TOURISM BRITISH COLUMBIA
CANADA

Research Services

# Regional Partners Research Program
# REGIONAL INQUIRIES
# OCTOBER TO DECEMBER 2006

March 2007

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 final quarterly summary of consumer inquiries for 2006 and includes inquiries recorded by the six regional tourism offices from October 1 to December 31, 2006. Compilation of the regional inquiries into these quarterly summaries began in the April to June quarter of 2004. Select tables in this report present data to indicate the proportion change since the previous year, which is calculated by subtracting overall quarterly percentages for the previous year from the current year.

Exactly 5,063 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, annual summaries have been provided presenting an overview of all data collected during 2006.

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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 final 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 October 1 to December 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, 5,063 consumer inquiries were recorded by the six regions between October 1 and December 31, 2006. Just over half of all quarterly inquiries were recorded in November (52%). However, both TAVI and CTA recorded a greater number of inquiries in October (Table 1).

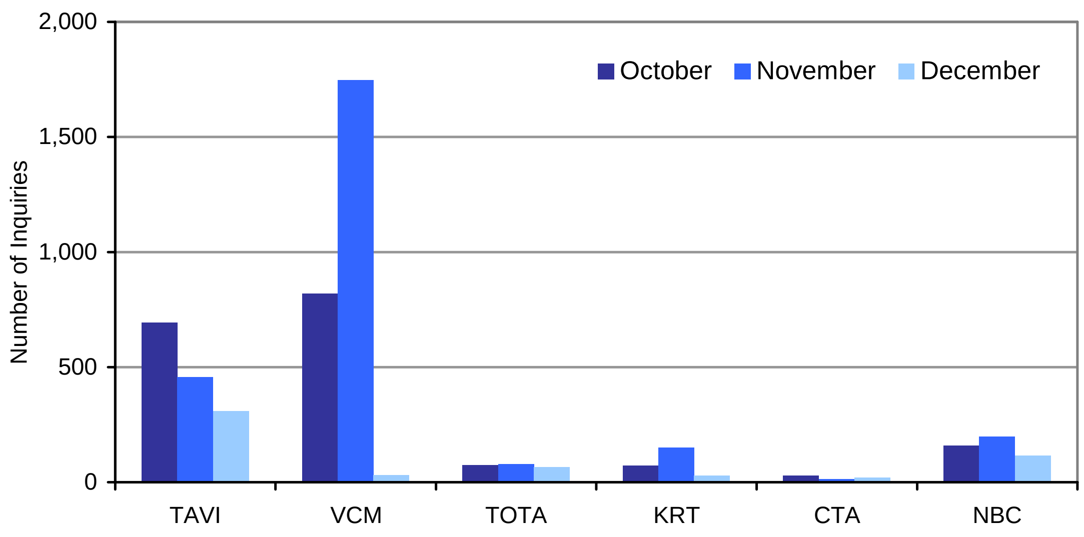
The total number of inquiries increased in 2006 compared to the same quarter in 2005 (up 686 inquiries, which represented a 16% increase over the previous year). This year over year change was consistent with the increases seen since the April to June quarter. The current quarter, however, saw a decrease of over 2,000 inquiries compared to July to September of 2006.

Table 1. Total inquiries by region and month.

| Month | TAVI | VCM | TOTA | KRT | CTA | NBC | Overall | Change from 2005 |
|---|---|---|---|---|---|---|---|---|
| October | 48% | 32% | 34% | 28% | 45% | 34% | **36%** | **-<1%** |
| November | 31% | 67% | 36% | 60% | 23% | 42% | **52%** | **+17%** |
| December | 21% | 1% | 30% | 12% | 32% | 24% | **11%** | **-17%** |
| **Total** | **1,460** | **2,598** | **219** | **253** | **62** | **471** | **5,063** | **4,377** |

Regionally, VCM accounted for just over half (51%) of the total inquiries for the current quarter. TAVI accounted for 29% of the overall inquiries, with the remaining regions accounting for 20% of all quarterly inquiries (Figure 1).

Figure 1. Total inquiries by region and month.



### 3.2 Inquiries by method

During the current quarter, reply cards[1] were again the most frequently used method (54%). The web represented another significant source of inquires with 38% of all inquiries processed through online forms accessible on regional websites (Table 2).

There continued to be significant variations in the use of each method throughout the current quarter. November saw the highest percentage of reply card inquiries with 69% of all inquiries using this method during this month. Web-based inquiries ranged from a high of 72% of all inquiries for December to a low of 25% for November. When this year is compared to 2005, significant differences were also observed. The greatest differences were with reply cards, which were up 46% over the previous year (8% of all inquiries in 2005 compared to 54% in 2006), and e-mail, which decreased 49% from the previous year (down from 51% of the overall total in 2005).

Table 2. Total inquiries by method and month.

| Method | October | November | December | Overall | Change from 2005 |
|---|---|---|---|---|---|
| Web | 47% | 25% | 72% | **38%** | **+3%** |
| Phone | 2% | 2% | 11% | **3%** | **+1%** |
| Reply | 47% | 69% | 6% | **54%** | **+46%** |
| Email | 2% | 2% | 6% | **2%** | **-49%** |
| Fax | <1% | 1% | 1% | **1%** | **-<1%** |
| Mail | <1% | <1% | 1% | **<1%** | **0%** |
| Voicemail | 2% | 2% | 4% | **2%** | **-1%** |
| **Total** | **1,847** | **2,646** | **570** | **5,063** | **4,377** |

When comparisons are made to the previous quarter, the most frequently used method of contact remained consistent within most regions. Web-based forms were the most frequent method of inquiry for TAVI, TOTA, CTA and NBC. The most frequent method of inquiry for VCM and KRT were reply cards (Table 3).

[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 | 77% | 8% | 81% | 14% | 58% | 74% | **38%** |
| Phone | 6% | | 1% | | 32% | 9% | **3%** |
| Reply | 14% | 91% | 1% | 66% | | | **54%** |
| Email | 2% | <1% | 7% | 11% | 5% | 6% | **2%** |
| Fax | | | | | | 7% | **1%** |
| Mail | <1% | <1% | 1% | 1% | | | **<1%** |
| Voicemail | | 1% | 9% | 8% | 5% | 4% | **2%** |
| **Total** | **1,460** | **2,598** | **219** | **253** | **62** | **471** | **5,063** |

### 3.3 Inquiries by origin

Overall, American consumers once again initiated the greatest percentage (74%) of all inquiries. The number of US inquiries peaked in November, while inquiries from Canadian consumers peaked in December (Table 4). The origin of consumers from European nations remained consistent with previous quarters. Forty-one percent of all European inquiries were from the UK. This was followed by 18% from Germany and 12% from the Netherlands. Of those from Asia/Pacific nations, Australians again made the most frequent contact with 53% of the total from this category. For the current quarter the Asia/Pacific country with the second highest number of inquiries was India with 9% of the total from this category. There were only small differences between the current quarter and the same period in 2005. The greatest difference was seen in overseas inquiries, which were down 9% compared to last year.

Table 4. Total inquiries by origin and month.

| Origin | October | November | December | Overall | Change from 2005 |
|---|---|---|---|---|---|
| Canada | 15% | 9% | 27% | **13%** | **-2%** |
| United States | 72% | 82% | 45% | **74%** | **1%** |
| Overseas | 3% | 2% | 6% | **3%** | **-9%** |
| *Europe* | *10%* | *7%* | *21%* | ***10%*** | ***1%*** |
| *Asia/Pacific* | *2%* | *1%* | *4%* | ***2%*** | ***0%*** |
| *Other overseas* | *1%* | *1%* | *2%* | ***1%*** | ***0%*** |
| Unknown | <1% | <1% | 1% | **<1%** | **0%** |
| **Total** | **1,847** | **2,646** | **570** | **5,063** | **4,377** |

Overall, Ontario had the greatest number of Canadian inquiries, followed by British Columbia (Table 5). This pattern was consistent across all months in the current quarter. California, Washington, and Oregon were once again the top US states, comprising 52% of all American inquiries during the current quarter. Other US states continued to represent a significant number of inquiries with 26% of the overall total. During the month of December alone, 47% of US inquiries were from other US states. Only the top 10 states are represented in the table below.

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

| Province/State | October | November | December | Overall |
|---|---|---|---|---|
| **Canada** | | | | |
| British Columbia | 32% | 29% | 27% | **30%** |
| Alberta | 12% | 14% | 21% | **15%** |
| Ontario | 33% | 32% | 33% | **33%** |
| Other Canada | 23% | 25% | 18% | **22%** |
| **Total** | **275** | **250** | **154** | **679** |
| **United States** | | | | |
| California | 32% | 38% | 16% | **35%** |
| Washington | 9% | 9% | 10% | **9%** |
| Oregon | 13% | 6% | 7% | **8%** |
| Texas | 5% | 5% | 5% | **5%** |
| Arizona | 4% | 5% | 4% | **4%** |
| Colorado | 4% | 5% | 3% | **4%** |
| Nevada | 3% | 4% | 1% | **3%** |
| Florida | 3% | 2% | 5% | **2%** |
| Utah | 2% | 2% | 2% | **2%** |
| New Mexico | 1% | 2% | 1% | **2%** |
| Other US | 25% | 24% | 47% | **26%** |
| **Total** | **1,328** | **2,159** | **258** | **3,745** |

The highest percentage of inquiries to TAVI, VCM, KRT and NBC were received from American consumers (57%, 93%, 73% and 49%, respectively), while TOTA, and CTA received the greatest percentage of inquiries from Canadians (47% and 40%, respectively). Overseas inquiries were proportionately the highest in TOTA (30% of the total for this region).

Table 6. Total inquiries by origin and region.

| Origin | TAVI | VCM | TOTA | KRT | CTA | NBC | Overall |
|---|---|---|---|---|---|---|---|
| Canada | 21% | 3% | 47% | 17% | 40% | 26% | **13%** |
| United States | 57% | 93% | 21% | 73% | 32% | 49% | **74%** |
| Overseas | 22% | 3% | 30% | 10% | 19% | 25% | **12%** |
| *Europe* | *18%* | *2%* | *21%* | *8%* | *13%* | *20%* | ***10%*** |
| *Asia/Pacific* | *3%* | *1%* | *4%* | *1%* | *5%* | *4%* | ***2%*** |
| *Other overseas* | *1%* | *<1%* | *5%* | *1%* | *2%* | *1%* | ***1%*** |
| Unknown | | | 2% | | 8% | | **<1%** |
| **Total** | **1,460** | **2,598** | **219** | **253** | **62** | **471** | **5,063** |

The highest number of consumer inquiries was from British Columbia in TOTA, KRT, CTA and NBC (Table 7). For TAVI and VCM the highest number of inquiries was from Ontario. The vast majority of inquiries to VCM again came from the US. For VCM, California represented 44% of all American inquiries. For all other regions, the highest number of consumer inquires again originated 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 | 20% | 30% | 39% | 35% | 64% | 38% | **30%** |
| Alberta | 16% | 9% | 13% | 28% | 8% | 16% | **15%** |
| Ontario | 39% | 36% | 25% | 19% | 16% | 30% | **33%** |
| Other Canada | 25% | 25% | 23% | 19% | 12% | 16% | **22%** |
| **Total** | **306** | **80** | **103** | **43** | **25** | **122** | **679** |
| **United States** | | | | | | | |
| California | 22% | 44% | 20% | 3% | 10% | 12% | **35%** |
| Washington | 9% | 9% | 13% | 9% | 10% | 5% | **9%** |
| Oregon | 5% | 8% | 7% | 37% | 15% | 5% | **8%** |
| Texas | 7% | 3% | 9% | 11% | 5% | 6% | **5%** |
| Arizona | 4% | 5% | 2% | | 5% | 1% | **4%** |
| Colorado | 5% | 4% | 2% | 1% | | 6% | **4%** |
| Nevada | 1% | 4% | | | | 1% | **3%** |
| Florida | 4% | 1% | 9% | 4% | 5% | 6% | **2%** |
| Utah | 2% | 3% | | 1% | 5% | 1% | **2%** |
| New Mexico | 1% | 2% | | 1% | | | **2%** |
| Other US | 39% | 17% | 39% | 34% | 45% | 58% | **26%** |
| **Total** | **834** | **2,429** | **46** | **184** | **20** | **232** | **3,745** |

### 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, with just over half of all inquiries citing this source. This was followed by Other Internet and Tourism BC sources (Table 8). The majority of the magazine sources cited continued to be from a single publication; Sunset Pacific Northwest (75% of all magazines). VIA magazine was also cited for 17% of all magazine sources.

In previous 2006 quarters, consistent increases were seen in magazines as a source of inquiry when compared to 2005. There were no significant variations from the current quarter as compared to the same quarter last year.

Table 8. Total inquiries by major source and month.

| Major Source | October | November | December | Overall | Change from 2005 |
|---|---|---|---|---|---|
| Tourism BC | 14% | 9% | 27% | **13%** | **+1%** |
| Tourism Association | 6% | 5% | 16% | **7%** | **+4%** |
| Other Internet | 16% | 9% | 27% | **14%** | **0%** |
| Newspaper | 7% | 2% | 2% | **4%** | **+1%** |
| Consumer show | <1% | | <1% | **<1%** | **0%** |
| Magazine | 47% | 69% | 10% | **54%** | **-1%** |
| Guide | 1% | 1% | 2% | **1%** | **0%** |
| Referral | 3% | 1% | 5% | **2%** | **0%** |
| Past visit | <1% | <1% | 1% | **<1%** | **0%** |
| Other | 1% | <1% | 1% | **1%** | **-2%** |
| Unknown | 3% | 3% | 9% | **4%** | **-2%** |
| **Total** | **1,847** | **2,646** | **570** | **5,063** | **4,377** |

Magazines were the most frequently cited source for VCM and KRT. For TAVI and CTA Tourism BC sources were cited the most frequently, whereas consumers for TOTA and NBC cited Other Internet most often (Table 9). Magazines continued to be a significant source of inquiries for VCM (88%), with the bulk of the magazines cited being Sunset Pacific Northwest (79% of all magazines cited for this region). The Internet is also a considerable source of inquiries with the Tourism BC website and search engines both prominent among the sources cited in all regions. Overall, very little change has been seen in the source by region throughout 2006.

[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 | 25% | 3% | 31% | 8% | 37% | 20% | **13%** |
| Tourism Association | 17% | 0% | 8% | 6% | 6% | 10% | **7%** |
| Other Internet | 23% | 4% | 32% | 7% | 27% | 36% | **14%** |
| Newspaper | 1% | 3% | 2% | 32% | | <1% | **4%** |
| Consumer show | | <1% | | | | <1% | **<1%** |
| Magazine | 20% | 88% | 5% | 38% | 6% | 15% | **54%** |
| Guide | 2% | <1% | 2% | | 3% | 4% | **1%** |
| Referral | 6% | <1% | 4% | 1% | | 3% | **2%** |
| Past visit | | <1% | 3% | 1% | 2% | 1% | **<1%** |
| Other | 1% | | 2% | | 3% | 2% | **1%** |
| Unknown | 5% | 1% | 12% | 8% | 15% | 8% | **4%** |
| **Total** | **1,460** | **2,598** | **219** | **253** | **62** | **471** | **5,063** |

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 represented a wide variety of campaigns and marketing efforts in which each region participated, there was substantial regional variation.

To better illustrate fluctuations within each region, this table reflects each detailed source as a percentage of the regional quarterly total. For example, 31% of all inquiries from KRT cited the Oregonian, while this same source represents 3% of all VCM inquiries for the quarter. Seventy percent of all VCM inquiries contacted the region as a result of information obtained from Sunset Pacific Northwest. TOTA, CTA and NBC consumers relied heavily upon Internet sources. Thirty-one percent of TOTA consumers used either a link from another website or a search engine to locate regional contact information, while 36% of all NBC inquiries and 23% of CTA inquiries were made in the same manner. Consumers to TAVI relied most heavily upon search engines (19%), Sunset Pacific Northwest (18%), and the Tourism BC website (14%).

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

| Secondary Source | TAVI | VCM | TOTA | KRT | CTA | NBC | Total | % of all Inquiries |
|---|---|---|---|---|---|---|---|---|
| Sunset Pacific Northwest | 18% | 70% | <1% | | | | **2,078** | **41%** |
| Search engine (i.e. Google) | 19% | 3% | 17% | | 15% | 28% | **542** | **11%** |
| VIA | | 18% | | | | | **463** | **9%** |
| Tourism BC website | 14% | 3% | 13% | 2% | 8% | 7% | **345** | **7%** |
| Oregonian | <1% | 3% | | 31% | | | **164** | **3%** |
| BC Vacation Planner | 7% | <1% | 8% | | 6% | 7% | **162** | **3%** |
| Link from another site | 4% | <1% | 14% | | 8% | 8% | **132** | **3%** |
| TVI Publication | 9% | | | | | | **130** | **3%** |
| Travel 50 & beyond | | | | 35% | | | **88** | **2%** |
| From a friend or relative | 4% | <1% | 4% | 1% | | 2% | **84** | **2%** |
| Alaska Magazine | | | | | | 14% | **65** | **1%** |
| TVI Website | 4% | | | | | <1% | **57** | **1%** |
| BC Accommodations Guide | 2% | <1% | 3% | | 5% | 2% | **46** | **1%** |
| Tourism BC call centre | 2% | <1% | 4% | <1% | 6% | 1% | **42** | **1%** |
| BC Outdoor Adventure Guide | 1% | <1% | 3% | | 3% | 3% | **34** | **1%** |
| Dawson Creek VIC | | | | | | 7% | **32** | **1%** |
| Other referral | 1% | <1% | | | | 1% | **30** | **1%** |
| Local Tourism association or chamber of commerce | 2% | | | | | <1% | **28** | **1%** |
| Unknown | 5% | 1% | 12% | 8% | 15% | 8% | **193** | **4%** |

[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 were asked for permission to contact them for follow-up studies during their inquiry. However, for some inquiries (those received through reply cards, 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, 12% of consumers gave permission to be re-contacted in this reporting period. The large number of magazine inquiries 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 (71% refusal) than when contact takes place over the phone (19% refusal).

Table 11. Permission response by month.

| Month | Yes | No Response | No | Total |
|---|---|---|---|---|
| October | 13% | 55% | 33% | **1,847** |
| November | 8% | 73% | 19% | **2,646** |
| December | 26% | 20% | 54% | **570** |
| **Overall** | **12%** | **60%** | **28%** | **5,063** |

Table 12. Permission response by region.

| Region | Yes | No Response | No | Total |
|---|---|---|---|---|
| TAVI | 18% | 23% | 59% | **1,460** |
| VCM | 3% | 92% | 5% | **2,598** |
| TOTA | 30% | 19% | 51% | **219** |
| KRT | 5% | 88% | 7% | **253** |
| CTA | 42% | 0% | 58% | **62** |
| NBC | 33% | 13% | 54% | **471** |
| **Overall** | **12%** | **60%** | **28%** | **5,063** |

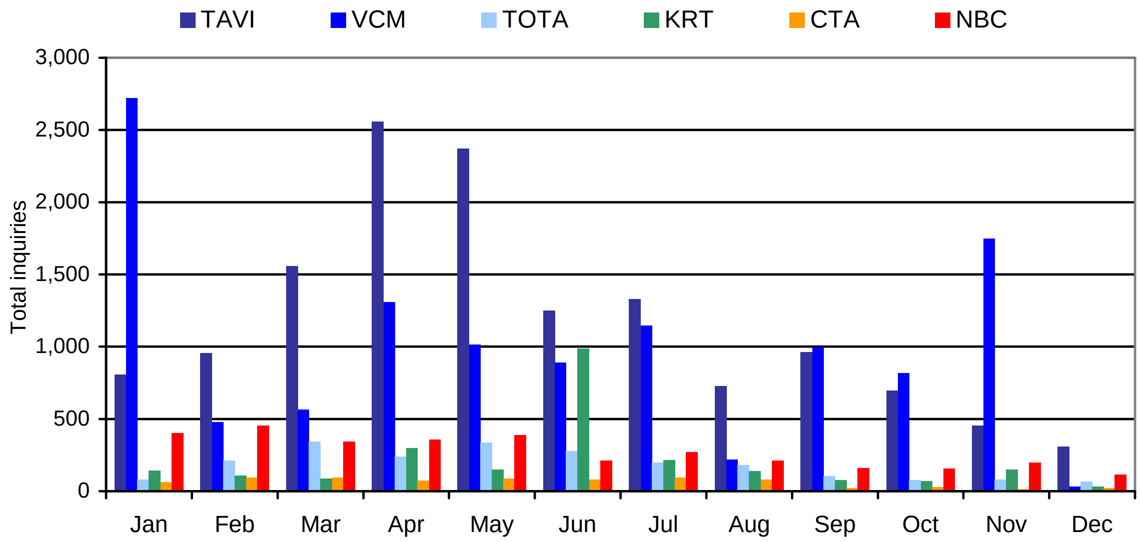
Table 13. Permission response by method.

| Method | Yes | No Response | No | Total |
|---|---|---|---|---|
| Web | 25% | 4% | 71% | **1,928** |
| Phone | 53% | 28% | 19% | **154** |
| Reply | <1% | 100% | | **2,728** |
| Email | 10% | 88% | 3% | **115** |
| Fax | | 100% | | **31** |
| Mail | | 100% | | **10** |
| Voicemail | 25% | 71% | 4% | **97** |
| **Overall** | **12%** | **60%** | **28%** | **5,063** |

## 4.0 2006 ANNUAL TRENDS

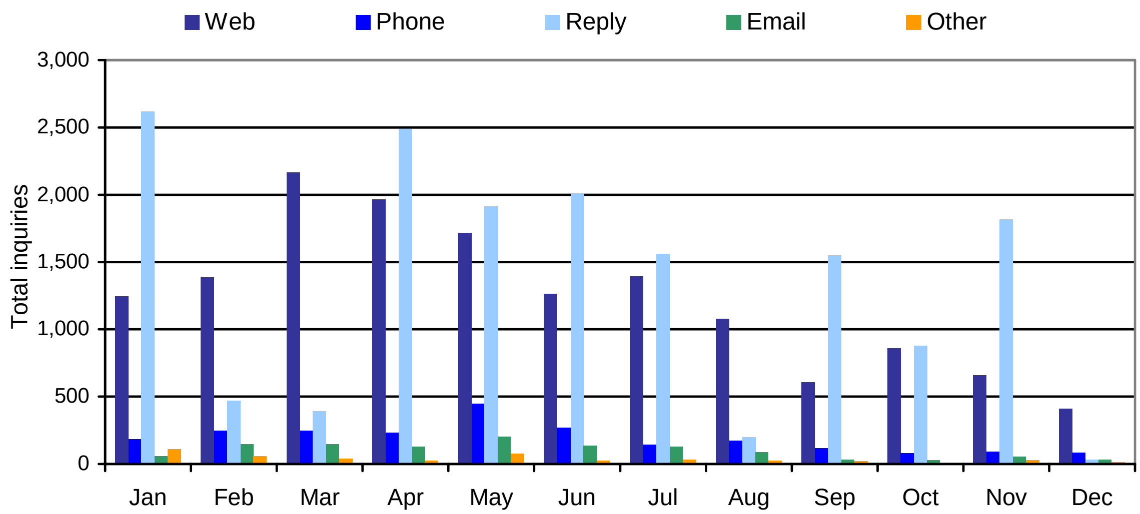
In total, 34,605 inquiries were recorded from all six regions between January 1 and December 31, 2006 (Figure 2). Overall, 40% of these inquiries were recorded by TAVI, while VCM reported the second highest number with 35% of all inquiries. April was the busiest month in 2006 with 14% of all inquiries. Compared to 2005, this year saw an overall increase of 17% (29,679 inquiries were received in 2005). There were only slight variations in the distribution of inquiries across regions and months. Inquiries to TAVI were down from 44% of last year's total, whereas inquiries to VCM were up considerably from last year when this region recorded 23% of the total number of inquiries. Last year, only slightly more inquiries were made in February as compared to April (both months had 13% of the annual total).

Figure 2.Total inquiries by region (January to December 2006)



Overall, the majority of consumers used either reply cards or web-based forms to contact the regions with these two methods comprising 89% of all regional inquiries. Forty-six percent of consumers chose reply cards, while 43% used the web-based forms. Phone methods (direct calls and voicemail) represent 7%, and Email an additional 3%. Reply methods have increased considerably over last year when this method accounted for only 13% of the overall number of inquiries. Much of this change can be attributed to reply cards collected from magazine sources.

Figure 3. Total inquiries by method (January to December 2006).



Inquiries from American consumers were recorded most often in all months, except March. Overall, 64% of all inquiries were from US consumers. Canadian consumers initiated 26% of all inquiries in 2006 (Figure 4). It is worth noting again, however, that origin of consumers varies considerably by region. Compared to last year, inquiries from Americans were up (from 54% of all 2005 inquiries), while inquiries from Canadians were down (32% of all 2005 inquiries were from Canadians).

Figure 4. Total inquiries by origin (January to December 2006).