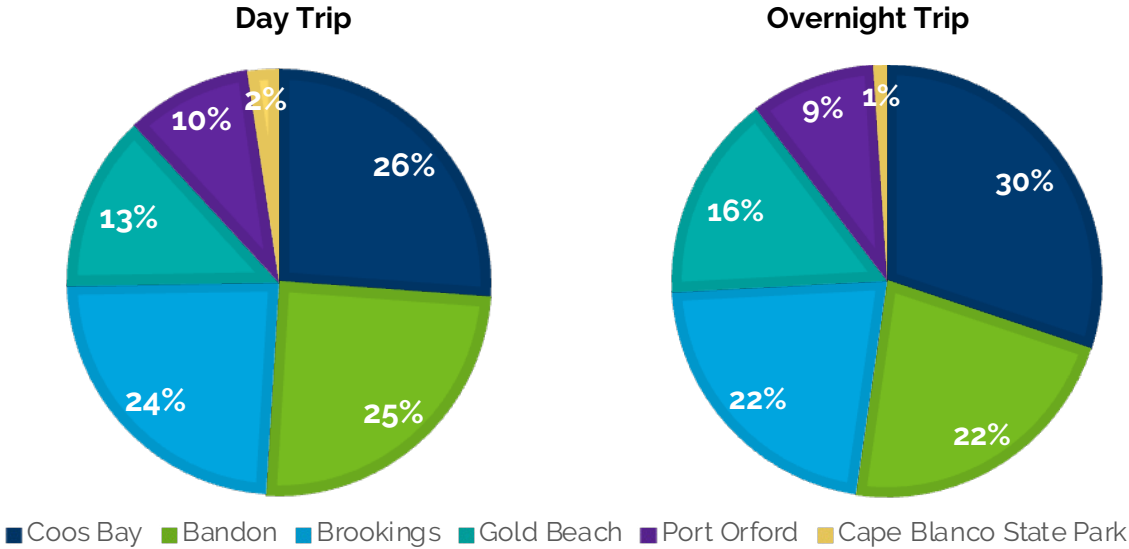
Table 5. Southern Oregon Coast Population

Location	2021 Population
Coos Bay, OR	15,907
Brookings, OR	6,837
Bandon, OR	3,331
Gold Beach, OR	2,365
Port Orford, OR	1,155
Cape Blanco State Park	NA

Source: US Census

Trends of overnight and day visitation are similar across the areas of interest. Bandon has a slightly higher percentage of day and overnight visitors than might be suggested by their resident population. Generally, the population size of a city correlates strongly with the day and overnight visitation of the area.

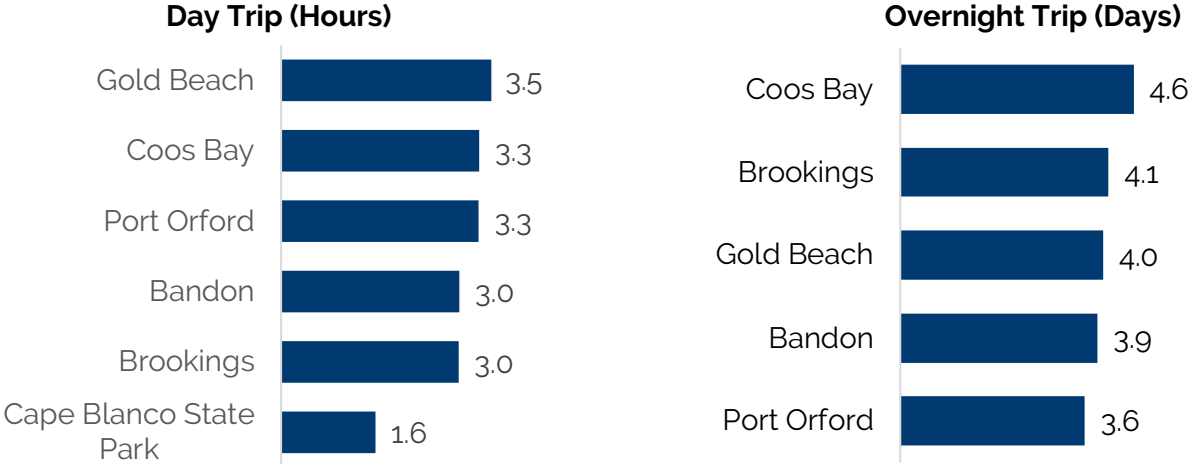
Figure 13. Total Visitation to the Southern Oregon Coast



Source: Dean Runyan Associates; NEAR, 2021

The average stay for day trippers across all the Southern Oregon Coast city destinations was approximately 3.1 h. This result differed from the average time spent by day visitors to Cape Blanco State Park daily, approximately 1.6 h. The average stay for overnight visitors ranged from 3.6 days to 4.6 days.

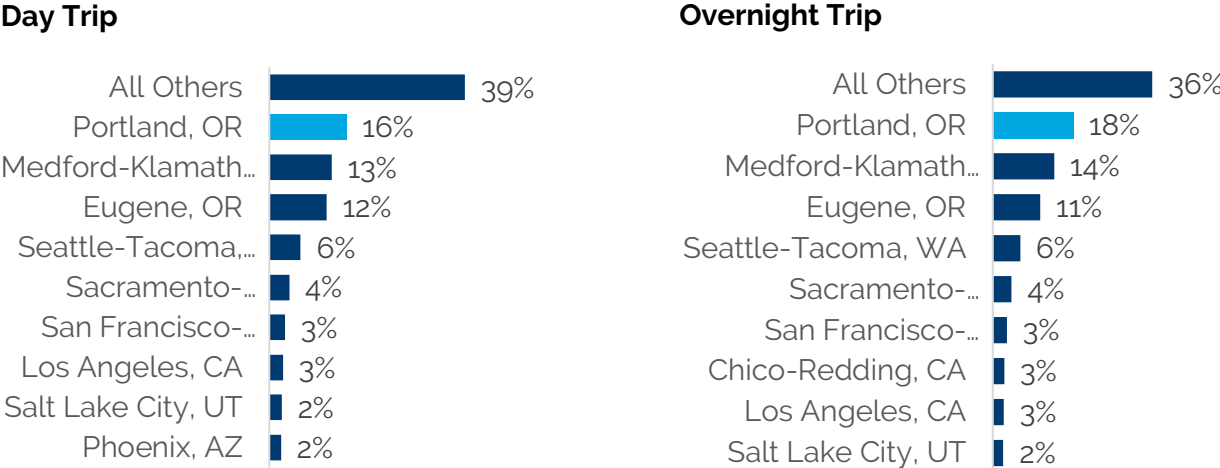
Figure 14. Average Length of Stay



Source: Dean Runyan Associates; NEAR, 2021

In the figures below, we listed the top markets for travel to the Southern Oregon Coast. Despite the closer proximity of Medford and Eugene to the Southern Oregon Coast, most travelers who took a day trip or overnight trip came from the Portland metro area. While it is possible that residents of Portland made a day trip to the region and returned on the same day, it is more likely that these visitors stayed the night outside of the Southern Oregon Coast region or in one of the towns or unincorporated areas outside the five cities studied. Visitor origin patterns are consistent between day trip visitors and overnight visitors.

Figure 15. Top Markets: Percent of Total Visitation



Source: Dean Runyan Associates; NEAR, 2021

The seasonality of visits is heavily skewed toward summer. The number of visitors on an average day in July was almost two times as many day visitors as during the rest of the year and more than four times as many day visitors than in December. The majority of day visitation occurred on Fridays, Saturdays, and Sundays.

Figure 16. Seasonality of Day Visitation

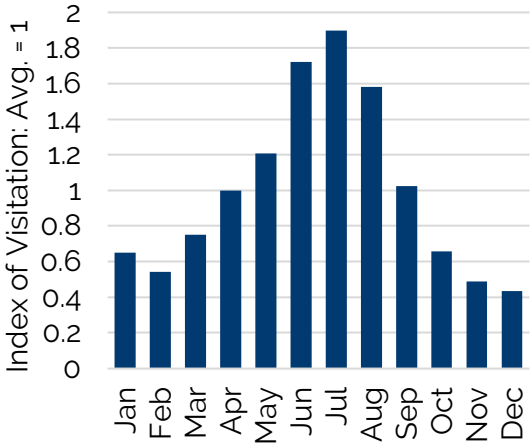
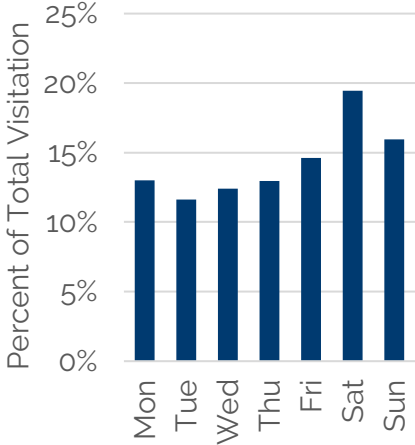


Figure 17. Day of the Week of Day Visitation



Source: Dean Runyan Associates; NEAR, 2021

Recent Visitor Behaviors—Destination Analysts Survey

The majority (69.2%) of recent visitors to the Southern Oregon Coast primarily visited for vacation and leisure, followed by less than one in five (17.1%) whose primary motivation was to visit friends or relatives. On average, recent visitors spent 4.1 days and 3.6 nights on their last trip to the Southern Oregon Coast, with only a small portion (5.3%) coming for a day visit. Among overnight visitors, hotel, or motel (80%) was the most common accommodation type, with vacation rentals such as Airbnb or VRBO a distant second at 18.2%. A similar number of recent visitors chose to stay in a traditional bed and breakfast (16.1%), while approximately 1 in 10 stayed in the private home of friends (10.4%) or at a campsite or RV park (9.7%).

When asked what type of transportation they used for their trip, recent visitors most arrived to and departed from the Southern Oregon Coast by airplane (43.9% and 41.4%, respectively), while a third drove to and from the area in their car (35.2% and 33.7%, respectively). One-fourth (26.1%) of visitors arrived by rental car. While traveling within the Southern Oregon Coast, half of the recent visitors used a rental car (51%), while one-third (34%) used their car to get around.

The average party size was 2.9 people, with roughly half (55.1%) of recent visitors traveling without children. The majority (73.6%) traveled with their spouse or partner, and 4 of 10 (41.7%) traveled with their children under 18.

Looking at how much recent visitors typically spent on a trip to the Southern Oregon Coast, the average daily trip spend per party in-market was \$559.28 (Table 6). When calculated

against the average number of people in the travel parties (2.6 people), the average daily spend per person was \$215.11. Based on the average number of days (4.1 days) spent on recent trips to the Southern Oregon Coast, the average overall trip spend per person was \$881.94.

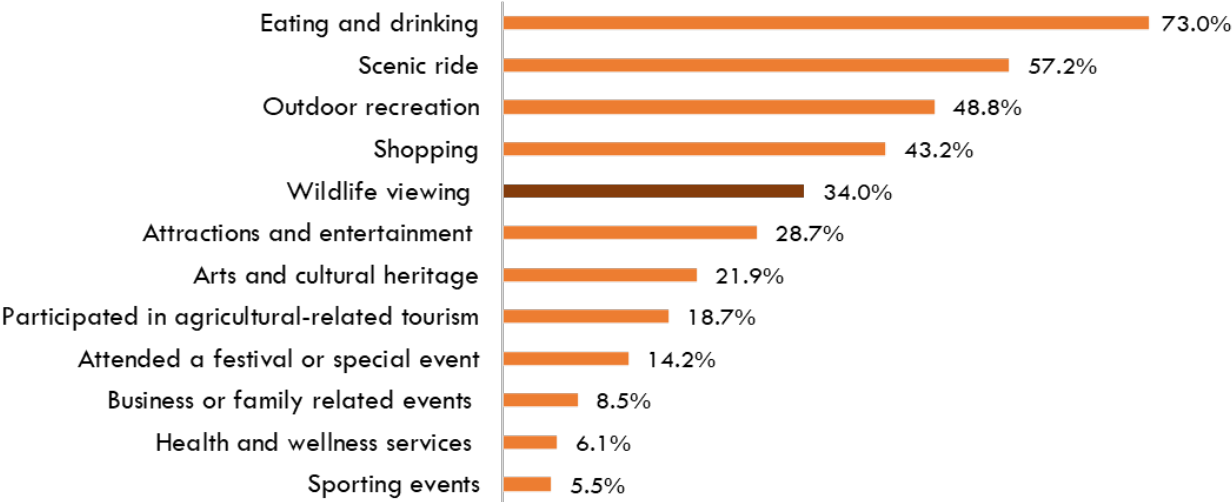
Table 6. Average Daily Trip Spend by Party

Category	Average Daily Spend
Lodging/Accommodations	\$156.92
Restaurants/dining out	\$104.40
Rental car	\$67.52
Shopping	\$66.11
Entertainment/attractions	\$52.58
Gasoline	\$51.55
Outdoor recreation activities	\$49.07
Ground transportation	\$11.16
Total	\$559.28

Source: Destination Analysts

The most common types of activities experienced on their last trip to the Southern Oregon Coast were eating and drinking (73.0%), followed by scenic rides (57.2%) and outdoor recreation (48.8%, Figure 18). As mentioned in the executive summary, wildlife viewing activities were the fifth most common type of activity selected, with one-third (34.0%) of recent visitors participating in wildlife viewing on their last trip to the area. On average, these participants of wildlife viewing spent a total of \$207 on this activity for the duration of their trip to the Southern Oregon Coast.

Figure 18. Activities Participated in on Most Recent Oregon Coast Trip

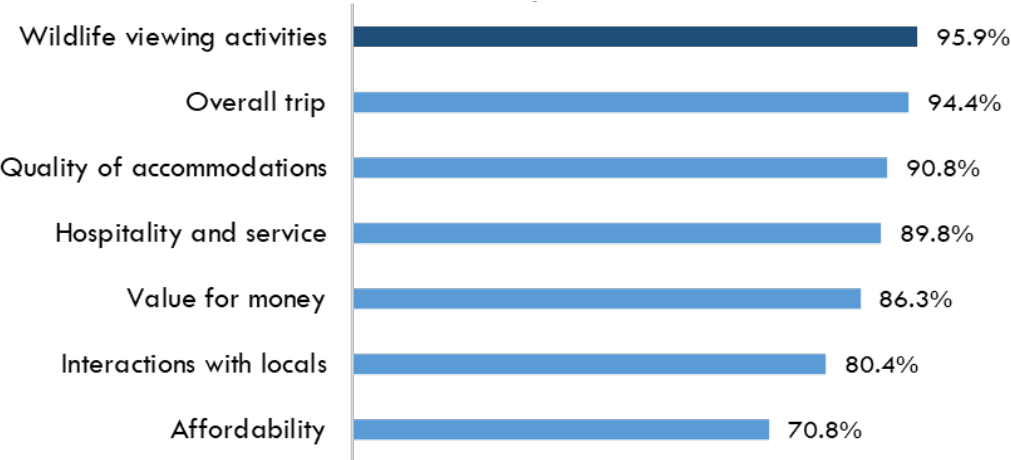


Source: Destination Analysts

Satisfaction and Destination Brand Health Metrics

Recent visitors had exceptionally high satisfaction levels with the wildlife viewing activities on their most recent trip, with 95.9% reporting they were satisfied or extremely satisfied (Figure 19). Most recent visitors were satisfied or extremely satisfied with the overall trip (94.4%), quality of accommodations (90.8%), hospitality and service (89.8%), and value for money (86.3%). A slight decrease in satisfaction levels was observed with interactions with locals (80.4%), and significantly fewer respondents reported being satisfied with affordability (70.8%) on their last trip.

Figure 19. Satisfaction with Most Recent Southern Oregon Coast Trip



Source: Destination Analysts

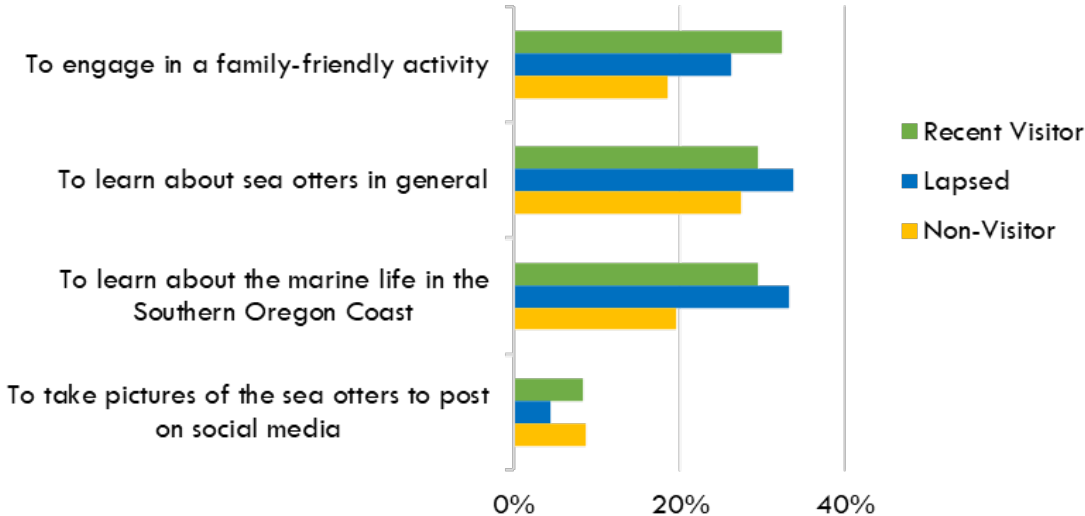
Nevertheless, when asked how likely they are to recommend the Southern Oregon Coast as a place to visit friends or family, 92.3% of recent visitors said they would be likely or extremely likely to recommend the area as a destination. Two-thirds (65.7%) were extremely likely to recommend the Southern Oregon Coast. An even higher proportion of recent visitors said they were likely or extremely likely (96.2%) to return, although only half (50.2%) were extremely likely to do so.

Coastal Wildlife Viewing Activities

Among all respondents, the overall interest in enjoying wildlife viewing activities while traveling to a coastal wildlife viewing destination (i.e., Sitka, AK; Port Angeles, WA; Newport, OR; Monterey, CA; Morro Bay, CA) was high (78.5%). Whales were most likely to be selected as one of the top three types of wildlife travelers would be interested in viewing on a trip to a coastal wildlife viewing destination. Sea otters were most likely to be selected by lapsed visitors (42.1%), followed by recent visitors (35.6%). However, sea otters were selected by less than one-fourth of non-visitors (22.2%).

When respondents were asked to imagine that sea otters had already been reintroduced to the Southern Oregon Coast before their most recent or imagined trip to the area, 89.8% of respondents said they would have been somewhat or extremely likely to take a trip to the harbor to view sea otters on this trip. While slightly lower than recent visitors, about three-fourths of lapsed visitors (72.4%) and non-visitors (73.6%) also reported that they would likely include a sea otter viewing activity on this trip. Their reasons for this likelihood vary somewhat by visitor segment, with recent visitors most likely to select "to engage in a family-friendly activity" (32.4%). Meanwhile, learning about sea otters, in general, was the most selected reason for lapsed visitors (33.9%) and non-visitors (27.5%) (Figure 20).

Figure 20. Reasons for Viewing Sea Otters¹



Source: Destination Analysts

¹ **Recent Visitors** Visitors who took a trip to the Southern Coast of Oregon between 2018-2022.
Lapsed Visitors Visitors whose last trip to the Southern Coast of Oregon was in 2017 or earlier.
Non-Visitors Travelers who have never been to the Southern Coast of Oregon.

Comparable Destinations

To evaluate the potential impact of establishing the Southern Oregon Coast as a wildlife viewing destination, DRA chose five comparable cities with significant wildlife viewing opportunities, including sea otter viewing. The following section of the report presents economic data and other qualitative insights related to the economies of the comparable destinations. The similarities and differences across these destinations can provide insight into what the Southern Oregon Coast might develop in response to the increasing demand for wildlife viewing opportunities by reintroducing sea otters.



Photo credit: Vlada Karpovich via Pexels

Selection of the Comparable Destinations

The five Western US destinations selected for comparative research include Monterey Bay and Morro Bay, California; Sitka, Alaska; Newport, Oregon; and Port Angeles, Washington. These destinations were selected based on their proximity to the Southern Oregon Coast and their marine wildlife populations known to draw visitors. Table 7 specifies the counties in which each comparable destination is located. Given that economic data are often more available and consistent at a county level, many insights are reported for the counties where the comparable cities are located.

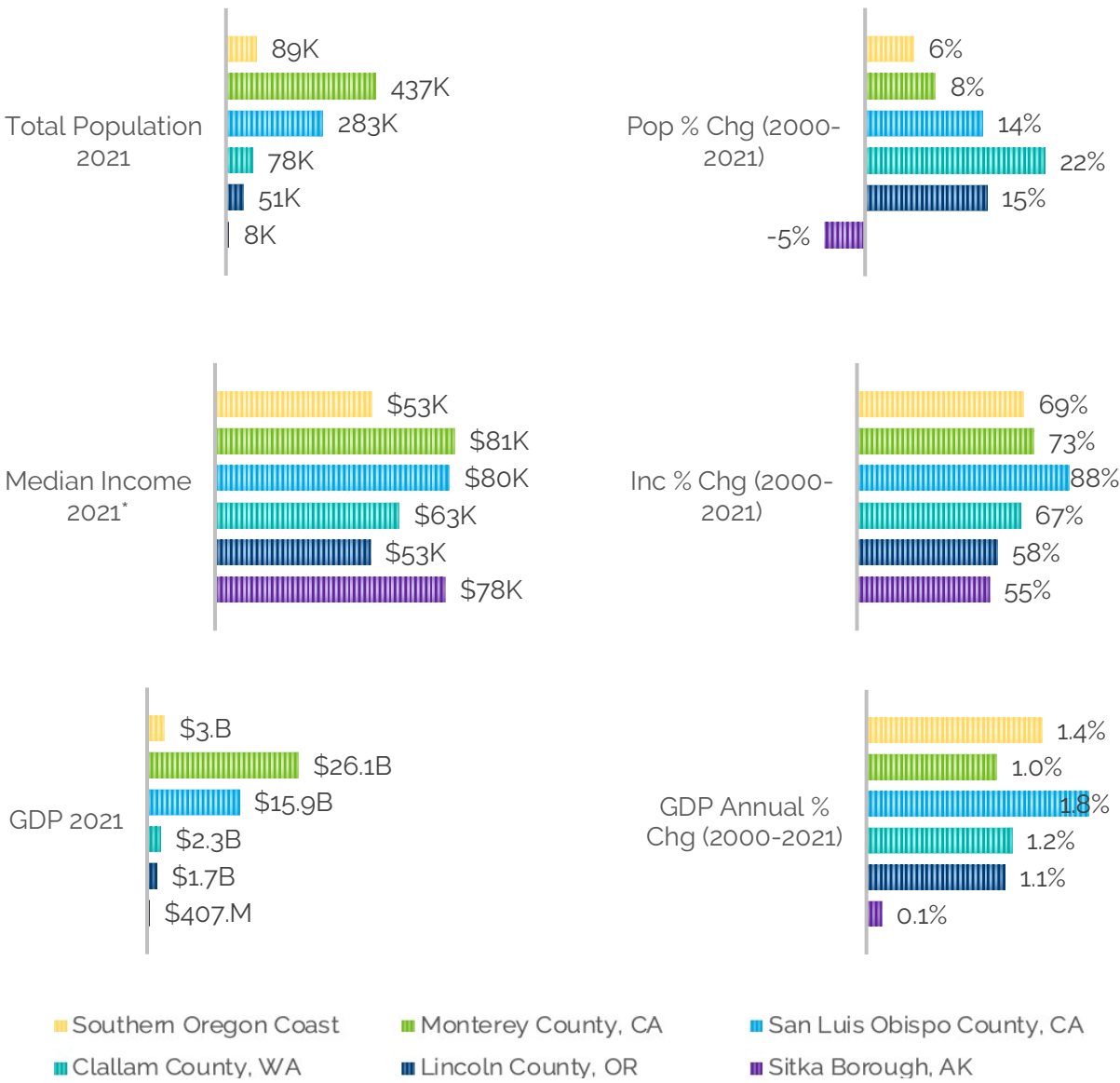
Table 7. Comparable Destinations

State	City	County
Alaska	Sitka	NA
California	Monterey Bay	Monterey
California	Morro Bay	San Luis Obispo
Oregon	Newport	Lincoln
Washington	Port Angeles	Clallam

Key Characteristics of the Comparable Destinations

Population, income, and GDP are among the important metrics to compare the Southern Oregon Coast to the comparable destinations. These metrics demonstrate the size and level of economic opportunity in the area. Monterey County and San Luis Obispo County have the largest populations and economies of the five comparable destinations. Not only do these areas contain significant populations, but they are also within a day's drive of other large metropolitan areas. In contrast, Sitka, Alaska, has the smallest population and economy. This destination is very remote and is generally reached by either a cruise ship or a small airplane. The most comparable destinations to the Southern Oregon Coast are Clallam County and Lincoln County, which have small-to-mid-sized populations and a similar median income.

Figure 21. Key Characteristics of the Comparable Destinations



Source: US Economic Development Administration Stats America

Employment Trends

Trends of Trade-Oriented Industry Clusters in the Comparable Destinations

The following comparison of trade-oriented industries in the five comparable destinations was collected from the US Cluster Mapping Project. The most recent year for which data are available for the data compiled in the US Cluster Mapping Project is 2016. By comparing employment in 1998 to employment in 2016 for each of the top 10 trade-oriented industries, we could indicate each industry's top economic drivers and the historical trajectory. By highlighting clusters, we saw the regional concentration of related industries arising from various types of linkages or externalities that span across industries in a local economy.

All five comparable destinations had significant industry clusters in hospitality and tourism. Furthermore, the hospitality and tourism industry cluster provided the highest number of jobs across four of the five comparable destinations, with Sitka, AK, being the exception. Monterey County, CA, and San Luis Obispo County, CA, had the strongest clustering within the hospitality and tourism industry cluster. This result indicated that tourism plays a particularly strong role in the local economy of these destinations. Concerning the specialization of Monterey County's hospitality and tourism industry, only 64 other US counties were more specialized in this industry.

Lincoln County, OR, and Sitka, AK, specialized in fishing and fishing products, having clusters that nationally rank 26 and 30, respectively. This result indicates that only 25 other counties in the US ranked higher for specialization in the fishing and fishing products industry cluster compared with Lincoln County, OR. Employment growth was also strong between 1998 and 2016 for the fishing and fishing products industry cluster in Lincoln County and Sitka. Other relevant rankings of note for the comparable cities included water transportation (Clallam County, WA: 89; Sitka, AK: 284) and performing arts (Sitka, AK: 1,139).

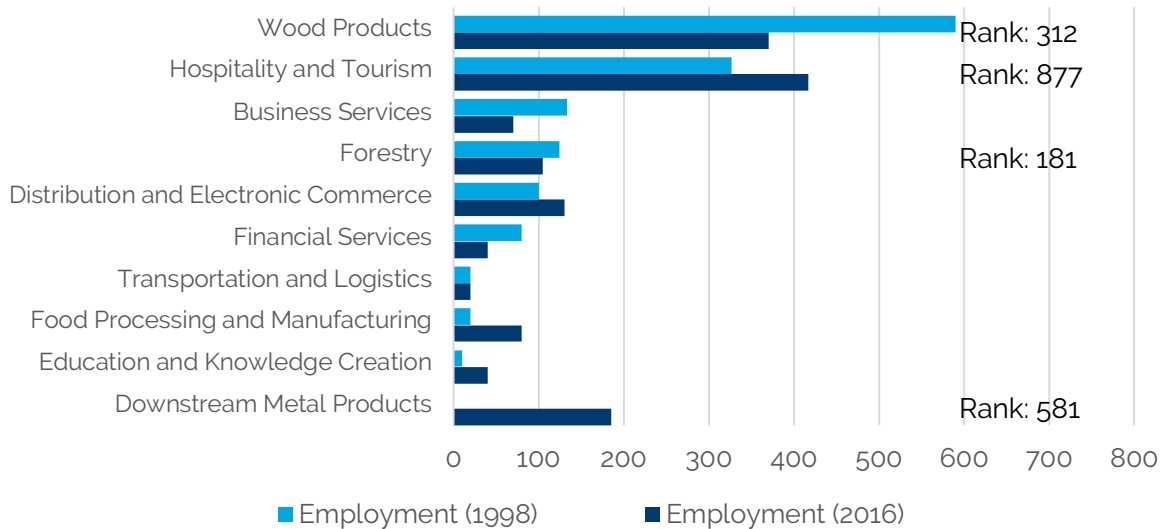


Photo credit: Pok Rie via Pexels

Top Trade-Oriented Industry Clusters

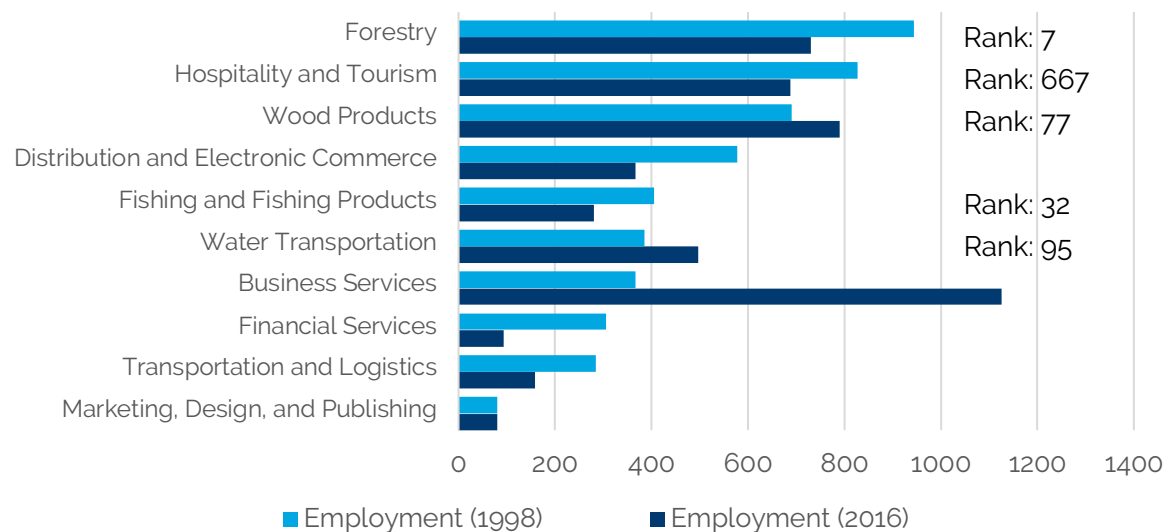
Coos County and Curry County shared clusters in hospitality and tourism, forestry, and wood products. Coos County also had significant industry clusters in fishing and fishing products (rank: 32) and water transportation (rank: 95).

Figure 22. Top Trade-Oriented Industry Clusters for Curry County, OR



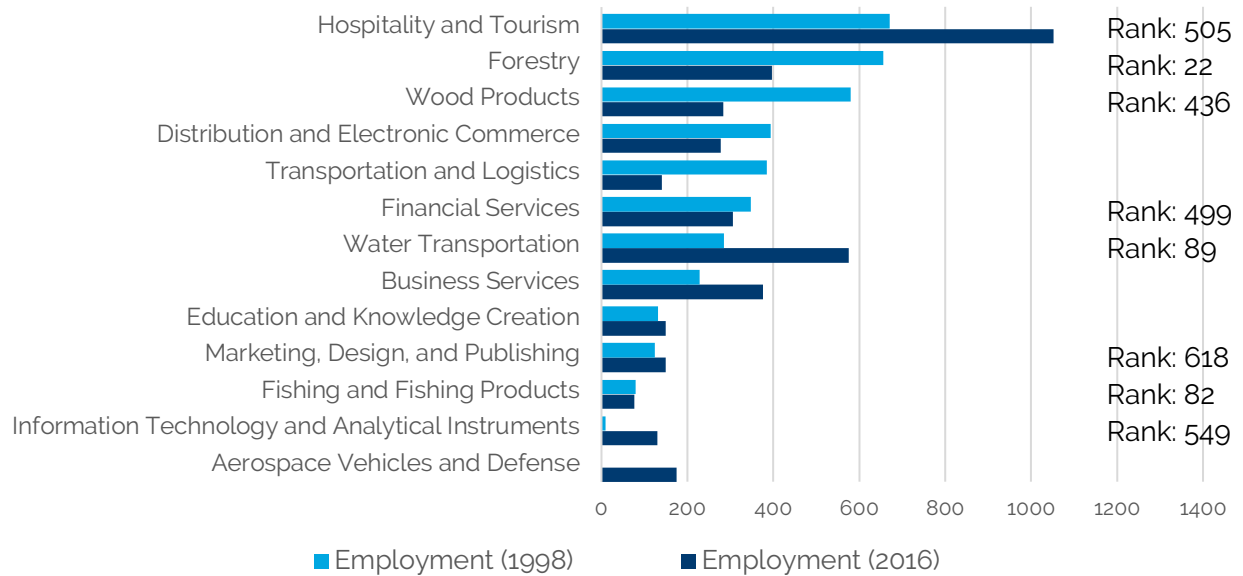
Source: US Cluster Mapping Project

Figure 23. Top Trade-Oriented Industry Clusters for Coos County, OR



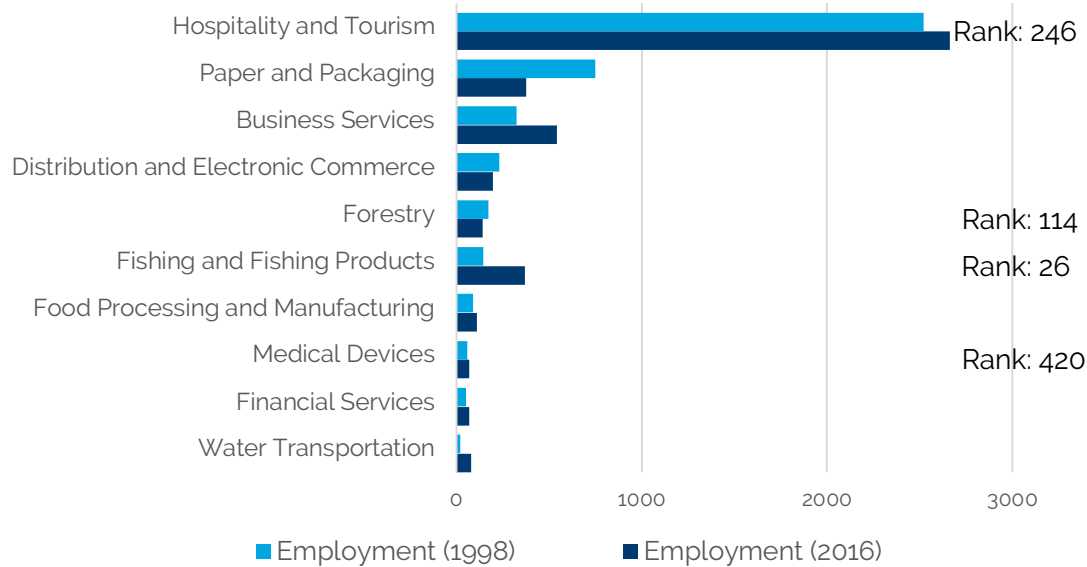
Source: US Cluster Mapping Project

Figure 24. Top Trade-Oriented Industry Clusters for Clallam County, WA



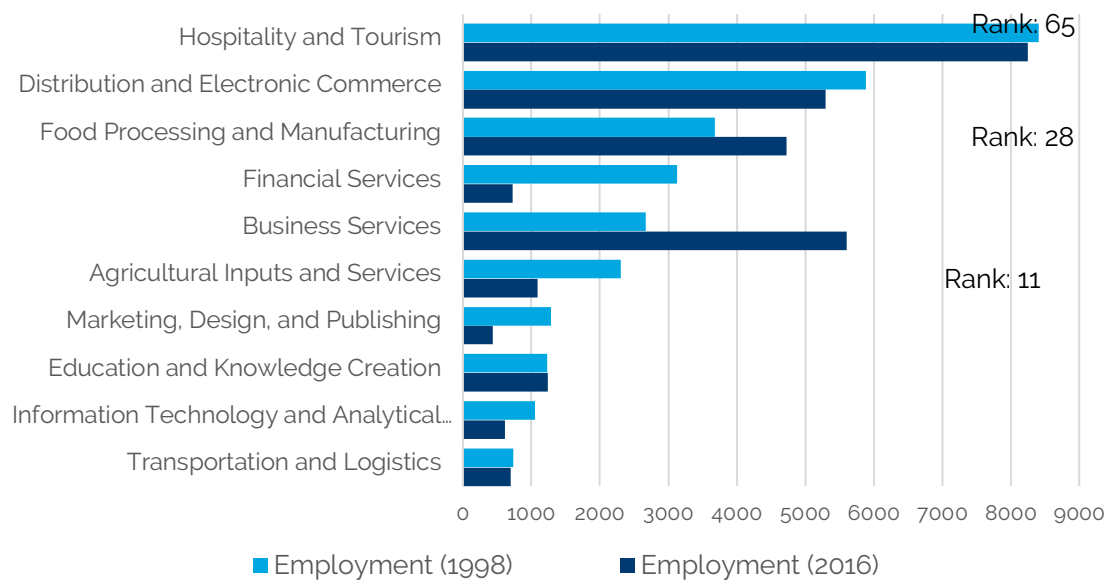
Source: US Cluster Mapping Project

Figure 25. Top Trade-Oriented Industry Clusters for Newport, OR



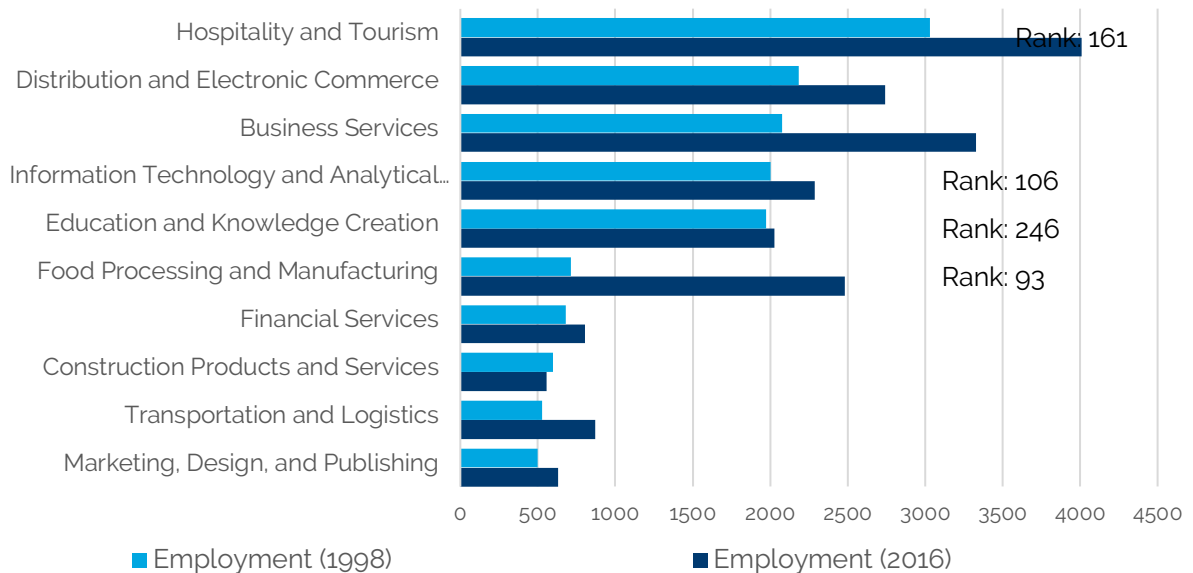
Source: US Cluster Mapping Project

Figure 26. Top Trade-Oriented Industry Clusters for Monterey County, CA



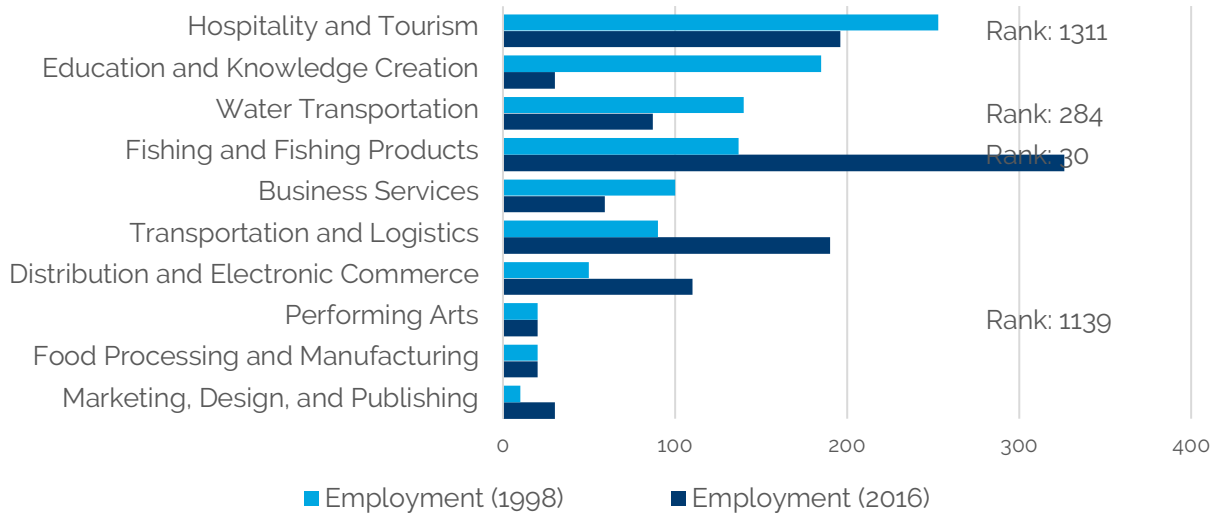
Source: US Cluster Mapping Project

Figure 27. Top Trade-Oriented Industry Clusters for San Luis Obispo County, CA



Source: US Cluster Mapping Project

Figure 28. Top Trade-Oriented Industry Clusters for Sitka, AK



Source: US Cluster Mapping Project

The graphs above show the growth in employment for the hospitality and tourism industry clusters between 1998 and 2016. Tourism expanded greatly in Clallam County, WA, and San Luis Obispo County, CA. The hospitality and tourism industry cluster grew slightly in Lincoln County between 1998 and 2016 and remained approximately the same for Monterey County, CA. Meanwhile, the hospitality and tourism industry cluster in Sitka, AK, shrank significantly.



Photo credit: Quang Nguyen Vinh via Pexels

In the table below, industries are ranked by the number of clusters present across Coos County, Curry County, and the five comparable destinations. Hospitality and Tourism was a cluster for all destinations. Four destinations had clusters in forestry and fishing and fishing products. We averaged the growth or decline in employment of each trade-oriented industry cluster for each comparable destination containing that industry cluster. The results showed that many industries had marginal or negative annual growth rates. Fishing and fishing products, information technology and analytical instruments, and food processing and manufacturing showed the strongest growth in employment across destinations. While the wages for the hospitality and tourism industry cluster ranked the lowest among the various industry clusters, the level of employment far exceeds other industries. Many jobs in the hospitality and tourism industry are entry-level, part-time, and seasonal.

Table 8. Industry Clusters in Reintroduction Sites and Comparable Destinations

Industry	# Clusters	Total Emp (2016)	Emp % Chg. (1998-2016)	Avg Wage (2016)	Avg Wage for the US (2016)
Hospitality and Tourism	7	17,264	12%	\$31,553.23	\$36,222.47
Forestry	4	1,372	-24%	\$51,011.82	\$43,732.51
Fishing and Fishing Products	4	1,051	64%	\$48,965.30	\$47,956.30
Water Transportation	3	1,158	31%	\$49,784.08	\$65,645.27
Wood Products	3	1,443	-25%	\$52,964.71	\$41,161.93
Food Processing and Manufacturing	2	7,208	138%	\$48,662.49	\$50,553.90
Information Technology and Analytical Instruments	2	2,418	607%	\$70,851.31	\$114,684.57
Education and Knowledge Creation	1	2,026	3%	\$57,733.05	\$59,175.01
Agricultural Inputs and Services	1	1,090	-53%	\$77,776.47	\$41,662.66
Financial Services	1	305	-0.12	\$115,385.71	\$140,638.88
Marketing, Design, and Publishing	1	150	0.21	NA	\$88,659.79
Downstream Metal Products	1	185	NA	NA	\$52,455.98
Medical Devices	1	70	0.17	NA	\$69,301.70
Performing Arts	1	20	0.00	NA	\$54,527.13

Source: US Cluster Mapping Project

Travel Industry Performance of the Comparable Destinations

As defined previously, the travel industry involves any economic activity associated with travel. The travel industry comprises accommodations; food and beverage; arts, entertainment, and recreation; transportation, and retail industries. Spending by a traveler on one of these industries is considered "travel-related spending."

From 2017 to 2019, all destinations grew their travel industries. However, comparing 2017 and 2021, a large variance was observed in the performance of the travel industry across the destinations. Clallam County, WA, performed the best of all destinations, growing approximately 54% across the 5-year period. This result was largely driven by an extraordinary recovery in travel activity following the COVID-19 pandemic in 2020. All destinations lost significant visitor activity in 2020 due to the COVID-19 pandemic. Monterey County and Coos County have struggled the most to return to their 2019 high in travel activity.

Table 9. Travel-Related Spending on the Southern Oregon Coast and Comparable Destinations

Direct Travel Spending (mil)	2017	2018	2019	2020	2021	2019-2021	2017-2021
Lincoln County, OR	\$590	\$617	\$644	\$467	\$605	-6%	2%
Monterey County, CA	\$2,820	\$3,136	\$3,241	\$1,555	\$2,541	-22%	-10%
San Luis Obispo County, CA	\$1,782	\$1,915	\$2,019	\$1,349	\$1,783	-12%	0%
Clallam County, WA	\$289	\$311	\$334	\$282	\$445	33%	54%
Sitka City and Borough	NA	NA	NA	NA	NA	NA	NA
Curry County, OR	\$132	\$138	\$143	\$111	\$157	10%	19%
Coos County, OR	\$271	\$277	\$288	\$184	\$228	-21%	-16%

Sources: Dean Runyan Associates 2021



Photo credit: Life Of Pix via Pexels

Room Sales of the Comparable Destinations (2017-2021)

Taxable sales of all lodging activities are a key indicator of the performance of the travel industry. Lodging taxable sales represent the revenue generated by hotels, motels, short-term vacation rentals, lodges, bed and breakfasts, and other forms of paid overnight accommodations in the destination's city limits. While destinations may have lodging outside of the jurisdiction's limits (resulting in a differing level of taxation or no taxation), the bulk of a destination's paid overnight activity is reflected in the city's lodging taxable sales. The taxable lodging sales are derived by dividing the jurisdiction's lodging taxable revenue by the jurisdiction's lodging tax rate.

Table 10. Room sales on the Southern Oregon Coast and Comparable Destinations

Room sales (mil)	2017	2018	2019	2020	2021	% chg. 19-21	% chg. 17-21
Monterey Bay	\$232	\$246	\$266	\$192	\$128	-108%	-82%
Morro Bay	\$33	\$34	\$36	\$29	\$38	5%	12%
Newport	\$37	\$42	\$44	\$37	\$48	9%	22%
Sitka	\$140	\$146	\$154	\$109	\$103	-50%	-36%
Port Angeles	\$4	\$19	\$20	\$19	\$15	-28%	74%
Port Orford	\$1	\$1	\$1	\$1	\$2	41%	53%
Coos Bay	\$9	\$10	\$11	\$8	\$10	-6%	12%

Source: lodging tax data collected by DRA



Photo credit: Quang Nguyen Vinh via Pexels

Sightseeing Industry in the Comparable Destinations

The scenic and sightseeing transportation (NAICS Code 487) industry uses transportation equipment for recreation or entertainment. Jobs in this industry include bus drivers, pilots and crew of water vessels, and reservation ticket agents. Sightseeing companies (including businesses that offer wildlife viewing tours) would be included in the table below. Like the results from the industry cluster analysis, Sitka, AK, and Lincoln County, OR, ranked high for economic activity related to water-related sightseeing activity relative to the size of the overall economy. This result demonstrated that the sightseeing industry could be a significant driver of the local economy for small destinations.

Observing the revenue generated by businesses that self-identify as scenic and sightseeing transportation (NAICS Code 487), we could see that the same order holds. According to both census datasets, sightseeing had the largest market share in Sitka, followed by Monterey County and Lincoln County. Results for San Luis Obispo County, Coos County, Curry County, and Clallam County were not available in the US Census dataset.

Table 11. Sight-seeing Industry in the Comparable Destinations

Destination	Business Receipts
Sitka City and Borough	\$15.1M
Monterey County	\$9.1M
Lincoln County	\$3.5M

Source: US Census County Business Patterns 2020

Note: Results for Curry County, OR, and Clallam County, WA, are not available

Table 4. Revenue Generated by Sight Seeing

Destination	Number of Establishments	Number of Employees	Avg Company Payroll	Avg Employee Salary
Sitka City and Borough	19	67	\$200,263	\$56,791
Monterey County	13	94	\$218,154	\$30,170
Lincoln County	10	36	\$85,300	\$23,694
San Luis Obispo County	7	24	\$66,714	\$19,458
Coos County	4	4	\$19,750	\$19,750

Source: US Census Economy-Wide Key Statistics, 2017 (Survey performed every 5 years and not available for 2022)

DMO Questionnaire

DMOs or CVBs are responsible for promoting a destination or region to attract visitors. These organizations also provide information that could interest travelers, event planners, and the media. To understand how wildlife tourism and sea otters might influence destination marketing, we contacted the DMOs in the five comparable destinations. We asked them to complete an online questionnaire that asked questions related to wildlife tourism and sea otters.

Wildlife viewing is incorporated into the destination marketing strategy by DMOs in all comparable destinations. When asked how important wildlife viewing was to draw travelers to the destination on a one-to-five scale, with five as extremely important, four responded with five, and one responded with three. When asked how important sea otters were to draw visitors to their destination, Morro Bay, Sitka, and Newport responded five, followed by Monterey responding four, and Port Angeles responding three. Every DMO, besides Port Angeles, features sea otters in their marketing initiatives. Port Angeles has no resident sea otter population, so this result is not surprising. Newport does not have a wild sea otter population. However, there is a sea otter exhibit in the Oregon Coast Aquarium, a popular attraction in the area. When asked what types of content are used to promote sea otter viewing, respondents replied with "images" as the most popular response, followed by wildlife viewing guidelines, educational content, and video.

Figure 29. Importance of Sea Otters to Draw Visitors

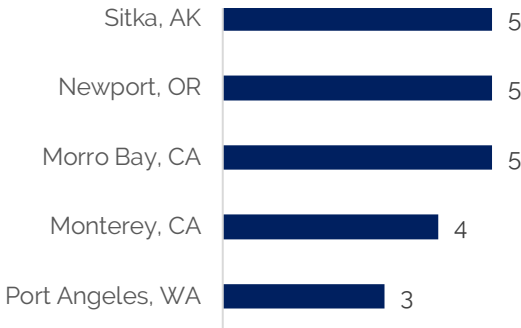
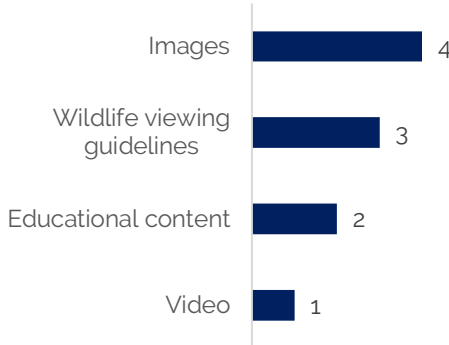


Figure 30. Types of Content Used to Promote Wildlife Viewing

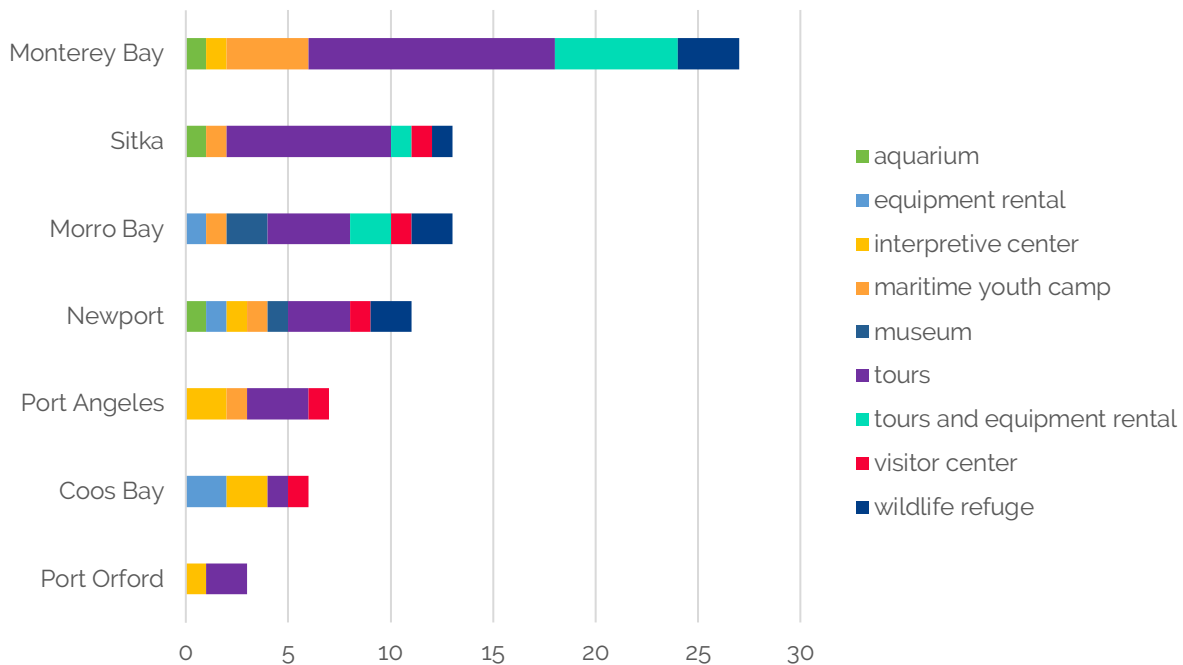


Source: Dean Runyan Associates DMO Questionnaire
Note: Rated on a 1-5 scale where 5 is very important and 1 is not important

Businesses and Services in the Wildlife Tourism Sector

Among the comparable destinations, we identified nine primary categories of businesses and services that facilitate opportunities for wildlife viewing, appreciation, or education: aquariums, tour guides, equipment rental, youth camps, museums, visitor centers, and wildlife refuges. Figure 31 presents the number of businesses that fit within the nine primary categories for each comparable destination.

Figure 31. Inventory of Businesses and Services



Source: Dean Runyan Associates

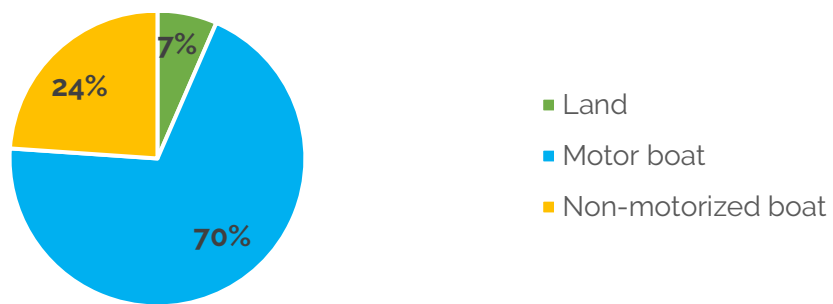


Photo credit: Spencer Gurley Films via Pexels

Wildlife Viewing Tours

Wildlife viewing tours constituted the largest number of businesses among the comparable destinations. Most marine wildlife viewing tours are facilitated using motorized boats, and approximately a quarter are facilitated using non-motorized boats, such as kayaks, canoes, and stand-up paddleboards (SUPs). Two tour operators facilitate a hiking tour, and one facilitates a biking tour with a marine wildlife viewing component. Only a few tour operators offer a sea otter-specific tour, but sea otters are often mentioned in the description of wildlife that might be viewed during a given trip. Whale watching tours are a common “species-specific” tour, but the marketing of these tours often mentions other types of wildlife visitors can expect to see during the tour.

Figure 32. Guided Tour Type



Source: Dean Runyan Associates

Approximately a quarter of the businesses that facilitate tours also offer gear rental, which constituted the “tours and equipment rental” category (Figure 32). The number of businesses within this category surpasses the number of businesses that only offer equipment rental, suggesting that there may be an advantage of incorporating tours within the businesses’ service offerings.



Photo credit: Bekir Dönmez via Pexels

Price of Wildlife Viewing Tours

Price data for boat tour services were collected from the websites of all tour businesses identified in the comparable destinations. On average, the price of boat tours in Sitka was the highest, followed by Port Angeles and Morro Bay. Based on the price data reviewed, we found that tour length had some impact on price, but boat type did not.

Figure 33. Tour Price by Location

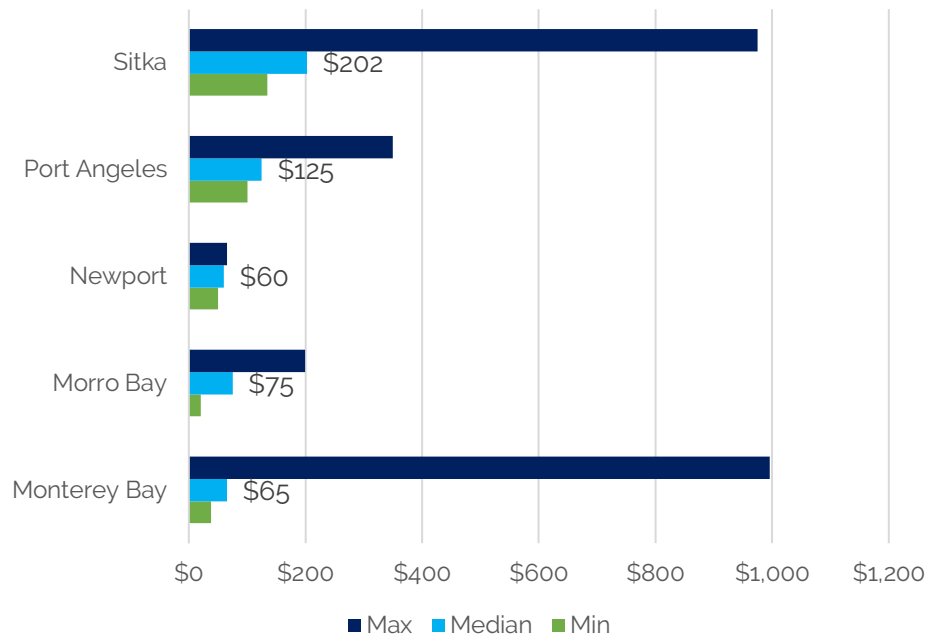


Figure 34. Tour Price by Boat Type

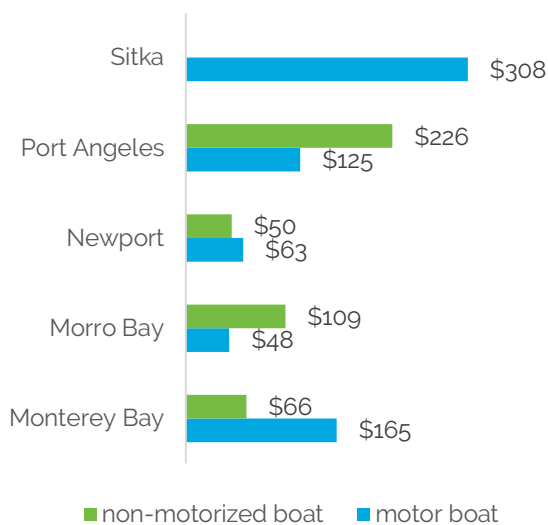
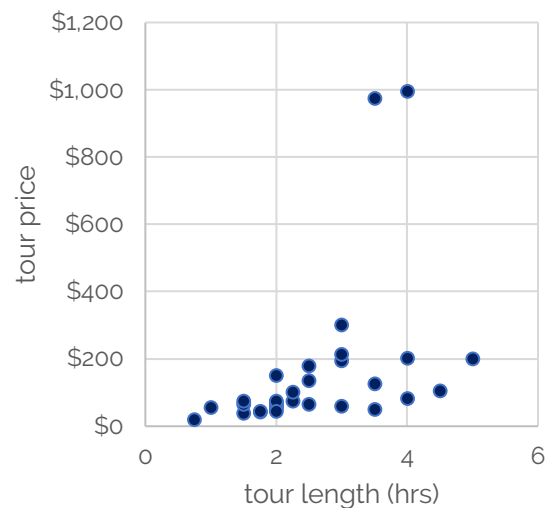


Figure 35. Tour Price by Tour Length



Source: Dean Runyan Associates

Tour and Equipment Rental Business Questionnaire

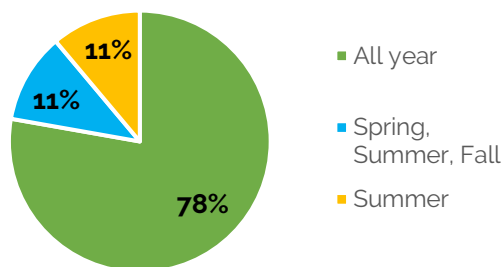
DRA contacted 39 guided tour and equipment rental businesses identified among the 5 comparable destinations to request their participation in an online questionnaire. The questionnaire asked about the business's operations and their perspective on wildlife and sea otter viewing. After completing outreach by phone and email, 11 businesses completed the questionnaire: 8 guided tour businesses, 2 equipment rental businesses, and 1 business offering tours and rentals. Although the sample was small, it accounted for approximately a quarter of the industry segment, and insights can be drawn from the results.

Business Operations

The first section of the questionnaire asked about the business operations, including the seasonality of tour services, the number of tours facilitated in 2019, the number of guests on a typical tour, and annual revenue generated from tour services or equipment rental in 2019. The seasonality of guided tours is presented in Figure 36. Most businesses that completed the questionnaire facilitated tours all year (78%). The respondents that did not provide tours all year were in Port Angeles and Newport.

The number of tours facilitated in 2019 by businesses that completed the questionnaire is presented in Figure 37. The number of tours reported by respondents ranged from 25 to 450, with a median of 152.

Figure 36. Seasonality of Tours



The number of guests able to participate in a single motorboat tour is constrained by the capacity of the boat. In the case of non-motorboat tours, the number of guests is constrained by the number of boats and guides. The number of guests on a typical tour is reported in Figure 38. As stated before, most of the tour operators who completed the questionnaire used motorboats, which explained why the majority (66%) had 4–6 guests per tour.

Figure 37. Number of Tours per Year (2019)

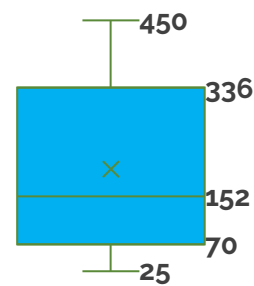
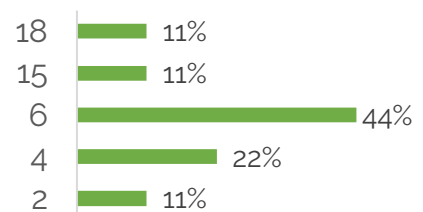


Figure 38. Number of Guests



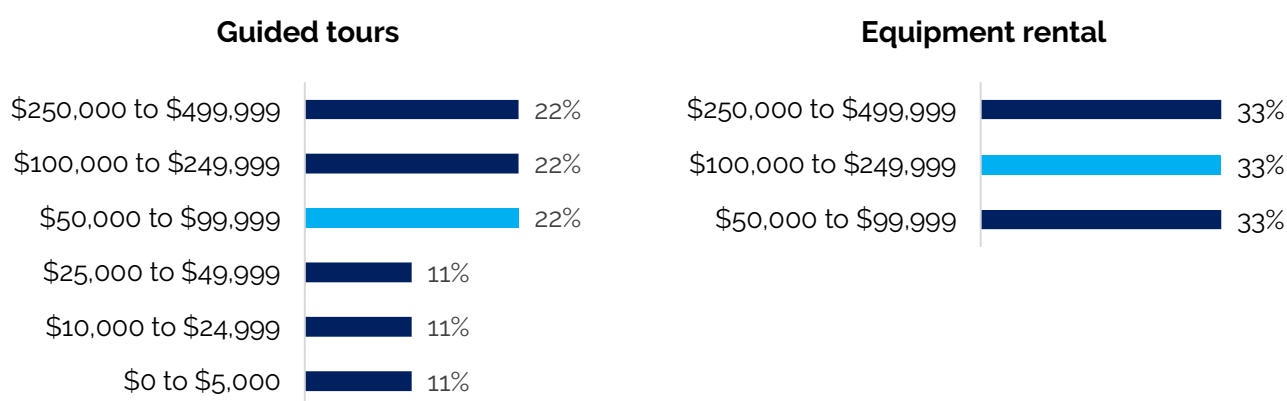
Source: Dean Runyan Associates Business Questionnaire

Revenue Generated from Tours and Rentals

Businesses were asked to estimate the annual revenue from tours or rentals in 2019. The revenue for guided tours was \$0–\$499,999, with a median range of \$50,000–\$99,999. The revenue reported for equipment rental was \$50,000–\$499,999, with a median range of \$100,000–\$249,999.

Given the limited sample size and variation in business operations among tour and rental businesses in the comparable destinations, we cannot extrapolate the total revenue generated by all businesses in this industry. Public data on the scenic and sightseeing transportation industry (NAICS 487) was displayed earlier in this report and can be used to approximate the relative strength of tours and rentals across the destinations.

Figure 39. Revenue Generated by Tours or Equipment Rental (2019)



Source: Dean Runyan Associates Business Questionnaire

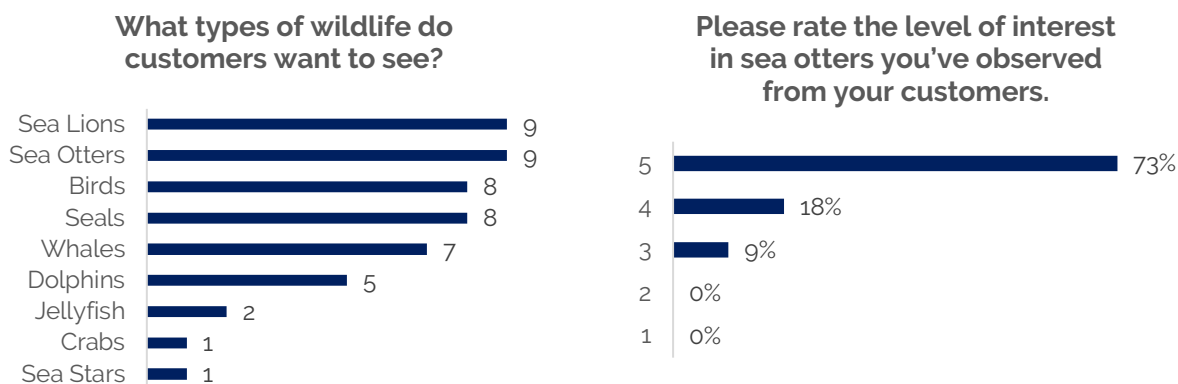
Wildlife Viewing and Sea Otters

Tour guides spend considerable time engaging with customers, so we asked for their perspectives on wildlife viewing and sea otters. When asked to rate the level of interest of their customers in wildlife viewing on a scale from one to five, where five was "extremely interested," and one was "not interested at all," most respondents answered five (73%), and the remaining said four (27%).

Businesses that offer rental equipment were asked whether their customers rent equipment with the primary goal of viewing marine wildlife. Our hope was to understand whether viewing wildlife is a direct or indirect benefit visitors expect from engaging in this type of activity. Given that only three businesses that offer equipment rental completed the questionnaire, we cannot establish a definitive answer to this question. However, two of the three businesses responded that viewing marine wildlife is the primary goal for customers renting equipment.

When asked to select the types of wildlife customers would want to see, respondents selected sea lions and otters as the two most popular species, followed by birds and seals. These results differed from the visitor survey completed by Destination Analysts. These results are only provided as an additional perspective from a small sample of individuals entrenched in this travel industry sector.

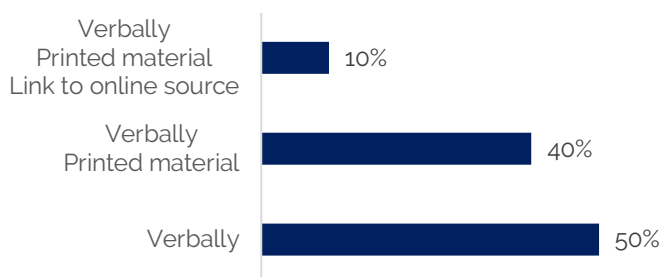
Figure 40. Tour Guests' Interest in Marine Wildlife and Sea Otters



Source: Dean Runyan Associates Business Questionnaire

When asked whether wildlife viewing guidelines are provided before facilitating a tour or renting equipment, all but one business said yes. The one business that said no facilitates tours using a sailboat, which allows the boat captain to control the proximity to wildlife. All businesses that provide wildlife viewing guidelines provide them through verbal instruction, while half provide printed materials.

Figure 41. Delivery of Wildlife Viewing Guidelines



Source: Dean Runyan Associates Business Questionnaire

A tour operator from Monterey Bay said that visitors have "a very strong urge to get close to the otters" and that "it takes a lot to get visitors to abide by the guidelines for viewing." They also said that "most guests do a good job with following our guidelines" and that they believe "strong informational and educational messages associated with renting equipment is effective."

When asked what organization was referenced for wildlife viewing guidelines, businesses mentioned NOAA, Sea Otter Savvy, ADFG, and their experience. While reviewing wildlife viewing tours, we observed many of these businesses have an owner or other staff with expertise in environmental or biological science.

Quotes from Boat Tour Operators

We included several open-ended questions about wildlife viewing and sea otters in the questionnaire section. The responses deemed relevant are provided below.

Question: What do customers say about their experience viewing wildlife?

- It really helps to have a guide who knows who, what, when, where, and how to look. For sea otters, they generally need optics – at least binoculars.
- We have a 5-star average review rating on TripAdvisor and that is mostly due to the quality of wildlife viewing available in Monterey Bay and the fact that our staff are all skilled naturalists.
- People are usually surprised by the variety and abundance of wildlife species found in Sitka Sound. Most do not usually realize just how fascinating sea otters are until you tell them how world history has been significantly impacted by sea otters (fur value and the influence of Chinese high fashion in the 1700s). They are also very interested to learn how much effect sea otters have on the environment, as a key stone species.
- Both locals and visitors to Morro Bay love the wildlife here, especially the sea otters. People often tell us they come to Morro Bay because of the sea otters.

Question: How do you think sea otters impact the demand for your business's services?

Neither positive nor negative (27%)

- We primarily are offering wildlife viewing opportunities out in Monterey Bay, focused on whales. Our customers love to see sea otters when we are entering and leaving Moss Landing Harbor, and we often see them in the Bay near the harbor. But they are not a real focus of our tours. We make sure people get to see a couple of otters on a trip because they are always in the harbor channel. We do recommend people kayak or take an Elkhorn Slough boat tour to see the dozens of otters that are easily seen there.
- Sea otters are a nice add-on, but I don't advertise tours to see specific wildlife. I offer birding tours and encourage participants to give me a bird list so we can go to the right habitat for their wish list, but wildlife viewing is not something you can ever count on. My motto is to under-promise and over deliver. In Port Angeles, river otters are way easier to deliver. Around 90% of the time I can get a sea otter at the Kalaloch beaches (the colony there is most dependable).

Positive (45%)

- Sea otters are one of the major wildlife attractions in Morro Bay. The opportunity to view sea otters is often a deciding factor for our customers when they sign up for a tour or rent kayaks/canoes/SUPs.
- Many people view them as cute and cuddly animals, like their pets, rather than wild and potentially harmful mammals. There is a strong urge to get close to them and most people seek out interaction with them.
- Sea otters are very cute and charismatic as well as being relatively rare. People just want to see them in the wild.

Strong positive (27%)

- The Elkhorn Slough has about 140 resident Sea Otters. They are viewed eating, sleeping, grooming and quite often there are moms with pups. People get to see them out in nature and observe them in their natural habitat. They love to get this opportunity to see the otters free and going about their own business without disturbing them.

Source: Dean Runyan Associates Business Questionnaire

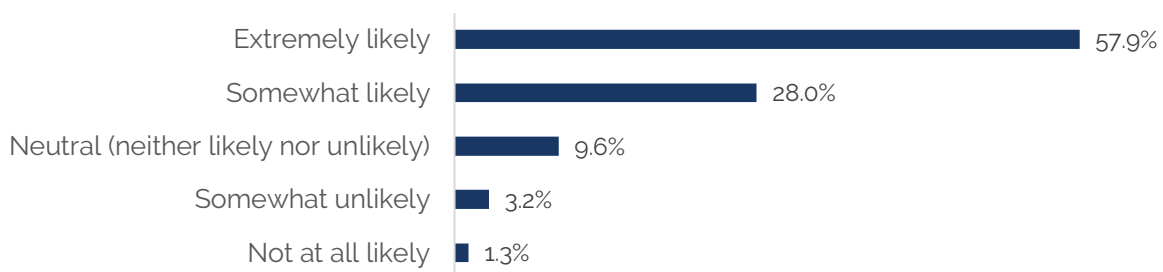
Sea Otter Viewing on the Southern Oregon Coast

This section of the report presents insights into the sea otter-viewing industry. Using results from the traveler survey by Destination Analysts, we present insights on sentiment related to sea otters and the proportion of potential visitors who indicate the availability of wildlife viewing activities and the ability to see sea otters would incentivize them to take a trip to the Southern Oregon Coast.

Visitor Sentiment on Sea Otter-Related Activities

Respondents were asked to imagine that sea otters had been reintroduced to the Southern Oregon Coast prior to their most recent trip to the Southern Oregon Coast. They were then asked how likely they would have been to visit the harbor to see sea otters on their most recent trip to the Southern Oregon Coast. More than half said, "extremely likely," and just over a quarter answered, "somewhat likely."

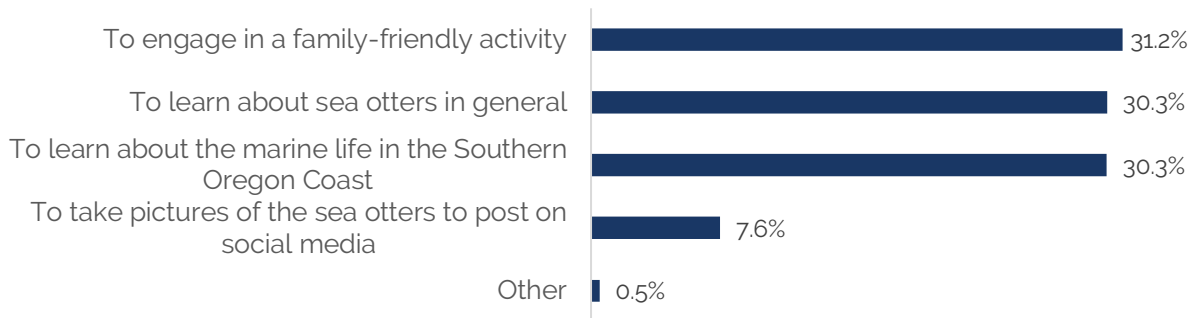
Figure 42. Likelihood of Potential Visitors Visiting the Harbor to See Sea Otters



Source: Destination Analysts

Respondents who said "extremely likely" or "somewhat likely" were then asked to select the reason that best describes why they would have been likely to view sea otters at the harbor. The responses were relatively equally split between "engage in a family-friendly activity," "learn about the sea otters in general," and "learn about the marine life on the Southern Oregon Coast."

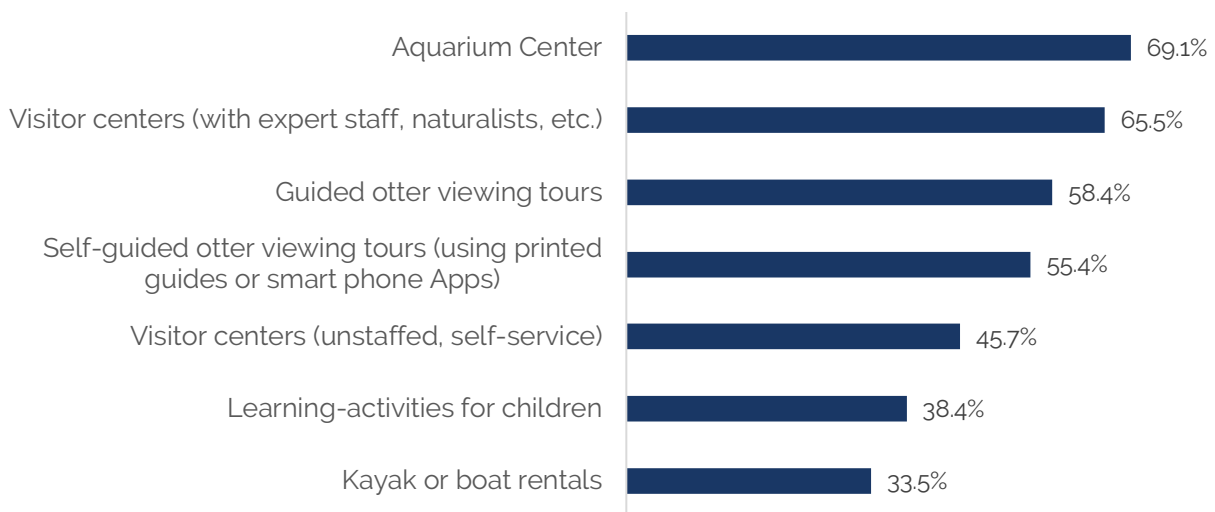
Figure 43. Reasons Visitors are Likely to View Sea Otters in the Harbor



Source: Destination Analysts

In terms of what types of sea otter-related activities were most important to the visitor, aquariums topped the list, followed by staffed visitor centers and guided otter-viewing tours.

Figure 44. Importance of Sea Otter-Related Activities



Source: Destination Analysts

These results indicated visitors are more interested in sea otter-related activities where they can learn about sea otters or other species and have access to knowledgeable staff or guides. The availability of businesses or services with an education component is an important motivating factor.



Photo credit: Rachel Claire via Pexels

When travelers were asked to select the top three species that they would be most interested in seeing on a trip to the PNW, over a quarter (26%) selected sea otters.

Figure 45. Interest in seeing Specific Wildlife while Visiting PNW



Source: Destination Analysts

To understand the categories of travelers who are most interested in viewing sea otters on a trip to the PNW, we presented the interest in seeing sea otters by visitor type, traveler persona, region, and generation on the following page (Figure 46). Interest in sea otters is highest for lapsed visitors, Western US residents, sea otter aficionados (defined in table footnote), and boomers. Interest in whales and seals or sea lions is also included for comparison.

Figure 46. Interest in Viewing Sea Otters, Seals, Sea Lions, and Whales by Visitor Groups



Source: Destination Analysts

¹ **Wildlife Enthusiasts** Respondents (recent, lapsed, and non-visitors) who indicated they were "very interested" or "interested" in engaging in wildlife viewing activities while traveling on the Southern Oregon Coast.

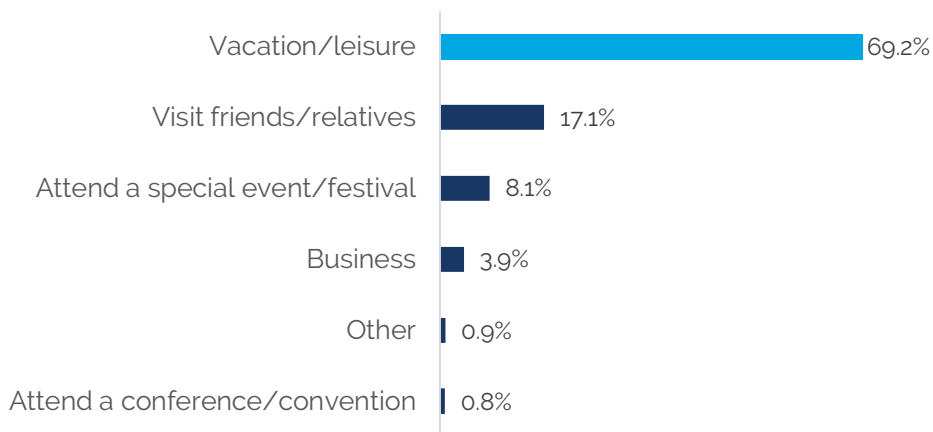
² **Sea Otter Aficionados** Respondents stating they were "extremely likely" to include a trip to the harbor to view sea otters on their most recent trip to the Southern Oregon Coast if sea otters had been present.

Economic Impact of Travel Post-Sea Otter Reintroduction

To estimate the potential economic impact of reintroduction to the Southern Oregon Coast, we focused on the consequences that a newly established population would have on drawing additional visitors to the region as well as how existing wildlife viewing and educational services may benefit from increased usage by visitors and locals alike.

For estimated revenue increases attributable to new visitors, we first identified the proportion of potential visitors we expect to visit for vacation or leisure (69.2%) (Figure 47). We then segmented the population further based on their interest in wildlife viewing (34%, Figure 48).

Figure 47. Reasons for Traveling to the Southern Oregon Coast

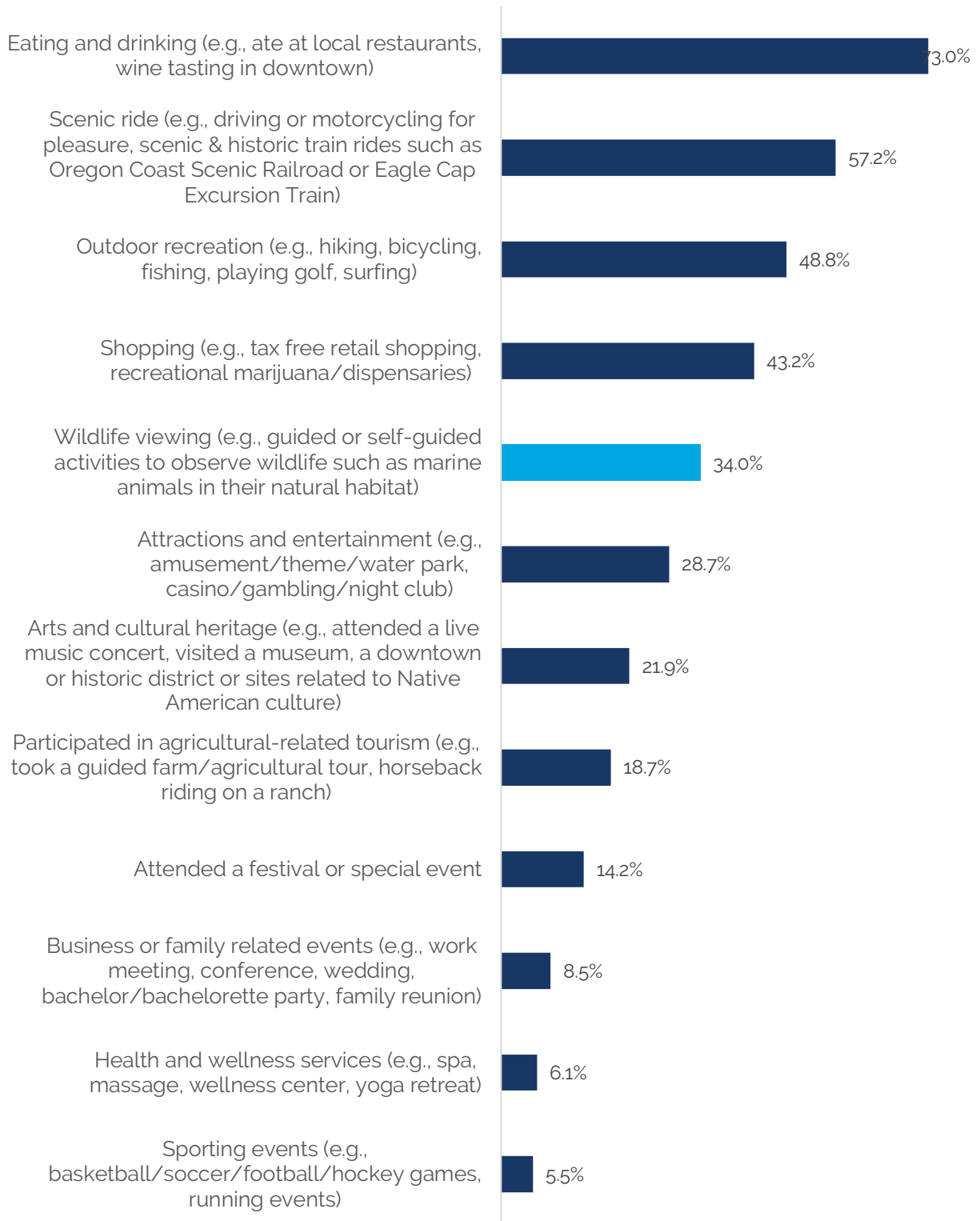


Source: Destination Analysts



Photo credit: Leah Kelley via Pexels

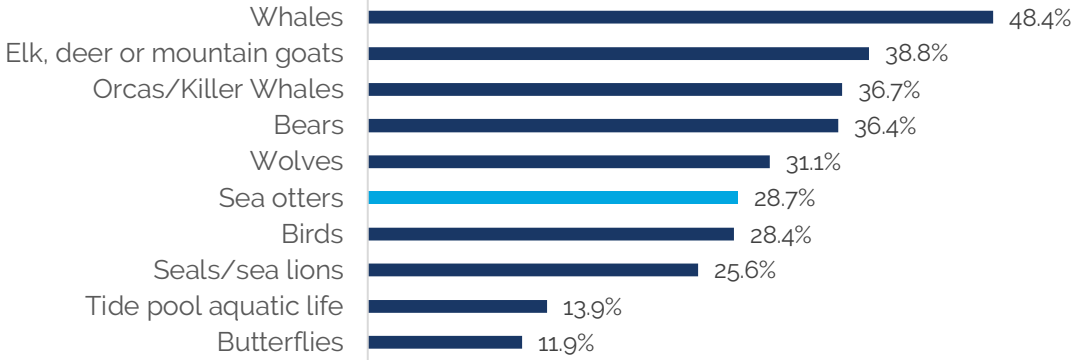
Figure 48. Visitors' Interest in Leisure Activities



Source: Destination Analysts

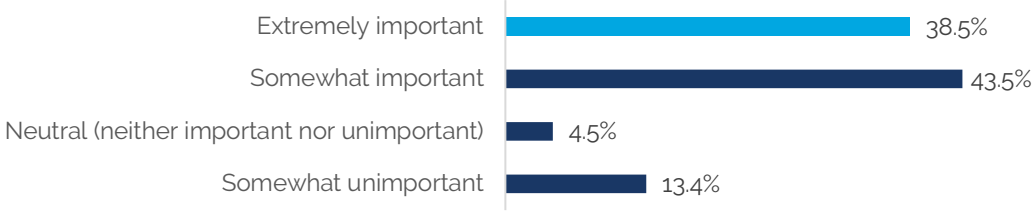
We then selected the corresponding proportions interested in seeing sea otters (Figure 49) and who indicated that the availability of wildlife viewing activities is extremely important when visiting PNW destinations (Figure 50).

Figure 49. "Wildlife Viewers" Rating of Top 3 Species of Interest



Source: Destination Analysts

Figure 50. Importance of the Availability of Wildlife Viewing



Source: Destination Analysts

With this audience segment in place, we then considered the expected growth rate based on visitor volumes to comparable destinations as well as previous research conducted on the impacts of sea otter population expansion in California's Santa Barbara and Ventura counties (Loomis, 2005). Applying average visitor expenditures data from our Regional Travel Impacts Model for Coos and Curry Counties to this additional visitor base yielded over \$3.4 million in expected revenue.

Our calculations of increased revenue for current businesses serving wildlife viewing along the Southern Oregon Coast considered payroll and receipts data for the scenic and sightseeing transportation industry (NAICS 487) in Coos and Curry counties as well as operational data from the tour operator survey, including average number of tours and average people on each tour. With limited data on business receipts for these counties, we used total employment (4) and payroll (\$79,000) within the scenic and sightseeing transportation industry for Curry County to estimate revenue. We then expanded this estimate to the two-county region given that the Industry in Coos County is approximately 60% of the size of Curry County. We then generated scenarios under which sea otters might increase the number of tours performed by these sightseeing businesses. Table 13. presents our calculations for the range of revenue tour guide businesses in the area might expect to generate based on the percent increase in tour demand.

Table 13. Potential Increase in Revenue for Tour Businesses

% increase in tours	Increase in annual revenue
5%	\$19,862
10%	\$39,723
25%	\$99,308
50%	\$198,615

Source: Dean Runyan Associates

Given these two potential revenue sources, we estimate that **the Southern Oregon Coast could realize approximately \$3.5 million in increased spending** once a sea otter population is established. This projection would amount to a 1% increase in travel-related spending to the region, a figure that aligns with the research by Loomis.



Photo credit: Hivkumar Sd via Pexels

Role of Marine Wildlife Viewing and Appreciation in the Travel Industry

Wildlife tourism is a sector of the travel industry that offers visitors the opportunity to view, appreciate, or learn about wildlife. Like all other sectors of the travel industry, wildlife tourism injects “outside money” into the local economy. The businesses and services within this industry sector can be leveraged to attract potential visitors motivated to visit a destination to view wildlife.

Although there is potential to generate positive economic and environmental impacts from wildlife tourism, we must acknowledge the potential negative impacts that can occur. Habitat degradation and harmful wildlife interactions (disturbances) are two potential negative impacts that could occur from unmanaged visitor recreational activity. Proper planning and management of wildlife tourism are important to achieve sustainable outcomes, which entails serving visitors while protecting the well-being of wildlife populations and their habitats.

DRA conducted two interviews to understand how activity from wildlife viewing might impact sea otters and what can be done to achieve sustainable outcomes. The first interview was with Sea Otter Savvy, a 501 C3 organization in Moss Landing, California, a popular location to view sea otters in Monterey Bay, CA. Sea Otter Savvy’s mission is to reduce human-caused disturbances of sea otter populations by engaging through proactive community outreach. The second interview was with Jessica Fujii, the manager of the Sea Otter Program and the principal investigator for the Monterey Bay Aquarium.

Harmful Wildlife Interactions (Disturbances)

Sea Otter Savvy defines a disturbance as any engagement that induces stressful movement of sea otters that results in them breaking from rest. The two primary negative outcomes of disturbing sea otters are unnecessary energy expenditure and habituation. Rest is essential for the health of sea otters due to their rapid metabolism and low-calorie diet. Their research showed that sea otters are disturbed six times during a 12-hour period on average. The primary cause of disturbance is recreation (85%), particularly from non-motorized paddle boats. Swimming away from human-related activity and consistent interruption of rest can have a detrimental impact on the sea otter’s health. Habituation is another negative impact that can occur. When humans consistently approach sea otters or wild animals, the healthy boundary that should be maintained with wildlife can be broken. Habituated sea otters may start approaching humans, and this direct contact can result in injuries, the spread of disease, and, potentially, death.

Wildlife Viewing Guidelines

Wildlife viewing guidelines ensure the safety and well-being of sea otters, humans, and domestic pets. In the comparable coastal destinations with sea otter populations, we observed wildlife viewing guidelines shared by various stakeholders, including DMOs, businesses, and conservation organizations. Wildlife viewing guidelines curated for the sea otter reintroduction to the Southern Oregon Coast should reflect the unique factors present at the selected reintroduction site. For example, estuaries and other sites close to human activity would require more oversight than non-accessible points, such as a rocky coastline. Sea Otter Savvy and NOAA are two organizations we recommend referencing for this information.

Conclusion

In this report, DRA assessed the potential impact sea otters could have on travel and tourism to the Southern Oregon Coast.

First, we looked at the current and historical economic impacts of travel and tourism in the region. As of 2021, travel-related spending totaled \$228 million in Coos County and \$157 million in Curry County. The growth of the travel industry in the region trailed overall compared with the travel spending growth for the State of Oregon. However, it still constituted one of the primary trade-oriented industries for the region. Travel and tourism also played a strong role in the five selected coastal destinations comparable to the Southern Oregon Coast.

Among the five comparable coastal destinations, Sitka, AK, had the largest sight-seeing industry, with approximately 19 businesses reporting that they earn most of their revenue from scenic and sightseeing transportation (NAICS Code 487). As public data are largely unavailable for Coos County and Curry County, we compiled a comprehensive list of businesses and services related to wildlife tourism in these counties and for the comparable destinations.

Tour price and tour length data were collected for all businesses offering guided tours on the Southern Oregon Coast and its comparable destinations. The tours ranged from \$20 to \$995, with an average price of \$152 across all destinations. Using a business survey, we also collected more detailed business information and insights regarding the importance of sea otter viewing. Approximately one-third of businesses identified in the comparable destinations agreed to participate.

DRA conducted two informational interviews to understand how wildlife tourism might impact sea otters. The first interview was with Sea Otter Savvy, a conservation organization in Morro Bay, California. The primary takeaway from this interview was that recreational activity can lead to "disturbances" that can have a negative impact on sea otters' health and lead to habituation. Sea Otter Savvy estimated that sea otters in Morro Bay are disturbed six times during a 12-hour period, and 85% of disturbances are caused by recreational activity, typically non-motorized boats. Wildlife viewing guidelines should be shared with businesses and visitors engaged in wildlife tourism to prevent disturbances. The second interview was with Jessica Fujiii, the manager for the Sea Otter Program and the principal investigator at the Monterey Bay Aquarium (MBA). The primary points of discussion were the positive and negative ecosystem impacts that are associated with a sea otter population, as well as how the MBA partners with the California Department of Fish and Wildlife to manage the presence of sea otters in Monterey.

DRA also contacted visitor bureaus (also known as DMOs) in the five comparable destinations to understand how sea otters can impact the promotion of coastal destinations. When asked to rate the important sea otters to draw visitors to the coastal destination on a one-to-five scale, with one as not important and five as very important, three out of the five respondents selected five. When asked what types of content were used to promote sea otters, images and wildlife viewing guidelines were the two most popular responses.

To gauge travelers' sentiment related to sea otters and wildlife viewing, DRA partnered with Destination Analysts and conducted a visitor survey. The survey involved 822 respondents and included approximately an even split between persons who had visited the Southern Oregon Coast and those who had never visited the region. The purpose of this survey was to understand recent traveler behavior and perceptions of the Southern Oregon Coast and gauge how sea otter reintroduction may impact a potential visitor's decision to come to the Southern Oregon Coast.

Based on findings from this visitor survey and previous travel spending research for the region conducted by DRA in 2022, we estimated the potential economic impact of increased visitation to view sea otters along the Southern Oregon Coast. We projected the region could see approximately \$3.5 million in additional spending associated with the reintroduction of sea otters, representing a 1% increase in the region's travel industry.

Although we expect sea otters would have a positive economic impact on the tourism industry, the actual outcome is variable and dependent on the commitment from key stakeholders (DMOs, local government, business owners) to market the introduction of sea otters to potential visitors and a continued effort to promote wildlife tourism as a part of the destination's marketing strategy.



Photo credit: Timothy Wills-DeTone via Pexels

Recommendations for Successful Outcomes

To achieve a successful travel impact outcome from the reintroduction of sea otters, we recommend that the Elakha Alliance partner with visitor and recreation-oriented entities, government agencies, education organizations, and other valuable stakeholders. These partnerships can be leveraged to promote sea otter reintroduction and foster increased visitor market penetration to generate positive economic impacts for businesses and residents of the Southern Oregon Coast.

The following are some measures available to take advantage of sea otter reintroduction. We recognize that Elakha Alliance and its community partners have already taken steps on some or all of what is included here.

Strategic Partnerships

- Southern Oregon Coast DMOs and CVBs: Advocate for sea otters, marine wildlife, and the ocean environment to be prioritized in the destination's marketing strategy.
- Other US West Coast DMOs and CVBs: Enhance sea otters as a component of West Coast visitor-oriented branding.
- Organizations for wildlife viewing and appreciation: Collaborate with local, regional, or national organizations such as Audubon and Whale Watch Spoken Here.

Economic Development

- Support local and regional measures to foster visitor industry business development associated with marine wildlife viewing and education.

Marketing and Education Materials

- Media: Prepare content that can be used by regional and national media interested in covering sea otter introduction; make it readily available on the Elakha Alliance website.
- DMOs, CVBs, and other government agencies: Prepare content that covers the background of sea otters and related marine wildlife that can be used by DMOs and other government entities that seek state, federal, and foundation financial assistance for visitor-oriented branding and marketing.
- Foster program: Develop education programs for local area residents and schools where children can "foster" sea otters and other marine wildlife species residing locally. This program could promote awareness among residents. Additionally, DMOs can promote otter viewing among families that are hosting visitors.

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Appendix

Destination Analysts Traveler Survey—Executive Summary

Recent Visitors, Lapsed Visitors, and Non-Visitors: A Profile

Recent Visitors (visitors who took a trip to the Southern Coast of Oregon between 2018-2022)
A total of 88.0% of recent visitors originate from the three West Coast states, California (49.5%), Oregon (20.9%), and Washington (17.6%). The recent visitors tended to skew younger, with 26.5% ranging between ages 25–34, with a mean age of 46.4.

Recent visitors were the most likely to have children under 18 in their household (44%). Their average annual household income was \$97,058.

Lapsed Visitors (visitors whose last trip to the Southern Coast of Oregon was in 2017 or earlier)

A total of 90.9% of lapsed visitors are based on the West Coast, skewing more heavily toward California (66.1%) compared with recent visitors. Washington residents (15.7%) had a larger share of lapsed visitors than those from Oregon (9.1%). Lapsed visitors were the oldest segment, with 37.7% over 65 years old and a mean age of 54.5.

Only under one-third of lapsed visitors have children under 18 in their household (31.4%). Their average annual household income was the highest at \$101,633.

Non-Visitors (travelers who have never been to the Southern Coast of Oregon)

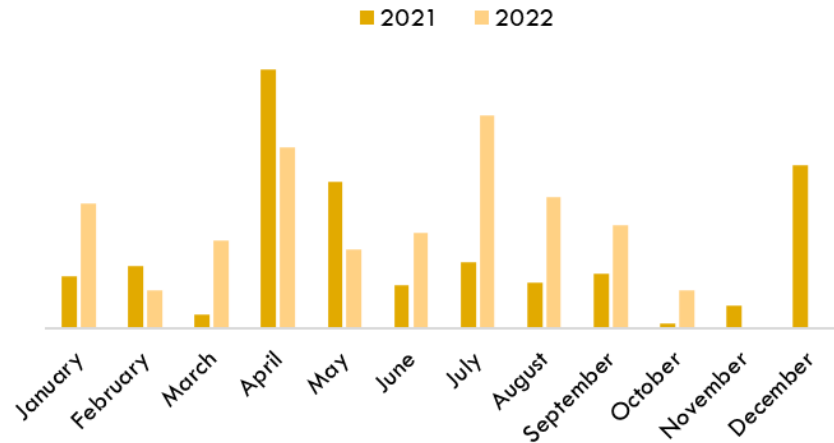
Lastly, non-visitors were also likely to be from California (44.0%), although to a lesser extent than recent and lapsed visitors. This result was followed distantly by those from Florida (4.8%), Washington (4.0%), New York (3.5%), and Illinois (3.3%). Non-visitors had a mean age of 49.3 and the highest share of respondents under 24 (9.2%).

Non-visitors were the least likely segment to have children under 18 in their household (22.7%). Non-visitors have a significantly lower annual household income than recent and lapsed visitors at \$72,165, with 4 of 10 reporting an annual household income of less than \$50,000.



Photo credit: Kindel Media via Pexels

Year of Last Trip to the Southern Oregon Coast

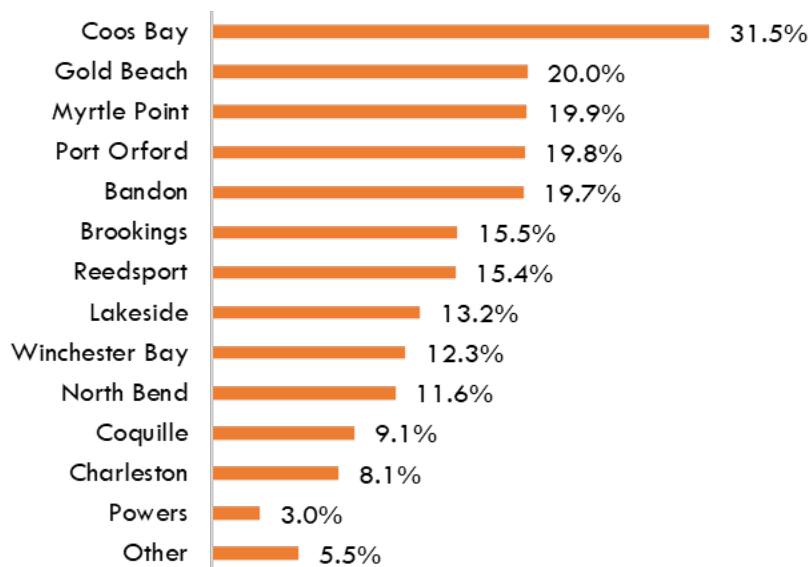


Recent Visitors: Southern Oregon Coast Trip Details

Half of the recent visitors' last trips to the Southern Oregon Coast took place in the past two years (49.9%). Their trips' timing tended to cluster around the spring and summer months. However, some outliers can be attributed to key events during the COVID-19 pandemic, such as the availability of vaccines in the Spring of 2021.

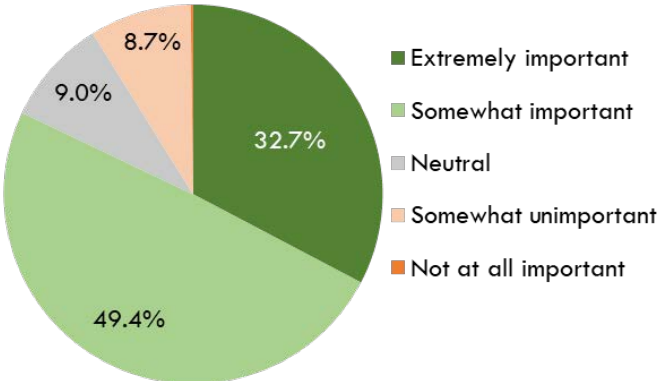
Recent visitors were most likely to have gone to Coos Bay (31.5%) on their last trip to the Southern Oregon Coast, followed distantly by Gold Beach (20.0%), Myrtle Point (19.9%), Port Orford (19.8%), and Bandon (19.7%). In terms of length of stay, their trips were an average of 4.1 days and 3.6 nights, with hotels or motels being the most common type of accommodation (80.0%).

Southern Oregon Coast Cities Visited



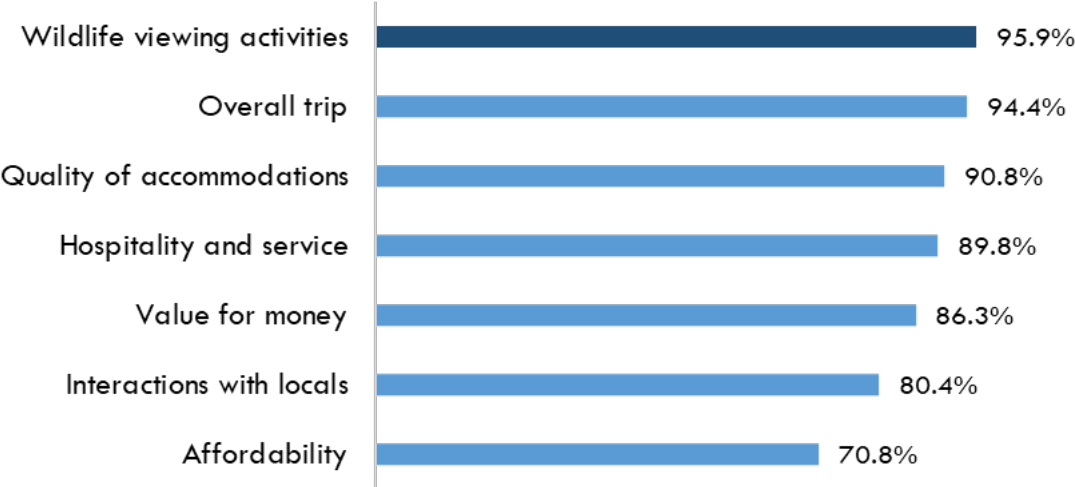
A total of 34.0% of the recent visitors participated in wildlife viewing activity on their most recent trip, spending an average of \$207 on wildlife viewing activities throughout this trip.

Importance of Availability of Wildlife Viewing Activities



The availability of wildlife viewing activities played a major role in recent visitors' decision to visit the Southern Oregon Coast, with 82.1% saying it was somewhat or extremely important.

Satisfaction with Most Recent Southern Oregon Coast Trip



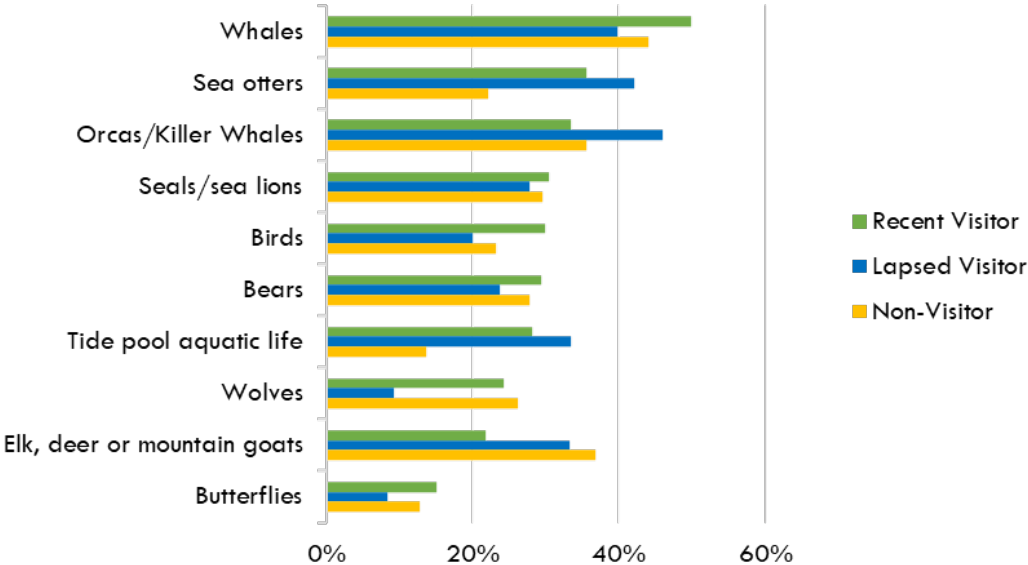
Recent visitors had exceptionally high satisfaction levels with wildlife viewing activities on their most recent trip, with 95.9% reporting they were satisfied or extremely satisfied, which was the highest satisfaction ranking for the list of trip attributes shown, followed by overall trip (94.4%) and quality of accommodations (90.8%).

Engagement Level with Wildlife on Leisure Trips

Pacific Northwest (PNW) Destinations: Wildlife Interest Levels

Among the three visitor segments analyzed, recent visitors to the Southern Oregon Coast were the most likely (93.8%) to be interested or very interested in enjoying wildlife viewing activities when traveling in the PNW. Lapsed visitors had relatively lower interest levels (86.1%), followed by non-visitors (73.1%).

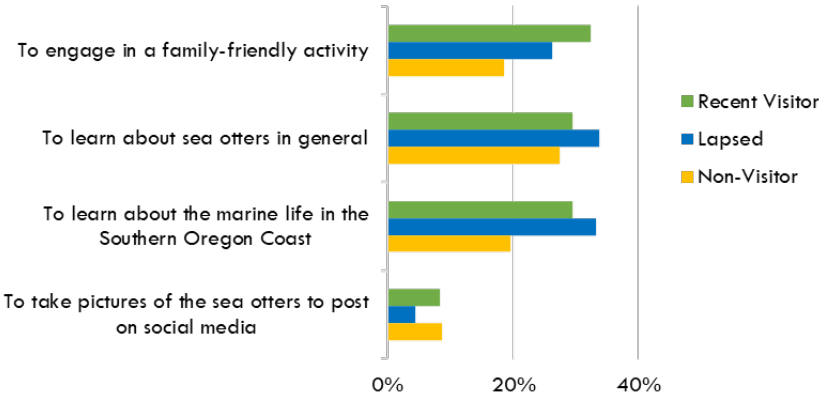
Three Wildlife Types of Interest for PNW Trip



Whales were most likely to be selected as one of the top three types of wildlife travelers would be interested in viewing on a trip to the PNW. Sea otters were most likely to be selected by lapsed visitors (42.1%), followed by recent visitors (35.6%). However, sea otters were selected by less than one-fourth of non-visitors (22.2%).

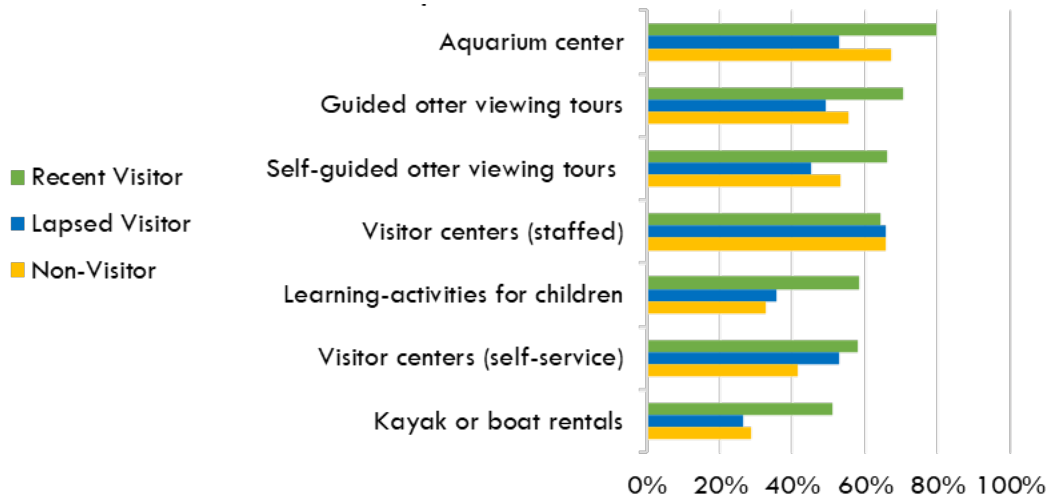
Southern Oregon Coast: Sea Otters Interest Levels

Reasons for Viewing Sea Otters



All respondents were asked to imagine that sea otters had already been reintroduced to the Southern Oregon Coast before their most recent or imagined trip to the area. Most recent visitors (89.8%) said they would have been somewhat or extremely likely to take a trip to the harbor to view sea otters on this trip. While slightly lower than recent visitors, about three-fourths of lapsed visitors (72.4%) and non-visitors (73.6%) also reported that they would likely include a sea otter viewing activity on this trip.

Important Services for Sea Otter Activities



Their reasons for this likelihood vary somewhat by visitor segment, with recent visitors most likely to select "to engage in a family-friendly activity" (32.4%). Meanwhile, learning about sea otters, in general, was the most selected reason for lapsed visitors (33.9%) and non-visitors (27.5%).

Respondents were asked to rank the importance of the availability of certain tourism services for sea otter-related activities in the Southern Oregon Coast. Recent visitors (79.6%) and non-visitors (67.3%) were most likely to say it is important or very important to them that an aquarium center be available. In contrast, the availability of staffed visitor centers was most important for lapsed visitors (65.7%).

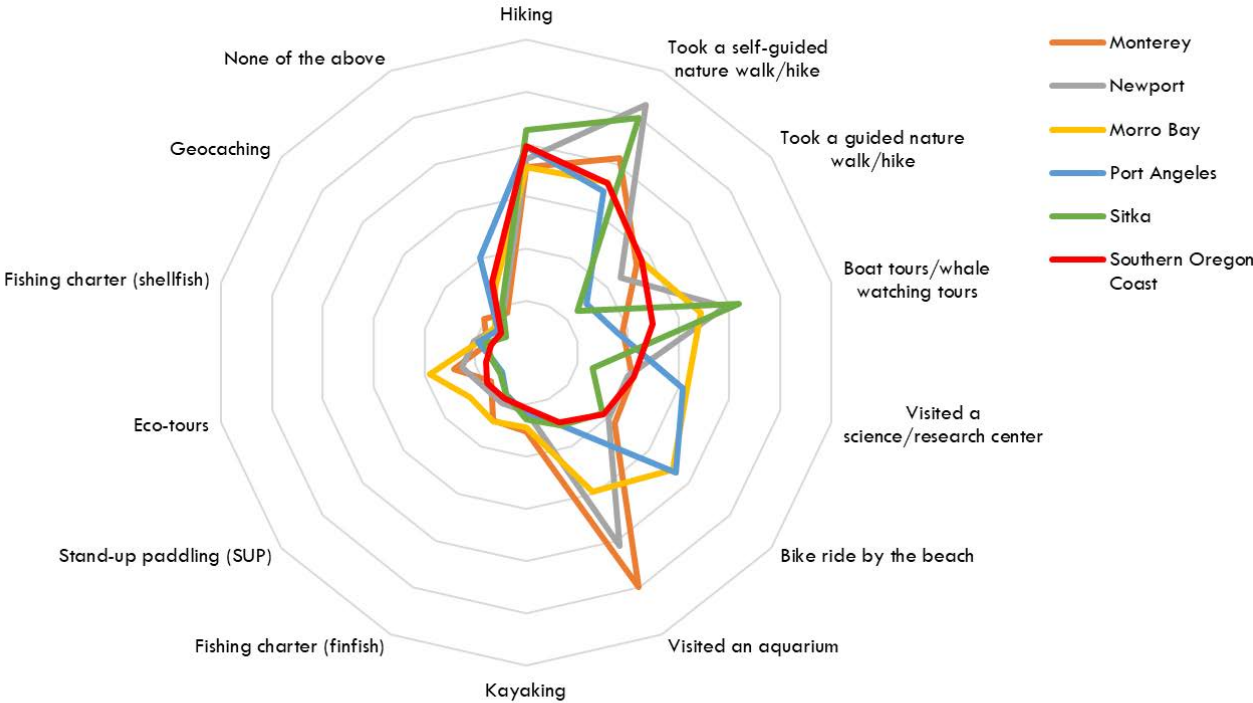
Visitation to Coastal Wildlife Viewing Destinations

Recent visitors to the Southern Oregon Coast were most likely to have also visited Newport, OR, in the past 10 years (43.8%). Monterey, CA, had the highest share of past 10-year visitation for lapsed visitors (61.4%) and non-visitors (10.8%). Overall, lapsed visitors were more likely to have been to the 2 California coastal wildlife viewing destinations (Morro Bay, Monterey) in the past 10 years, while recent visitors represented the largest share of past 10-year visitation to the PNW destinations (Newport, Port Angeles, Sitka).

Past Participation in Coastal Wildlife Viewing Destination Activities

In terms of what kind of activities travelers participated in on their most recent trips to coastal wildlife viewing destinations, recent visitors to Monterey, CA (49.8%), Newport, OR (41.2%), and Morro Bay, CA (29.5%) were much more likely to have visited an aquarium than recent visitors to the Southern Oregon Coast (14.7%). The Southern Oregon Coast fell largely in the middle of the pack for most types of activities but pulled ahead of other coastal wildlife viewing destinations for guided nature walks or hikes, which 28.3% of Southern Oregon Coast visitors participated in on their last trip to the area, followed by Morro Bay (28.2%) and Monterey (27.2%).

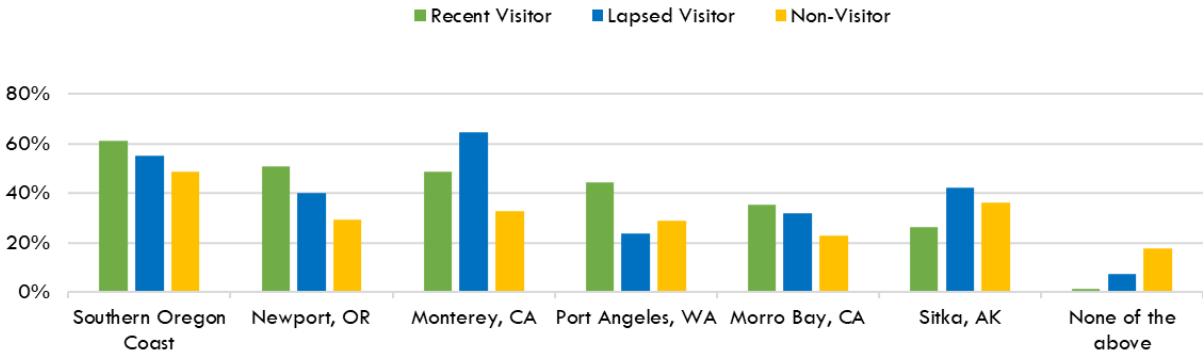
Activities Participated in on Most Recent Trip



Future Travel Interest in Coastal Wildlife Viewing Destination

Looking at interest in traveling to coastal wildlife viewing destinations for leisure trips in the next three years, the Southern Oregon Coast's biggest competitors were Monterey (64.7% of lapsed visitors) and Sitka (42.2% of lapsed visitors, 36.3% of non-visitors). However, the Southern Oregon Coast had the highest shares of travel interest for both recent visitors (61.1%) and non-visitors (48.6%).

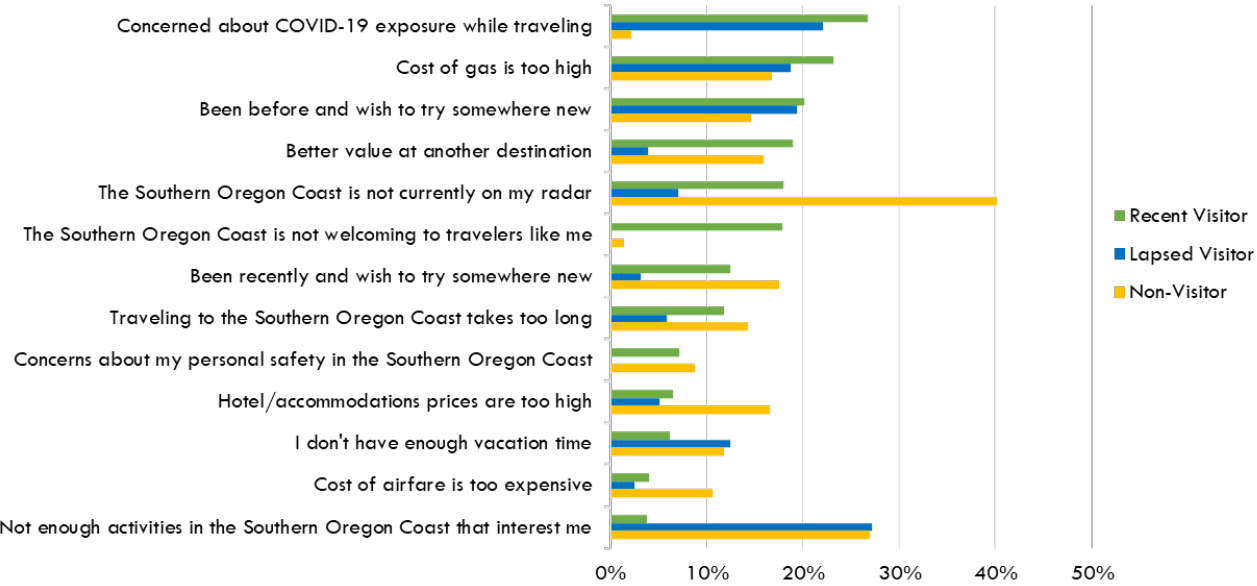
Destinations Interested in Visiting in the Next 3 Years for Leisure



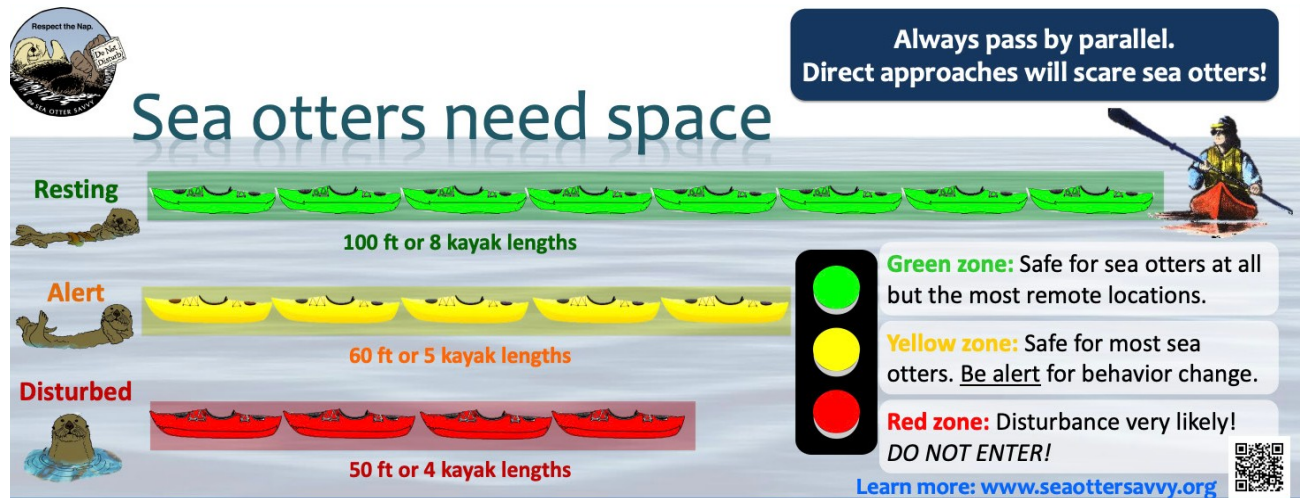
Barriers to Leisure Travel to the Southern Oregon Coast

Among travelers who were not interested in visiting the Southern Oregon Coast for a leisure trip in the next three years, recent visitors' top barrier was concern about COVID-19 exposure while traveling (26.7%), followed by the cost of gas being too high (23.2%) for recent visitors. Non-visitors were most likely to say that the Southern Oregon Coast was not currently on their radar (40.1%). Lapsed visitors' top barrier was not enough activities on the Southern Oregon Coast that interest them (27.0%), which was also the second most frequent barrier for non-visitors (27.1%).

Barriers to Visiting the Southern Oregon Coast in the Next 3 Years



Sea Otter Viewing Guidelines (text and graphic provided by Sea Otter Savvy)



The graphic is titled "Sea otters need space" and features a central illustration of a sea otter resting on a log. To the right, a kayaker is shown in a red kayak. The graphic is divided into three horizontal zones, each with a corresponding color and distance from the otter:

- Resting:** Represented by a green zone, 100 ft or 8 kayak lengths away.
- Alert:** Represented by a yellow zone, 60 ft or 5 kayak lengths away.
- Disturbed:** Represented by a red zone, 50 ft or 4 kayak lengths away.

A traffic light icon on the right side of the graphic shows the green, yellow, and red lights. To the right of the traffic light, the following text is provided:

- Green zone:** Safe for sea otters at all but the most remote locations.
- Yellow zone:** Safe for most sea otters. Be alert for behavior change.
- Red zone:** Disturbance very likely! **DO NOT ENTER!**

At the top right, a dark blue box contains the text: "Always pass by parallel. Direct approaches will scare sea otters!". At the bottom right, there is a QR code and the text: "Learn more: www.seaottersavvy.org".

Sea otters occupy the nearshore coastline where people live, work, and recreate. Where people are regular visitors, sea otters may become habituated to human presence. Sea otters who have lost their natural fear of humans become bolder. In most cases, habituated sea otters will simply allow humans to get closer before fleeing. But on rare occasions, they may demonstrate aggression towards humans and pets or try to interact with humans by climbing on kayaks, paddleboards, or docks. *Responsible wildlife viewers must prevent such physical interactions.*

Direct interaction with sea otters can be dangerous to pets, people, and the sea otters themselves. Sea otters are carnivores with powerful jaws and sharp teeth that can inflict serious injury. Because they are dangerous animals, sea otters who display aggression towards people or pets are likely to be removed from the wild. Please do your part to prevent these hazardous interactions from occurring. *Sea otters don't know better. You do.*

