TOURISM BRITISH COLUMBIA
CANADA

Research Services

Regional Partners Research Program

REGIONAL INQUIRIES
JULY TO SEPTEMBER 2005

December 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 third quarterly summary of consumer inquiries for 2005 and includes inquiries recorded by the six regional tourism offices from July 1 to September 30, 2005. 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 since the previous year. Select tables in this report present data to indicate the proportion change since the previous year.

Exactly 5,597 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 which present an overview of all data collected from January to September, 2005.

TABLE OF CONTENTS

For assistance or information, contact:

Richard Porges
Director, Research Services
Tourism British Columbia

250.356.9936

250.356.8246

Richard.Porges@tourismbc.com

300 - 1803 Douglas Street
Victoria, British Columbia
V8W 9W5

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 third 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 July 1 to September 30, 2005 and presents inquiries by region, method, origin and source. The final section of this document presents year to date summaries of all inquiries received in the first three quarters of 2005.

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, 5,597 consumer inquiries were recorded by the six regions between July 1 and September 30, 2005. The highest number of inquiries was recorded in July, and this was consistent across all regions reporting. The only exception was NBC, where due to technical difficulties regional inquiry data for July and August for NBC was not available. (
Table 1).

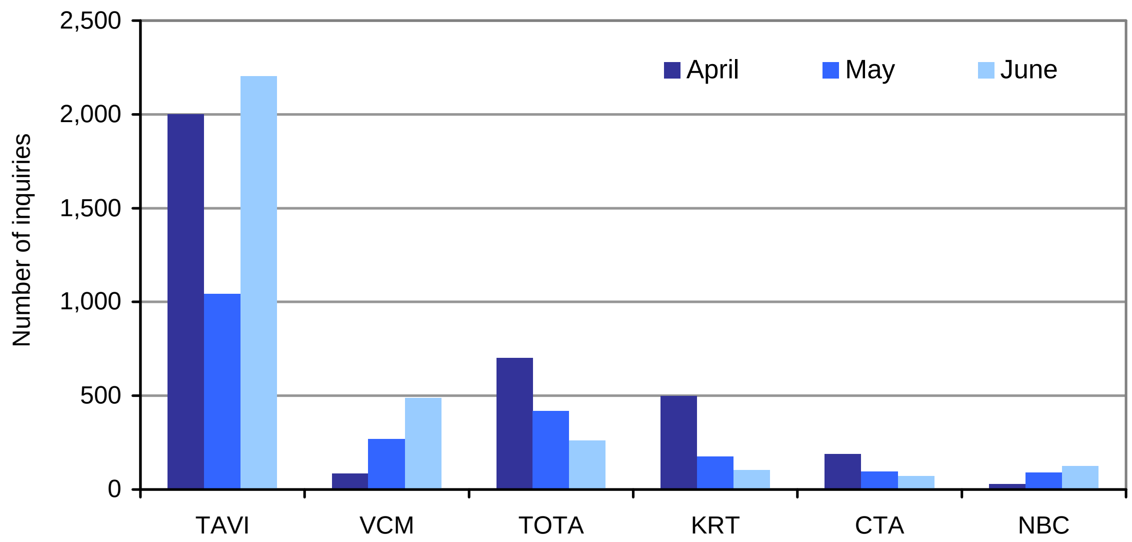
The total number of inquiries increased 20% in July to September of 2005 as compared to the same quarter in 2004 (from 4,662 inquiries in 2004 to 5,597 inquiries this year). Overall, July saw a 10% proportional increase as compared to July 2004.

Table 1. Total inquiries by region and month.

Month	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall	Change from 2004[1]
July	46%	57%	47%	72%	47%	N/A	53%	**+ 10%**
August	33%	27%	30%	13%	38%	N/A	27%	**- 3%**
September	21%	16%	22%	16%	15%	100%	21%	**- 6%**
Total	**2,290**	**965**	**853**	**1,193**	**183**	**113**	**5,597**	**4,662**

Regionally, TAVI accounted for 41% of total inquiries. This continues the trend seen in all 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 consistent across all regions. In this quarter, KRT reported the second highest number of inquiries with 21% of the overall total, due in large part to increased inquiries in July. VCM accounted for 17%, while TOTA accounted for 15% (Figure 1).

Figure 1. Total inquiries by region and month.



[1] Change from 2004 represents a proportional change calculated by subtracting overall quarterly percentages for 2004 from 2005.

3.2 Inquiries by method

Web-based forms on the regional websites again continued to be the most frequently used method of inquiry (57%), followed by reply[2] (15%), email (12%), and consumer shows (7%) (Table 2). The use of web methods was consistent compared to the April to June quarter, but the proportion of consumers using this method has declined by 18% compared to the same quarter last year.

The proportion of consumers using reply methods, email, and initiating an inquiry as a result of a consumer show has increased over the same quarter last year (12%, 7%, and 7%, respectively). These methods are more likely to be influenced by specific regional marketing efforts, for example advertisements and fulfilment cards distributed through publications or at events.

Table 2. Total inquiries by method and month.

Method	July	August	September	Overall	Change from 2004
Web	49%	69%	65%	**57%**	**- 18%**
Phone	2%	4%	2%	**2%**	**- 4%**
Reply	17%	8%	17%	**15%**	**+ 12%**
Email	13%	14%	9%	**12%**	**+ 7%**
Mail	>1%	>1%	1%	**>1%**	**- 1%**
Show	13%			**7%**	**+ 7%**
Voicemail	6%	5%	6%	**6%**	**- 2%**
Total	**2,946**	**1,502**	**1,149**	**5,597**	**4,662**

Web-based forms were again reported as the most frequent method of inquiry for TAVI, TOTA, CTA and NBC. In all of these regions, this method accounted for over 70% of all regional inquiries. The most frequent method of inquiry for VCM was again email, while for KRT it was again reply (Table 3). This pattern is similar to the results from the previous quarter and it should again be noted that caution should be used when making comparisons across regions 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.

[2] 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	86%	33%	74%	4%	75%	96%	**57%**
Phone	4%		1%	>1%	12%	3%	**2%**
Reply	7%		6%	52%			**15%**
Email	1%	56%	7%	4%	2%	2%	**12%**
Mail	>1%	2%	>1%	>1%			**>1%**
Show				31%			**7%**
Voicemail	1%	9%	11%	8%	10%		**6%**
Total	**2,290**	**965**	**853**	**1,193**	**183**	**113**	**5,597**

3.3 Inquiries by origin

Overall, American consumers again initiated the greatest percentage (52%) of all inquiries and July represented the month with the highest number of inquiries from the United States. Inquiries from Canadian consumers also peaked in July (35%), while inquiries from overseas consumers was highest in September (21%) (Table 4). The greatest number of European inquiries originated from the United Kingdom (39%), Germany (15%), and Poland (14%). Of those from Asia/Pacific nations, Australians made the most frequent contact with 35% of the total from this category. American inquiries were up 8% from 44% of all inquiries during this quarter in 2004 to 52% this year.

Table 4. Total inquiries by origin and month.

Origin	July	August	September	Overall	Change from 2004
Canada	35%	34%	31%	**34%**	**- 3%**
United States	55%	50%	47%	**52%**	**+ 8%**
Overseas	10%	16%	21%	**14%**	**- 5%**
Europe	*7%*	*12%*	*17%*	***11%***	***- 3%***
Asia/Pacific	*1%*	*2%*	*3%*	***2%***	***- 2%***
Other overseas	*1%*	*2%*	*1%*	***1%***	***0%***
Unknown	>1%	>1%	>1%	**>1%**	**0%**
Total	**2,946**	**1,502**	**1,149**	**5,597**	**4,662**

Of all Canadian inquiries, the greatest number was from BC, followed by Alberta (Table 5). This was the same for all months except August when the second highest number of inquiries originated from Ontario. September saw very little variation among the top three provinces for origin of regional inquiries. California, Washington, Texas, and Oregon were the top US states. Inquiries from California experienced a considerable increase in July (39% of all American inquiries for this month), but then levelled off for the remainder of the quarter.

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

Province / State	July	August	September	Overall
Canada				
British Columbia	32%	42%	26%	**33%**
Alberta	31%	17%	27%	**26%**
Ontario	19%	26%	26%	**22%**
Other Canada	18%	15%	20%	**18%**
Total	**1,035**	**506**	**358**	**1,899**
United States				
California	39%	17%	16%	**29%**
Washington	9%	14%	15%	**12%**
Texas	5%	5%	5%	**5%**
Oregon	4%	7%	4%	**5%**
Arizona	3%	5%	4%	**4%**
Florida	3%	4%	4%	**3%**
Colorado	2%	4%	2%	**3%**
Michigan	2%	2%	5%	**3%**
Illinois	2%	2%	2%	**2%**
Pennsylvania	2%	2%	3%	**2%**
Minnesota	2%	1%	4%	**2%**
Other US	28%	36%	36%	**31%**
Total	**1,615**	**751**	**540**	**2,906**

TOTA and CTA had the highest percentage of inquiries from Canadian consumers (64% and 58% respectively), while TAVI, VCM, KRT, and NBC received the greatest percentage of inquiries from Americans (ranging from 44% to 70%). NBC 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	29%	16%	64%	34%	58%	25%	**34%**
United States	53%	70%	18%	65%	20%	44%	**52%**
Overseas	18%	14%	16%	2%	22%	31%	**14%**
Europe	*14%*	*10%*	*13%*	*1%*	*13%*	*20%*	***11%***
Asia/Pacific	*2%*	*2%*	*2%*	*>1%*	*2%*	*9%*	***2%***
Other overseas	*1%*	*2%*	*1%*	*>1%*	*8%*	*2%*	***1%***
Unknown			1%				**>1%**
Total	**2,290**	**965**	**853**	**1,193**	**183**	**113**	**5,597**

The origin of Canadian consumers once again varied considerably by region (Table 7). VCM, TOTA, and CTA reported the highest numbers for consumers from British Columbia. For TAVI, Ontario represented the greatest proportion of Canadian consumer inquiries, while KRT reported the greatest number of Canadian consumer inquiries coming from Alberta. The highest percentage of NBC inquiries originated in other Canadian provinces. Consumers from California represented 51% of all American KRT inquiries, and 34% of all US inquiries for NBC came from Washington State. Among all other regions, the category representing the greatest number of inquiries was Other US. This is an indication that although Washington, California, Texas 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	27%	40%	45%	15%	75%	32%	**33%**
Alberta	17%	10%	29%	51%	8%	7%	**26%**
Ontario	35%	32%	14%	13%	9%	18%	**22%**
Other Canada	21%	18%	12%	21%	8%	43%	**18%**
Total	**662**	**156**	**546**	**401**	**106**	**28**	**1,899**
United States							
California	18%	28%	21%	51%	22%	10%	**29%**
Washington	13%	13%	27%	3%	19%	34%	**12%**
Texas	7%	4%	3%	3%	3%	2%	**5%**
Oregon	6%	5%	7%	1%	6%	4%	**5%**
Arizona	3%	5%	3%	3%	8%	6%	**4%**
Florida	5%	3%	5%	2%			**3%**
Colorado	3%	5%	2%	>1%		2%	**3%**
Michigan	2%	1%		5%		8%	**3%**
Illinois	4%	2%	2%	1%	3%		**2%**
Minnesota	2%	1%	1%	3%			**2%**
Pennsylvania	2%	2%	1%	3%	6%	4%	**2%**
Other US	36%	30%	28%	26%	33%	30%	**31%**
Total	**1,222**	**672**	**155**	**771**	**36**	**50**	**2,906**

3.4 Inquiries by source

Consumers inquiring at regional tourism offices were asked how they had heard about the regional phone number or website.[3] Overall, magazines were again the most frequently reported source, followed by other Internet resources and Tourism BC (Table 8). The majority of the magazine sources cited were two specific publications; Sunset Pacific Northwest (53% of all magazines) and Travel 50 and Beyond (28%).

The increase in magazines in this quarter resulted in a 17% increase in the use of this source as compared to the same quarter last year. Consumer shows and other sources also increased by 6%, while Tourism BC and Tourism Associations both experienced declines of 12% and 13%, respectively.

Table 8. Total inquiries by major source and month.

Major source	July	August	September	Overall	Change from 2004
Tourism BC	16%	22%	20%	**18%**	**- 12%**
Tourism Association	2%	5%	4%	**3%**	**- 13%**
Other Internet	16%	22%	24%	**19%**	**+ 3%**
Newspaper	1%	1%	2%	**1%**	**- 2%**
Consumer Show	13%	>1%	>1%	**7%**	**+ 6%**
Magazine	20%	22%	26%	**22%**	**+ 17%**
Guide	1%	1%	2%	**1%**	**- 1%**
Referral	4%	5%	4%	**4%**	**- 6%**
Past Visit	1%	>1%	>1%	**1%**	**0%**
Other	13%	6%	5%	**10%**	**+ 6%**
Unknown	13%	15%	13%	**14%**	**+ 1%**
Total	**2,946**	**1,502**	**1,149**	**5,597**	**4,662**

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

Tourism BC was the most frequently cited source of information for consumers in TAVI and CTA. For NBC, other Internet sources were most frequently reported. VCM reported magazines as the most frequent source of information, while KRT reported consumer shows as the most frequently cited source (Table 9). Overall, magazines were again the most frequently cited source of information for consumers; this is likely due to the large percentage of consumers in VCM citing magazines as the source of their inquiry (53%). As mentioned previously, Sunset Pacific Northwest was the primary magazine cited, accounting for 93% of all magazine inquiries for VCM and 67% of all magazine inquiries in TAVI.

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

Major source	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Tourism BC	33%	11%	6%	2%	39%	25%	**18%**
Tourism Association	3%	4%	2%	3%	5%	4%	**3%**
Other Internet	27%	19%	21%	3%	16%	47%	**19%**
Newspaper	1%	>1%	1%	1%	3%	5%	**1%**
Consumer Show	>1%	>1%	>1%	31%			**7%**
Magazine	11%	53%	11%	29%	8%	6%	**22%**
Guide	2%	1%	1%	>1%	1%	4%	**1%**
Referral	7%	2%	5%	1%	2%	3%	**4%**
Past Visit	>1%	1%	2%	>1%	3%		**1%**
Other	8%	1%	6%	23%	9%	3%	**10%**
Unknown	8%	8%	45%	7%	15%	3%	**14%**
Total	**2,290**	**965**	**853**	**1,193**	**183**	**113**	**5,597**

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.[4]

Secondary source	TAVI	VCM	TOTA	KRT	CTA	NBC	Total	% of inquiries
Search engine	473	126		4	14	42	**659**	**12%**
Sunset PNW	164	478	1				**643**	**11%**
Tourism BC website	306	70	1		23	8	**408**	**7%**
S. California golf show				369			**369**	**7%**
Tourism BC call centre	277	5	1	24	40	2	**349**	**6%**
Travel 50 & Beyond				346			**346**	**6%**
Global TV				272			**272**	**5%**
Other Internet unknown	1		183	8	1		**193**	**3%**
Link from another site	137	3			11	11	**162**	**3%**
BC Vacation Planner	115	18	1	1	3	10	**148**	**3%**
TV/Radio	131	3			3		**137**	**2%**
From a friend or relative	102	6		3	2	3	**116**	**2%**
Magazine unknown	1		88		1		**90**	**2%**
Phone book or directory	56	4			11	3	**74**	**1%**
Other unknown		5	48				**53**	**1%**
Tourism BC unknown			44		1		**45**	**1%**
Referral unknown			42	2			**44**	**1%**
BC Accommodations Guide	30	3	2		3	5	**43**	**1%**
From travel or tourism business	31	5		2	1		**39**	**1%**
travel.bc.ca		22		15	2		**39**	**1%**
Past visit	1	13	13	4	5		**36**	**1%**
British Columbia Magazine	25	1			7	2	**35**	**1%**
Northwest Travel	6	28		1			**35**	**1%**
Other guide or book	28	4			1	2	**35**	**1%**
BC Outdoor Adventure Guide	19	6	2			3	**30**	**1%**
VCM publication		28					**28**	**1%**
Unknown	192	77	385	81	27	3	**765**	**14%**

[4] 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, 24% of consumers gave permission to be re-contacted in this reporting period. This number matches that in the previous quarter. Interestingly, refusal rates continue to be much higher on web-based forms (60% refusal) than when contact takes place over the phone (12% 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
July	21%	37%	42%	**2,946**
August	28%	19%	53%	**1,502**
September	25%	28%	47%	**1,149**
Overall	**24%**	**30%**	**46%**	**5,597**

Table 12. Permission response by region.

Region	Yes	No Response	No	Total
TAVI	34%	10%	56%	**2,290**
VCM	9%	5%	85%	**965**
TOTA	39%	28%	33%	**853**
KRT	2%	96%	3%	**1,193**
CTA	32%	26%	42%	**183**
NBC	27%		73%	**113**
Overall	**24%**	**30%**	**46%**	**5,597**

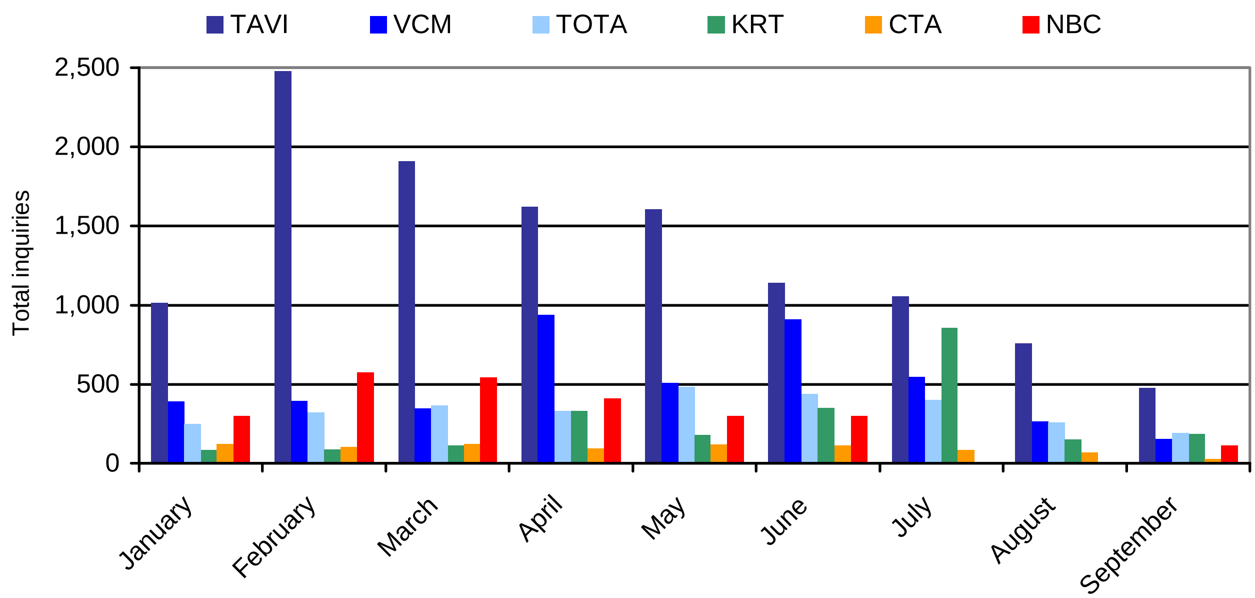
Table 13. Permission response by method.

Method	Yes	No Response	No	Total
Web	37%	3%	60%	**3,218**
Phone	60%	27%	12%	**139**
Reply	>1%	99%	1%	**833**
Email	2%	20%	78%	**689**
Mail	25%	42%	33%	**24**
Show		100%		**369**
Voicemail	3%	76%	21%	**325**
Overall	**24%**	**30%**	**46%**	**5,597**

4.0 YEAR TO DATE TRENDS

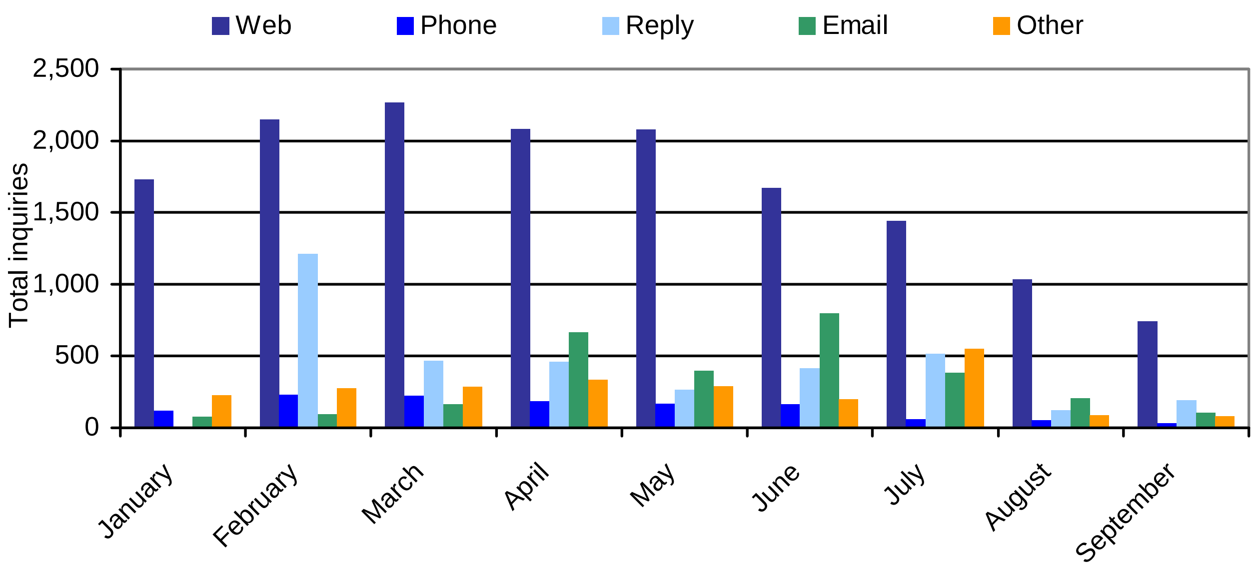
In total, 25,302 inquiries were recorded from all six regions between January 1 and September 30, 2005 (Figure 2). Overall, 48% of these inquiries were recorded by TAVI. VCM reported the second highest number with 18% of all inquiries. February remained the busiest month with 16% of all inquiries so far in 2005 occurring in this month.

Figure 2.Total inquiries by region (January to September 2005).



Overall, 60% of all consumers contacted the regions via their web-based forms (Figure 3). This method of inquiry was highest during March. Reply methods represented 14% of responses, and email represented an additional 11%.

Figure 3. Total inquiries by method (January to September 2005).



Inquiries from American consumers were recorded most often in all months and overall 51% of all inquiries were from US consumers. Canadian consumers initiated 35% of all inquiries to date in 2005 (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 2005).