



Research Services

Regional Partners Research Program  
**REGIONAL INQUIRIES**  
**JULY TO SEPTEMBER 2004**

December 2004

Research Services  
Tourism British Columbia

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## 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 recorded by the six regional tourism offices from July 1 to September 30, 2004.





Over 4,600 inquiries were recorded by the regions in this three-month period. This document summarizes the inquiries by month, region, method of inquiry, origin, and source code. This document also provides a year to date summary of all inquiries recorded from April 1 to September 30, 2004, including information on month, method of inquiry, and consumer origin.

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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 by the regional tourism associations.

The report is based on inquiries from July 1 to September 30, 2004 and presents inquiries by month, region, method of inquiry, origin, and source of inquiry.

## 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 to Tourism BC monthly 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

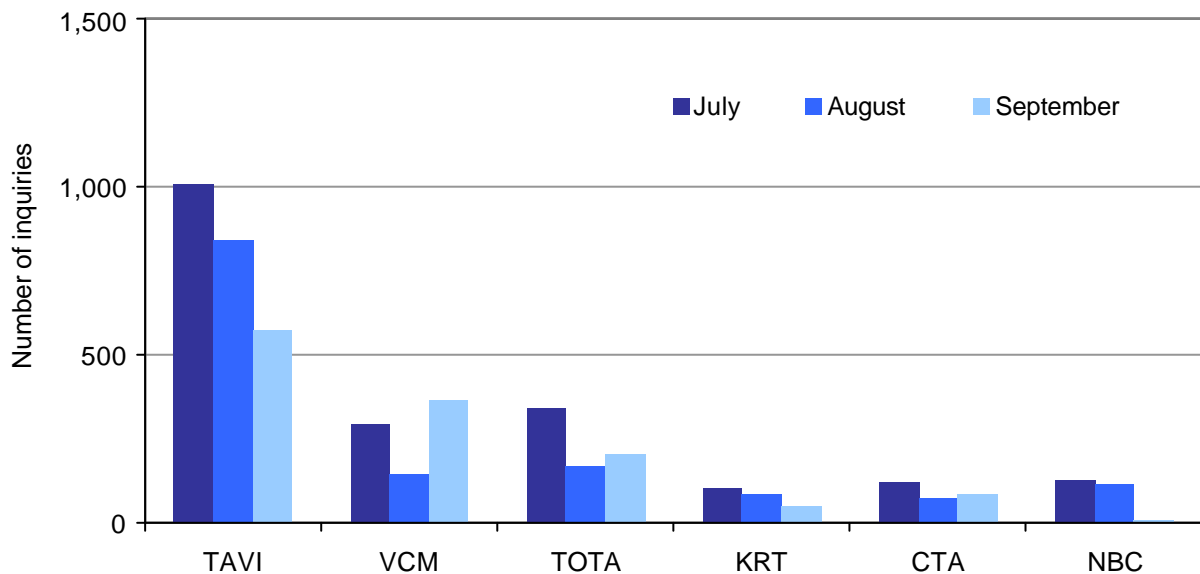
Overall, 4,662 consumer inquiries were recorded by the six regions between July 1 and September 30, 2004. Forty-three percent were recorded in July and 30% in August (Table 1).

Table 1. Total inquiries by region and month.

Month	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
July	42%	37%	48%	45%	44%	52%	<b>43%</b>
August	35%	18%	24%	35%	26%	46%	<b>30%</b>
September	24%	46%	29%	20%	30%	2%	<b>27%</b>
<b>Total</b>	<b>2,414</b>	<b>801</b>	<b>709</b>	<b>226</b>	<b>270</b>	<b>242</b>	<b>4,662</b>

Regionally, TAVI accounted for 52% of total inquiries, which is similar to the previous quarter. VCM accounted for 17% of all inquiries and TOTA accounted for 15% (Figure 1). In most regions, inquiries decreased between July and September, dropping from 43% to 27%. However, VCM received nearly half of their inquiries in September. NBC received 2% of their inquiries in September.

Figure 1. Total inquiries by region and month.



### 3.2 Inquiries by method

All of the regions had implemented the Consumer Database Standards by the end of the previous quarter, so less than 1% of all records were missing method of contact during the July to September period.

Web-based forms on the regional websites continued to be the most frequent method of inquiry (75%), followed by voicemail (8%), telephone (6%), and email (5%) (Table 2.) The use of web-based forms increased considerably compared to June when 32% of consumers used this method.

Table 2. Total inquiries by method and month.

Method	July	August	September	Overall
Web	71%	76%	80%	75%
Phone	6%	8%	5%	6%
Reply <sup>1</sup>	4%	2%	2%	3%
Email	6%	5%	3%	5%
Fax	2%	2%	1%	2%
Mail	1%	1%	1%	1%
Show	>1%			>1%
Voicemail	10%	6%	7%	8%
Unknown	>1%	>1%		>1%
<b>Total</b>	<b>1,984</b>	<b>1,411</b>	<b>1,267</b>	<b>4,662</b>

Web-based forms were the most frequent method of inquiry in all regions, except KRT where voicemail was the most frequently used method (Table 3). There was considerable variation in the proportion of inquiries made through web-forms across the other regions. For example, web-forms accounted for 91% of TAVI's inquiries, compared to 40% of NBC's inquiries.

Table 3. Total inquiries by method and region.

Method	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Web	91%	67%	56%	27%	79%	40%	75%
Phone	5%	5%	1%	11%	17%	26%	6%
Reply <sup>1</sup>	1%		14%		>1%		3%
Email	2%	7%	9%	20%		4%	5%
Fax	>1%	>1%	2%		>1%	27%	2%
Mail	1%	3%	>1%	2%	1%	>1%	1%
Show		>1%					>1%
Voicemail	1%	18%	18%	41%	1%	2%	8%
Unknown	>1%				>1%	>1%	>1%
<b>Total</b>	<b>2,414</b>	<b>801</b>	<b>709</b>	<b>226</b>	<b>270</b>	<b>242</b>	<b>4,662</b>

<sup>1</sup> Reply includes coupons, request cards, and labels returned to the regions.

### 3.3 Inquiries by origin

Overall, there were slightly more inquiries from the United States (44%) than from Canada (37%) (Table 4). Canadian inquiries were highest in July (40%) tapering off slightly by September (32%). American inquiries also tapered off throughout the quarter. While the relative proportion of overseas inquiries increased from 14% to 27%, the number of overseas inquiries remained stable over the quarter.

Table 4. Total inquiries by origin and month.

Country	July	August	September	Overall
Canada	40%	37%	32%	37%
United States	45%	44%	41%	44%
Overseas	14%	18%	27%	19%
<i>Europe</i>	10%	13%	22%	14%
<i>Asia-Pacific</i>	3%	3%	4%	4%
<i>Other overseas</i>	1%	1%	1%	1%
Unknown	1%	1%	>1%	1%
<b>Total</b>	<b>1,984</b>	<b>1,411</b>	<b>1,267</b>	<b>4,662</b>

Overall, 37% of all Canadian inquiries were from BC. Ontario was second with 27% followed by Alberta with 19% (Table 5). Washington, California, and Oregon remained the top three states.

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

Province / State	July	August	September	Overall
<b>Canada</b>				
British Columbia	39%	37%	35%	37%
Alberta	20%	19%	17%	19%
Ontario	26%	26%	28%	27%
Other Canada	15%	18%	20%	17%
<b>Total</b>	<b>803</b>	<b>526</b>	<b>401</b>	<b>1,730</b>
<b>United States</b>				
Washington	19%	16%	14%	17%
California	15%	15%	17%	16%
Oregon	8%	6%	5%	7%
Texas	6%	8%	5%	6%
New York	4%	4%	2%	3%
Colorado	3%	3%	4%	3%
Arizona	3%	3%	3%	3%
Florida	3%	4%	2%	3%
Illinois	3%	3%	3%	3%
Pennsylvania	3%	1%	4%	3%
Other US	33%	38%	40%	36%
<b>Total</b>	<b>890</b>	<b>626</b>	<b>516</b>	<b>2,032</b>

There was less variation in the origin of inquiries by region between July and September, compared to the previous quarter (Table 6). Canadian inquiries accounted for over half of inquiries to TOTA and NBC, while TAVI had the largest proportion of American inquiries (51%). VCM received the largest proportion of overseas inquiries (28%), compared to the other regions.

Table 6. Total inquiries by origin and region.

Country	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Canada	30%	28%	56%	48%	51%	56%	<b>37%</b>
United States	51%	44%	28%	38%	26%	34%	<b>44%</b>
Overseas	18%	28%	12%	14%	23%	10%	<b>19%</b>
<i>Europe</i>	14%	23%	8%	10%	17%	8%	<b>14%</b>
<i>Asia-Pacific</i>	4%	5%	3%	3%	4%	2%	<b>4%</b>
<i>Other overseas</i>	1%	1%	1%	1%	1%	1%	<b>1%</b>
Unknown			4%				<b>1%</b>
<b>Total</b>	<b>2,414</b>	<b>801</b>	<b>709</b>	<b>226</b>	<b>270</b>	<b>242</b>	<b>4,662</b>

The origin of North American inquiries varied considerably by region (Table 7). For example, British Columbians accounted for 73% of CTA's Canadian inquiries, compared to 23% for KRT. Similarly, consumers from Washington made up 39% of TOTA's American inquiries, compared to 10% for NBC.

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

Province / State	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
<b>Canada</b>							
British Columbia	25%	33%	50%	23%	73%	48%	<b>37%</b>
Alberta	19%	11%	20%	39%	11%	19%	<b>19%</b>
Ontario	37%	34%	17%	17%	8%	17%	<b>27%</b>
Other Canada	20%	21%	14%	21%	9%	16%	<b>17%</b>
<b>Total</b>	<b>726</b>	<b>221</b>	<b>400</b>	<b>109</b>	<b>139</b>	<b>135</b>	<b>1,730</b>
<b>United States</b>							
Washington	12%	17%	39%	33%	19%	10%	<b>17%</b>
California	17%	14%	14%	8%	19%	15%	<b>16%</b>
Oregon	7%	4%	14%	1%	9%	5%	<b>7%</b>
Texas	7%	8%	4%	6%	4%	7%	<b>6%</b>
New York	3%	6%	1%	5%	3%	2%	<b>3%</b>
Colorado	3%	3%	3%	3%	3%	4%	<b>3%</b>
Arizona	3%	2%	4%	3%	6%	5%	<b>3%</b>
Florida	3%	4%	2%	3%	1%	7%	<b>3%</b>
Illinois	3%	3%	1%	1%	1%	5%	<b>3%</b>
Pennsylvania	3%	3%	2%	2%	4%	1%	<b>3%</b>
Other US	39%	37%	19%	34%	31%	39%	<b>36%</b>
<b>Total</b>	<b>1,242</b>	<b>352</b>	<b>200</b>	<b>86</b>	<b>70</b>	<b>82</b>	<b>2,032</b>

### 3.4 Inquiries by source

Consumers inquiring at the regional tourism offices were asked what prompted them to make their inquiry.<sup>2</sup> This quarter, Tourism BC was the most frequent source of inquiry, followed by other Tourism Associations and other Internet sites (Table 8).

Table 8. Total inquiries by major source and month.

Major source	July	August	September	Overall
Tourism BC	30%	32%	28%	<b>30%</b>
Tourism Association	15%	18%	14%	<b>16%</b>
Other Internet	14%	16%	21%	<b>16%</b>
Referral	12%	9%	6%	<b>10%</b>
Magazine	6%	4%	6%	<b>5%</b>
Other	3%	3%	5%	<b>4%</b>
Newspaper	2%	3%	3%	<b>3%</b>
Guide	3%	2%	1%	<b>2%</b>
Past Visit	1%	>1%	1%	<b>1%</b>
Consumer Show	>1%	>1%	>1%	<b>&gt;1%</b>
Unknown	13%	13%	14%	<b>13%</b>
<b>Total</b>	<b>1,984</b>	<b>1,411</b>	<b>1,267</b>	<b>4,662</b>

Source of inquiry varied considerably by region again this quarter (Table 9). Tourism BC was the most frequently cited source of information for consumers in TAVI and CTA, while consumers mentioned other Internet sites most often in VCM, and other tourism associations (including regional publications and websites) most often in NBC. Overall, 13% of all inquiries were missing information on major source code. The Tourism BC website was the most frequently mentioned level 2 source code, followed by search engines (Table 10).

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

Major source	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Tourism BC	38%	24%	9%	19%	37%	29%	<b>30%</b>
Tourism Association	21%	10%	2%	15%	5%	31%	<b>16%</b>
Other Internet	14%	28%	18%	12%	9%	11%	<b>16%</b>
Referral	14%	7%	4%	3%	2%	2%	<b>10%</b>
Magazine	3%	4%	17%	2%	5%	4%	<b>5%</b>
Other	3%	2%	7%	2%	9%	4%	<b>4%</b>
Newspaper	2%	3%	2%	13%	>1%	1%	<b>3%</b>
Guide	2%	2%		1%	3%	9%	<b>2%</b>
Past Visit	>1%	3%		1%	3%		<b>1%</b>
Consumer Show	>1%	>1%		>1%	>1%	>1%	<b>&gt;1%</b>
Unknown	2%	16%	41%	31%	27%	8%	<b>13%</b>
<b>Total</b>	<b>2,414</b>	<b>801</b>	<b>709</b>	<b>226</b>	<b>270</b>	<b>242</b>	<b>4,662</b>

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

Table 10. Inquiries by source (level 2) by region.<sup>3</sup>

Secondary source	TAVI	VCM	TOTA	KRT	CTA	NBC	Total	% of Inquiries
Tourism BC website	604	102	23		17	46	<b>792</b>	<b>17%</b>
Search engine	255	197		5	9	19	<b>485</b>	<b>10%</b>
VCM publication	260	42	1				<b>303</b>	<b>6%</b>
From a friend or relative	266	20		6	4	3	<b>299</b>	<b>6%</b>
BC Vacation Planner	188	43	8		4	10	<b>253</b>	<b>5%</b>
Tourism BC call centre	37	31	16	42	21	4	<b>151</b>	<b>3%</b>
Other Internet - not specified			127	7	8		<b>142</b>	<b>3%</b>
Magazine - not specified	2	1	113	1	2	1	<b>120</b>	<b>3%</b>
Local tourism association or chamber of commerce	29		1		1	69	<b>100</b>	<b>2%</b>
TAVI Publication	99						<b>99</b>	<b>2%</b>
Link from another site	78	5			5	7	<b>95</b>	<b>2%</b>
BC Outdoor Adventure Guide	29	12	10		31	7	<b>89</b>	<b>2%</b>
Other referral	59	15				1	<b>75</b>	<b>2%</b>
TAVI website	61	14					<b>75</b>	<b>2%</b>
BC Accommodations Guide	57	6	2		3	4	<b>72</b>	<b>2%</b>
Other - not specified			53	1	15		<b>69</b>	<b>1%</b>
TV/Radio	46	11			2		<b>59</b>	<b>1%</b>
Other guide or book	25	11			2	2	<b>40</b>	<b>1%</b>
Past Visit	3	26		3	8		<b>40</b>	<b>1%</b>
Phone book or directory	23	3			1	10	<b>37</b>	<b>1%</b>
travel.bc.ca		24		12	1		<b>37</b>	<b>1%</b>
From travel or tourism business	14	16		1		1	<b>32</b>	<b>1%</b>
Other tourism association	22	6	1	1		1	<b>31</b>	<b>1%</b>
Tourism BC - not specified			7		22		<b>29</b>	<b>1%</b>
VCM website	15	14					<b>29</b>	<b>1%</b>
KRT publication	4			20	1	1	<b>26</b>	<b>1%</b>
Referral - not specified			25		1		<b>26</b>	<b>1%</b>
Unknown	50	127	288	70	75	20	<b>630</b>	<b>14%</b>

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

### 3.5 Permission rates

New privacy legislation was introduced in BC on January 1, 2004. According to the new laws, consumers must give their permission to be re-contacted for research purposes. During an inquiry, consumers are asked for permission to contact them for a follow-up conversion study. For some inquiries (received by mail, email, fax or voicemail) it was not possible to ask permission, and “no response” was recorded in the database.

Table 11, Table 12, and Table 13 present the permission responses by month, method of inquiry and by region. Overall, 28% of consumers gave explicit permission to be re-contacted in this reporting period. This is a 10% increase over the previous quarter.

Table 11. Permission response by month.

Month	Yes	No Response	No	Total
July	28%	24%	49%	1,984
August	29%	19%	53%	1,411
September	26%	17%	56%	1,267
<b>Overall</b>	<b>28%</b>	<b>20%</b>	<b>52%</b>	<b>4,662</b>

Table 12. Permission response by region.

Region	Yes	No Response	No	Total
TAVI	32%	4%	63%	2,414
VCM	22%	32%	46%	801
TOTA	19%	52%	29%	709
KRT	15%	64%	21%	226
CTA	33%		67%	270
NBC	30%	34%	36%	242
<b>Overall</b>	<b>28%</b>	<b>20%</b>	<b>52%</b>	<b>4,662</b>

Table 13. Permission response by method.

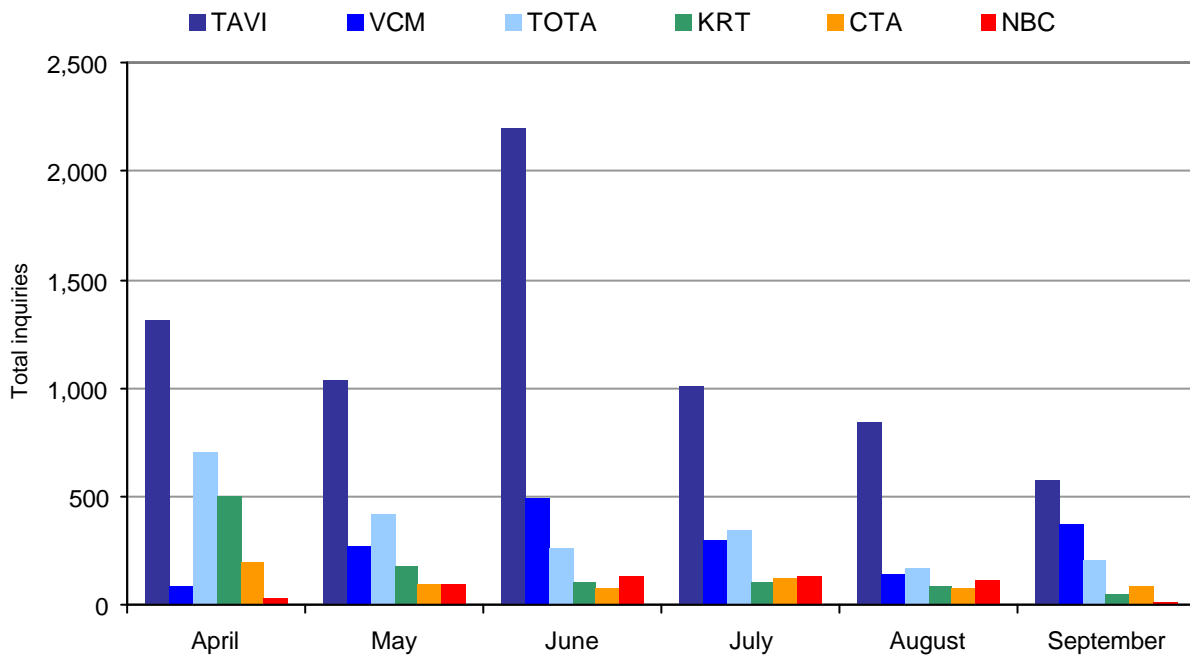
Method	Yes	No Response	No	Total
Web	32%	5%	63%	3,494
Phone	49%	8%	43%	297
Reply		98%	2%	124
Email	2%	92%	6%	215
Fax		96%	4%	83
Mail	6%	44%	50%	52
Show		100%		1
Voicemail	5%	81%	15%	392
Unknown	25%	25%	50%	4
<b>Overall</b>	<b>28%</b>	<b>20%</b>	<b>52%</b>	<b>4,662</b>

#### 4.0 YEAR TO DATE TRENDS

This section present year-to-date inquiries between April and September 2004, summarized by region, method and source.

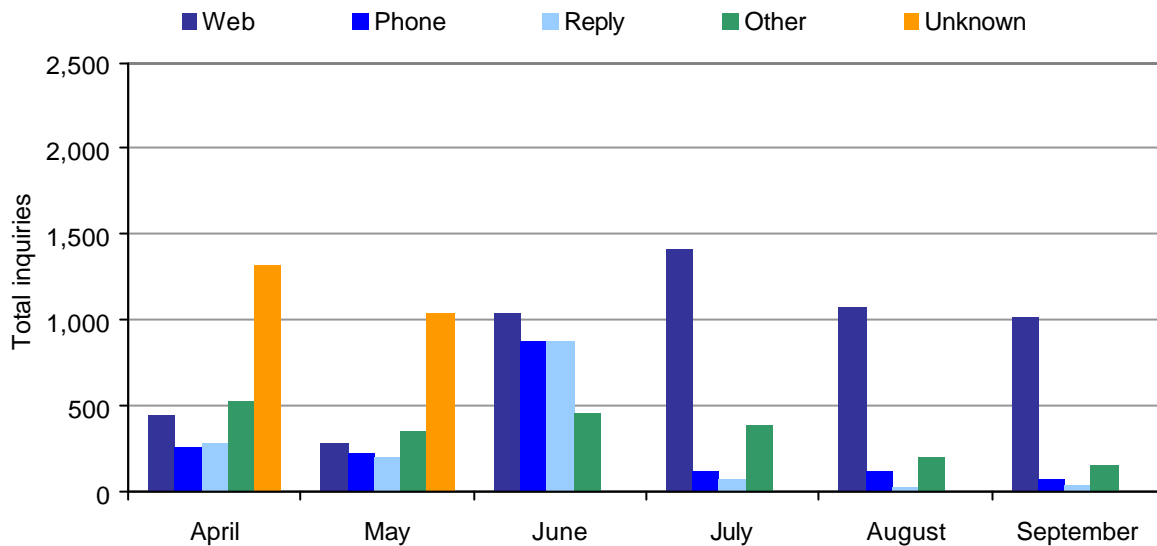
In total, 12,813 inquiries were recorded at the six regions between April 1 and September 30, 2004 (Figure 2). Overall, inquiries to TAVI accounted for 54% of inquiries, followed by TOTA (16%). A quarter of all April to September inquiries were made in June, mainly due to the response to TAVI's Sunset Pacific Northwest magazine promotion.

Figure 2.Total inquiries by region (April to September 2004).



Overall, 41% of all consumers contacted the regions using web-based forms (Figure 3). This method of inquiry showed a dramatic increase during the July to September quarter, compared to the April to June quarter. However, this pattern reflects the number of records with unknown method in April and May. Other methods - which includes email, voicemail, fax, mail, and consumer shows - represented 16% of all consumer inquiries to date.

Figure 3. Total inquiries by method (April to September 2004).



There were more American inquiries in each month, except April (Figure 4). The peak in American inquiries in June reflects replies to the Sunset Pacific Northwest magazine promotion. Overseas inquiries were fairly stable over the six month period.

Figure 4. Total inquiries by origin (April to September 2004).

