



TOURISM BRITISH COLUMBIA
C A N A D A

Research Services

Regional Partners Research Program
REGIONAL INQUIRIES
APRIL TO JUNE 2006

November 2006

Research Services
Tourism British Columbia

SUMMARY

Research Services, Tourism BC coordinates the Regional Partners Research Program, which provides centralized marketing research services to the six regional tourism associations.

This report presents the second quarterly summary of consumer inquiries for 2006 and includes inquiries recorded by the six regional tourism offices from April 1 to June 30, 2006. Compilation of the regional inquiries into these quarterly summaries began in the April to June quarter of 2004. Select tables in this report present data to indicate the proportion change since the previous year, which is calculated by subtracting overall quarterly percentages for the previous year from the current year.

Exactly 12,892 inquiries were recorded by the regions during this three-month period. This document summarizes the inquiries by month, region, method, consumer origin, and source code. Additionally, year to date summaries have been provided presenting an overview of all data collected from January to June 2006.

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1.0 INTRODUCTION

Research Services, Tourism BC coordinates the Regional Partners Research Program, which provides centralized marketing research services to the six regional tourism associations. The goals of this program are to:

1. Collect information to accurately evaluate the impact of the Tourism Partners marketing program
2. Provide the regional tourism associations with timely and relevant information to assist their marketing activities.

As part of their marketing activities, the regional tourism associations fulfill travel information requests by mailing packages to consumers. This report is the second quarterly summary of the consumer inquiries collected in 2006 by the regional tourism associations, and continues on the quarterly summary reports initiated in the April through June quarter of 2004.

The report is based on inquiries from April 1 to June 30, 2006 and presents inquiries by region, method, origin, and source.

2.0 METHODS

All regions use the procedures outlined in the *Consumer Database Standards Manual* (March 2004) to collect the following information:

- *Inquiry method:* How the inquiry was made (phone, fax, voicemail, email, web, mail, etc.)
- *Contact information:* Name, address, country, postal code
- *Source codes:* What prompted the consumer to make the inquiry (i.e. newspaper, magazine, internet, etc.)
- *Permission:* Where possible, consumers are asked for permission to contact them for a follow-up conversion study, which will examine trip characteristics and determine return on investment
- *Phone number:* Collected from consumers who give permission for the follow-up research.

The regional inquiry databases are submitted quarterly to Tourism BC where they are cleaned and compiled into a master inquiry database. The master database is used to monitor trends in inquiries (by region, by inquiry method, by source of inquiry, etc.) and to provide a foundation for inquiry conversion studies.

3.0 QUARTERLY SUMMARY

3.1 Total inquiries

Overall, 12,892 consumer inquiries were recorded by the six regions between April 1 and June 30, 2006. The highest number of inquiries was recorded in April. There were, however, variations between the regions on the month with the highest number of inquiries. VCM and TAVI reported the highest number of inquiries in April. TOTA, CTA and NBC received the highest number in May, while June marked the peak month for KRT. KRT inquiries in June were higher than the previous two months combined (Table 1).

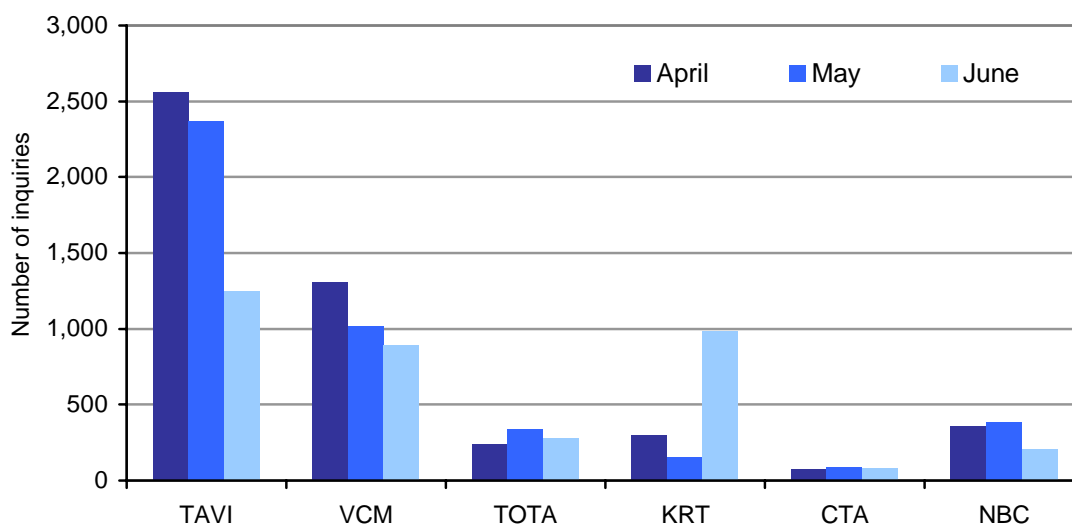
The total number of inquiries increased in 2006 compared to the same quarter in 2005 (up over 2,700 inquiries, which represents a 27% change over the previous year). The proportion of the monthly inquiries received during the quarter, however, has not changed significantly.

Table 1. Total inquiries by region and month.

Month	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall	Change from 2005
April	41%	41%	28%	21%	30%	37%	38%	+1%
May	38%	32%	39%	11%	36%	41%	34%	+2%
June	20%	28%	32%	69%	34%	22%	29%	-3%
Total	6,183	3,214	856	1,437	244	958	12,892	10,175

Regionally, TAVI accounted for almost half (48%) of the total inquiries for this quarter. This was different from the trend seen in the previous two quarters, but reverts back to the pattern established in all prior reporting periods. In this quarter, VCM accounted for 25% of the overall inquiries during this period (Figure 1).

Figure 1. Total inquiries by region and month.



3.2 Inquiries by method

During this quarter, reply cards¹ were the most frequently used method (50%). The web represented another significant source of inquiries with 38% of all inquiries processed through online forms accessible through the regional websites (Table 2).

The use of each method of inquiry was relatively consistent throughout the quarter. However, significant differences were found when comparing this year to 2005, and this quarter to the previous. The greatest differences could be seen with reply cards, which were up 39% over the previous year (11% of all inquiries in 2005 compared to 50% in 2006), and web-based forms which decreased 12% from the previous quarter (down from 50% of the overall total in January through March).

Table 2. Total inquiries by method and month.

Method	April	May	June	Overall	Change from 2005
Web	41%	39%	34%	38%	-19%
Phone	2%	3%	3%	3%	-2%
Reply	51%	44%	54%	50%	+39%
Email	3%	5%	4%	4%	-15%
Fax	<1%	2%	1%	1%	-<1%
Mail	<1%	<1%	<1%	<1%	+<1%
Voicemail	2%	7%	5%	5%	-<1%
Total	4,838	4,354	3,700	12,892	10,175

Web-based forms were the most frequent method of inquiry for TAVI, TOTA, and NBC. The most frequent method of inquiry for VCM and KRT were reply cards, while email was the most frequently used method for CTA (Table 3). Overall numbers should be interpreted with caution as they are strongly affected by the proportion of inquiries submitted for each region and there are significant regional variations.

¹ Reply includes coupons, request cards and labels returned to the regions.

Table 3. Total inquiries by method and region.

Method	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Web	56%	6%	66%	7%	1%	64%	38%
Phone	3%	<1%	1%	<1%	20%	11%	3%
Reply	40%	85%	11%	75%			50%
Email	1%	1%	7%	5%	75%	8%	4%
Fax			2%			10%	1%
Mail	<1%		<1%	<1%			<1%
Voicemail	<1%	7%	13%	12%	5%	6%	5%
Total	6,183	3,214	856	1,437	244	958	12,892

3.3 Inquiries by origin

Overall, American consumers again initiated the greatest percentage (62%) of all inquiries. Similar to the previous reporting period, the number of US inquiries decreased throughout the quarter, while inquiries from Canadian consumers increased throughout the quarter (Table 4). Forty-five percent of all European inquiries were from the UK. This was followed by 20% from Germany and 11% from the Netherlands. Of those from Asia/Pacific nations, Australians again made the most frequent contact with 42% of the total from this category, while an additional 13% of inquiries came from neighbouring New Zealand. The volume of American inquiries was once again up 10% over the same quarter in 2005 and matches the trend observed in the January to March quarter.

Table 4. Total inquiries by origin and month.

Origin	April	May	June	Overall	Change from 2005
Canada	25%	29%	42%	31%	-5%
United States	68%	64%	52%	62%	+10%
Overseas	7%	7%	6%	7%	-5%
<i>Europe</i>	6%	6%	4%	5%	-3%
<i>Asia/Pacific</i>	1%	1%	1%	1%	-1%
<i>Other overseas</i>	<1%	<1%	<1%	<1%	+1%
Unknown	<1%			<1%	0%
Total	4,838	4,354	3,700	12,892	10,175

Alberta had the greatest number of Canadian inquiries, followed by British Columbia (Table 5). This was the same for all months except May when the highest number of inquiries originated from British Columbia (36% of all Canadian inquiries in this month). California, Washington, and Oregon were again the top US states, comprising 54% of all American inquiries during this quarter. Inquiries from California were highest in May (38% of all monthly inquiries from the US), and overall inquiries from California were up 8% over the previous quarter (26% of all US inquiries in January through March were from California).

Table 5. Inquiries for Canadian and American consumers by month.

Province/State	April	May	June	Overall
Canada				
British Columbia	20%	36%	24%	26%
Alberta	52%	32%	48%	44%
Ontario	16%	20%	13%	16%
Other Canada	13%	13%	16%	14%
Total	1,197	1,275	1,546	4,018
United States				
California	32%	38%	33%	34%
Washington	12%	11%	12%	11%
Oregon	11%	6%	7%	9%
Colorado	5%	4%	4%	5%
Arizona	5%	4%	4%	4%
Texas	4%	4%	5%	4%
Nevada	2%	4%	3%	3%
Florida	2%	2%	3%	2%
Idaho	2%	2%	2%	2%
Utah	2%	2%	1%	2%
Other US	23%	23%	26%	24%
Total	3,289	2,765	1,927	7,981

The highest percentage of inquiries to TAVI, VCM and NBC were received from American consumers (64%, 93% and 48% respectively), while TOTA, KRT, and CTA all received the greatest percentage of inquiries from Canadians (ranging from 46% to 70%).

Table 6. Total inquiries by origin and region.

Origin	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Canada	27%	7%	73%	70%	46%	38%	31%
United States	64%	93%	15%	28%	31%	48%	62%
Overseas	10%		11%	1%	23%	14%	7%
<i>Europe</i>	8%		9%	1%	19%	9%	5%
<i>Asia/Pacific</i>	1%		2%	<1%	1%	4%	1%
<i>Other overseas</i>	<1%		1%		3%	1%	<1%
Unknown			<1%				<1%
Total	6,183	3,214	856	1,437	244	958	12,892

The origin of Canadian consumers varied considerably by region (Table 7). The highest number of inquiries recorded for VCM, TOTA, CTA and NBC came from British Columbia, while TAVI and KRT recorded the highest number of inquiries from Alberta. VCM also recorded high numbers of inquiries from Ontario. However, the majority of inquiries to VCM again came from the US. For VCM, California represented 41% of all American inquiries. TAVI also reported that the highest number of American inquiries came from California, while KRT inquiry volume was highest from Oregon. For TOTA, CTA, and NBC there was considerable variation in inquiries with over 30% of all American inquiries originating from other US states. Only those states with the top ten overall inquiries are shown here.

Table 7. Inquiries for Canadian and American consumers by region.

Province/State	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Canada							
British Columbia	17%	36%	47%	17%	69%	42%	26%
Alberta	52%	12%	22%	62%	13%	22%	44%
Ontario	18%	34%	14%	6%	13%	22%	16%
Other Canada	13%	18%	16%	15%	5%	14%	14%
Total	1,666	235	627	1,013	112	365	4,018
United States							
California	35%	41%	14%	5%	11%	14%	34%
Washington	11%	11%	23%	13%	12%	13%	11%
Oregon	6%	7%	8%	47%	11%	5%	9%
Colorado	5%	6%	4%		4%	2%	5%
Arizona	4%	5%	3%	1%	3%	3%	4%
Texas	4%	3%	8%	5%	11%	7%	4%
Nevada	3%	3%	1%	<1%		2%	3%
Florida	2%	2%	6%	3%	4%	7%	2%
Idaho	2%	2%	4%	3%	4%	1%	2%
Utah	2%	2%		<1%	3%	2%	2%
Other US	26%	18%	30%	21%	39%	44%	24%
Total	3,929	2,979	132	403	75	463	7,981

3.4 Inquiries by source

Consumers inquiring at regional tourism offices were asked how they had heard about the regional phone number or website.² Overall, magazines were again the most frequently reported source, followed by Tourism BC and Other Internet sources (Table 8). The majority of the magazine sources cited were from a single publication; Sunset Pacific Northwest (77% of all magazines). VIA magazine was also cited for 12% of all magazine sources.

The increase in magazines in this quarter resulted in an 18% increase in the use of this source as compared to the same quarter in 2005. All other categories either decreased or saw no significant proportional change from the same quarter last year.

Table 8. Total inquiries by major source and month.

Major Source	April	May	June	Overall	Change from 2005
Tourism BC	12%	14%	14%	13%	-6%
Tourism Association	7%	9%	7%	7%	1%
Other Internet	12%	12%	12%	12%	-6%
Newspaper	7%	5%	1%	5%	0%
Consumer show	<1%	<1%		<1%	-2%
Magazine	50%	46%	36%	44%	18%
Guide	1%	1%	1%	1%	-1%
Referral	3%	3%	2%	3%	-2%
Past visit	1%	<1%	<1%	<1%	<1%
Other	4%	2%	22%	9%	4%
Unknown	3%	8%	6%	6%	-6%
Total	4,838	4,354	3,700	12,892	10,175

Magazines were the most frequently cited source for TAVI and VCM, while for TOTA and NBC Other Internet sources were the most commonly cited. Inquiries for CTA were more likely to cite Tourism BC, while other sources accounted for the greatest number of inquiries for KRT (Table 9). Magazines have been a consistently high source of inquiries for VCM, but during this quarter magazines also represented a significant portion of the inquiries for TAVI at 42%. There was very little overall change from this quarter as compared to the January through March period.

² Please refer to the *Consumer Database Standards Manual, March 2004* for more detail on source codes.

Table 9. Total inquiries by major source code and region.

Major Source	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Tourism BC	18%	2%	21%	3%	50%	15%	13%
Tourism Association	12%	<1%	10%	2%	7%	10%	7%
Other Internet	13%	4%	32%	2%	12%	32%	12%
Newspaper	4%	1%	9%	18%	2%	2%	5%
Consumer show	<1%	<1%		<1%		<1%	<1%
Magazine	42%	85%	10%	10%	5%	13%	44%
Guide	1%	<1%	1%	<1%	4%	5%	1%
Referral	3%	1%	3%	2%	5%	5%	3%
Past visit		<1%	2%	1%	2%	1%	<1%
Other	4%	<1%	1%	54%	4%	5%	9%
Unknown	2%	7%	14%	8%	10%	13%	6%
Total	6,183	3,214	856	1,437	244	958	12,892

Table 10 presents the source of inquiries according to the detailed source code collected. For this question, consumers were asked specifically from which source (magazine, newspaper, consumer show, etc) they obtained regional contact information. Given that this question represented a wide variety of campaigns and marketing efforts in which each region participated, there was substantial regional variation.

To better illustrate fluctuations within each region, this table now reflects each detailed source as a percentage of the regional quarterly total. For example, 74% of all inquiries from VCM cited Sunset Pacific Northwest, while this same magazine represents 33% of all TAVI inquiries for the quarter. Fifty-four percent of all KRT inquiries mentioned they contacted the region as a result of information obtained on TV or radio, and 38% of all CTA inquiries indicated they were referred by either the Tourism BC website or call centre. The greater number of inquiries for TOTA and NBC were generated as consumers located regional contact information through an Internet search engine.

Table 10. Inquiries by source (level 2) by region.³

Secondary Source	TAVI	VCM	TOTA	KRT	CTA	NBC	Total	% of all Inquiries
Sunset Pacific Northwest	33%	74%	<1%				4,417	34%
Search engine (i.e. Google)	9%	3%	20%	<1%	7%	24%	1,080	8%
TV/radio	4%	<1%	<1%	54%	1%	1%	1,044	8%
Tourism BC website	10%	2%	10%	1%	18%	4%	865	7%
VIA	7%	9%					690	5%
TVI Publication	8%	<1%					471	4%
Link from another site	3%	1%	12%	2%	5%	8%	445	3%
BC Vacation Planner	4%	1%	4%	<1%	4%	5%	377	3%
Oregonian		1%		16%			254	2%
From a Friend or Relative	2%	<1%	1%	1%	3%	2%	205	2%
Tourism BC Call centre	1%	<1%	2%	<1%	20%	1%	168	1%
TVI Website	2%	<1%	<1%	<1%		<1%	150	1%
BC Accommodations Guide	1%		2%		1%	2%	125	1%
BC Outdoor Adventure Guide	1%	<1%	3%	1%	5%	2%	119	1%
Local tourism association or chamber of commerce	<1%		<1%		1%	9%	113	1%
Edmonton Sun/Journal	2%		2%			<1%	111	1%
Other magazine	<1%	<1%		7%	<1%		109	1%
Calgary Sun/Herald	2%		<1%	<1%			106	1%
Other Guide or book	1%	<1%	1%	<1%	3%	3%	84	1%
Vancouver Sun/Province	<1%	<1%	7%	1%	<1%	<1%	81	1%
Canadian Geographic	1%					2%	77	1%
Alaska Magazine						8%	73	1%
Westworld AB	<1%	<1%	1%	3%		<1%	70	1%
Unknown	2%	7%	14%	8%	10%	13%	750	6%

³ For source (level 2) codes that received 1% or more of total inquiries.

3.5 Permission rates

Privacy legislation in BC requires that consumers be asked for permission to be re-contacted for research purposes. Consumers were asked for permission to contact them for follow-up studies during their inquiry. However, for some inquiries (received by mail, e-mail, fax or voicemail) it was difficult or not possible to ask permission and “no response” was recorded in the database.

Tables 11, 12 and 13 present permission responses by month, region, and method of inquiry. Overall, 14% of consumers gave permission to be re-contacted in this reporting period. The large number of magazine inquiries from VCM for which it was not possible to ask permission no doubt had an effect on overall permission rates. Refusal rates continue to be much higher on web-based forms (77% refusal) than when contact takes place over the phone (23% refusal). It would appear to be the case that the personal contact involved in The phone call increased the likelihood that respondents would agree to participate in future research.

Table 11. Permission response by month.

Month	Yes	No Response	No	Total
April	12%	56%	32%	4,838
May	17%	51%	32%	4,354
June	12%	60%	28%	3,700
Overall	14%	55%	31%	12,892

Table 12. Permission response by region.

Region	Yes	No Response	No	Total
TAVI	15%	39%	46%	6,183
VCM	2%	94%	4%	3,214
TOTA	37%	18%	45%	856
KRT	2%	94%	4%	1,437
CTA	40%	2%	59%	244
NBC	36%	20%	44%	958
Overall	14%	55%	31%	12,892

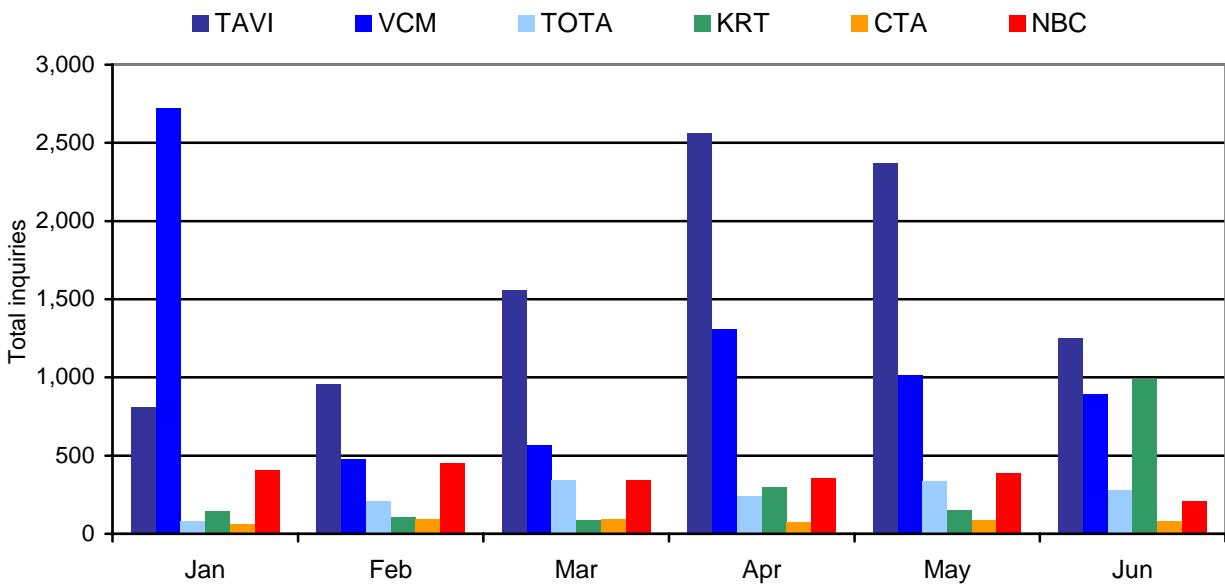
Table 13. Permission response by method.

Method	Yes	No Response	No	Total
Web	23%	1%	77%	4,944
Phone	57%	19%	23%	349
Reply	3%	96%	<1%	6,411
Email	22%	52%	25%	463
Fax	15%	85%		111
Mail	13%	73%	13%	15
Voicemail	17%	81%	2%	599
Overall	14%	55%	31%	12,892

4.0 YEAR TO DATE TRENDS

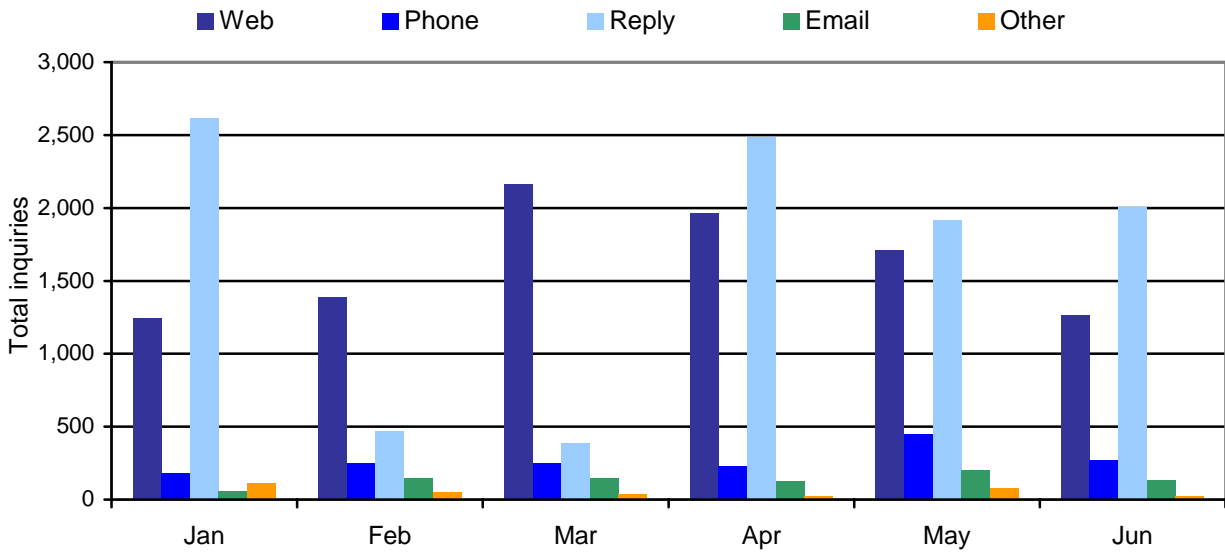
In total, 22,400 inquiries were recorded from all six regions between January 1 and June 30, 2006 (Figure 2). Overall, 42% of these inquiries were recorded by TAVI. VCM reported the second highest number with 31% of all inquiries. April was the busiest month in 2006 so far with 22% of all 2006 YTD inquiries.

Figure 2. Total inquiries by region (January to June 2006).



Thus far in 2006, consumers were equally likely to have used web-based forms and reply cards to contact the regions. Forty-four percent of consumers chose each of these two methods. Reply cards, in particular, had increased over last year (up from 13% at the end of 2005). Phone methods (direct calls and voicemail) represent 7%, and Email an additional 4%.

Figure 3. Total inquiries by method (January to June 2006).



Inquiries from American consumers were recorded most often in all months, except March. Overall, 61% of all inquiries were from US consumers. Canadian consumers initiated 30% of all inquiries in 2006 (Figure 4). It is worth noting again, however, that origin of consumers varies considerably by region.

Figure 4. Total inquiries by origin (January to June 2006).

