



Research Services

Regional Partners Research Program
REGIONAL INQUIRIES
JANUARY TO MARCH 2005

July 2005

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 first quarterly summary of consumer inquiries for 2005 and includes inquiries recorded by the six regional tourism offices from January 1 to March 31, 2005.





Exactly 9,530 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.

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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 first quarterly summary of the consumer inquiries collected in 2005 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 January 1 to March 31, 2005 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 monthly 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

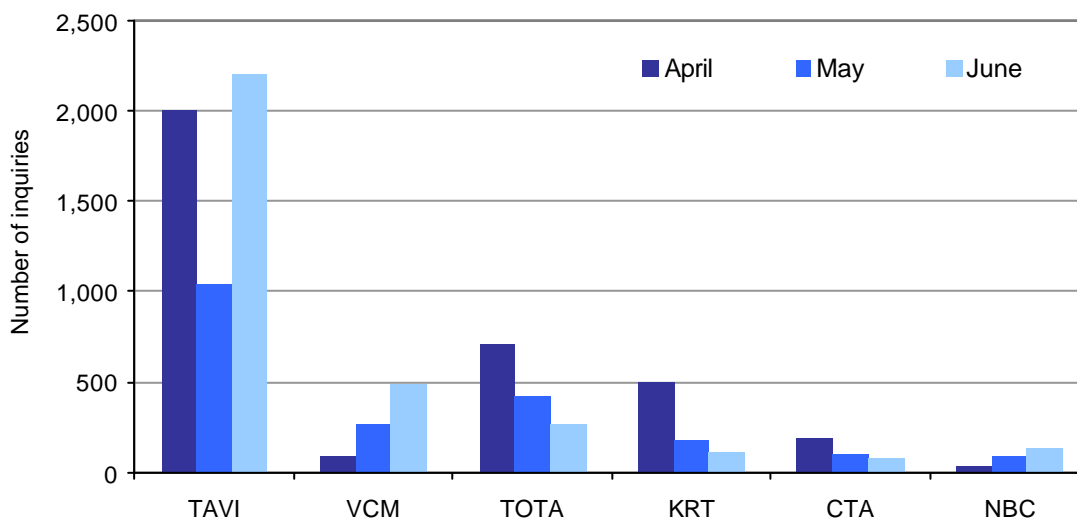
Overall, 9,530 consumer inquiries were recorded by the six regions between January 1 and March 31, 2005. The highest number of inquiries was recorded in February, but there were small variations across the regions. For TAVI and NBC the greatest number of inquiries occurred in February, while for TOTA, KRT, and CTA March inquiry numbers were highest. In VCM there was little variation across all three months with March numbers being only slightly lower (Table 1).

Table 1. Total inquiries by region and month.

Month	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
January	19%	35%	27%	30%	34%	21%	23%
February	46%	35%	34%	30%	30%	40%	42%
March	35%	31%	39%	40%	35%	38%	36%
Total	5,403	1,134	939	290	349	1,415	9,530

Regionally, TAVI accounted for 57% of total inquiries. This continues the trend seen in all of the previous quarterly reports. Given that the TAVI numbers are considerably higher than those reported by other regions, overall figures should be interpreted with caution. These numbers will tend to reflect trends that may not be the same in all regions. In this quarter, NBC reported the second highest number of inquiries with 15% of the overall total. VCM accounted for 12%, while TOTA accounted for an additional 10% (Figure 1).

Figure 1. Total inquiries by region and month.



3.2 Inquiries by method

Web-based forms on the regional websites again continued to be the most frequently used method of inquiry (65%), followed by reply¹ (18%), phone (6%), and email and voicemail (4% each) (Table 2). The use of Internet-based methods to contact the region, which had shown consistent growth throughout each of the quarterly reporting periods, seems to have decreased slightly during this quarter. It is too early to definitively state whether web-based methods have reached a point of saturation among those consumers who would be most likely to use these methods, or whether the group of consumers making inquiries in this quarter is different from those who do not use web-based forms. For example, overseas consumers were more likely to use the web than either Canadian or American consumers (92% of overseas consumers use the web compared to 71% and 50% for Canadian and American consumers, respectively), and overseas consumers were also more likely to contact the regions in January (see table 4). This may account for some of the variation in method of contact by month.

Table 2. Total inquiries by method and month.

Method	January	February	March	Overall
Web	80%	54%	67%	65%
Phone	6%	6%	7%	6%
Reply	>1%	31%	14%	18%
Email	4%	2%	5%	4%
Fax	3%	1%	1%	2%
Mail	2%	1%	3%	2%
Show	1%	2%		1%
Voicemail	4%	3%	4%	4%
Unknown		>1%	>1%	>1%
Total	2,160	3,964	3,406	9,530

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

Web-based forms were reported as the most frequent method of inquiry across all regions, although there was considerable variation in the use of other methods. Comparisons across regions should be made with caution since the procedures used by each region to process information will have an effect on the results. For example, consumers who email TAVI are redirected to the website to complete the request form online and are counted as a web visitor. Other regions may process show requests differently with some collecting information directly from consumers at the show and others distributing reply or fulfillment cards for consumers to initiate contact with the region later. In this quarter, KRT consumers were more likely to initiate contact via email or voicemail, while TAVI consumers were more likely to use reply cards distributed through consumer shows or magazines. Inquiries to NBC and CTA were more likely to be made via telephone (Table 3).

Table 3. Total inquiries by method and region.

Method	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Web	62%	69%	75%	41%	84%	63%	65%
Phone	5%	>1%	1%	9%	10%	18%	6%
Reply	30%		6%		5%		18%
Email	1%	4%	8%	28%	>1%	4%	4%
Fax	>1%	>1%	1%		>1%	10%	2%
Mail	1%	5%	1%	2%	1%	2%	2%
Show		6%				2%	1%
Voicemail	>1%	15%	9%	20%	>1%	1%	4%
Unknown		>1%					>1%
Total	5,403	1,134	939	290	349	1,415	9,530

3.3 Inquiries by origin

Overall, American consumers initiated the greatest percentage (49%) of all inquiries. Inquiries from Canadian consumers peaked in March (39%), while inquiries from overseas consumers saw the highest percentage in January (26%) (Table 4). Among European inquiries, those from the United Kingdom made up 41% of the total, while Germany represented 17% and the Netherlands an additional 11%. Of those from Asia/Pacific nations, Australians made the most frequent contact with 57% of the total from this category.

Table 4. Total inquiries by origin and month.

Origin	January	February	March	Overall
Canada	36%	29%	39%	34%
United States	38%	57%	45%	49%
Overseas	26%	14%	16%	17%
<i>Europe</i>	22%	11%	13%	14%
<i>Asia/Pacific</i>	3%	2%	2%	2%
<i>Other overseas</i>	1%	1%	1%	1%
Unknown	>1%	>1%	>1%	>1%
Total	2,160	3,964	3,406	9,530

Of all Canadian inquiries, the greatest number was from Ontario, followed by BC (Table 5). This pattern is similar to the previous quarter. Washington, California and Oregon were once again the top US states, although the order in which these three states appear in the list is continually changing from one quarter to the next. It is also interesting to note that although inquiries from California and Oregon remained relatively stable throughout the quarter, inquiries from Washington were quite variable ranging from a high of 43% of all US inquiries in February to a low of 9% in January.

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

Province / State	January	February	March	Overall
Canada				
British Columbia	22%	26%	29%	26%
Alberta	16%	22%	19%	19%
Ontario	34%	33%	32%	33%
Other Canada	28%	20%	20%	22%
Total	779	1,143	1,312	3,234
United States				
Washington	9%	43%	34%	34%
California	16%	16%	12%	15%
Oregon	5%	4%	5%	5%
Texas	7%	3%	5%	4%
Florida	6%	3%	4%	3%
Colorado	3%	2%	3%	3%
New York	5%	2%	2%	3%
Illinois	4%	2%	2%	2%
Minnesota	3%	2%	2%	2%
Arizona	3%	1%	2%	2%
Other US	40%	22%	30%	28%
Total	819	2,275	1,541	4,635

TOTA, KRT, and CTA had the highest percentage of inquiries from Canadian consumers (ranging from 50% to 60%), while TAVI, VCM, and NBC received the greatest percentage of inquiries from Americans (ranging from 39% to 59%). VCM once again had the highest percentage of overseas inquiries, with 25% of these inquiries from Russian consumers.

Table 6. Total inquiries by origin and region.

Country	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Canada	27%	29%	60%	50%	55%	39%	34%
United States	59%	39%	19%	32%	19%	46%	49%
Overseas	14%	32%	20%	19%	25%	15%	17%
<i>Europe</i>	12%	27%	16%	16%	22%	11%	14%
<i>Asia/Pacific</i>	2%	3%	3%	1%	2%	2%	2%
<i>Other overseas</i>	1%	2%	1%	2%	1%	2%	1%
Unknown			1%				>1%
Total	5,403	1,134	939	290	349	1,415	9,530

The origin of Canadian consumers once again varied considerably by region (Table 7). TAVI, VCM and NBC reported the highest numbers for consumers from Ontario, while TOTA, and CTA reported that the greatest number of Canadian inquiries were from British Columbians. For KRT the highest number was from consumers from Alberta. While those from Washington State represented 46% of all TAVI inquiries from the US, the category representing the greatest number of inquiries in the other regions was Other US. This is an indication that although Washington, California and Oregon remain generally strong markets there is widespread interest in the regions from across the US.

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

Province / State	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Canada							
British Columbia	21%	19%	31%	24%	58%	28%	26%
Alberta	19%	12%	25%	30%	17%	17%	19%
Ontario	37%	45%	21%	22%	16%	33%	33%
Other Canada	23%	23%	23%	24%	10%	21%	22%
Total	1,452	332	562	144	193	551	3,234
United States							
Washington	46%	4%	12%	23%	22%	6%	34%
California	13%	24%	23%	9%	19%	16%	15%
Oregon	4%	4%	6%	8%	6%	5%	5%
Texas	3%	6%	7%	3%	6%	8%	4%
Florida	3%	8%	4%	4%	6%	4%	3%
Colorado	2%	3%	3%	1%	1%	5%	3%
New York	2%	5%	1%	1%	7%	5%	3%
Illinois	2%	4%	3%	4%	1%	3%	2%
Minnesota	1%	3%	3%	1%	4%	4%	2%
Arizona	1%	3%	3%	3%		3%	2%
Other US	22%	36%	36%	42%	26%	42%	28%
Total	3,198	442	181	92	68	654	4,635

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, Tourism BC was again the most frequent source of inquiry, followed by Internet sources, consumer shows and magazines (Table 8). Tourism BC and other Internet as a source of the inquiry peaked in January, whereas consumer shows peaked in February and magazines were highest in March.

Table 8. Total inquiries by major source and month.

Major source	January	February	March	Overall
Tourism BC	31%	19%	24%	24%
Tourism Association	9%	8%	9%	9%
Other Internet	25%	15%	19%	19%
Newspaper	1%	1%	1%	1%
Consumer Show	1%	27%	5%	13%
Magazine	4%	12%	18%	12%
Guide	2%	2%	3%	2%
Referral	7%	4%	5%	5%
Past visit	2%	1%	1%	1%
Other	5%	3%	4%	4%
Unknown	13%	8%	11%	10%
Total	2,160	3,964	3,406	9,530

Tourism BC was the most frequently cited source of information for consumers in all regions except TOTA (Table 9). For TOTA the greatest percentage of known source of inquiry was other Internet sites. The number of inquiries from consumer shows has increased in all regions over the previous quarter as a result of the spring show season. Although there are regional variations, the percentage of records with unknown source code information has continued to decline over the year in which this data has been collected.

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

Major source	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Tourism BC	24%	26%	10%	27%	48%	23%	24%
Tourism Association	9%	8%	2%	14%	5%	15%	9%
Other Internet	17%	22%	20%	16%	12%	22%	19%
Newspaper	1%	1%	>1%	3%	1%	1%	1%
Consumer Show	21%	6%	>1%	>1%	5%	4%	13%
Magazine	15%	5%	11%	1%	7%	13%	12%
Guide	1%	2%	2%	>1%	3%	6%	2%
Referral	6%	5%	5%	4%	4%	4%	5%
Past visit		4%	2%	8%	3%	3%	1%
Other	5%	1%	4%	2%	4%	1%	4%
Unknown	1%	21%	44%	24%	9%	10%	10%
Total	5,403	1,134	939	290	349	1,415	9,530

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

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

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

Secondary source	TAVI	VCM	TOTA	KRT	CTA	NBC	Total	% of Inquiries
Search engine	13%	22%		3%	6%	19%	1,238	13%
TBC website	11%	15%	7%		17%	15%	1,104	12%
NW Flower and Garden Show	18%						965	10%
TBC call centre	8%	2%	>1%	24%	24%	2%	622	7%
Journey Magazine	8%	>1%					436	5%
BC Vacation Planner	4%	7%	1%		3%	4%	351	4%
VCM publication	4%	7%				>1%	320	3%
Link from another site	5%				3%	2%	294	3%
LA Times	3%	6%				2%	232	2%
From a friend or relative	3%	1%		2%	2%	2%	224	2%
TV/Radio	4%	>1%		1%	2%	>1%	210	2%
Other Internet unknown		>1%	20%	2%	1%		195	2%
Local tourism association or chamber of commerce	1%	>1%	>1%	>1%	>1%	10%	183	2%
Northwest Travel	3%	1%					174	2%
From a travel or tourism business	2%	2%		2%	1%	>1%	128	1%
Past visit		4%	2%	8%	3%	3%	128	1%
Magazine unknown		>1%	11%		1%		107	1%
Alaska Magazine						7%	105	1%
Phone book or directory	2%			>1%	2%	1%	103	1%
Unknown	1%	21%	44%	24%	9%	10%	967	10%

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. During an inquiry, consumers are asked for permission to contact them for follow-up studies, however, for some inquiries (received by mail, email, 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, 30% of consumers gave permission to be re-contacted in this reporting period. This is up slightly from the previous quarter in which 27% of consumers consented to give permission. Interestingly, refusal rates continue to be much higher on web-based forms than when contact takes place over the phone. It would appear to be the case that the personal contact involved in a phone call increases the likelihood that one will agree to participate in future research.

Table 11. Permission response by month.

Month	Yes	No response	No	Total
January	32%	15%	53%	2,160
February	27%	28%	45%	3,964
March	33%	17%	51%	3,406
Overall	30%	21%	49%	9,530

Table 12. Permission response by region.

Region	Yes	No response	No	Total
TAVI	37%	19%	44%	5,403
VCM	26%	30%	44%	1,134
TOTA	37%	28%	35%	939
KRT	12%	52%	36%	290
CTA	30%	20%	50%	349
NBC	8%	10%	82%	1,415
Overall	30%	21%	49%	9,530

Table 13. Permission response by method.

Method	Yes	No response	No	Total
Web	34%	1%	65%	6,147
Phone	43%	14%	44%	574
Reply	28%	57%	15%	1,686
Email	5%	79%	17%	337
Fax	1%	65%	34%	161
Mail	20%	61%	19%	179
Show	11%	80%	9%	98
Voicemail	3%	93%	4%	346
Unknown		100%		2
Overall	30%	21%	49%	9,530