



TOURISM BRITISH COLUMBIA
C A N A D A

Research Services

Regional Partners Research Program
REGIONAL INQUIRIES
JANUARY TO MARCH 2006

August 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 first quarterly summary of consumer inquiries for 2006 and includes inquiries recorded by the six regional tourism offices from January 1 to March 31, 2006. Compilation of the regional inquiries into these quarterly summaries began in the April to June quarter of 2004, and sufficient data has been collected to make comparisons to the previous year. Select tables in this report present data to indicate the proportion change since the previous year.

Exactly 9,508 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 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 January 1 to March 31, 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, 9,508 consumer inquiries were recorded by the six regions between January 1 and March 31, 2006. The highest number of inquiries was recorded in January. However, there was considerable variation among the regions. While VCM and KRT both reported the highest number of inquiries in January, for NBC the highest incidence occurred in February, and for TOTA and TAVI the highest incidence occurred in March. CTA reported an equal number of inquiries in both February and March, and this number was higher than the number of inquiries received in January for that region (Table 1).

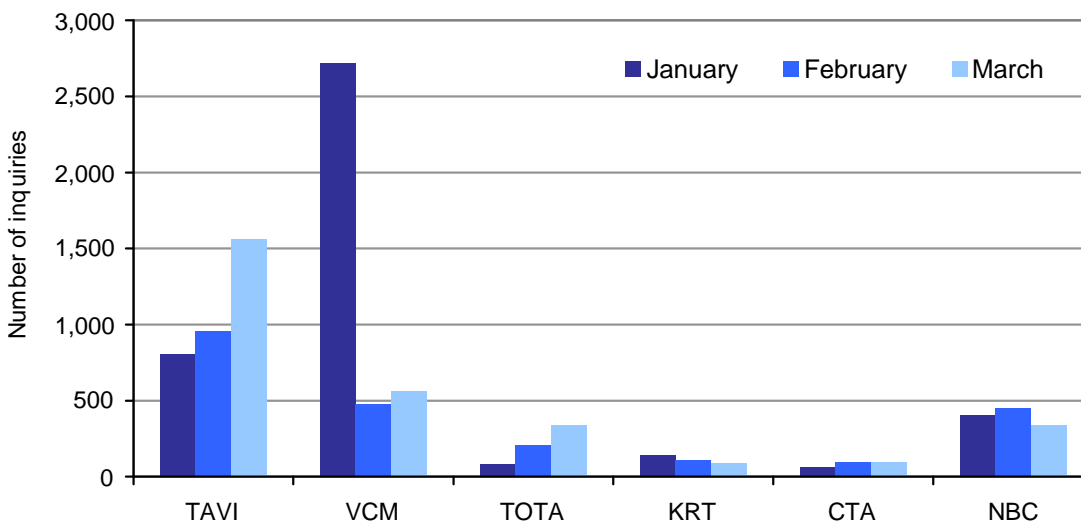
The total number of inquiries decreased slightly from 2005 (down 22 inquiries in 2006). There were significant proportional changes for the months of January and February, while the proportion of inquiries occurring in March decreased slightly.

Table 1. Total inquiries by region and month.

Month	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall	Change from 2005
January	24%	72%	13%	42%	25%	34%	44%	+21%
February	29%	13%	33%	32%	37%	38%	24%	-18%
March	47%	15%	54%	26%	37%	29%	31%	-5%
Total	3,323	3,764	634	339	249	1,199	9,508	9,530

Regionally, VCM accounted for 40% of the total inquiries for this quarter. This continues a trend from the previous quarter (October to December, 2005), but differs from reported totals in quarters previous to that. In this quarter, as in last, TAVI reported the second highest number of inquiries with 35% of the overall total. NBC accounted for 13%, while TOTA accounted for an additional 7% (Figure 1).

Figure 1. Total inquiries by region and month.



3.2 Inquiries by method

During this quarter, the web was the most frequently used method (40%). Reply cards¹ were also a popular method of contact for consumers with 37% of all inquiries processed through these online forms (Table 2).

The use of each method of inquiry is relatively consistent throughout the quarter, with the exception of reply and web-based methods. The use of reply cards dropped from 62% in January to 13% in March, while web-based methods increased from 30% to 73% in the same period. Overall, however, this method decreased 15% proportionally over the same period in the previous year, while reply methods increased by 19%. Some of this change is likely due to the fact that reply cards that were entered as email in VCM in previous quarters have been coded differently in 2006 than they were in 2005.

Table 2. Total inquiries by method and month.

Method	January	February	March	Overall	Change from 2005
Web	30%	60%	73%	50%	-15%
Phone	3%	7%	4%	4%	-2%
Reply	62%	20%	13%	37%	+19%
Email	1%	6%	5%	4%	0%
Fax	1%	2%	1%	1%	-1%
Mail	<1%	1%	<1%	<1%	->1%
Voicemail	2%	3%	4%	3%	-1%
Show	1%	<1%		1%	0%
Unknown	<1%	<1%		<1%	0%
Total	4,219	2,301	2,988	9,508	9,530

Web-based forms were reported as the most frequent method of inquiry for CTA, NBC, TAVI and TOTA. In all of these regions except CTA, this method accounted for over two-thirds of all regional inquiries, with the total web inquiries from TAVI representing 91% of all consumer inquiries for that region during this quarter. The most frequent method of inquiry for VCM was reply card. Voicemail was the most frequently used method of inquiry for KRT (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	91%	9%	74%	22%	48%	65%	50%
Phone	7%	<1%	2%	1%	13%	12%	4%
Reply	1%	90%	6%	9%	8%		37%
Email	<1%	2%	5%	23%	26%	9%	4%
Fax		<1%				9%	1%
Mail	<1%	<1%	2%	2%	1%		
Show	1%	<1%	11%	29%	4%	5%	3%
Voicemail		0%		15%			1%
Unknown	<1%	<1%					<1%
Total	3,323	3,764	634	339	249	1,199	9,508

3.3 Inquiries by origin

Once again, American consumers initiated the greatest percentage (59%) of all inquiries. The number of US inquiries decreased throughout the quarter. Inquiries from Canadian consumers increased throughout the quarter, as did inquiries from overseas (Table 4). Forty-three percent of all European inquiries were from the UK. This was followed by 15% from the Netherlands and 14% from Germany. Of those from Asia/Pacific nations, Australians again made the most frequent contact with 49% of the total from this category, while an additional 10% of inquiries came from neighbouring New Zealand. The volume of American inquiries (up 10% proportionally from the same period in 2005) has a strong influence on the proportional change for the other origin categories.

Table 4. Total inquiries by origin and month.

Origin	January	February	March	Overall	Change from 2005
Canada	13%	37%	47%	29%	-5%
United States	79%	50%	39%	59%	+10%
Overseas	8%	13%	15%	11%	-6%
<i>Europe</i>	6%	11%	13%	9%	-5%
<i>Asia/Pacific</i>	1%	2%	1%	1%	-1%
<i>Other overseas</i>	1%	<1%	1%	1%	0%
Unknown			<1%	<1%	0%
Total	4,219	2,301	2,988	9,508	9,530

Alberta had the greatest number of inquiries from Canada, followed by Ontario (Table 5). This was the same for all months except January when the highest number of inquiries originated from Ontario (36% of all Canadian inquiries in this month) and BC followed with 23% of all monthly inquiries. California, Washington, and Oregon were the top US states, comprising 41% of all American inquiries during this quarter. Inquiries from California were highest in March (29% of all monthly inquiries from the US), but this state saw consistently high numbers of inquiries throughout this reporting period.

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

Province/State	January	February	March	Overall
Canada				
British Columbia	23%	24%	19%	21%
Alberta	20%	30%	49%	37%
Ontario	36%	27%	18%	25%
Other Canada	21%	19%	14%	17%
Total	565	840	1,390	2,795
United States				
California	25%	24%	29%	26%
Washington	9%	9%	9%	9%
Oregon	5%	6%	7%	6%
Texas	6%	5%	5%	5%
Florida	5%	6%	3%	5%
Colorado	5%	7%	3%	5%
Arizona	4%	3%	3%	4%
New York	3%	2%	2%	3%
Illinois	3%	2%	2%	2%
Nevada	2%	2%	3%	2%
Other US	33%	34%	34%	33%
Total	3,324	1,155	1,155	5,634

The highest percentage of inquiries to CTA, TAVI and TOTA were received from Canadian consumers (48%, 46% and 60% respectively), while KRT, NBC, and VCM all received the greatest percentage of inquiries from Americans (ranging from 44% to 93%). CTA had the highest percentage of overseas inquiries, the majority of which came from European countries.

Table 6. Total inquiries by origin and region.

Origin	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Canada	46%	4%	60%	33%	48%	41%	29%
United States	37%	93%	22%	52%	30%	44%	59%
Overseas	17%	3%	18%	14%	22%	15%	11%
<i>Europe</i>	14%	3%	15%	12%	19%	12%	9%
<i>Asia/Pacific</i>	2%	<1%	2%	2%	2%	2%	1%
<i>Other overseas</i>	1%	<1%	1%	1%	2%	1%	1%
Unknown			<1%				<1%
Total	3,323	3,764	634	339	249	1,199	9,508

Origins of Canadian consumers varied considerably by region (Table 7). The highest number of inquiries recorded for CTA, KRT, NBC and TOTA came from British Columbia, while TAVI recorded the highest number of inquiries from Alberta. Over half of inquiries made to VCM came from Ontario. However, Canadian inquiries overall made up a very small percentage of all inquiries made to VCM; most came from the United States. For VCM, California represented 33% of all American inquiries. Within CTA inquiry volume was highest from Washington. KRT and TOTA both reported a high number of American inquiries coming from Florida. For NBC and TAVI there was considerable variation in inquiries with over 40% of all American inquiries originating 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	11%	21%	29%	37%	53%	35%	21%
Alberta	51%	10%	24%	29%	13%	21%	37%
Ontario	23%	51%	21%	15%	19%	28%	25%
Other Canada	15%	18%	25%	19%	15%	15%	17%
Total	1,534	154	381	113	119	494	2,795
United States							
California	15%	33%	12%	6%	15%	13%	26%
Washington	9%	9%	10%	11%	36%	10%	9%
Oregon	7%	5%	5%	6%	5%	5%	6%
Texas	8%	5%	3%	4%	1%	5%	5%
Florida	4%	3%	25%	27%	3%	4%	5%
Colorado	5%	4%	3%	2%	1%	12%	5%
Arizona	3%	5%	5%	3%	0%	3%	4%
New York	4%	3%	4%	3%	1%	2%	3%
Illinois	4%	2%	1%	2%	3%	2%	2%
Nevada	1%	3%	2%	2%	1%	1%	2%
Other US	40%	28%	30%	34%	34%	43%	33%
Total	1,230	3,486	139	177	75	527	5,634

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 sources and Tourism BC (Table 8). The majority of the magazine sources cited were three specific publications; Sunset Pacific Northwest (57% of all magazines), Travel 50 and Beyond (31%), and Via Magazine(7%).

The increase in magazines in this quarter translated into a 28% increase in the use of this source as compared to the same quarter in 2005. Newspapers saw a slight increase (2%) as well. All other categories either decreased or saw no proportional change from the same quarter last year.

Table 8. Total inquiries by major source and month.

Major Source	January	February	March	Overall	Change from 2005
Tourism BC	11%	20%	20%	16%	-8%
Tourism Association	2%	5%	11%	6%	-3%
Other Internet	12%	21%	23%	17%	-2%
Newspaper	1%	0%	9%	3%	+2%
Consumer show	1%	6%	1%	2%	-11%
Magazine	63%	26%	18%	40%	+28%
Guide	1%	2%	2%	1%	-1%
Referral	2%	5%	4%	3%	-2%
Past visit	<1%	1%	1%	1%	0%
Other	2%	5%	4%	3%	-1%
Unknown	5%	10%	8%	7%	-3%
Total	4,219	2,301	2,988	9,508	9,530

Tourism BC was the most frequently cited source of information for consumers in TAVI and CTA. Other Internet sources were most frequently reported for NBC and TOTA,. Magazines were the most frequently cited source for VCM while the most frequently cited source was unknown for KRT (Table 9). The fact that magazines were again the most frequently cited source of information for consumers is likely due to the large percentage of consumers in VCM citing magazines as the source of their inquiry (90%) and the high volume of inquiries from this region.

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	29%	5%	10%	10%	42%	16%	16%
Tourism Association	10%	<1%	12%	18%	5%	2%	6%
Other Internet	24%	4%	44%	10%	13%	31%	17%
Newspaper	8%	<1%	<1%	8%	<1%	<1%	3%
Consumer show	1%		6%	15%	8%	6%	2%
Magazine	7%	90%	3%	1%	5%	11%	40%
Guide	2%	<1%	1%	1%	2%	4%	1%
Referral	6%	<1%	6%	4%	3%	3%	3%
Past visit		<1%	2%	2%	3%	2%	1%
Other	7%		1%	<1%	6%	4%	3%
Unknown	6%	<1%	14%	29%	13%	21%	7%
Total	3,323	3,764	634	339	249	1,199	9,508

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 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
Sunset Pacific Northwest	>1%	21%					2,019	21%
Travel 50		12%					1,097	12%
Search engine (i.e. Google)	5%	1%	2%		>1%	3%	1,037	11%
Tourism BC website	3%	1%		>1%	>1%	1%	431	5%
Tourism BC unknown	3%			>1%		>1%	323	3%
Tourism BC call centre	2%		>1%	>1%	1%	>1%	303	3%
Link from another site	1%	>1%	1%		>1%	1%	302	3%
VIA		3%					257	3%
BC Vacation Planner	1%	>1%	>1%		>1%	1%	237	2%
Other internet unknown	2%						234	2%
Tourism association unknown	2%						185	2%
Newspaper unknown	2%						170	2%
From a friend or relative	1%	>1%	>1%	>1%	>1%	>1%	166	2%
BC Outdoor Adventure Guide	>1%	1%	>1%		>1%	>1%	151	2%
TV/Radio	1%		>1%	>1%	>1%	>1%	130	1%
Westworld AB	1%	>1%	>1%			>1%	109	1%
Phone book or directory	>1%		>1%		>1%	>1%	76	1%
TVI publication	1%					>1%	75	1%
Other guide or book	>1%			>1%	>1%	>1%	74	1%
Canadian Geographic	>1%					>1%	69	1%
Other unknown	1%						66	1%
Referral unknown	1%						59	1%
Denver Fishing						1%	58	1%
BC Accommodations Guide		>1%	>1%		>1%	>1%	56	1%
KR Publication	>1%			1%			53	1%
Magazine unknown	1%		>1%				52	1%
Florida Super Rally RV Show				1%			51	1%
TOTA Publication	>1%		1%				50	1%
Unknown	2%	>1%	1%	1%	>1%	3%	685	7%

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 are 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, 19% 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 (70% refusal) than when contact takes place over the phone (19% refusal). 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	13%	67%	20%	4,219
February	27%	30%	43%	2,301
March	22%	21%	56%	2,988
Overall	19%	44%	37%	9,508

Table 12. Permission response by region.

Region	Yes	No Response	No	Total
TAVI	27%	1%	71%	3,323
VCM	4%	91%	6%	3,764
TOTA	33%	31%	36%	634
KRT	8%	75%	17%	339
CTA	29%	27%	44%	249
NBC	41%	15%	45%	1,199
Overall	19%	44%	37%	9,508

Table 13. Permission response by method.

Method	Yes	No Response	No	Total
Web	29%	1%	70%	4,800
Phone	67%	15%	19%	418
Reply		100%		3,476
Email	25%	56%	19%	350
Fax	4%	94%	2%	112
Mail		79%	21%	38
Show		100%		51
Voicemail	22%	69%	9%	261
Unknown	50%		50%	2
Overall	19%	44%	37%	9,508