



TOURISM BRITISH COLUMBIA
C A N A D A

Research Services

Regional Partners Research Program
REGIONAL INQUIRIES
JULY TO SEPTEMBER 2006

December 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 third quarterly summary of consumer inquiries for 2006 and includes inquiries recorded by the six regional tourism offices from July 1 to September 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 7,142 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 September 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 July 1 to September 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, 7,142 consumer inquiries were recorded by the six regions between July 1 and September 30, 2006. The highest number of inquiries was recorded in July and this was consistent across all regions (Table 1).

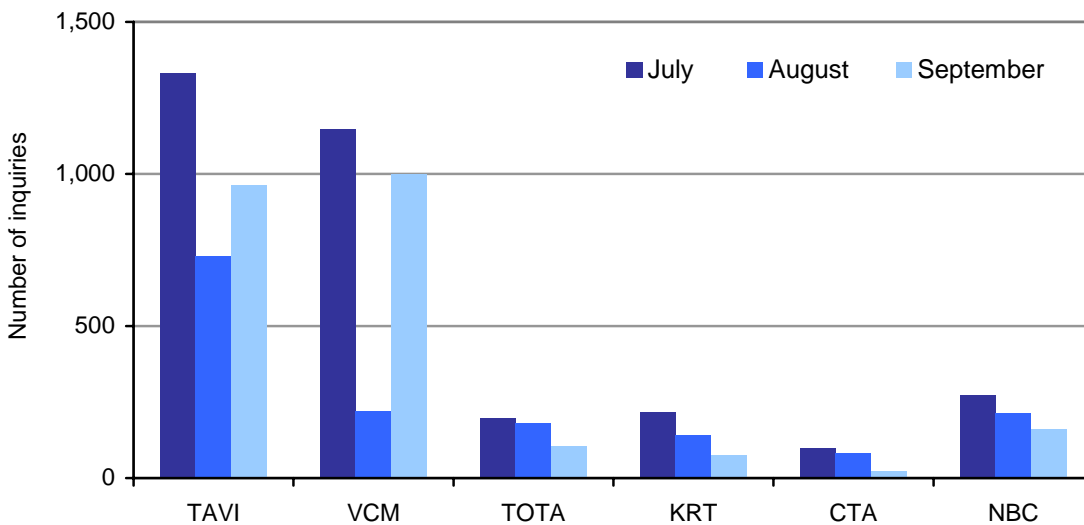
The total number of inquiries increased in 2006 compared to the same quarter in 2005 (up over 1,500 inquiries, which represents a 28% increase over the previous year). This year over year change is consistent with the increase also seen in the April to June quarter. This quarter, however, saw a decrease of 5,750 inquiries compared to the previous quarter in 2006.

Table 1. Total inquiries by region and month.

Month	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall	Change from 2005
July	44%	48%	41%	50%	49%	42%	46%	-7%
August	24%	9%	37%	32%	40%	33%	22%	-5%
September	32%	42%	22%	18%	11%	25%	33%	+12%
Total	3,024	2,363	481	432	198	644	7,142	5,597

Regionally, TAVI accounted for almost half (42%) of the total inquiries for this quarter. VCM accounted for 33% of the overall inquiries during this period, with the remaining regions accounting for 25% of all quarterly inquiries (Figure 1).

Figure 1. Total inquiries by region and month.



3.2 Inquiries by method

During this quarter, reply cards¹ were again the most frequently used method (46%). The web represented another significant source of inquiries with 43% of all inquiries processed through online forms accessible on regional websites (Table 2).

There were significant variations in the use of each method throughout the quarter. Web-based inquiries ranged from a high of 69% of all inquiries for August to a low of 26% for September. Conversely, reply methods were lowest in August (13% of all monthly inquiries), while September was the highest month for this method of contact (67% of all monthly inquiries). Significant differences were also found when comparing this year to 2005. The greatest differences could be seen with reply cards, which were up 31% over the previous year (15% of all inquiries in 2005 compared to 46% in 2006), and web-based forms, which decreased 14% from the previous year (down from 57% of the overall total in 2005).

Table 2. Total inquiries by method and month.

Method	July	August	September	Overall	Change from 2005
Web	43%	69%	26%	43%	-14%
Phone	1%	4%	3%	2%	<1%
Reply	48%	13%	67%	46%	+31%
Email	4%	6%	1%	4%	-9%
Fax	1%	1%	<1%	1%	+1%
Mail	<1%	<1%	1%	<1%	0%
Voicemail	3%	7%	3%	4%	-2%
Unknown	<1%			<1%	+<1%
Total	3,257	1,560	2,325	7,142	4,662

There was no change in the most frequently used method of inquiry by region compared to the previous quarter. 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	59%	14%	78%	19%		75%	43%
Phone	1%	<1%	1%	1%	28%	9%	2%
Reply	39%	82%	3%	45%			46%
Email	<1%	1%	5%	12%	66%	3%	4%
Fax			<1%			9%	1%
Mail	<1%	<1%	1%	<1%	1%		<1%
Voicemail	<1%	3%	12%	23%	4%	4%	4%
Unknown					1%		<1%
Total	3,024	2,363	481	432	198	644	7,142

3.3 Inquiries by origin

Overall, American consumers again initiated the greatest percentage (68%) of all inquiries. The number of US inquiries peaked in September, while inquiries from Canadian consumers peaked in August (Table 4). The origin of consumers from European nations remained consistent this quarter compared to the April to June period. Forty-four percent of all European inquiries were from the UK. This was followed by 15% 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. For this quarter the Asia/Pacific country with the second highest number of inquiries was Japan with 9% of the total from this category. The volume of American inquiries was up 16% over the same quarter in 2005 and matches the trend observed in previous quarters. Consequently, inquiries from Canadian consumers saw a proportional decrease of 11% compared to the same quarter last year when Canada represented 34% of the overall number of inquiries.

Table 4. Total inquiries by origin and month.

Origin	July	August	September	Overall	Change from 2005
Canada	25%	33%	12%	23%	-11%
United States	67%	50%	81%	68%	+16%
Overseas	8%	17%	7%	10%	-4%
<i>Europe</i>	6%	13%	5%	7%	-3%
<i>Asia/Pacific</i>	2%	3%	1%	2%	<1%
<i>Other overseas</i>	1%	1%	<1%	1%	<1%
Unknown	<1%	<1%	<1%	<1%	0%
Total	3,257	1,560	2,325	7,142	5,597

Overall, British Columbia had the greatest number of Canadian inquiries, followed by Alberta (Table 5). However, when inquiries are examined by month this pattern only holds true for July. In all other months this quarter the second highest number of inquiries was from consumers in Ontario. California, Washington, and Oregon were again the top US states, comprising 49% of all American inquiries during this quarter. Other US states also represented a significant number of inquiries. In August, 41% of all American inquiries were from other US states. Only the top 10 states are represented in the table below.

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

Province/State	July	August	September	Overall
Canada				
British Columbia	36%	41%	41%	39%
Alberta	34%	19%	14%	26%
Ontario	18%	24%	25%	21%
Other Canada	11%	16%	20%	14%
Total	812	521	280	1,613
United States				
California	35%	20%	34%	32%
Washington	10%	13%	11%	11%
Oregon	5%	5%	6%	6%
Texas	4%	7%	5%	5%
Arizona	4%	2%	6%	5%
Colorado	4%	3%	6%	5%
Nevada	4%	1%	3%	3%
Florida	3%	4%	2%	3%
Utah	3%	1%	2%	2%
Illinois	2%	2%	1%	2%
Other US	25%	41%	25%	28%
Total	2,170	774	1,884	4,828

The highest percentage of inquiries to TAVI, VCM, KRT and NBC were received from American consumers (68%, 89%, 59% and 44% respectively), while TOTA, and CTA all received the greatest percentage of inquiries from Canadians (64% and 62%, respectively).

Table 6. Total inquiries by origin and region.

Origin	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Canada	21%	7%	64%	36%	62%	38%	23%
United States	68%	89%	19%	59%	23%	44%	68%
Overseas	12%	4%	15%	5%	11%	18%	10%
<i>Europe</i>	9%	3%	10%	3%	7%	12%	7%
<i>Asia/Pacific</i>	2%	1%	4%	1%	1%	3%	2%
<i>Other overseas</i>	1%	<1%	2%	<1%	3%	2%	1%
Unknown			1%		5%		<1%
Total	3,024	2,363	481	432	198	644	7,142

The highest number of consumer inquiries was from British Columbia in all regions, except TAVI (Table 7). For TAVI the highest number of inquiries was from Alberta. The vast majority of inquiries to VCM again came from the US. For VCM, California represented 42% of all American inquiries. For all other regions, the highest number of consumer inquiries originated in Other US states.

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

Province/State	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Canada							
British Columbia	27%	37%	48%	41%	67%	42%	39%
Alberta	33%	14%	23%	31%	18%	18%	26%
Ontario	27%	29%	16%	15%	7%	21%	21%
Other Canada	13%	20%	13%	13%	8%	19%	14%
Total	626	154	308	156	122	247	1,613
United States							
California	28%	42%	13%	12%	20%	16%	32%
Washington	11%	10%	22%	7%	16%	14%	11%
Oregon	6%	5%	9%	3%	4%	5%	6%
Texas	6%	4%	4%	7%	11%	7%	5%
Arizona	4%	6%	3%	2%	4%	2%	5%
Colorado	5%	5%	1%	2%	4%	2%	5%
Nevada	3%	4%	1%	1%		2%	3%
Florida	3%	2%	2%	8%	2%	4%	3%
Utah	3%	2%		<1%	2%	2%	2%
Illinois	2%	2%	2%	3%		3%	2%
Other US	29%	19%	43%	55%	36%	43%	28%
Total	2,045	2,105	93	256	45	284	4,828

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 Other Internet and Tourism BC (Table 8). The majority of the magazine sources cited continued to be from a single publication; Sunset Pacific Northwest (76% of all magazines). VIA magazine was also cited for 13% of all magazine sources, and Travel 50 and Beyond by an additional 5% of consumers.

The increase in magazines this quarter continues to result in an increase in the use of this source compared to the same quarter in 2005. This source was cited 26% more than it was during the same quarter last year. All other categories either decreased or saw very small increases in proportional change from the same quarter last year.

Table 8. Total inquiries by major source and month.

Major Source	July	August	September	Overall	Change from 2005
Tourism BC	16%	24%	7%	15%	-3%
Tourism Association	8%	12%	4%	8%	+4%
Other Internet	14%	26%	11%	16%	-4%
Newspaper	1%	2%	1%	1%	+<1%
Consumer show	3%			1%	-5%
Magazine	47%	16%	68%	47%	+26%
Guide	1%	2%	1%	1%	-<1%
Referral	3%	4%	2%	3%	-1%
Past visit	<1%	1%	<1%	1%	-<1%
Other	2%	2%	1%	2%	-8%
Unknown	4%	10%	5%	6%	-8%
Total	3,257	1,560	2,325	7,142	5,597

Magazines were the most frequently cited source for TAVI, VCM and KRT, while for TOTA and NBC Other Internet sources were the most commonly cited. CTA consumers were more likely to cite Tourism BC (Table 9). Magazines have been a consistently high source of inquiries for VCM and TAVI (83% and 38%, respectively), but during this quarter magazines also represented a significant portion of the inquiries for KRT. For TAVI and VCM Sunset Pacific Northwest and VIA magazine are cited the majority of the time, while for KRT Travel 50 and Beyond was the magazine cited by most consumers. There has been very little overall change in the source by region throughout 2006.

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	21%	4%	25%	6%	37%	18%	15%
Tourism Association	12%	<1%	7%	7%	11%	12%	8%
Other Internet	16%	7%	38%	6%	14%	40%	16%
Newspaper	1%	<1%	2%	6%	2%	3%	1%
Consumer show	3%	<1%		<1%			1%
Magazine	38%	83%	7%	47%	5%	5%	47%
Guide	1%	1%	2%	1%	3%	4%	1%
Referral	4%	1%	4%	3%	3%	2%	3%
Past visit		<1%	1%	3%	4%	1%	1%
Other	2%	<1%	2%		8%	5%	2%
Unknown	2%	4%	12%	21%	14%	10%	6%
Total	3,024	2,363	481	432	198	644	7,142

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 reflects each detailed source as a percentage of the regional quarterly total. For example, 64% of all inquiries from VCM cited Sunset Pacific Northwest, while this same magazine represents 34% of all TAVI inquiries for the quarter. Forty-two percent of all KRT inquiries contacted the region as a result of information obtained from Travel 50 and Beyond. TOTA and NBC consumers relied heavily upon Internet sources. Forty percent of NBC consumers used either a link from another website or a search engine to locate regional contact information, while 38% of all TOTA inquiries were made in the same manner. For CTA consumers the Tourism BC call centre represented the largest number of inquiries with 17% of the regional total during this quarter.

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

Secondary Source	TAVI	VCM	TOTA	KRT	CTA	NBC	Total	% of all Inquiries
Sunset PNW	34%	64%	1%				2,570	36%
Search engine (i.e. Google)	12%	6%	19%	3%	8%	29%	808	11%
Tourism BC website	12%	3%	10%	4%	8%	7%	574	8%
VIA Magazine	2%	16%					445	6%
Link from another site	4%	<1%	19%	4%	5%	11%	301	4%
BC Vacation Planner	4%	<1%	5%		4%	5%	207	3%
TVI publication	6%					<1%	186	3%
Travel 50 & Beyond				42%			181	3%
From a Friend or Relative	3%	<1%	3%	3%	2%	1%	117	2%
Tourism BC call centre	2%	<1%	2%	1%	17%	<1%	106	1%
BC Accommodations Guide	1%	<1%	5%		1%	3%	95	1%
Calgary Gas & Petroleum Show	3%						84	1%
TV/Radio	2%	<1%	<1%		5%	1%	70	1%
TVI Website	2%						70	1%
BC Outdoor Adventure Guide	1%	<1%	3%	1%	2%	2%	65	1%
Dawson Creek VIC						9%	58	1%
Victoria Vacation Guide	2%						58	1%
Other guide or book	1%	<1%	2%	<1%	1%	2%	47	1%
Other Referral	1%	<1%	1%		1%	1%	42	1%
Past Visit		<1%	1%	3%	4%	1%	40	1%
Source unknown/can't recall	2%	4%	12%	21%	14%	10%	393	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, 13% of consumers gave permission to be re-contacted in this reporting period. The large number of magazine inquiries 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 (76% refusal) than when contact takes place over the phone (25% refusal).

Table 11. Permission response by month.

Month	Yes	No Response	No	Total
July	13%	47%	41%	3,257
August	21%	24%	55%	1,560
September	8%	72%	20%	2,325
Overall	13%	50%	37%	7,142

Table 12. Permission response by region.

Region	Yes	No Response	No	Total
TAVI	12%	33%	55%	3,024
VCM	5%	86%	9%	2,363
TOTA	27%	17%	56%	481
KRT	6%	81%	14%	432
CTA	46%	4%	50%	198
NBC	32%	14%	54%	644
Overall	13%	50%	37%	7,142

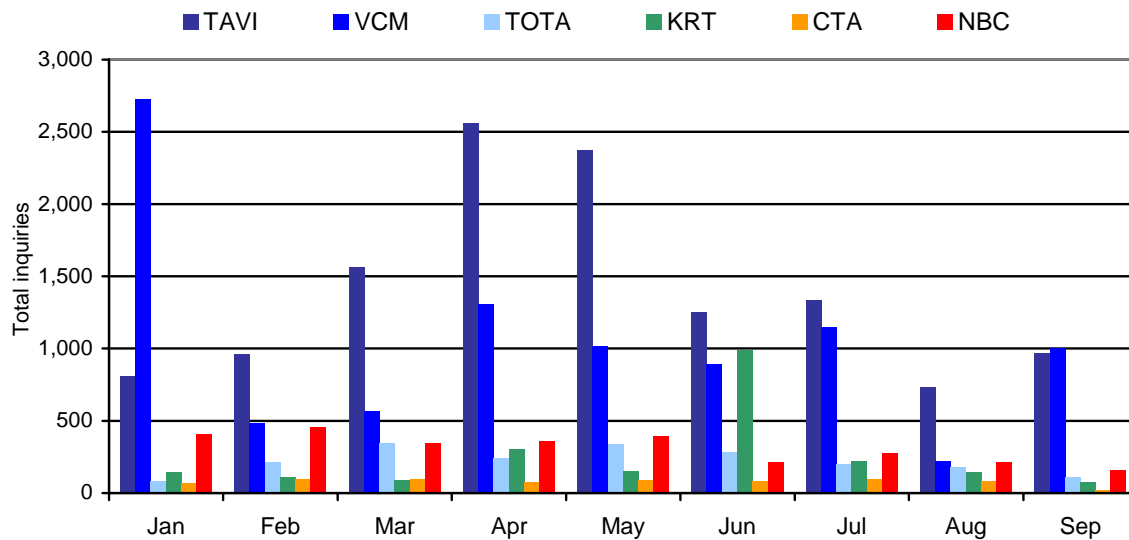
Table 13. Permission response by method.

Method	Yes	No Response	No	Total
Web	22%	1%	76%	3,074
Phone	52%	23%	25%	164
Reply	1%	93%	6%	3,307
Email	26%	46%	28%	250
Fax	2%	98%		60
Mail		82%	18%	17
Voicemail	14%	83%	3%	268
Unknown	50%	50%		2
Overall	13%	50%	37%	7,142

4.0 YEAR TO DATE TRENDS

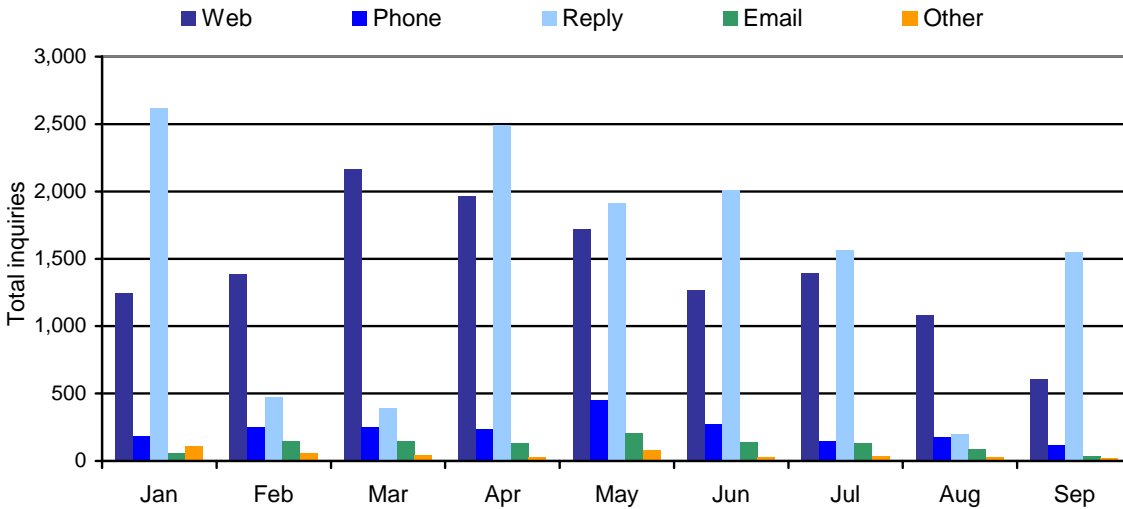
In total, 29,542 inquiries were recorded from all six regions between January 1 and September 30, 2006 (Figure 2). Overall, 42% of these inquiries were recorded by TAVI. VCM reported the second highest number with 32% of all inquiries. April was the busiest month in 2006 so far with 16% of all 2006 YTD inquiries.

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



Thus far in 2006, the majority of consumers used either reply cards or web-based forms to contact the regions, with slightly more consumers using reply cards. Forty-five percent of consumers chose reply cards, while 43% used the web-based forms. Phone methods (direct calls and voicemail) represent 7%, and Email an additional 4%. Reply cards in particular have increased over last year. The 2006 year to date total has already exceeded the 2005 by approximately 9,200 consumers.

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



Inquiries from American consumers were recorded most often in all months, except March. Overall, 62% of all inquiries were from US consumers. Canadian consumers initiated 29% 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 September 2006).

