



Research Services

Regional Partners Research Program
REGIONAL INQUIRIES
OCTOBER TO DECEMBER 2005

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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 fourth quarterly summary of consumer inquiries for 2005 and includes inquiries recorded by the six regional tourism offices from October 1 to December 31, 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 4,377 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, a year-end summary has been provided which presents an overview of all data collected during 2005.

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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 fourth 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 October 1 to December 31, 2005 and presents inquiries by region, method, origin and source. The final section of this document presents a year-end summary of all inquiries received in 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 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, 4,377 consumer inquiries were recorded by the six regions between October 1 and December 31, 2005. The highest number of inquiries was recorded in October. This was true in all regions except VCM and NBC, in which November was the month with the greatest number of overall inquiries (Table 1).

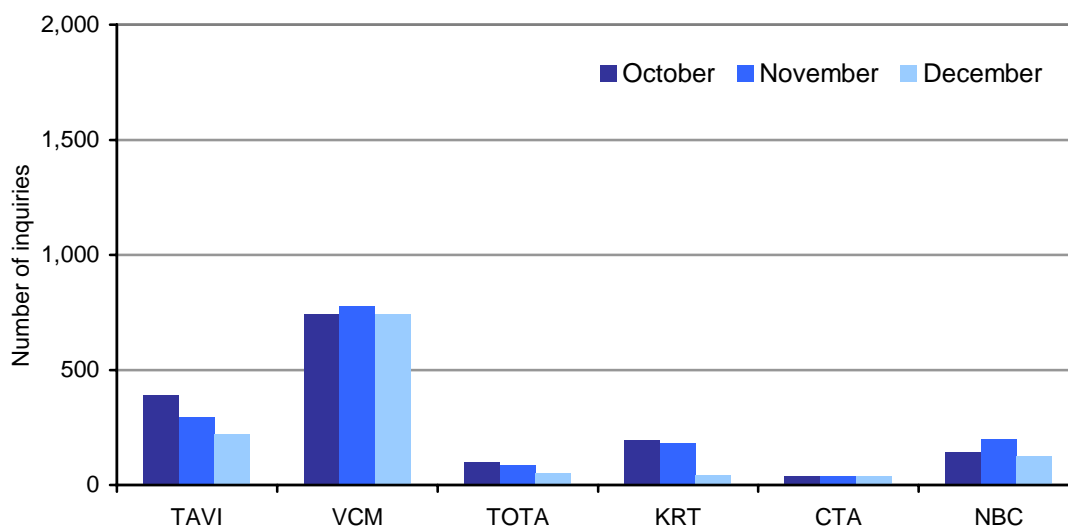
The total number of inquiries increased 40% in October to December of 2005 as compared to the same quarter in 2004 (up from 3,135 inquiries in 2004). Overall, proportional changes were minimal during this quarter as compared to the same time period last year. Both October and November increased 3%, while December saw a 6% decrease in the proportion of total inquiries.

Table 1. Total inquiries by region and month.

Month	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall	Change from 2004 ¹
October	43%	33%	41%	47%	35%	31%	37%	+ 3%
November	33%	34%	36%	43%	32%	42%	36%	+ 3%
December	24%	33%	23%	11%	32%	27%	28%	- 6%
Total	901	2,256	234	415	108	463	4,377	3,135

Regionally, VCM accounted for 52% of the total inquiries for this quarter. This represents a departure from the trend seen in all previous quarterly reports in which TAVI received the greatest number of inquiries. In this quarter, TAVI reported the second highest number of inquiries with 21% of the overall total. NBC accounted for 11%, while KRT accounted for an additional 9% (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

During this quarter, e-mail was the most frequently used method (51%). However, this number should be interpreted with caution as many of these inquiries represent inquiries received via e-mail to VCM as a result of labels sent directly to the region. In subsequent reports these inquiries will be reclassified to reply². Web-based forms were still a popular method of contact for consumers with 35% 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. The use of this method dropped from 10% in November to 1% in December. This likely reflects the drop in coupon and label submissions from outside sources during the holiday period. Overall, however, this method increased 7% proportionally over the same period in the previous year.

Table 2. Total inquiries by method and month.

Method	October	November	December	Overall	Change from 2004
Web	37%	34%	33%	35%	- 41%
Phone	2%	3%	2%	2%	- 3%
Reply	11%	10%	1%	8%	+ 7%
Email	47%	49%	60%	51%	+ 44%
Fax	>1%	2%	>1%	1%	0%
Mail	>1%	>1%	>1%	>1%	- 5%
Show		>1%		>1%	0%
Voicemail	3%	2%	3%	3%	- 2%
Unknown			>1%	>1%	0%
Total	1,599	1,562	1,216	4,377	3,135

² Reply includes coupons, request cards and labels returned to the regions.

Web-based forms were reported as the most frequent method of inquiry for TAVI, TOTA, CTA and NBC. In all of these regions, this method accounted for over two-thirds of all regional inquiries, with the total web inquiries from TAVI representing 93% of all consumer inquiries during this quarter. The most frequent method of inquiry for VCM was e-mail, however as noted above this is likely to change on further quarterly reports as a large number of records will be coded to the reply category. Reply 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 is a fair degree of regional variation.

Table 3. Total inquiries by method and region.

Method	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Web	93%	3%	69%	9%	68%	76%	35%
Phone	5%		1%	>1%	16%	8%	2%
Reply	>1%		10%	75%			8%
Email	>1%	96%	9%	6%	13%	6%	51%
Fax	>1%		>1%			6%	1%
Mail	1%	>1%	>1%				>1%
Show		>1%					>1%
Voicemail	1%	1%	10%	10%	4%	3%	3%
Unknown		>1%					>1%
Total	901	2,256	234	415	108	463	4,377

3.3 Inquiries by origin

Overall, American consumers again initiated the greatest percentage (73%) of all inquiries. The number of US inquiries was consistent throughout the quarter. Again, however, these numbers are largely influenced by American e-mail inquiries from VCM. Inquiries from Canadian consumers also peaked in October (17%), while inquiries from overseas consumers was highest in November (13%) (Table 4). Forty-one percent of all European inquiries were from the UK. This is followed by 16% from Germany and 14% from the Netherlands. Of those from Asia/Pacific nations, Australians again made the most frequent contact with 35% of the total from this category. The volume of American inquiries (up 35% proportionally from the same period in 2004) has a strong influence on the proportional change for the other origin categories.

Table 4. Total inquiries by origin and month.

Origin	October	November	December	Overall	Change from 2004
Canada	17%	15%	13%	15%	- 14%
United States	72%	72%	75%	73%	+ 35%
Overseas	11%	13%	11%	12%	- 21%
<i>Europe</i>	8%	10%	8%	9%	- 17%
<i>Asia/Pacific</i>	2%	2%	2%	2%	- 3%
<i>Other overseas</i>	1%	1%	1%	1%	- 1%
Unknown	>1%	>1%	>1%	>1%	0%
Total	1,599	1,562	1,216	4,377	3,135

Of all Canadian inquiries, the greatest number was from BC, followed by Ontario (Table 5). This was the same for all months except October when the highest number of inquiries originated from Ontario (31% of all Canadian inquiries in this month) and BC followed with 25% of all monthly inquiries. California, Oregon, and Washington were the top US states, comprising 55% of all American inquiries during this quarter. Inquiries from California were highest in November (37% 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	October	November	December	Overall
Canada				
British Columbia	25%	39%	31%	31%
Alberta	23%	11%	11%	16%
Ontario	31%	25%	32%	29%
Other Canada	21%	25%	27%	24%
Total	265	238	157	660
United States				
California	23%	37%	31%	30%
Oregon	6%	16%	21%	14%
Washington	7%	14%	14%	11%
Colorado	6%	3%	3%	4%
Arizona	7%	3%	2%	4%
Texas	5%	2%	3%	3%
Florida	4%	2%	3%	3%
Minnesota	2%	2%	1%	2%
Utah	2%	2%	1%	2%
Idaho	3%	1%	1%	2%
New York	3%	1%	1%	2%
Other US	33%	18%	19%	24%
Total	1,152	1,123	918	3,193

TOTA and CTA again had the highest percentage of inquiries from Canadian consumers (54% and 47% respectively), while TAVI, VCM, KRT, and NBC all received the greatest percentage of inquiries from Americans (ranging from 41% to 96%). 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	28%	2%	54%	11%	47%	32%	15%
United States	46%	96%	23%	83%	24%	41%	73%
Overseas	26%	2%	21%	6%	29%	27%	12%
<i>Europe</i>	20%	2%	13%	4%	20%	19%	9%
<i>Asia/Pacific</i>	5%	>1%	5%	1%	5%	5%	2%
<i>Other overseas</i>	1%	>1%	3%	1%	4%	3%	1%
Unknown			3%				>1%
Total	901	2,256	234	415	108	463	4,377

The origin of Canadian consumers again varied considerably by region (Table 7). TAVI recorded the highest number of inquiries from Ontario, while for TOTA the highest number originated in Alberta. KRT, CTA, and NBC all experienced the highest volume of inquiries from British Columbians, however, the proportion of the total number of inquiries varied considerably. For VCM the greatest number of Canadian inquiries was from provinces other than BC, Alberta, or Ontario, however, Canadian inquiries represented only a small overall percentage of VCM's total inquiry volume during this quarter. For VCM, California represented 38% of all American inquiries. Within CTA, inquiry volume was highest from both California and Washington. Among all other regions, the category representing the greatest number of inquiries was Other US. This is an indication that 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%	26%	28%	34%	65%	40%	31%
Alberta	12%	5%	32%	27%	10%	11%	16%
Ontario	42%	30%	20%	20%	10%	24%	29%
Other Canada	24%	40%	21%	18%	16%	24%	24%
Total	249	43	126	44	51	147	660
United States							
California	13%	38%	23%	12%	23%	13%	30%
Oregon	6%	14%	4%	28%	4%	3%	14%
Washington	8%	13%	13%	6%	23%	13%	11%
Colorado	5%	5%	6%	1%		3%	4%
Arizona	3%	5%	4%	3%	4%	3%	4%
Texas	8%	2%	2%	5%	4%	5%	3%
Florida	5%	2%	8%	4%	12%	7%	3%
Minnesota	2%	1%	2%	6%	4%	3%	2%
Utah	2%	2%		1%	4%	2%	2%
Idaho	1%	2%		1%		2%	2%
New York	3%	1%	4%	2%		5%	2%
Other US	44%	17%	36%	32%	23%	42%	24%
Total	416	2,162	53	345	26	191	3,193

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 sources and Tourism BC (Table 8). The majority of the magazine sources cited were three specific publications; Sunset Pacific Northwest (81% of all magazines), Travel 50 and Beyond (8%), and the Oregonian (7%).

The increase in magazines in this quarter resulted in a 51% increase in the use of this source as compared to the same quarter last year. Because of the volume of inquiries from this source, all other sources (with the exception of the Other category) either decreased or saw no proportional change from the same quarter last year.

Table 8. Total inquiries by major source and month.

Major source	October	November	December	Overall	Change from 2004
Tourism BC	13%	12%	12%	12%	- 17%
Tourism Association	4%	2%	3%	3%	- 11%
Other Internet	14%	15%	13%	14%	- 9%
Newspaper	>1%	7%	1%	3%	- 2%
Consumer Show	>1%	>1%		>1%	0%
Magazine	56%	50%	60%	55%	+ 51%
Guide	1%	1%	1%	1%	0%
Referral	2%	3%	2%	2%	- 6%
Past visit	>1%	1%	>1%	>1%	- 1%
Other	3%	4%	2%	3%	+ 1%
Unknown	6%	7%	5%	6%	- 7%
Total	1,599	1,562	1,216	4,377	3,135

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

For both VCM and KRT, magazines were the most frequently cited source. This source represented the vast majority of inquiries in VCM. Tourism BC was the most frequently cited source of information for consumers in TAVI and CTA, while for NBC and TOTA, other Internet sources were most frequently reported (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 (94%) and the high volume of inquiries from this region. As mentioned previously, Sunset Pacific Northwest was the primary magazine cited, accounting for 92% of all magazine inquiries for VCM, while Travel 50 and beyond represented 97% of all KRT magazine inquiries.

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

Major source	TAVI	VCM	TOTA	KRT	CTA	NBC	Overall
Tourism BC	35%	1%	13%	7%	45%	20%	12%
Tourism Association	6%	>1%	10%	5%	7%	1%	3%
Other Internet	28%	2%	40%	3%	16%	37%	14%
Newspaper	1%	>1%	>1%	29%			3%
Consumer Show		>1%	>1%				>1%
Magazine	4%	94%	14%	46%	5%	6%	55%
Guide	2%		>1%		3%	5%	1%
Referral	8%	>1%	5%	1%	1%	3%	2%
Past visit		>1%	>1%	1%	1%	3%	>1%
Other	10%	>1%			11%	4%	3%
Unknown	7%	1%	16%	8%	11%	20%	6%
Total	901	2,256	234	415	108	463	4,377

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
Sunset PNW	3	1,956	1				1,960	45%
Search engine	198	33	51		10	135	427	10%
Oregonian		173		111			284	6%
Tourism BC website	120	19	10	2	15	35	201	5%
Travel 50 & Beyond				185			185	4%
Tourism BC call centre	124		8	12	21	1	166	4%
Link from another site	56	3	42		4	37	142	3%
BC Vacation Planner	46	4	8	2	7	26	93	2%
TV/Radio	58	1				7	66	2%
From a friend or relative	45		9	3		8	65	1%
Phone book or directory	34				11	13	58	1%
BC Accommodations Guide	13			1	2	21	37	1%
Westworld Alberta			25				25	1%
From travel / tourism business	19	2	1			1	23	1%
BC Outdoor Adventure Guide	8		2		2	10	22	1%
KR Publication				21		1	22	1%
Other guide or book	8				1	13	22	1%
Unknown	66	33	37	32	12	91	271	6%

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, 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. This number is lower than in previous quarters, most likely as a result of the large number of magazine inquiries from VCM for which it was not possible to ask permission. Refusal rates continue to be much higher on web-based forms (67% refusal) than when contact takes place over the phone (14% 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
October	14%	60%	26%	1,599
November	12%	57%	31%	1,562
December	13%	65%	23%	1,216
Overall	13%	60%	27%	4,377

Table 12. Permission response by region.

Region	Yes	No Response	No	Total
TAVI	31%	3%	66%	901
VCM	1%	97%	2%	2,256
TOTA	30%	31%	39%	234
KRT	3%	60%	37%	415
CTA	25%	25%	50%	108
NBC	33%	15%	52%	463
Overall	13%	60%	27%	4,377

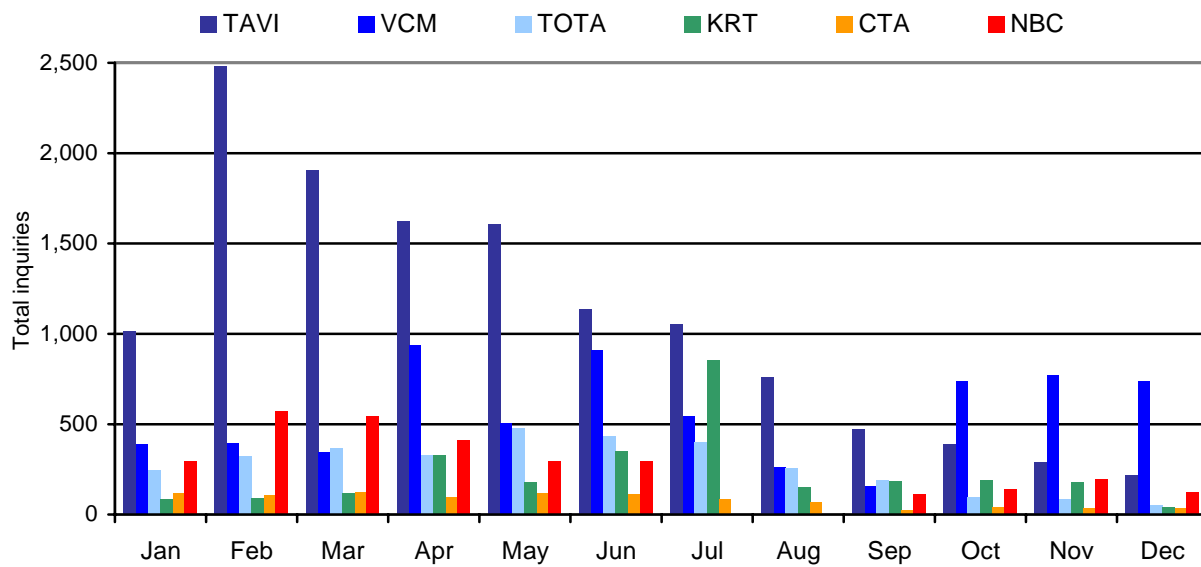
Table 13. Permission response by method.

Method	Yes	No Response	No	Total
Web	32%	1%	67%	1,528
Phone	56%	30%	14%	101
Reply	1%	61%	38%	336
Email	>1%	99%	>1%	2,248
Fax	3%	97%		33
Mail		100%		17
Show		100%		1
Voicemail	5%	85%	10%	111
Unknown		100%		2
Overall	13%	60%	27%	4,377

4.0 YEAR TO DATE TRENDS

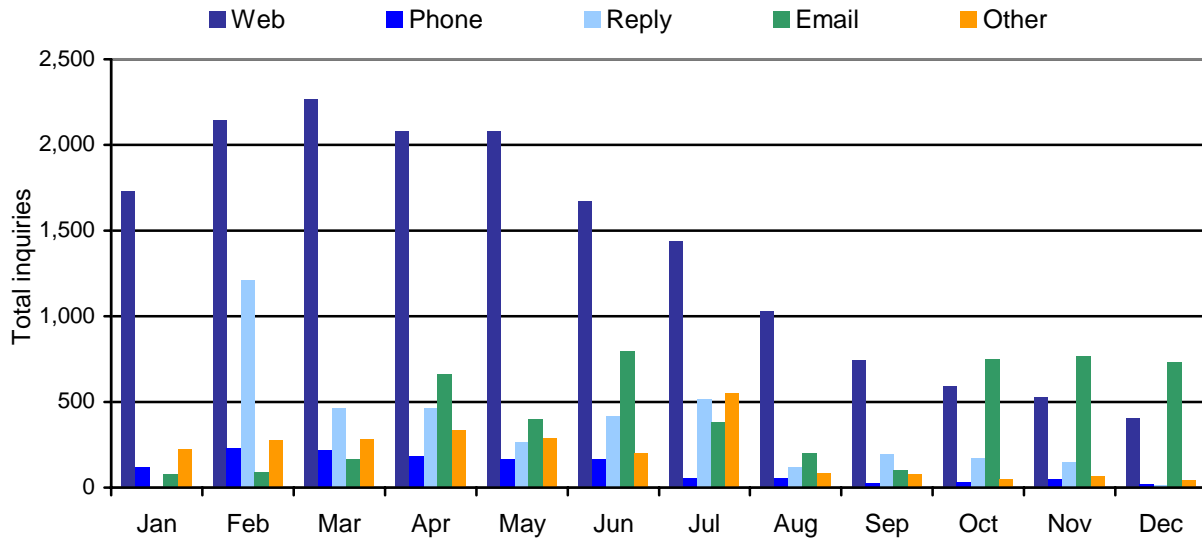
In total, 29,679 inquiries were recorded from all six regions between January 1 and December 31, 2005 (Figure 2). Overall, 44% of these inquiries were recorded by TAVI. VCM reported the second highest number with 23% of all inquiries. February remained the busiest month with 13% of all 2005 inquiries occurring in this month.

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



Overall, 56% of all consumers contacted the regions via their web-based forms (Figure 3). This method of inquiry was highest during March. E-mail represented 17% of responses, and reply cards an additional 13%.

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



Inquiries from American consumers were recorded most often in all months, and overall 54% of all inquiries were from US consumers. Canadian consumers initiated 32% of all inquiries 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 December 2005).

