TOURISM
SOUTH EAST

Hampshire Tourism Trends Survey 2001-2006

Final Report

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EXECUTIVE SUMMARY

National Overview

- Full year figures for 2006 from the International Passenger Survey show that the number of overseas visits to the UK reached a record 32.17 million, an increase of 7% on 2005. This is equivalent to an overseas visitor arriving in the UK every second of every day throughout the year. Estimates also indicate that total inbound visitor spending in the UK in 2006 reached £15.4bn, 8% up on 2006.

- Visits from Western Europe were up 7% (topping 20 million for the first time), visits from North America (USA and Canada) ose by 6% and visits from other countries increased by 9%.

- According to the May – October 2006 figures from the United Kingdom Survey for England (full year data not available at time of writing) there were a total of 57.9 million overnight trips made by UK residents in England, a fall of 7% compared with the same six months in 2005. In addition, total spend for this period was £10.1 billion, down 4%. By comparison, the number of outbound visits from the UK by UK residents during 2006 grew by 3% compared with 2005 and outbound spend increased by 4%.

- Recent results from the TRI Hospitality Consulting chain hotel survey (3 and 4 star hotels) indicate that UK generally, and in particular those in London, saw a relatively good performance during 2006 compared with 2005. Outside London the performance has been steadier with occupancy rates level with those achieved over the same period in 2005.

- Figures released by ALVA indicate that performance by the UK's visitor attractions appears to be back on track following a difficult year in 2005. The figures show a marked increase for several attractions compared with their 2005 performance; but this is partly explained by the impact of the July bombings in 2005. For some attractions, performance was down in 2006 due to the World Cup football keeping many potential visitors at home and also the effects of the very hot weather over the June and July period.

Serviced Accommodation Occupancy Results

- At the county level, the annual average room occupancy remains static at around 63%, slightly higher than the average for the UKOS Southern Region (61%). Average bed occupancy decreased by 2% when compared with 2005 (44% in 2006 and 46% in 2005) and was 1% lower than the Southern Region in 2006.

- The falling of the Easter period within the Quarter 2 2006 (April to June) had no noticeable impact on occupancy rates.

- As in previous years, weekday room occupancy levels for Hampshire were consistently higher than weekends, with less seasonal variation, although this varied between individual districts within Hampshire.

- At a county level, the average length of stay for visitors in serviced accommodation remained fairly static, averaging between 1.8 and 2.1 nights, but was lower than that recorded for the Southern Region.

- Overall, an average of 10% of all guests encountered in serviced accommodation establishments in Hampshire were from overseas. This was up 3% compared with the figures recorded in the previous two years.

Self Catering Accommodation Occupancy Results

- Overall the annual average unit occupancy in 2006 was 66% (compared with 61% in 2005).
- The average unit occupancy rate for the county is 4% higher than the average unit occupancy for the region.

Attraction Results

- Just fewer than 100 Hampshire attractions submitted monthly visitor numbers on a regular basis in 2005. Among these attractions just over 5.2 million visits were recorded in 2006.
- Among the constant sample just over 3.3 million visits were recorded during 2006 (3,327,358). This was down 2% compared with 2005 and up 6% compared with both 2004.
- For the vast majority of attractions, the timing of the Easter holiday period had a significant impact of a decline of visits during Q1 2006 compared to Q1 2005 and an increase in visits in Q2 2006 compared to Q2 2005.
- The figures for 2006 reflect a significant decrease in visitor numbers for free attractions in the constant sample (down by 14% compared with 2005). Charging attractions saw a 2% increase in visits in 2006 compared with 2005.
- Visits to rural attractions increased by 2% in 2006 compared with 2005. Urban attractions within the constant sample saw a fall of 8% on 2005 figures.
- Historic properties as well as museums and art galleries within the 'constant' sample experienced a fall in visitor numbers compared to 2005. Country parks were up 5%, gardens were up 1% and zoos and wildlife attractions were up 1%.

Tourist Information Centre Results

- Based on the constant sample of 10 TICs, aggregate footfall in 2006 was much lower than each of the previous years. The decline is greatest when compared to aggregate footfall for 2003, 2002 and 2001. Compared to 2005, footfall declined by 12%.
- The experience of declining footfall is not unique to Hampshire TICs. All over the region most TICs have seen the number of personal enquiries drop as more and more visitors turn to other sources of information, most notably the Internet for pre-arrival information.

Business Confidence Survey Results

- Forty-seven percent of Hampshire tourism businesses reported improved business over 2006 compared with 2005. A quarter felt that business was 'about the same (35% last year), whilst 17% indicated that business was down overall compared to the previous year.
- Only a third of Hampshire businesses were more confident about their expectations for 2007 when compared with the same time last year. 30% expect overall levels of business to be better in 2007 and 58% expect business performance to be 'about the same'. A minority of businesses (5%) expect business to be down in 2007 compared with 2006.

Outlook for 2007

- South East business operators are optimistic about the forthcoming year, with 58% expecting better overall performance for the year ahead compared with last year and over a third (36%) expecting performance to be about the same, while just 6% were predicting a worse year. The South East tourism industry appears to be more confident about the year ahead compared with the same time 12 months ago when 49% expected better overall performance for 2006 (compared with 2005).

- Businesses, however, do have concerns about the UK economy not just the effect on consumer spending but also the impact of rising costs on running a business. The main challenges and threats, identified by the tourism sector that could impact on future growth of the industry, were the growth in lost cost travel market, terrorism, green taxes and rising energy costs.

1. INTRODUCTION

The following tables and graphs present final results for 2006 for serviced and self catering accommodation, attractions and Tourist Information Centres from the Hampshire Tourism Trends Survey 2001-2006.

1.1 Objectives

The Survey has five main objectives:

- To identify the level and pattern of demand for serviced accommodation at district, county and regional level throughout the year, and to identify year on year trends
- To identify the level and pattern of demand for self-catering accommodation at district and county level (baseline year)
- To identify trends in attraction visitation and TIC visitation on a month by month and year on year basis
- To present industry feedback on business performance and optimism for the year ahead, adding context to occupancy and visitor figures provided by attractions and accommodation providers
- To provide those involved in the management of tourism in Hampshire with reliable data to help them to target their tourism marketing programmes and monitor their effectiveness

1.2 Methodology & Sample sizes

Serviced accommodation occupancy data is obtained through a postal survey of serviced accommodation establishments in Hampshire, as part of the Southern Region sample for the UK Occupancy Survey. Results are based on data provided by participating open establishments; therefore sample sizes may vary from month to month due to seasonal closures and non-returns. Average sample sizes at district and county level, and by size band are shown in Appendix 1. Participating establishments are shown in Appendix 2 and response rates by district are shown in Appendix 3.

Recruitment takes place among non-participating establishments on an annual basis, and on an individual basis when opportunities arise.

Occupancy questionnaires are mailed in advance on a monthly basis, and participants are supplied with regular feedback in the form of results sheets containing figures for their own establishment, Hampshire and the UKOS Southern Region as a whole.

Whilst every attempt has been made to maintain a constant sample of accommodation establishments each year, this has not been possible due to the voluntary nature on which participation is based. However a level of proportionality is achieved by weighting establishments on the basis of their size (i.e. bedspaces) relative to the average establishment size within the survey population. Results based on less than three establishments have not been included in this report, since margins of error are likely to be significant.

The statistical accuracy of the results depends upon the size of the sample, the variation in occupancy rates between establishments and (to a smaller extent) the size of the survey population. As the sample is self-selecting, it is not possible to calculate true statistical margins of error. However, it is likely that the results are accurate to between ± 5.9%. As there continues to be a substantial core of survey participants providing data every month, the trends which are identified by the survey are believed to reflect accurately overall trends in the use of serviced accommodation.

Self-catering accommodation occupancy data is obtained through a quarterly postal survey of self-catering accommodation providers. Results are again based on data provided by participating open establishments, and sample sizes vary according to seasonal closures and non-returns. Sample sizes at district and county level are shown in Appendix 1 and participating establishments are listed in Appendix 2.

Recruitment originally took place early in 2004 and has been repeated again in 2006, it was also boosted with help from some district Tourism Officers. The occupancy forms are mailed at the end of each quarter, and participants are provided with personal results for their own business. County and/or district results may be provided to participants where sample sizes are sufficiently robust.

Self-catering accommodation results are unweighted and district results are provided only where sample sizes consist of three or more self-catering establishments.

The **attractions survey sample** is divided into two sub-sets: the 'all participants' and 'constant participant' sets. During 1999, a total of 108 attractions participated in the survey. This has gradually fallen over the years due to a number of reasons including closures, staff changes and the voluntary aspect of the survey. In total 91 attractions returned data over the four quarterly periods of 2005. A list of attractions participating in the survey is provided in Appendix 4.

Weighting is not possible for attractions, as there is no shared numerical attribute that can be apportioned. Therefore, in order to enable year on year comparison, a 'constant', albeit smaller sample has been drawn on.

The 'constant participant' sample is based on 52 attractions that were selected from the outset of the study. This was to ensure that, on the one hand, the data from the survey came from a representative spread of different types of attractions (e.g. heritage attractions, museums, gardens and country parks), and on the other, that data would be comparable year on year.

The **TIC survey sample** is made up of 19 Hampshire TICs. Visitor figures from the three TICs which have closed since the commencement of the survey in 1999 have been removed from the monthly totals to ensure comparability of the data year on year. It should be noted that figures for Lyndhurst TIC are not available for September 2003 to July 2005 as their automated 'person counter' had been broken during this time.

The **business confidence survey** is sent on a quarterly basis to all South East tourism businesses that agreed to take part following a recruitment exercise at the end of 2003. The survey covers all sub-regions and all tourism and related sectors. Participants in the survey are asked about business performance for the year-to-date, expectations for the forthcoming year and factors affecting business performance. The business confidence sample for the January to December period was made up of 100 Hampshire tourism businesses, including attractions, accommodation providers and other tourism-related businesses.

1.3 Weather and seasonality

An indication of general monthly weather trends for Central Southern England is provided in Appendix 5. Figures are obtained from the Met Office, and have been included in order to help contextualise some of the variations in accommodation occupancy and attraction visits over the last five years. It should be noted, however, that the weather is only one factor, and it may or may not have had an influence on tourism patterns in Hampshire at any given time.

School holiday periods can be assumed to have a degree of influence on tourism visits, particularly for attractions. The main variations between years occur with the relative timing of the two week long Easter holidays in March or April each year, and should be taken into consideration when comparing monthly figures for these months year on year. It should also be noted that the late May Bank Holiday weekend in 2002 was moved to the first weekend in June to coincide with the Queen's Jubilee Celebrations (four day holiday weekend).

Easter school holiday dates (correct to the best of our knowledge, but not taking into account any regional or other variations) for each year over the survey period are listed below:

2001 Week commencing Monday 9th April to Sunday 22nd April 2001
2002 Week commencing Monday 25th March to Sunday 7th April 2002
2003 Week commencing Monday 14th April to Sunday 27th April 2003
2004 Week commencing Monday 5th April to Sunday 18th April 2004
2005 Week commencing Friday 25th March to Sunday 10th April 2005
2006 Week commencing Friday 31st March to Sunday 16th April 2006

1.4 Definitions

Hotel - An establishment with four rooms or more.

B&B – An establishment with one to three rooms.

Bedspace - A single room has 1 bedspace and a twin or double room has 2 bedspaces. Participating establishments were asked to indicate the number of bedspaces available and those occupied during the year. The analysis therefore takes into account any day to day increase or reduction in the bedstock as well as seasonal closures.

$$\textbf{\textit{Bed occupancy}} = \frac{\text{Total bedspaces occupied}}{\text{Total bedspaces available}} \times 100$$

$$\textbf{\textit{Room occupancy}} = \frac{\text{Total bedrooms occupied}}{\text{Total bedrooms available}} \times 100$$

UKOS Southern Region – Berkshire, Buckinghamshire, Dorset (excluding West Dorset and Weymouth & Portland districts), Hampshire, Isle of Wight and Oxfordshire.

UKOS South East Region – Kent, Surrey, East Sussex and West Sussex.

England – The whole of England (not Britain) covering all counties. These provisional figures are obtained from the UK Occupancy Survey.

1.5 Presentation of results

Average occupancy results for serviced accommodation establishments are provided in Section 2. Tables of results are included in the main text, with graphical presentation of results (room and bed occupancy by month at county and district level) included in Appendix 5.

Self-catering accommodation results are presented in Section 3 and results for attractions are presented in Section 4. Tourist Information Centre visitor figures are presented in Section 5 and business confidence survey results in Section 6.

2. SERVICED ACCOMMODATION OCCUPANCY RESULTS

2.1 Average room & bedspace occupancy 2001-2006 (Tables 1 & 2)

At the aggregated county level, average room and bed occupancy has been relatively stable (within +/- 3% points) year on year, although bed occupancy rates did fall by 2% on 2005 levels in 2006. Average room occupancy rates for Hampshire (63%) were slightly higher than the average for the UKOS Southern Region (61%) and average bed occupancy was 1% point lower in Hampshire compared to the Southern Region (46%).

Table1: County and Regional Average Annual Occupancy - 2001-2006

Average annual occupancy (%)	2001	2002	2003	2004	2005	2006
ROOM OCCUPANCY						
Hampshire	63	62	63	64	63	**63**
Dorset	62	61	63	57	63	**66**
Isle of Wight	52	52	52	49	56	**53**
UKOS Southern Region	63	61	61	58	61	**61**
BEDSPACE OCCUPANCY						
Hampshire	46	46	48	52	46	**44**
Dorset	50	50	50	44	48	**49**
Isle of Wight	46	45	44	42	47	**45**
UKOS Southern Region	47	46	46	45	46	**45**

Variations in occupancy performance month by month at a county level are presented in graph format in Figures A1 and A2, Appendix 6. Monthly occupancy performance at district level is presented in Figures A7 to A20 Appendix 6. Where relevant, notes have been included on factors affecting district results (mainly due to changes in the sample size or composition).

Annual averages at county and district level are summarised in Table 2, overleaf.

Table 2: Average Annual Room & Bedspace Occupancy (%) – by County & District – 2001-2006

Average annual occupancy (%)	2001	2002	2003	2004	2005	2006
ROOM OCCUPANCY						
Hampshire	**63**	**62**	**63**	**64**	**63**	**63**
East Hampshire	49	47	41	39	38	**42**
New Forest	55	54	57	55	61	**58**
North Hampshire	65	65	57	62	59	**62**
Portsmouth	70	69	66	68	68	**66**
Southampton	74	71	69	74	69	**71**
Test Valley	61	65	66	64	65	**65**
Winchester	68	70	71	64	63	**62**
BEDSPACE OCCUPANCY						
Hampshire	**46**	**46**	**48**	**52**	**46**	**44**
East Hampshire	36	37	32	30	30	**30**
New Forest	46	46	47	45	51	**48**
North Hampshire	43	43	39	41	38	**38**
Portsmouth	56	52	49	46	42	**42**
Southampton	56	54	51	54	53	**50**
Test Valley	46	48	48	47	48	**48**
Winchester	47	49	47	43	44	**46**

The average annual room occupancy level in **East Hampshire** is 4% points higher to that achieved in 2005, whereas bed occupancy remains at a similar level.

The average annual room and bed occupancy result for the New Forest in 2006 each presented a 3% point drop compared to 2005.

The average room occupancy rate in **North Hampshire** for 2006 showed a 3% point increase on the level recorded in 2005, and was comparable with the level recorded in 2004. Average bed occupancy for the year remained the same as last year.

Results for **Portsmouth** show that average bed occupancy in 2006 was equal to that of 2005; however there was a 2% decrease in average room occupancy compared with 2005.
The average room occupancy level for **Southampton** in 2006 showed an increase of 2% compared with 2005 (from 69% to 71%), whereas bed occupancy declined by 3% compared to the previous year.

The annual average room and bed occupancy rate for the **Test Valley** remained at the same level as 2005 (65% and 48% respectively) reflecting a relative static state in performance over the past few years.

The average annual room and bed occupancy level for **Winchester** in 2006 were slightly lower to those achieved in 2005. Average room occupancy declined by 1% points and average bed occupancy declined by 2% points.

2.2 Regional and national comparisons (Table 3)

As shown in Table 3, below, annual average room occupancy rates for Hampshire exceeded those of the Southern Region by 2% points, were 4% points above regional results for the South East, and a significant 13% points higher than the England results. Average bed occupancy rates were level with those for the Southern Region, 3% points higher than the South East Region and a significant 8% points higher than the results for England as a whole.

Table 3: Room & Bedspace Occupancy (%) 2006 by month: County, Regional and National Comparisons

Average occupancy (%)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Average
ROOM OCCUPANCY													
Hampshire	48	57	58	58	62	66	76	72	75	68	60	55	**63**
UKOS Southern Region	42	51	54	59	65	68	72	71	71	63	57	49	**61**
UKOS South East Region	41	51	52	55	60	68	71	67	71	60	54	48	**59**
England	-	-	-	-	-	-	-	-	-	-	-	-	**55**
BEDSPACE OCCUPANCY													
Hampshire	31	38	39	44	45	48	57	58	55	48	37	35	**44**
UKOS Southern Region	28	35	38	45	47	50	58	62	53	47	37	34	**45**
UKOS South East Region	27	36	35	45	49	49	57	58	53	47	36	34	**45**
England	30	36	37	47	48	53	58	61	57	48	41	41	**43**

Source: United Kingdom Occupancy Survey

Over the past 8 years, the annual average room occupancy rate has remained relatively static at around 62% to 64% (Table 4). There has been slightly more variation in the annual average bed occupancy rate over this period, with the highest rate seen in 2004 at 49% and the lowest seen in 2006 at 44% (Table 5).

Table 4: Annual Average Room Occupancy 8 year trend

		Average Room Occupancy (%)												
	Year	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Average**
Hampshire	1999	49	58	58	60	64	70	74	70	75	67	61	48	**63**
	2000	47	56	59	60	65	72	75	74	76	69	62	53	**64**
	2001	53	61	59	57	64	68	69	73	74	67	58	52	**63**
	2002	48	56	58	59	62	68	72	71	72	65	61	51	**62**
	2003	47	55	58	61	62	67	75	73	78	67	62	55	**63**
	2004	52	61	65	63	66	70	75	72	77	70	63	53	**62**
	2005	49	55	54	61	64	69	71	70	77	67	59	52	**63**
	2006	48	57	58	58	62	66	76	72	75	68	60	55	**63**

Table 5: Annual Average Bed Occupancy 8 year trend

		Average Bed Occupancy (%)												
	Year	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Average**
Hampshire	1999	31	38	40	44	48	51	57	56	54	48	40	36	**45**
	2000	30	38	39	45	48	52	56	59	58	51	41	37	**46**
	2001	34	43	41	43	49	51	53	61	54	49	40	38	**46**
	2002	32	41	43	42	45	52	56	59	52	47	42	38	**46**
	2003	31	38	41	46	48	49	58	63	60	52	46	43	**48**
	2004	40	47	49	50	53	54	60	61	60	56	48	37	**49**
	2005	34	39	38	43	46	51	55	57	56	48	39	36	**46**
	2006	31	38	39	44	45	48	57	58	55	48	37	35	**44**

2.3 Average Weekday and Weekend Room Occupancy (Tables 6 & 7 – on following two pages)

As in previous years, weekday room occupancy levels for Hampshire as a whole are consistently higher than weekends, with less seasonal variation in demand. Both average weekday and weekend room occupancy levels for Hampshire during 2005 remained within +/- 2% points compared with averages for the previous five years.

In **East Hampshire** the average weekday room occupancy rate at 41% is 26% points lower than the Hampshire average, and is the same as the rate achieved in 2005. Following a poor record last year, weekend room occupancy has improved, increasing from 36% in 2005 to 42% in 2006.

In the **New Forest** average weekday room occupancy returned to the same level achieved in 2003 at 53% and average weekend room occupancy returned to the same level achieved in 2004 at 64%.

North Hampshire saw an increase in both weekday and weekend occupancy levels in 2006 compared with 2005. Weekday room occupancy rate increased by 5% points while weekend room occupancy rate increased by 2% points.

Portsmouth also recorded an increase in weekday occupancy levels in 2006. The weekday room occupancy rate increased by 4% points. The weekend room occupancy rate decreased by 1% points compared to 2005.

Southampton saw an increase in both weekday and weekend occupancy levels in 2006 compared with 2005. Weekday room occupancy rate increased by 2% points while weekend room occupancy rate increased by 3% points.

Test Valley continues to experience a relatively static level of performance for annual weekend and weekday room occupancy. At 70% the average weekday room occupancy rate was 1% point lower to that achieved in 2005 and at 55% the average weekend room occupancy rate was 1% point higher to that achieved in 2005.

Over the last two years, the annual average weekday and weekend occupancy rate has remained static in **Winchester's** at 64% and 59% respectively.

Table 6: Average Weekday Room Occupancy (%) – by County & District

	Year	Weekday Room Occupancy (%)												
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Hampshire	2001	64	72	70	62	68	74	75	74	79	72	64	56	**69**
	2002	56	62	63	64	66	72	74	70	79	69	68	58	**67**
	2003	53	59	63	63	65	73	76	74	80	71	68	58	**67**
	2004	57	64	69	64	65	73	77	70	77	75	62	52	**67**
	2005	56	61	56	66	66	76	75	70	81	71	64	52	**66**
	2006	**55**	**64**	**63**	**61**	**63**	**71**	**79**	**72**	**78**	**73**	**66**	**57**	**67**
East Hampshire	2001	56	59	60	52	59	64	55	48	50	42	45	35	**52**
	2002	45	47	46	49	49	53	69	55	64	37	37	41	**49**
	2003	30	38	39	32	32	55	71	46	52	43	44	34	**43**
	2004	42	42	48	36	30	44	56	37	51	45	35	32	**42**
	2005	24	29	25	37	39	63	54	42	60	57	32	31	**41**
	2006	**31**	**42**	**46**	**35**	**35**	**42**	**58**	**43**	**47**	**48**	**40**	**30**	**41**
New Forest	2001	34	47	39	44	45	58	62	66	69	51	43	43	**50**
	2002	29	37	42	43	46	60	61	63	64	52	43	39	**48**
	2003	32	38	47	47	50	60	67	70	68	59	46	46	**53**
	2004	37	46	50	48	53	60	64	66	68	60	39	38	**52**
	2005	40	46	46	53	59	67	68	67	69	57	46	43	**55**
	2006	**35**	**43**	**46**	**46**	**48**	**59**	**68**	**68**	**73**	**59**	**46**	**44**	**53**
North Hampshire	2001	84	89	91	83	84	88	83	72	79	79	80	66	**82**
	2002	74	80	78	81	79	80	83	71	83	78	86	70	**79**
	2003	66	68	69	62	66	78	73	60	65	75	80	66	**69**
	2004	73	77	84	61	72	83	83	71	68	79	87	60	**75**
	2005	64	74	62	80	71	76	67	51	85	79	80	65	**71**
	2006	**68**	**77**	**76**	**70**	**76**	**84**	**80**	**49**	**86**	**83**	**85**	**76**	**76**
Portsmouth	2001	68	79	76	64	76	87	90	88	93	84	68	54	**77**
	2002	64	60	67	78	82	87	91	83	91	90	57	51	**75**
	2003	52	53	63	80	74	75	88	82	90	78	64	61	**72**
	2004	60	65	65	74	75	85	84	76	86	82	64	60	**73**
	2005	43	60	55	66	71	84	85	80	88	81	71	46	**69**
	2006	**56**	**76**	**74**	**69**	**72**	**68**	**90**	**86**	**78**	**75**	**69**	**66**	**73**
Southampton	2001	76	79	89	-	89	90	86	-	77	81	-	-	**82**
	2002	-	-	-	84	80	75	89	79	93	96	86	71	**84**
	2003	82	83	94	79	83	81	90	87	91	75	76	58	**82**
	2004	67	62	72	69	72	74	80	65	91	81	86	69	**74**
	2005	82	75	70	86	71	78	76	77	85	76	57	63	**75**
	2006	**74**	**79**	**83**	**75**	**75**	**74**	**82**	**72**	**84**	**83**	**79**	**68**	**77**
Test Valley	2001	69	74	69	63	74	59	76	73	70	77	80	68	**71**
	2002	64	75	69	75	60	76	74	80	84	76	77	69	**73**
	2003	68	75	69	74	76	83	82	79	80	72	78	65	**75**
	2004	61	75	80	72	79	84	85	72	84	73	66	62	**74**
	2005	65	73	66	73	66	74	80	71	87	73	74	51	**71**
	2006	**69**	**68**	**64**	**66**	**74**	**75**	**78**	**75**	**74**	**87**	**64**	**50**	**70**
Winchester	2001	69	74	77	69	73	76	70	74	80	71	70	69	**73**
	2002	54	74	69	76	74	79	80	71	76	83	75	71	**73**
	2003	59	73	70	73	75	81	80	70	81	80	82	60	**74**
	2004	65	72	75	63	72	78	82	59	75	81	62	57	**70**
	2005	46	57	51	68	58	72	69	60	90	67	70	61	**64**
	2006	**40**	**57**	**50**	**57**	**59**	**78**	**81**	**69**	**80**	**73**	**65**	**63**	**64**

Note: Results not shown where data is based on a sample of less than 3 establishments

Table 7: Average Weekend Room Occupancy (%) – by County & District

		Weekend Room Occupancy (%)												
	Year	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Average**
Hampshire	2001	37	47	47	52	60	59	61	73	68	61	51	45	**55**
	2002	36	49	52	49	59	62	68	72	65	59	52	41	**55**
	2003	36	51	50	59	62	59	73	71	75	62	55	50	**58**
	2004	46	55	57	60	60	66	72	71	74	65	56	51	**61**
	2005	41	48	52	54	61	65	67	71	73	62	50	47	**58**
	2006	**39**	**47**	**51**	**55**	**61**	**61**	**72**	**72**	**72**	**61**	**52**	**52**	**58**
East Hampshire	2001	28	37	31	55	57	50	55	57	52	52	37	35	**46**
	2002	29	36	36	43	49	45	65	66	60	38	30	30	**44**
	2003	23	37	20	24	36	40	65	50	55	40	40	32	**39**
	2004	36	33	44	30	35	48	53	51	48	40	30	30	**40**
	2005	18	20	20	31	49	54	51	44	49	38	24	35	**36**
	2006	**18**	**36**	**49**	**32**	**42**	**47**	**61**	**53**	**47**	**50**	**37**	**27**	**42**
New Forest	2001	35	46	52	52	65	64	69	81	76	68	58	54	**60**
	2002	34	54	62	50	64	68	75	82	74	68	57	41	**61**
	2003	38	56	60	66	70	67	77	79	77	64	55	54	**64**
	2004	46	60	60	62	70	66	76	75	78	67	54	54	**64**
	2005	47	58	63	61	73	73	73	81	79	67	56	55	**66**
	2006	**43**	**55**	**58**	**67**	**68**	**65**	**75**	**83**	**79**	**69**	**56**	**52**	**64**
North Hampshire	2001	34	42	41	44	49	50	43	54	50	41	35	39	**44**
	2002	28	37	43	37	51	50	61	58	48	35	47	43	**45**
	2003	28	33	31	38	44	54	50	47	47	40	32	42	**41**
	2004	27	38	45	31	43	53	59	48	52	38	44	47	**44**
	2005	25	35	34	39	41	47	43	48	52	43	40	41	**41**
	2006	**25**	**32**	**29**	**37**	**48**	**54**	**56**	**55**	**61**	**44**	**32**	**41**	**43**
Portsmouth	2001	37	51	51	57	67	69	71	82	78	73	55	45	**61**
	2002	44	42	59	59	68	75	80	75	78	77	51	29	**61**
	2003	40	46	49	66	72	55	77	72	72	62	56	39	**59**
	2004	37	49	47	68	67	70	73	74	74	71	48	49	**61**
	2005	28	55	52	51	57	67	77	75	76	70	53	40	**58**
	2006	**50**	**47**	**47**	**52**	**65**	**49**	**72**	**70**	**66**	**58**	**52**	**53**	**57**
Southampton	2001	48	59	64	-	65	66	63	-	71	78	-	-	**64**
	2002	-	-	-	59	57	42	70	56	74	57	53	40	**56**
	2003	41	47	55	43	53	49	61	59	75	51	52	56	**54**
	2004	37	44	44	58	61	58	66	70	76	73	70	72	**61**
	2005	55	57	60	70	60	63	62	71	78	58	44	58	**61**
	2006	**55**	**58**	**62**	**62**	**66**	**62**	**73**	**68**	**75**	**65**	**59**	**65**	**64**
Test Valley	2001	32	34	26	59	56	41	65	69	63	53	46	45	**49**
	2002	26	36	47	53	56	67	68	77	70	59	50	41	**54**
	2003	33	48	42	63	64	61	69	73	70	46	50	44	**55**
	2004	31	41	45	57	56	67	72	68	68	56	44	51	**55**
	2005	36	43	53	54	58	68	65	66	67	55	47	37	**54**
	2006	**38**	**43**	**45**	**51**	**61**	**61**	**76**	**68**	**73**	**69**	**23**	**51**	**55**
Winchester	2001	48	56	59	54	62	59	65	78	73	68	64	60	**62**
	2002	46	66	66	62	64	72	75	75	64	76	60	51	**65**
	2003	30	62	62	68	71	67	78	70	76	69	60	53	**64**
	2004	37	58	57	65	74	68	72	64	73	65	51	58	**62**
	2005	37	49	48	57	62	61	67	61	79	65	57	59	**59**
	2006	**33**	**43**	**40**	**48**	**61**	**77**	**80**	**73**	**80**	**61**	**49**	**60**	**59**

Note: Results not shown where data is based on a sample of less than 3 establishments

2.4 Average Length of Stay (Table 8)

At county level, the average length of stay for visitors in serviced accommodation has remained fairly static, averaging between 1.8 and 2.1 nights, but was lower than that recorded for the Southern Region. Results for the whole of the Southern region suggest that average length of stay has also remained static at a regional level over the last six years.

Table 8: Average length of stay (nights) – by county, district & region

Average Length of Stay (nights)	2001	2002	2003	2004	2005	2006
Year average						
Hampshire	**1.8**	**1.8**	**1.9**	**2.1**	**1.8**	**1.9**
East Hampshire	1.9	1.8	1.7	1.7	1.6	**1.6**
New Forest	1.8	1.8	1.8	1.8	1.9	**1.8**
North Hampshire	1.8	1.8	1.8	1.7	1.7	**1.7**
Portsmouth	2.2	2.0	2.0	2.1	2.0	**1.9**
Southampton	1.8	2.3	2.2	2.2	1.9	**2.8**
Test Valley	1.8	1.8	1.7	1.8	1.8	**1.9**
Winchester	1.8	1.8	1.8	1.3	1.4	**1.7**
UKOS Southern Region	**2.2**	**2.1**	**2.1**	**2.1**	**2.1**	**2.1**

2.5 Comparison by Type of Establishment (Table 9a & b)

As in previous years, average room and bed occupancy tended to be higher in hotels (4+ rooms) than those recorded in B&B establishments (1-3 rooms). The average room occupancy for Hampshire hotels how no change compared to 2005 at 65%., whereas bed occupancy for hotels dropped 2% points compared to 2005.

For Hampshire's B&Bs, both room and bed occupancy declined by 3% points compared to the level achieved in 2005.

Table 9a: Average Room & Bed Occupancy (%) – January to December period – Hampshire Hotels (4+ rooms)

HOTELS (4+ rooms)	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Room occupancy (%)	2001	56	64	62	60	67	71	71	74	75	69	60	54	**65**
	2002	50	58	60	60	63	68	73	72	73	67	63	52	**63**
	2003	48	57	60	63	64	69	76	74	80	69	64	58	**65**
	2004	54	63	66	65	67	71	76	73	77	72	62	54	**67**
	2005	51	57	57	64	66	72	73	73	79	69	61	54	**65**
	2006	**49**	**59**	**60**	**60**	**64**	**68**	**78**	**74**	**77**	**71**	**62**	**58**	**65**
Bedspace occupancy (%)	2001	35	45	43	45	50	51	54	61	55	50	41	39	**47**
	2002	32	42	44	42	46	52	56	59	52	48	43	39	**46**
	2003	31	40	42	47	49	50	59	64	61	54	47	45	**49**
	2004	41	49	50	51	55	54	61	63	59	58	46	38	**52**
	2005	37	40	40	46	49	53	56	60	58	51	40	39	**48**
	2006	**32**	**39**	**40**	**45**	**46**	**49**	**58**	**60**	**55**	**50**	**38**	**37**	**46**

Table 9b: Average Room & Bed Occupancy (%) – January to December period - Hampshire B&Bs (1-3 rooms)

B&Bs (1-3 rooms)	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Room occupancy (%)	2001	35	38	36	38	47	48	57	68	58	51	42	32	**46**
	2002	28	37	44	45	46	52	60	65	60	53	45	34	**47**
	2003	35	35	40	47	47	53	62	63	62	50	41	33	**48**
	2004	31	42	44	48	54	58	60	57	57	51	42	32	**48**
	2005	33	38	38	46	47	55	55	55	63	49	44	37	**48**
	2006	**34**	**37**	**41**	**42**	**47**	**52**	**57**	**57**	**60**	**46**	**38**	**29**	**45**
Bedspace occupancy (%)	2001	25	27	26	30	39	39	49	62	48	41	32	25	**37**
	2002	22	28	35	37	39	46	51	57	48	41	33	25	**38**
	2003	24	26	31	37	39	41	52	54	50	42	31	25	**38**
	2004	22	32	32	39	45	47	50	47	47	40	31	25	**38**
	2005	23	28	29	36	38	45	46	47	51	39	33	26	**38**
	2006	**25**	**26**	**28**	**33**	**35**	**41**	**48**	**48**	**49**	**35**	**27**	**21**	**35**

2.6 Percentage of overseas guests and percentage of overseas bednights (Tables 10 & 11)

At a county level, the average proportion of overseas guests encountered within serviced accommodation establishments during 2005 was 10%. This shows a significant increase compared with recent years, and appears to reflect the recent increase in inbound tourism. That said, results should be interpreted with caution since not all establishments in the sample provide a domestic/overseas breakdown of arrivals and staying guests, and this is likely to have varied year on year with changes in the sample composition, particularly at a district level.

Table 10: Percentage of overseas guests - by County, District & Region

Percentage overseas guests (%)	2001	2002	2003	2004	2005	2006
Hampshire	**10**	**12**	**7**	**7**	**7**	**10**
East Hampshire	10	12	10	10	11	**13**
New Forest	6	6	5	7	5	**6**
North Hampshire	12	12	11	10	2	**3**
Portsmouth	11	12	7	9	9	**17**
Southampton	7	10	13	15	9	**13**
Test Valley	12	10	10	11	16	**15**
Winchester	17	13	10	18	21	**21**
UKOS Southern Region	**10**	**12**	**10**	**10**	**10**	**12**

Reflecting the increase in overseas guests, the percentage of bednights spent in Hampshire serviced accommodation establishments by overseas visitors in 2006 was 3% point higher than 2005 and 4% points higher than 2004, similar to the average achieved in 2001 and 2002. Figures for the Southern region and England were also higher than 2005.

Table 11: Average Overseas Occupancy (% overseas bednights)

Percentage overseas bednights (%)	2001	2002	2003	2004	2005	2006
Hampshire	**11**	**12**	**7**	**8**	**9**	**12**
Dorset	3	4	4	4	4	**4**
Isle of Wight	2	3	2	2	1	**2**
UKOS Southern Region	10	12	10	10	10	**13**
England	18	18	17	17	17	20

2.7 Percentage of guests staying on business

Overall, business visitors accounted for approximately 40% of all guests staying in serviced accommodation in Hampshire during 2006. This is 5% higher than the rate achieved in 2005 and is 14% points higher than the rate achieved in 2004.

Particularly high proportions of business visitors were recorded in both North Hampshire and Southampton (69% and 70% respectively).

Table 12: Percentage of guests staying overnight on business – by County & District

	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Hampshire	2004	46	24	26	23	24	23	32	25	24	17	29	37	**26**
	2005	51	43	38	40	33	33	26	27	34	36	50	37	**35**
	2006	**51**	**50**	**50**	**34**	**38**	**36**	**34**	**26**	**36**	**39**	**50**	**41**	**40**
East Hampshire	2004	56	61	54	43	30	34	29	24	48	30	46	38	**43**
	2005	49	39	38	38	24	40	22	42	42	47	58	33	**39**
	2006	**55**	**41**	**38**	**22**	**27**	**22**	**23**	**18**	**29**	**37**	**52**	**33**	**31**
New Forest	2004	23	19	27	16	18	17	16	13	18	21	25	18	**19**
	2005	33	23	20	21	16	23	16	10	22	18	28	16	**19**
	2006	**29**	**17**	**23**	**13**	**13**	**19**	**17**	**9**	**21**	**21**	**30**	**21**	**19**
North Hampshire	2004	73	24	77	70	58	72	64	51	82	89	90	82	**73**
	2005	91	84	87	82	75	79	72	70	82	85	82	65	**79**
	2006	**78**	**82**	**82**	**69**	**78**	**69**	**78**	**56**	**56**	**96**	**95**	**88**	**69**
Portsmouth	2004	52	53	52	39	45	33	22	11	21	34	43	46	**34**
	2005	69	29	30	51	35	25	25	34	34	44	61	52	**35**
	2006	**55**	**56**	**57**	**47**	**55**	**48**	**51**	**37**	**38**	**50**	**61**	**73**	**51**
Southampton	2004	73	71	78	53	58	61	55	45	73	52	68	74	**69**
	2005	81	75	77	60	47	47	41	35	48	60	73	75	**52**
	2006	**81**	**80**	**88**	**68**	**69**	**65**	**66**	**54**	**63**	**71**	**67**	**69**	**70**
Test Valley	2004	53	61	52	39	38	35	29	32	38	30	50	43	**42**
	2005	50	54	51	49	34	32	31	35	37	41	49	35	**40**
	2006	**62**	**54**	**53**	**37**	**35**	**31**	**44**	**26**	**35**	**39**	**71**	**28**	**39**
Winchester	2004	27	28	29	41	21	30	14	44	27	28	41	31	**32**
	2005	46	30	42	47	29	35	15	22	28	26	59	57	**34**
	2006	**59**	**61**	**60**	**24**	**46**	**25**	**18**	**14**	**23**	**30**	**46**	**33**	**38**

3. SELF-CATERING ACCOMMODATION OCCUPANCY RESULTS

3.1 Average unit occupancy 2006 (Table 13a & b)

Self catering results were reported for the first time in 2004 and, as was hoped, a constant sample of establishments has emerged in a number of districts to ensure consistency in reporting. Results are based on data provided by participating open establishments and therefore sample sizes will vary according to seasonal closures and non returns.

Unit occupancy results for Hampshire reflect the seasonal variations for this accommodation sector. Overall average unit occupancy in 2006 was 66% compared with 61% in 2005. Results from the South East self catering and caravan and camping survey indicate that net unit occupancy over the April –December 2006 period averaged 63%. Unit occupancy reached 77% and 76% during July and August respectively.

Table 13a: Self-catering houses, cottages & flats - unit occupancy results – by county & district 2006

Unit Occupancy (%)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Hampshire	**38**	**58**	**52**	**61**	**72**	**77**	**83**	**86**	**83**	**79**	**52**	**51**	**66**
East Hampshire	54	71	77	53	54	63	94	91	74	81	60	42	**68**
New Forest	32	53	45	72	79	89	92	99	96	73	43	44	**68**
North Hampshire	Sample too small												
Portsmouth	76	94	96	100	100	100	100	100	97	32	47	68	**84**
Southampton	Sample too small												
Test Valley	0	0	0	15	51	41	57	60	68	84	60	62	**42**
Winchester	50	41	65	49	74	73	82	71	74	88	78	74	**68**
SE region	53	57	66	77	76	67	64	54	53	53	57	66	**62**

Table 13b: Self-catering houses, cottages & flats - unit occupancy results – by county & district 2005

Unit Occupancy (%)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Hampshire	**48**	**50**	**47**	**53**	**59**	**63**	**67**	**71**	**72**	**71**	**67**	**62**	**61**
East Hampshire	77	81	80	83	85	86	85	84	83	83	79	77	**82**
New Forest	33	38	39	49	56	61	66	71	72	71	66	60	**57**
North Hampshire	Sample too small												
Portsmouth	86	83	84	84	84	81	81	81	83	84	85	85	**83**
Southampton	Sample too small												
Test Valley	0	0	0	0	23	29	42	46	53	53	53	53	**29**
Winchester	76	69	70	71	74	77	76	76	77	77	78	74	**75**
SE region	Not available – regional survey started 2006												

Sample sizes by district are shown in Appendix 1 and monthly response rates are shown in Appendix 3. A full list of participants by district can be found in Appendix 2.

4. VISITS TO ATTRACTIONS

4.1 Total Visitor Numbers (Tables 14, 15 & 16)

Among the 'all participant' sample, a total of just over 5.2 million visits were recorded in 2006 (5,226,184).

Among the constant sample, just over 3.3 million visits were made (3,327,358) during 2006 (Tables 13 and 14). This was down 2% compared with 2005, up 6% compared with both 2004 and up 11% compared with 2003, up 10% compared with 2002 and up 17% compared with 2001 (Table 14).

Table 14: Visitor numbers at attractions within the constant sample – annual totals 2006 compared with previous years

	2006	Compared with:	2005	2004	2003	2002	2001
Hampshire	**3,327,358**		3,383,138 down 2%	3,136,340 up 6%	3,009,792 up 11%	3,033,935 up 10%	2,855,560 up 17%
East Hampshire	**393,854**		387,304 up 2%	367,143 up 7%	305,540 up 29%	335,827 up 17%	311,187 up 27%
New Forest	**501,574**		505,398 down 1%	505,534 down 1%	504,496 down 1%	520,390 down 4%	481,841 up 4%
North Hampshire	**129,394**		127,245 up 2%	121,736 up 6%	129,994 no change	135,876 down 5%	115,310 up 12%
Portsmouth	**558,436**		630,998 down 11%	560,417 no change	468,895 up 19%	567,634 down 2%	592,157 down 6%
Southampton	**124,190**		117,764 up 5%	116,715 up 6%	100,183 up 24%	88,778 up 40%	93,787 up 32%
Test Valley	**324,556**		315,604 up 3%	293,937 up 10%	292,540 up 11%	252,713 up 28%	239,972 up 35%
Winchester	**593,232**		576,542 up 3%	535,568 up 11%	543,631 up 9%	512,887 up 16%	457,356 up 30%

At a district level, 'constant' attractions in Southampton saw the largest overall increases in visits when compared with 2005, up 5% (Table 14).

East Hampshire, North Hampshire, Test Valley and Winchester attractions saw more modest increases (between 2% & 3%) in visits in 2006 compared with 2005.

Whereas the New Forest was down slightly (1%) compared with 2005 Portsmouth was down -11% compared with 2005 this could be that the Spinnaker Tower opened in 2005 and displaced some business for the other City attractions.

Table 15: Total visits to attractions (constant sample) by month 2001-2006

		Total visits by month												
	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Hampshire	2001	117,768	172,973	99,028	270,048	332,295	335,375	348,950	462,983	267,816	218,423	134,811	95,090	2,855,560
(Base: 51)	2002	93,642	153,433	240,734	303,658	309,170	381,244	363,820	467,641	280,276	228,686	123,423	88,208	3,033,935
	2003	101,591	159,653	194,164	335,762	363,933	332,049	360,215	422,735	269,903	251,013	118,507	100,267	3,009,792
	2004	115,488	181,799	166,711	348,716	358,373	373,926	374,388	461,080	271,359	248,610	126,240	109,650	3,136,340
	2005	116,901	164,610	263,668	302,584	374,281	386,333	410,406	514,665	293,125	302,235	137,262	117,068	3,383,138
	2006	119,297	171,368	168,500	341,039	356,799	394,767	371,695	488,732	287,357	286,885	152,705	122,678	3,261,822
East Hampshire	2001	16,166	14,266	2,632	19,956	30,700	45,306	47,961	46,749	30,305	23,782	17,422	15,942	311,187
(Base: 5)	2002	11,468	17,622	20,923	31,124	28,409	42,966	48,497	50,236	34,139	24,797	13,693	11,953	335,827
	2003	11,703	12,034	15,454	34,279	26,222	30,135	55,042	44,410	32,168	21,828	9,337	12,928	305,540
	2004	16,130	20,391	21,117	29,334	32,859	46,501	54,448	51,289	32,221	26,251	20,292	16,310	367,143
	2005	16,610	18,616	33,749	24,738	42,255	46,052	53,141	54,135	33,681	28,298	19,678	16,351	387,304
	2006	20,902	19,422	21,171	43,291	37,413	46,020	52,424	52,447	36,548	30,383	19,456	14,377	393,854
New Forest	2001	8,097	16,895	12,164	46,989	82,599	51,189	49,162	89,447	62,816	40,781	12,909	8,793	481,841
(Base: 6)	2002	6,666	11,585	29,548	56,901	90,539	84,594	46,607	77,045	61,354	35,928	10,208	9,415	520,390
	2003	5,172	11,979	21,225	59,885	99,568	69,774	51,541	66,277	58,805	42,852	9,077	8,341	504,496
	2004	5,054	12,170	15,114	52,123	103,857	70,236	49,510	74,554	58,702	45,124	8,281	10,809	505,534
	2005	7,140	11,747	24,685	44,727	98,073	70,998	54,894	67,166	57,688	47,323	10,160	10,797	505,398
	2006	6,221	11,703	13,875	53,359	81,758	74,832	55,654	71,703	61,444	46,867	11,796	12,362	501,574
North Hampshire	2001	2,578	5,478	3,106	12,121	14,919	13,806	19,391	20,834	10,618	8,165	2,983	1,311	115,310
(Base: 6)	2002	1,842	5,601	6,645	17,651	13,674	17,258	20,362	21,720	14,137	11,083	4,400	1,503	135,876
	2003	2,589	5,272	5,943	21,081	15,437	13,131	18,928	21,011	12,639	10,105	3,078	780	129,994
	2004	1,462	3,416	5,022	21,384	12,921	11,984	17,638	20,968	12,353	11,205	1,999	1,384	121,736
	2005	2,070	4,682	9,973	15,338	14,485	14,981	15,412	19,908	12,826	12,860	1,789	2,921	127,245
	2006	1,878	4,449	5,323	21,233	12,040	14,286	15,905	20,669	14,030	14,217	1,787	3,577	129,394
Portsmouth	2001	32,653	44,764	36,819	69,287	60,403	64,322	70,431	85,153	47,433	39,399	26,558	14,935	592,157
(Base: 4)	2002	27,866	37,852	51,043	54,583	54,633	64,051	72,524	72,946	44,846	43,600	27,953	15,737	567,634
	2003	23,865	31,898	34,324	43,833	52,897	47,994	53,334	62,558	32,730	41,515	25,755	18,192	468,895
	2004	24,273	39,259	35,458	54,168	49,321	62,383	69,867	89,433	44,040	47,769	25,587	18,859	560,417
	2005	23,574	30,341	44,847	49,586	51,707	58,263	83,985	106,173	64,911	75,256	33,964	18,391	630,998
	2006	20,427	30,779	21,691	68,544	65,023	57,706	68,290	85,359	45,167	49,441	29,502	16,507	558,436
S'hampton	2001	7,159	10,836	9,747	7,768	7,159	6,657	8,840	7,661	8,370	7,410	6,909	5,271	93,787
(Base: 4)	2002	1,718	6,507	8,027	9,077	8,262	8,382	9,662	9,828	6,562	8,193	7,839	4,721	88,778
	2003	6,334	8,538	7,656	7,664	8,550	7,824	10,624	12,268	8,586	9,643	7,457	5,039	100,183
	2004	10,004	9,532	7,635	12,032	9,973	10,620	13,442	12,755	9,313	9,684	7,190	4,535	116,715
	2005	6,724	9,007	11,054	9,198	11,201	10,432	14,488	13,369	8,417	10,853	7,526	5,495	117,764
	2006	6,044	12,435	12,002	13,652	10,739	8,733	13,183	13,546	9,642	10,386	8,442	5,386	124,190
Test Valley	2001	4,715	7,567	2,696	18,812	27,072	50,825	41,897	38,307	20,394	16,283	8,249	3,155	239,972
(Base: 5)	2002	3,871	8,777	18,187	26,628	21,129	44,953	40,529	39,606	23,235	17,528	5,563	2,707	252,713
	2003	4,858	7,977	16,482	29,790	26,319	54,296	46,554	39,644	25,140	28,852	7,530	5,098	292,540
	2004	6,245	10,314	15,499	34,210	32,998	57,585	40,529	39,000	22,044	19,751	9,334	6,428	293,937
	2005	7,920	10,021	21,390	25,819	30,921	61,585	42,856	46,367	21,868	25,811	9,057	11,989	315,604
	2006	7,069	10,070	17,059	36,418	28,149	65,689	41,977	42,270	22,839	25,831	12,952	14,233	324,556
Winchester	2001	14,074	32,238	7,099	48,035	52,889	52,486	57,220	94,407	36,714	31,270	19,541	11,383	457,356
(Base: 6)	2002	11,709	28,276	48,307	48,678	42,698	63,899	59,815	106,093	43,399	34,435	15,197	10,381	512,887
	2003	15,987	40,296	40,924	69,262	59,055	53,399	61,746	92,693	42,079	36,926	17,828	13,436	543,631
	2004	16,054	39,075	25,878	71,819	52,981	59,204	62,978	93,826	36,699	39,706	20,369	16,979	535,568
	2005	21,377	39,613	53,278	56,097	49,387	59,791	68,903	111,976	42,789	41,827	16,447	15,057	576,542
	2006	21,320	38,004	32,992	84,356	59,224	63,682	56,743	106,920	39,725	52,554	22,029	15,683	593,232

Aggregated visitor figures by month and year are shown in Table 15 above and Figure 1 to 8, overleaf.

The impact of changes in the timing of Easter is well illustrated. The Easter 2005 holiday period occurred during the Quarter 1 2005 period (January to March 2005). However, the Easter 2006 holiday period fell during the Quarter 2 period (April to June

2006). Therefore, a year-on-year decline in admissions for the Quarter 1 period was common since many attractions were closed in Quarter 1 2006, but opened for Easter in Quarter 1 2005 and rely on high footfall during Easter.

Figure 1 reveals a strong seasonal pattern in the volume of visits to attractions to Hampshire, peaking in August.

Visits to attractions also peak in August for Portsmouth (Figure 5) and Winchester (Figure 8).

The other districts show a rather different pattern. In East Hampshire, July and August are both peak months and over the past 6 years, the volume of visits has varied year on year for the first two quarters of the year (Figure 2).

Data for the past six years illustrates that May is the most popular month for the constant sample of New Forest attractions (Figure 3).

April and August have been the most popular months for the constant sample of attractions in North Hampshire (Figure 4), whereas for attractions in Test Valley, June is the most popular month (Figure 7).

Data obtained from Southampton attractions reveal significant change year on year and month to month (Figure 6).

Figure 1: Total visits to Hampshire attractions

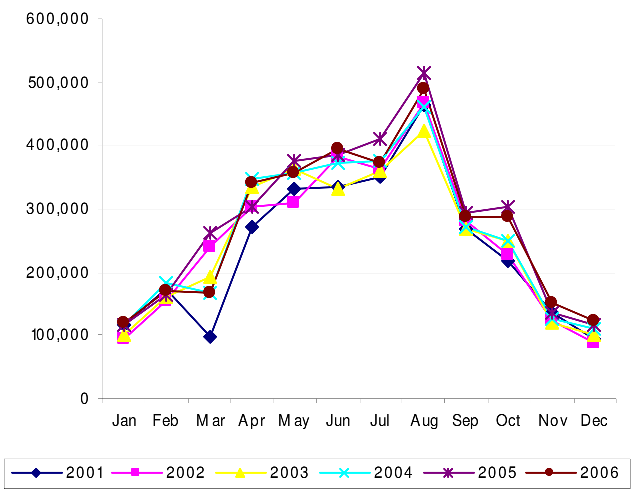


Figure 2: Total visits to East Hampshire attractions

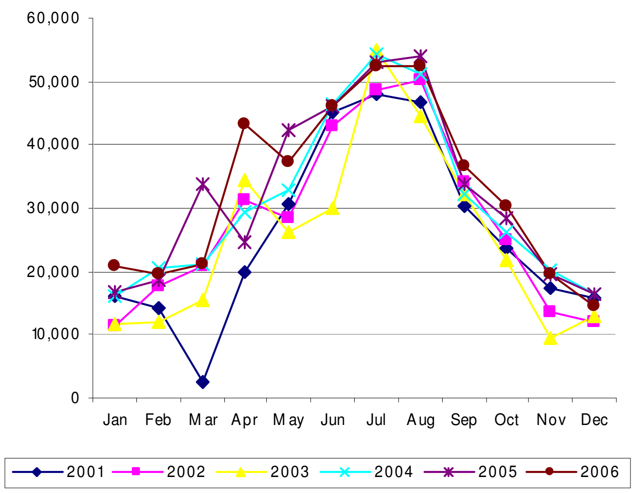


Figure 3: Total visits to New Forest attractions

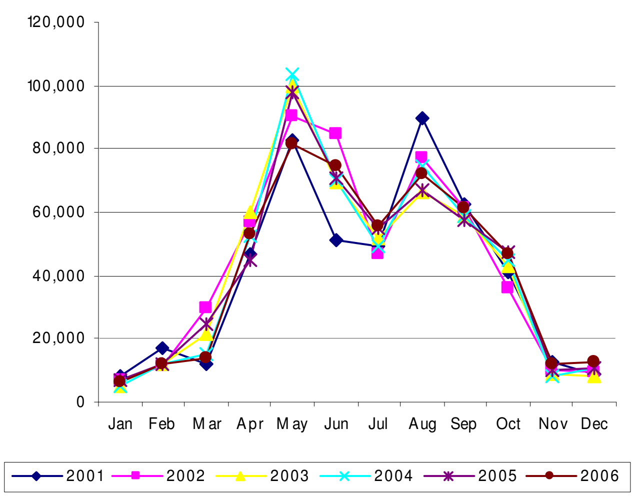


Figure 4: Total visits to North Hampshire attractions

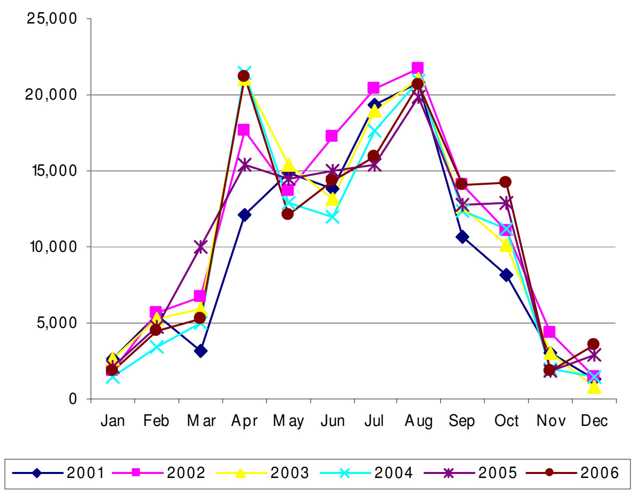


Figure 5: Total visits to Portsmouth attractions

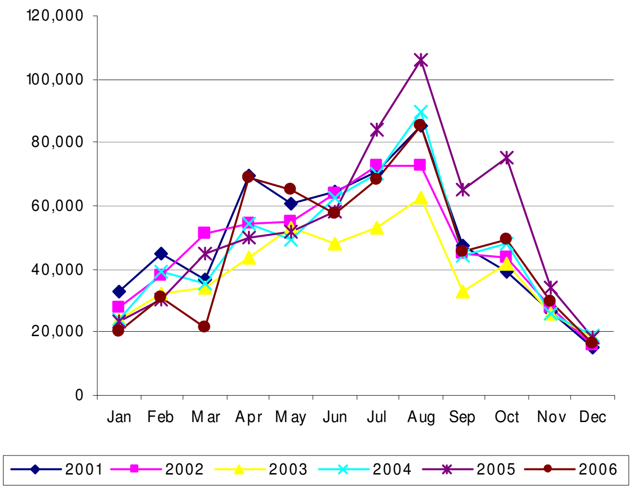


Figure 6: Total visits to Southampton attractions

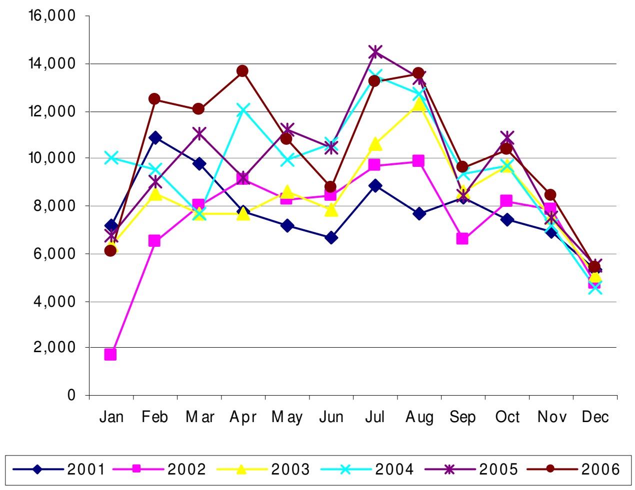


Figure 7: Total visits to Test Valley attractions

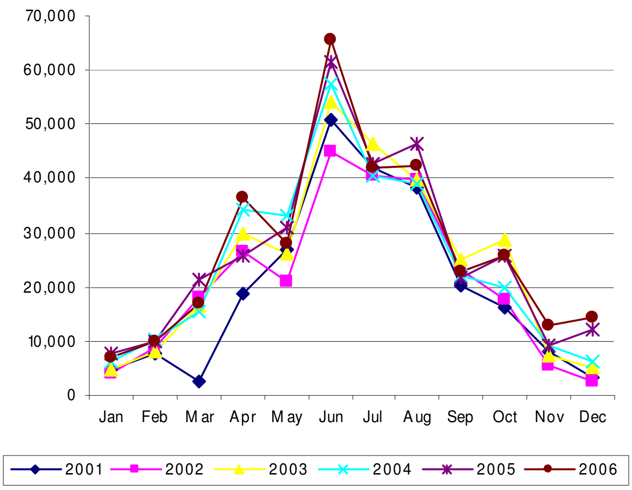
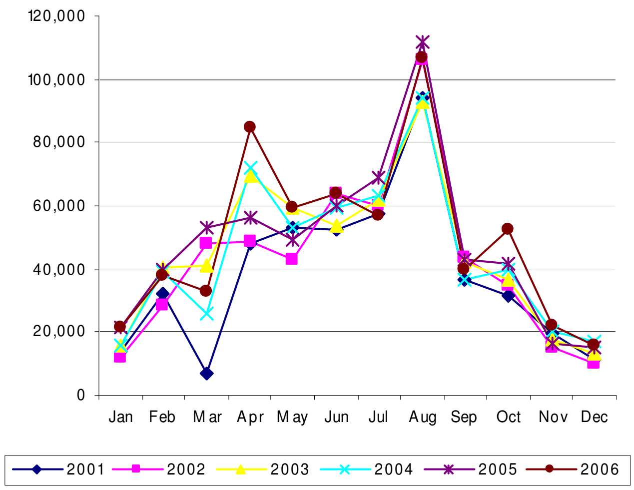


Figure 8: Total visits to Winchester attractions



4.2 Average number of visitors per day

Taking into account days when attractions are closed, the average number of visitors per day to attractions in Hampshire varied from an average of 152 visitors per day in Quarter 1, 283 visitors per day in Quarter 2, 284 visitors per day in Quarter 3 and 184 visitors per day in Quarter 4.

Table 16: Average number of visitors per day open (constant sample) by month 2001-2006

		Total visits by month											
	Year	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Hampshire	2001	118	180	114	235	255	259	255	340	213	177	133	113
(Base: 52)	2002	97	163	217	237	228	285	260	337	224	187	129	108
	2003	103	169	176	275	276	261	270	317	220	212	128	126
	2004	128	201	158	301	293	311	284	354	226	219	138	130
	2005	128	180	229	248	294	303	302	378	239	252	147	133
	2006	**126**	**181**	**150**	**272**	**276**	**300**	**274**	**351**	**227**	**252**	**158**	**143**
East Hampshire	2001	153	152	35	168	218	328	326	380	220	172	168	185
	2002	112	184	189	221	193	311	323	412	239	160	122	137
(Base: 5)	2003	102	116	133	272	200	230	351	327	223	168	92	196
	2004	151	208	182	227	243	347	383	377	242	210	197	175
	2005	163	194	288	193	315	336	359	389	257	228	189	197
	2006	**207**	**211**	**204**	**349**	**275**	**351**	**441**	**430**	**345**	**646**	**405**	**378**
New Forest	2001	66	144	119	313	456	299	278	481	367	263	89	79
	2002	54	103	188	343	509	486	263	445	423	299	138	160
(Base: 6)	2003	56	141	170	457	673	495	348	428	417	351	130	139
	2004	86	203	134	398	683	408	281	405	345	316	92	120
	2005	79	135	175	283	548	413	310	369	337	305	98	111
	2006	**68**	**141**	**90**	**329**	**457**	**438**	**314**	**401**	**359**	**302**	**115**	**130**
North Hampshire	2001	33	68	39	99	118	115	124	133	85	82	41	24
	2002	25	70	76	139	109	141	138	144	127	112	54	21
(Base: 6)	2003	33	65	68	173	119	111	143	162	133	120	50	16
	2004	26	53	73	200	120	108	120	145	100	107	25	21
	2005	27	58	108	123	117	107	104	136	107	121	23	44
	2006	**25**	**56**	**60**	**166**	**100**	**102**	**108**	**141**	**119**	**135**	**23**	**55**
Portsmouth	2001	268	400	297	577	487	536	568	687	395	318	221	130
(Base: 4)	2002	227	338	412	455	441	534	585	588	374	352	233	135
	2003	194	285	277	366	427	400	430	505	273	335	215	160
	2004	199	338	286	459	404	624	563	727	367	385	213	170
	2005	193	271	362	420	424	486	677	863	458	607	283	164
	2006	**167**	**275**	**175**	**571**	**524**	**481**	**551**	**688**	**376**	**399**	**246**	**144**
S'hampton	2001	97	164	134	100	81	84	138	124	137	88	133	117
(Base: 4)	2002	54	148	138	93	75	82	88	87	63	73	101	64
	2003	81	119	98	70	75	75	142	136	105	109	96	72
	2004	127	127	98	154	106	125	149	142	108	119	96	63
	2005	86	123	126	105	120	121	161	149	98	136	99	79
	2006	**77**	**173**	**148**	**126**	**99**	**81**	**121**	**121**	**89**	**87**	**98**	**66**
Test Valley	2001	76	115	60	209	240	374	276	255	179	140	125	63
(Base: 5)	2002	62	115	180	238	185	326	268	266	204	150	84	51
	2003	78	127	155	271	223	388	319	272	211	258	121	89
	2004	101	141	145	311	292	484	287	275	193	173	156	121
	2005	128	127	204	235	274	509	304	324	197	228	151	156
	2006	**114**	**123**	**161**	**331**	**249**	**581**	**304**	**311**	**206**	**227**	**190**	**233**
Winchester	2001	119	242	61	276	287	298	309	516	211	173	160	116
(Base: 6)	2002	100	213	318	277	233	361	325	576	248	194	128	101
	2003	139	303	280	403	321	303	337	501	239	203	154	129
	2004	142	298	178	469	333	395	401	583	245	263	177	166
	2005	188	305	358	390	321	404	405	626	256	277	183	173
	2006	**232**	**339**	**266**	**703**	**463**	**430**	**373**	**664**	**272**	**343**	**193**	**151**

4.3 Paid and Free Admissions (Tables 17a and b)

Tables 17(a) and 76(b) present data that provides an indication of visitor numbers for charging and non-charging attractions within the constant sample.

The figures for 2006 reflect a significant decrease in visitor numbers for free attractions in the constant sample (down by 14% compared with 2005 and down by 1% compared with 2004). However, these were still below visit totals recorded pre-2002 (down up to 24%).

Charging attractions saw a 2% increase in visits in 2006 compared with 2005 and remained well above annual figures recorded in previous years.

Table 17(a): Visits to free & paying attractions (constant sample): annual totals 2006 compared with previous years

	2006	Compared with:	2005	2004	2003	2002	2001
Free attractions	**625,360**		725,906	632,734	587,986	826,800	732,257
			down 14%	down 1%	up 6%	down 24%	down 15%
Charging attractions	**2,698,664**		2,657,262 up 2%	2,493,397 up 8%	2,421,806 up 11%	2,165,958 up 24%	2,122,795 up 27%

Table 17(b): Visits to free and paying attractions – constant sample – by month 2001-2006

		Total visits by month												
	Year	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Total**
Free	2001	53,762	63,423	28,707	50,061	66,545	76,221	85,143	92,479	63,390	58,362	53,161	41,003	**732,257**
Attractions	2002	36,844	56,050	70,019	73,305	66,626	79,611	97,723	117,965	69,758	69,768	51,173	37,958	**826,800**
(Base: 16)	2003	31,297	40,374	47,752	52,516	66,126	50,144	58,554	74,396	51,584	52,871	34,924	27,448	**587,986**
	2004	36,489	46,107	38,784	68,035	61,219	52,089	72,614	84,184	57,441	53,396	33,836	28,540	**632,734**
	2005	31,808	42,947	66,460	70,973	75,874	63,998	85,806	98,074	61,066	61,434	35,751	31,715	**725,906**
	2006	**31,962**	**51,646**	**46,740**	**65,700**	**55,373**	**51,687**	**64,845**	**82,573**	**55,171**	**52,236**	**38,097**	**29,330**	**625,360**
Charging	2001	64,006	109,550	70,321	219,987	265,750	259,154	263,997	370,314	204,426	160,112	81,281	53,897	**2,122,795**
Attractions	2002	56,798	97,383	170,715	230,353	242,544	301,633	266,097	349,676	210,518	117,741	72,250	50,250	**2,165,958**
(Base: 35)	2003	70,294	119,279	146,412	283,246	297,807	281,905	301,661	348,339	218,319	198,142	83,583	72,819	**2,421,806**
	2004	76,667	131,570	124,172	280,681	297,154	321,837	301,774	376,896	213,918	195,214	92,404	81,110	**2,493,397**
	2005	85,093	121,663	197,208	231,611	298,407	322,335	324,600	416,591	232,059	240,801	101,541	85,353	**2,657,262**
	2006	**87,335**	**119,722**	**121,760**	**340,875**	**301,426**	**343,080**	**306,850**	**406,159**	**232,186**	**234,649**	**112,644**	**91,978**	**2,698,664**

4.4 Visits to attractions by location (Tables 18 a & b)

Visits to attractions by location (either rural or urban) within the constant sample are shown in Tables 17(a) and 17(b) below. Overall, visits to rural attractions increased by 2% in 2006 compared with 2005 and 7% compared with 2004. They were also up by between 8% and 25% compared with figures from 2001 – 2003.

Urban attractions within the constant sample saw a fall (8%) on 2005 figures but saw a increase on 2004 visitor figures (up 4%). When compared with the years 2001 – 2003 there was an increase of between 4% - 15%.

Table 18(a): Visits to attractions by location type (constant sample): annual totals 2006 compared with previous years

	2006	Compared with:	2005	2004	2003	2002	2001
Rural attractions	**2,149,626**		2,104,380	2,010,270	1,988,275	1,919,826	1,726,463
			up 2%	up 7%	up 8%	up 12%	up 25%
Urban attractions	**1,174,398**		1,278,758 down 8%	1,126,070 up 4%	1,021,517 up 15%	1,114,109 up 5%	1,128,589 up 4%

Table 18(b): Visits to attractions by location type (rural/urban) – constant sample - by month 2001-2006

		Total visits by month												
	Year	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Total**
Rural	2001	53,790	82,722	19,423	148,972	222,771	221,781	228,890	311,666	173,539	134,565	74,316	54,028	**1,726,463**
Attractions	2002	43,351	77,158	143,352	201,647	209,534	261,921	234,852	314,686	193,549	133,549	58,239	47,988	**1,919,826**
(Base: 24)	2003	47,827	82,688	119,129	237,269	256,563	230,417	250,970	295,536	196,564	161,350	56,640	53,322	**1,988,275**
	2004	60,415	101,279	95,265	231,373	257,865	260,926	244,588	298,066	182,809	147,703	66,603	63,378	**2,010,270**
	2005	65,550	89,592	157,599	188,944	260,114	271,049	251,816	325,523	189,933	166,195	69,062	69,003	**2,104,380**
	2006	**67,802**	**88,678**	**100,282**	**266,441**	**237,903**	**291,283**	**246,257**	**321,635**	**195,707**	**179,687**	**79,528**	**74,423**	**2,149,626**
Urban	2001	63,978	90,251	79,605	121,076	109,524	113,594	120,060	151,317	94,277	83,909	60,126	40,872	**1,128,589**
Attractions	2002	50,291	76,275	97,382	102,011	99,636	119,323	128,968	152,955	86,727	95,137	65,184	40,220	**1,114,109**
(Base: 27)	2003	53,764	76,965	75,035	98,493	107,370	101,632	109,245	127,199	73,339	89,663	61,867	46,945	**1,021,517**
	2004	55,073	80,520	71,446	117,343	100,508	113,000	129,800	163,014	88,550	100,907	59,637	46,272	**1,126,070**
	2005	51,351	75,018	106,069	113,640	114,167	115,284	158,590	189,142	103,192	136,040	68,200	48,065	**1,278,758**
	2006	**51,495**	**82,690**	**68,218**	**140,134**	**118,896**	**103,484**	**125,438**	**167,097**	**91,650**	**107,198**	**71,213**	**46,885**	**1,174,398**

4.5 Visits to attractions by type of attraction (Tables 19 a & b)

Aggregated annual visitor numbers for 2006 for the different types of attraction within the constant sample are shown in Table 19(a) and compared with results for previous years.

Table 19(a): Visits to attractions by attraction type (constant sample): annual totals 2006 compared with previous years

	2006	Compared with:	2005	2004	2003	2002	2001
Historic properties	**938,753**		1,014,091	931,852	889,562	995,179	951,841
			Down 8%	up 9%	up 14%	up 2%	up 7%
Museums & galleries	**750,142**		773,306	708,179	643,331	671,571	682,897
			Down 3%	up 9%	up 20%	up 15%	up 13%
Gardens	**389,533**		384,340	372,877	362,341	314,179	279,162
			Up 1%	up 3%	up 6%	up 22%	up 38%
Country Parks	**638,684**		606,748	581,841	547,270	514,258	429,640
			Up 5%	up 4%	up 11%	up 18%	up 41%
Zoo & Wildlife attractions	**447,545**		442,505	439,462	452,910	436,969	396,396
			Up 1%	up 1%	down 2%	up 1%	up 12%
Other attractions	**119,751**		119,350	114,538	114,378	101,611	104,103
			No change	up 4%	up 4%	up 18%	up 15%

The **historic properties** in the constant sample experienced a 8% drop in visitor numbers in 2006 compared to 2005.

Visit levels for museums and art galleries were slightly down on 2005 figures, from 773,306 to 750,142 (2% drop).

Visitor numbers to **Gardens** increased very slightly by 1% compared to 2005.

Country parks recorded an increase in numbers of visitors of 5% compared with 2005.

Zoos and wildlife attractions in the constant sample had a 'typical' year, with visitor numbers comparable with those recorded in 2005 and 2004.

'Other' attractions performed on par with 2005.

Monthly figures by attraction type and year are shown in Table 19(b) overleaf. The majority of attraction categories experienced a fall in visitor numbers between Quarter 1 2005 and Quarter 1 2006, due to the impact of the timing of Easter.

Table 19(b): Visits to attractions by attraction type (constant sample): by month 2001-2006

	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
		Total visits by month												
Historic	2001	22,093	44,641	37,067	109,729	93,883	109,144	128,082	182,275	112,196	70,668	23,223	18,840	**951,841**
Properties	2002	19,975	42,163	67,333	103,830	100,494	142,864	129,165	156,770	112,800	74,331	27,741	17,713	**995,179**
(Base: 15)	2003	17,623	39,037	44,195	103,552	105,593	117,459	110,211	138,441	93,153	74,883	24,315	21,100	**889,562**
	2004	20,509	43,986	48,825	111,534	95,225	110,055	120,112	157,562	104,241	78,273	20,659	20,871	**931,852**
	2005	19,621	33,957	65,867	89,305	100,734	118,108	138,001	174,926	113,358	107,439	31,935	20,840	**1,014,091**
	2006	**14,311**	**31,391**	**24,332**	**121,116**	**107,800**	**121,041**	**122,518**	**153,022**	**110,053**	**86,226**	**25,127**	**21,816**	**938,753**
Museums &	2001	47,839	64,428	50,816	63,401	56,078	61,722	64,681	87,219	57,180	55,359	45,236	28,938	**682,897**
Galleries	2002	36,168	50,318	55,890	55,354	52,110	68,694	68,987	98,547	50,436	61,092	45,716	28,259	**671,571**
(Base: 23)	2003	38,766	51,226	45,842	57,292	61,655	59,426	70,413	81,047	46,461	55,310	44,531	31,362	**643,331**
	2004	36,773	50,546	42,015	66,144	59,804	75,236	77,402	104,430	55,324	65,848	43,870	30,787	**708,179**
	2005	36,299	51,969	69,199	73,208	69,266	72,764	91,465	103,022	58,630	72,227	41,751	33,506	**773,306**
	2006	**41,318**	**64,632**	**56,108**	**83,087**	**63,008**	**57,205**	**73,466**	**102,942**	**56,379**	**68,059**	**50,455**	**33,483**	**750,142**
Gardens	2001	3,829	4,108	1,911	18,795	79,961	57,710	36,573	24,845	19,082	21,103	8,606	2,639	**279,162**
(Base: 4)	2002	2,606	4,799	21,615	42,313	69,746	52,732	34,627	31,882	23,861	21,440	4,691	3,867	**314,179**
	2003	3,967	4,839	20,477	43,093	78,593	62,115	42,510	31,513	23,776	38,511	6,809	6,138	**362,341**
	2004	-	6,672	16,314	42,613	92,558	67,635	38,144	33,577	23,307	29,484	8,135	9,138	**372,877**
	2005	-	6,913	23,000	33,315	82,919	70,543	40,993	41,227	23,007	37,267	9,816	15,340	**384,340**
	2006	**5,744**	**7,296**	**17,356**	**41,958**	**67,202**	**78,434**	**40,640**	**39,308**	**23,332**	**34,839**	**15,274**	**18,150**	**389,533**
Country	2001	27,125	26,700	0	24,029	42,291	52,507	59,679	65,773	41,184	38,576	33,171	18,605	**429,640**
Parks	2002	22,168	30,177	44,219	50,107	40,066	54,223	65,739	70,164	44,815	38,980	27,732	25,868	**514,258**
(Base: 4)	2003	24,377	28,360	40,827	59,186	56,374	42,843	72,048	72,076	58,098	41,304	23,839	27,938	**547,270**
	2004	32,052	41,771	35,660	55,064	54,855	60,861	73,997	70,544	50,928	37,155	31,799	37,155	**581,841**
	2005	29,598	33,526	52,542	51,857	65,392	62,270	72,648	80,277	52,921	41,819	34,069	29,829	**606,748**
	2006	**34,612**	**35,969**	**38,829**	**74,296**	**56,989**	**70,239**	**77,962**	**82,661**	**56,965**	**45,919**	**35,191**	**29,052**	**638,684**
Zoos &	2001	-	25,877	-	45,393	49,520	44,975	51,608	91,012	30,696	24,273	-	-	**396,396**
Wildlife	2002	-	20,870	43,442	43,666	37,482	53,573	54,160	98,821	39,288	23,481	-	-	**436,969**
Attractions	2003	-	28,987	34,102	61,675	51,568	40,363	53,981	87,501	38,504	29,912	-	-	**452,910**
(Base: 2)	2004	-	30,885	20,131	61,505	45,357	50,129	54,593	84,947	29,729	26,307	-	-	**439,462**
	2005	-	27,306	44,345	44,347	44,829	51,915	56,961	104,242	37,057	31,503	-	-	**442,505**
	2006	**-**	**24,171**	**23,267**	**74,491**	**51,360**	**57,856**	**47,643**	**95,283**	**32,769**	**40,705**	**-**	**-**	**447,545**
Other	2001	7,436	7,219	8,866	8,701	10,562	9,317	8,327	11,859	7,478	8,495	9,170	6,673	**104,103**
Attractions	2002	5,594	5,106	8,235	8,388	9,272	9,158	11,142	11,457	9,076	9,362	8,552	6,269	**101,611**
(Base: 3)	2003	7,390	7,204	8,721	10,964	10,150	9,843	11,052	12,157	9,911	11,093	9,825	6,068	**114,378**
	2004	8,637	7,939	8,766	11,856	10,574	10,010	10,139	10,020	7,830	11,543	9,608	7,616	**114,538**
	2005	8,791	10,939	8,715	10,552	11,141	10,733	10,338	10,971	8,152	11,980	9,108	7,930	**119,350**
	2006	**8,475**	**7,909**	**8,608**	**11,627**	**10,440**	**9,992**	**9,.466**	**15,516**	**7,859**	**11,137**	**11,027**	**7,685**	**119,751**

(- = data provided by less than 2 attractions)

5. VISITS TO TOURIST INFORMATION CENTRES

Over the years a number of TICs have closed, whilst for others, obtaining total footfall figures for each month from them has been problematic for various reasons. For example, the people counter was not working at Lymington and Lyndhurst TIC for several months in 2006 and there are gaps in footfall for previous years for a number of other TICs. In view of the loss of trend data, we have reviewed the TIC data and have identified a constant sample of 10 TICs for whom we have a set of full year data since 2000. The data is presented in Table 20 (a) & (b) below.

Table 20(a) Total footfall 2000-2006

2000	2000	2001	2002	2003	2004	2005	2006
Aldershot	12,127	18,052	31,612	39,271	35,721	34,827	32,517
Alton	19,503	17,463	16,897	17,649	20,537	21,138	19,161
Andover	32,754	32,082	29,527	24,781	24,029	8,598	6,426
Fareham	25,519	25,633	30,133	27,462	22,379	21,775	19,942
Gosport	58,678	74,117	64,329	59,099	55,329	51,126	30,213
Petersfield	19,624	20,982	23,612	22,289	24,836	24,173	24,033
Portsmouth (Hard)	137,080	164,029	127,085	166,391	91,348	97,999	90,941
Romsey	68,813	62,536	60,949	57,873	57,963	56,573	54,731
Southampton	34,946	32,499	47,343	56,602	47,321	52,073	31,452
Winchester	196,198	207,557	230,313	227,074	200,920	203,235	209,061
Total	605,242	654,950	661,800	698,491	580,383	571,517	518,477

Table 20 (b): Aggregated annual figures & % differentials

	2006	Compared with:	2005	2004	2003	2002	2001	2000
Hampshire TICs	**508,477**		571,517	580,383	698,491	661,950	654,950	605,242
			-12%	-14%	-37%	-30%	-29%	-19%

Based on the constant sample of 10 TICs, aggregate footfall in 2006 was much lower than each of the previous years. The decline is greatest when compared to aggregate footfall for 2003, 2002 and 2001. Compared to 2005, footfall declined by 12%.

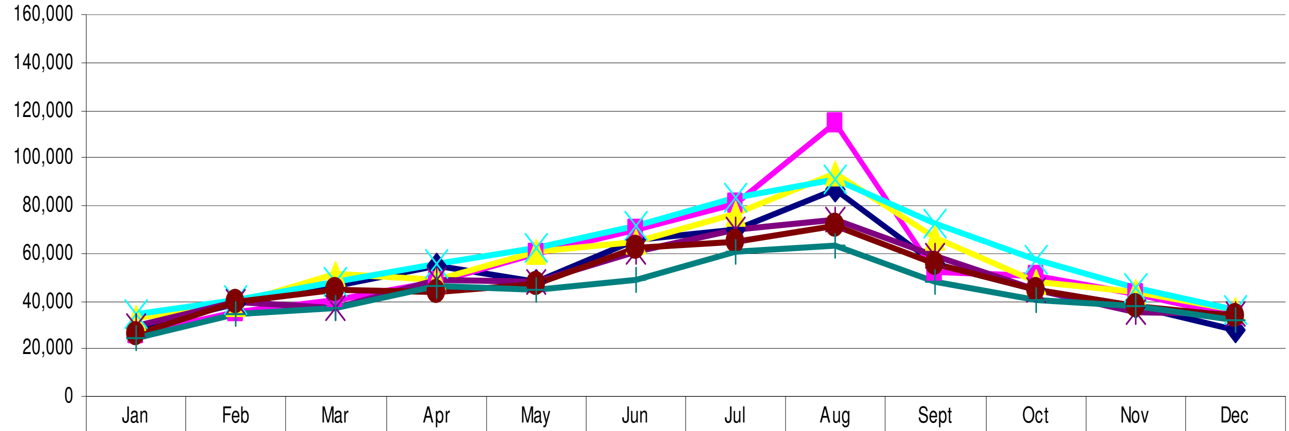
The decline is most clearly illustrated in Figure 9. Seasonal trends in footfall remain relatively consistent.

The experience of declining footfall is not unique to Hampshire TICs. All over the region most TICs have seen the number of personal enquiries drop as more and more visitors turn to other sources of information, most notably the Internet for pre-arrival information.

With an estimated 216 million people visiting the region each year, only 2% (approx, 7 million) people make a personal visit to a TIC during their trip[1]. That said a recent study carried out by Tourism South East[2] found that Local Authority expenditure on TICs has a positive ROI for the Local Authority. The study found that for every net £1 invested in the provision of TICs, £1.20 is generated through net income (e.g. through the sale of merchandise, room booking fees) and through off-site visitor expenditure (expenditure by visitors influenced to spend more as a result of visiting TIC).

[1] Source: UKTS/IPS, 2005 and Visitor Information Review of the South East of England Study (2005) carried out by TEAM on behalf of TSE.
[2] Source: Economic Impact of Tourism Information Centres. A regional overview (2007). Tourism South East

Figure 9: Monthly TIC footfall trends 2000-2006



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2000	28,786	39,070	46,473	54,954	47,905	65,571	69,839	86,854	55,816	44,337	37,729	27,908
2001	25905	35713	40153	48318	59839	69674	80965	114462	52,271	50,393	43,282	33,975
2002	33040	38526	51333	49095	60956	64952	76816	93828	66,256	47,613	43,510	35,875
2003	34162	40302	47827	55647	62730	71602	83008	91074	72,741	57,052	45,762	36,584
2004	29112	39511	37310	48470	48278	60717	69705	73904	58,535	44,275	35,689	34,877
2005	25924	39684	44866	43820	47217	62615	64857	71208	55,446	44,791	37,695	33,394
2006	24759	34708	37115	46475	44843	49168	60235	63344	47,948	40,395	37,512	31,975

2000 2001 2002 2003 2004 2005 2006

6. BUSINESS CONFIDENCE SURVEY RESULTS

6.1 Business performance

Performance across most of the sub-regions was better overall during 2006 compared with 2005. Businesses in the BBO, IOW and West Sussex sub regions were more likely to report better overall performance, whereas Hampshire, Surrey, East Sussex & Brighton and Kent businesses reported a more mixed performance. Results from the Hampshire sub-set of businesses participating in the TSE business confidence survey (Tables 21a and 21b) indicate that just under half (48%) reported improved business over 2006 compared with 2005. A quarter felt that business was 'about the same (35% last year), whilst 17% indicated that business was down overall compared to the previous year.

Most business operators reported that the weather had the most significant impact on business performance during 2006 – mentioned by 40% of businesses. Other issues likely to have affected performance included the UK's overall economic climate, competition from overseas holidays, strength of the pound/exchange rates and over regulation.

Table 21a: Business performance compared with same period in previous year

	Hampshire	Berks, Bucks, Oxon	I.O.W	Surrey	West Sussex	East Sussex and Brighton	Kent
Base	***(100)***	*(37)*	*(43)*	*(16)*	*(30)*	*(45)*	*(76)*
	%	%	%	%	%	%	%
Much better (Up more than 10%)	**17**	16	14	19	17	7	8
Better (Up by 5% - 10%)	**13**	19	21	13	23	20	16
Slightly better (Up by 1% - 5%)	**18**	24	19	19	30	22	24
Total % 'Up'	***48***	***59***	***54***	***51***	***70***	***49***	***48***
About the same	**35**	19	28	38	10	16	24
Slightly worse (Down by 1% - 5%)	**10**	16	14	6	7	20	20
Worse (Down by 5% - 10%)	**4**	5	5	6	7	9	7
Much worse (Down by more than 10%)	**3**	0	0	0	7	7	3
Total % 'Down'	***17***	***21***	***20***	***12***	***21***	***36***	***30***

6.2 Business expectations

Only a third of Hampshire businesses were more confident about their expectations for 2007 when compared with the same time last year. 30% expect overall levels of business to be better in 2007 and 58% expect business performance to be 'about the same'. A minority of businesses (5%) expect business to be down in 2007 compared with 2006.

Table 21b: Expectations for 2007, compared with 2006

	Hampshire	Berks, Bucks, Oxon	I.O.W	Surrey	West Sussex	East Sussex and Brighton	Kent
Base	***(99)***	*(33)*	*(42)*	*(14)*	*(23)*	*(34)*	*(68)*
	%	%	%	%	%	%	%
Much better (Up more than 10%)	**3**	3	7	7	4	3	9
Better (Up by 5% - 10%)	**25**	24	12	21	26	18	22
Slightly better (Up by 1% - 5%)	**30**	24	45	0	30	35	31
Total % 'Up'	***58***	***51***	***64***	***28***	***61***	***59***	***62***
About the same	**36**	45	36	57	39	32	29
Slightly worse (Down by 1% - 5%)	**4**	3	0	14	0	3	7
Worse (Down by 5% - 10%)	**0**	0	0	0	0	3	1
Much worse (Down by more than 10%)	**1**	0	0	0	0	3	0
Total % 'Down'	***5***	***3***	***0***	***14***	***0***	***9***	***8***

APPENDIX 1: SERVICED & SELF-CATERING ACCOMMODATION SAMPLE SIZES

Table A1: Minimum & maximum monthly sample sizes by year – serviced accommodation (2001 – 2006)

	2001	2002	2003	2004	2005	2006
East Hampshire	4-11	7-12	7-13	11-14	11-14	10-15
New Forest	39-54	39-50	34-44	33-43	27-39	27-35
North Hampshire	12-16	9-15	6-10	6-10	6-9	4-9
Portsmouth	9-12	7-10	6-10	5-8	7-10	7-9
Southampton	2-4	1-4	4-5	3-4	3-8	4-5
Test Valley	11-18	12-19	13-17	12-17	10-14	6-12
Winchester	13-15	13-19	9-13	6-12	7-11	7-10
Hampshire	**122-144**	**122-153**	**110-127**	**99-131**	**96-127**	**86-113**
Dorset	*63-120*	*61-120*	*77-112*	*38-79*	*33-45*	*3142*
Isle of Wight	*34-83*	*36-81*	*26-74*	*33-80*	*40-78*	*36-67*
Southern Region	***281-396***	***287-385***	***255-344***	***245-354***	***229-305***	***211-285***
Hampshire						
1-3 rooms	64-79	63-90	59-73	55-80	49-69	45-61
4-10 rooms	16-25	17-27	16-22	14-21	15-22	15-21
11-25 rooms	16-20	12-19	11-20	11-13	10-15	8-14
26-50 rooms	8-12	6-12	8-11	6-10	7-8	6-7
51-100 rooms	9-12	6-13	7-11	8-10	6-9	4-8
100+ rooms	2-4	2-4	1-3	1-4	3-6	3-5

Table A2: Minimum & maximum monthly sample sizes by year – self catering accommodation (2005 – 2006)

	2005	2006
East Hampshire	3-4	1-7
New Forest	24-27	19-29
North Hampshire	Sample to low	Sample to low
Portsmouth	2-3	1-2
Southampton	Sample to low	1-3
Test Valley	2-3	3-8
Winchester	4	4-5
Hampshire	**41-47**	**36-59**

Note: sample sizes are based on open establishments who have submitted monthly data – the recruited sample of participating establishments is larger than this and includes establishments which close for the off-peak season. While every effort is made to encourage regular long-term participation, it is important to realise that the survey is voluntary and reliable, accurate results are entirely dependent on the goodwill of those establishments who provide TSE with their data.

APPENDIX 2: OCCUPANCY SURVEY PARTICIPANTS – 2006 – BY DISTRICT

Please note that the below listings are response and include returns from both open and closed establishments. All establishments with 'current' status are on the current mailing list (as at March 2007). Establishments marked 'past' participated for at least one month during 2006, but have either asked to be removed from the occupancy database, or not returned any survey data forms during the last six months of 2006.

District – East Hampshire

SERVICED ACCOMMODATION

Name	Status	Rooms	Beds
8 Princess Drive	Current	1	2
Flowerdown	Current	1	2
Halketts	Current	1	2
Spring Cottage	Current	2	3
Ivanhoe	Current	2	4
Torberry Cottage	Current	2	4
Woodfield Bed & Breakfast	Current	2	4
15 High Street	Current	3	5
Boundary House B&B	Current	3	5
The Granary at Stubbs Farm	Current	3	6
Railway Hotel	Current	7	14
The Queens	Current	10	18
Langrish House Hotel	Current	13	28
Headley Park	Current	21	37
Three Quebec	Past	2	3
Heath Farmhouse	Past	3	6
West End Farm	Past	3	8

SELF CATERING ACCOMMODATION

Name	Status	Units
Butts House Studio Flat	Current	1
Dairy Cottage	Current	1
The Coach House	Current	1
Beaconhill Farm Cottages	Current	5

District – New Forest

SERVICED ACCOMMODATION

Name	Status	Rooms	Beds
Jobz-a-Gudn	Current	1	2
Amberwood	Current	2	4
Kingswood Cottage	Current	2	4
Merrimead	Current	2	4
Miranda	Current	2	4
Old School House B&B	Past	2	4
Old Stacks	Current	2	4
Taverners Cottage	Past	2	5
Goldenhayes	Current	2	6
Little Mead	Current	2	6
Clayhill House	Current	3	6
Highcroft	Current	3	6
Leygreen Farmhouse	Current	3	6
Picket Hill House	Past	3	6
Rose Cottage	Current	3	6
Saint Ursula	Current	3	6
The Victoriana B&B	Current	3	6
The Nurse's Cottage	Current	4	7
Fairways Guest House	Current	4	8
Alderholt Mill	Current	5	9
Temple Lodge Guest House	Current	6	14
The Burley Down	Past	8	16

District – New Forest (continued)

SERVICED ACCOMMODATION (continued)

Name	Status	Rooms	Beds
Cloud Hotel	Past	17	30
Beaulieu Hotel	Current	18	37
Knightwood Lodge Hotel	Current	19	39
Montagu Arms Hotel	Past	23	45
Ormonde House	Current	23	45
New Park Manor Hotel	Current	24	48
Master Builders House Hotel	Current	25	49
The Penny Farthing Hotel	Current	25	53
Stanwell House Hotel	Current	28	41
Forest Lodge Hotel	Current	28	72
Moorhill House Hotel	Current	31	78
Bartley Lodge Hotel	Current	31	81
The Crown Hotel	Current	38	71
Passford House Hotel	Current	48	94
Chewton Glen Hotel	Current	58	116
Whitemoor House Hotel	Past	7	15
Wiltshire House	Past	3	6

SELF CATERING ACCOMMODATION

Name	Status	Units
10 Newlands Manor	Current	1
Dwarf Cottage	Current	1
East Wing	Past	1
Forest Farm	Past	1
Garden Cottage	Past	1
Harmony	Current	1
Holly Cottage	Past	1
Honeysuckle Cottage	Current	1
Ivy Cottage	Past	1
Mares Tails Cottage	Current	1
Old Stable Cottage	Current	1
Purlins	Current	1
Springfield Wing	Current	1
Thatched Eaves	Current	1
The Cottage	Current	1
Waterfront House	Current	1
Wheatley Cottage	Current	1
Wittensford Lodge	Current	1
Bourne House	Current	2
Gothic Cottage	Current	2
Rainbow Cottage	Current	2
Hucklesbrook Farm	Current	3
The Cottages	Past	4
Glen Orchard Holiday Park	Past	19
Link Place & Acorn Cottage	Past	2
Windmill Cottage	Current	1
Burgate Farmhouse	Current	2
Squirrels Apartment	Current	1
Old Walls Flat	Current	1
Rose Cottage	Current	1
Forest Lodge	Current	1

Rufus House Hotel	Current	11	21
Woodlands Lodge Hotel	Current	16	34

District – North Hampshire

SERVICED ACCOMMODATION

Name	Status	Rooms	Beds
73 Cranmore Lane	Current	2	4
Manor House	Current	2	4
Newlands Farm	Current	3	3
The Hatchings Guest House	Current	3	4
Tower Hill Lodge	Past	3	6
Dawyk Beach Guest House	Current	6	9
Wessex House	Current	6	11
Colebrook Guest House	Past	8	14
Lismoyne Hotel	Past	62	114
Audleys Wood Thistle Hotel	Current	72	144
Hanover International Hotel & Club	Current	100	201
The White Hart	Past	4	8
Oaklea Guest House	Past	11	20

SELF CATERING ACCOMMODATION

Name	Status	Units
Wintney Stable	Current	1

District – Portsmouth

SERVICED ACCOMMODATION

Name	Status	Rooms	Beds
Avarest Guest House	Current	3	6
Fortitude Cottage	Current	4	8
The Festing Grove Guest House	Current	6	15
Albatross Guest House	Current	7	12
Oakleigh Guest House	Current	7	14
Abbey Lodge	Current	8	16
Harbour Lights Travel Inn	Past	64	181
The Queen's Hotel	Past	77	150
The Tulip Inn	Current	108	287
The Royal Beach Hotel	Current	124	257
Express by Holiday Inn	Past	130	331

SELF CATERING ACCOMMODATION

Name	Status	Units
Dairy Cottage	Current	1
Greenhays	Current	4
Helena Court Holiday Apptments	Current	6

District – Southampton

SERVICED ACCOMMODATION

Name	Status	Rooms	Beds
The Maples Hotel	Current	7	16
Landguard House	Current	8	13
Walcot House Hotel	Current	8	13
Alcantara Guest House	Current	9	15
Dolphin Hotel	Past	65	99
Chilworth Manor Hotel & Conference Centre	Current	95	164

Dahlia Cottage	Current	1
White Cottage	Current	1

District – Test Valley

ACCOMMODATION

Name	Status	Rooms	Beds
Tefilah House	Current	1	2
Juglans	Past	2	3
Acer	Current	2	4
Crofton Country B&B	Current	3	5
Fernihurst	Current	3	5
Holmdene Guest House	Current	3	5
Upton Cottage	Current	3	5
May Cottage	Current	3	6
New House B&B	Current	3	6
Old Grange B&B	Current	3	6
The Cabin B&B	Past	9	12
Mortimer Arms Hotel	Current	14	30
The Corus Hotel	Current	54	109
Roselea	Past	2	4
Cherry Trees B&B	Current	4	6
Abbey Hotel	Past	7	12

SELF CATERING ACCOMMODATION

Name	Status	Units
By the Way Annexe	Current	1
The Old Smithy Cottage	Current	1
Westmead	Past	1
Brook Farm Cottages	Current	4
Farley Farm Cottage Holidays	Current	2

District – Winchester

SERVICED ACCOMMODATION

Name	Status	Rooms	Beds
The Manor House	Past	1	2
Upper Farm	Current	1	2
Rowanhurst	Current	1	4
12 Christchurch Road	Current	2	4
152 Teg Down Meads	Past	2	4
38 Courtenay Road	Current	2	4
Complyns	Current	2	4
Windy Ridge	Current	3	4
Sycamores	Current	3	6
Twyford House	Current	3	6
Sandy Lodge B&B	Current	6	14
The Winchester Royal Hotel	Current	75	150
Marwell Hotel	Current	66	177

SELF CATERING ACCOMMODATION

Name	Status	Units
Annexe	Current	1
Flint Cottage	Current	1
Gyleen	Current	1
Mallard Cottage	Current	1
No 32.	Current	1
1 Abbotts Court Mews	Current	1

The Elizabeth House Hotel	Past	27	60
Premier Travel Inn (Rownhams)	Past	39	78

SELF CATERING ACCOMMODATION

Name	Status	Units
Pinewood Lodge Apartments	Current	2

APPENDIX 3: OCCUPANCY SURVEY MONTHLY RESPONSE RATES – 2006

The table below shows the number of participants per district each month in the occupancy survey and the number of closed establishments.

Serviced Accommodation:

DISTRICT	Jan	Feb	Mar	Apr	May	Jun	Jul	Au	Sep	Oct	Nov	Dec
East Hampshire	12	11(1)	15	14	14	13(1)	12	14	11	11	13	10
New Forest	32(3)	32(3)	35(2)	33	34(1)	32(1)	33	33	31(1)	27(3)	32(1)	30(2)
North Hampshire	8 (1)	7(2)	7(2)	7(1)	8(1)	9	7	6(1)	6(1)	4(1)	5 (1)	4(1)
Portsmouth	7	8(1)	8(1)	8	9	8	9	8	8	8	8	8
Southampton	5	5	5	5	5	5	5	5	5	4	5	5
Test Valley	11(1)	9(2)	12	12	12	11	12	10	8	6	8	7
Winchester	9(1)	7(2)	9(1)	10	10	9	9	8	8	8	9	7(1)
HAMPSHIRE	**104**	**97**	**110**	**109**	**113**	**107**	**109**	**102**	**94**	**86**	**98**	**88**
Closed ests.	***6***	***11***	***6***	***1***	***2***	***2***	***1***	***1***	***2***	***4***	***2***	***4***

( ) = Closed establishments

Self Catering Accommodation:

DISTRICT	Jan	Feb	Mar	Apr	May	Jun	Jul	Au	Sep	Oct	Nov	Dec
East Hampshire	3	3	3	7	6	7	6	6	7	1	1	1
New Forest	22(6)	22(5)	22(5)	29(1)	29	29	23	23	24	19(1)	19(2)	19(2)
North Hampshire	1(1)	1(1)	1(1)	1	1	1	1	1	0	0	0	0
Portsmouth	2	2	2	1	1	1	2(1)	2(1)	2(1)	2	2	2
Southampton	1	1	1	3	3	3	3	3	3	2	2	3
Test Valley	2(2)	2(2)	2(2)	8(3)	8	8	8	8	8	4	3	3
Winchester	4	4	5	5	5	5	6	5	5	5	5	5
HAMPSHIRE	**38**	**40**	**41**	**59**	**56**	**56**	**53**	**52**	**53**	**37**	**36**	**37**
Closed ests.	***10***	***9***	***8***	***4***	***0***	***0***	***1***	***1***	***1***	***1***	***2***	***2***

( ) = Closed establishments

APPENDIX 4: PARTICIPATING ATTRACTIONS – 2006

East Hampshire
Alice Holt Woodland Park
Allen Gallery
Coors Brewers (Alton) (C)
Birdworld
Curtis Museum (C)
George Gale & Co. Ltd
Gilbert White's House & Oates Museum (C)
Jane Austen's House
Queen Elizabeth Country Park (C)
Stansted House (C)
Uppark (C)

Eastleigh
Botley Flour Milling Company
Bursledon Windmill (C)
Eastleigh Lakeside Railway
Eastleigh Museum (C)
Itchen Valley Country Park (C)
Netley Chapel at Royal Victoria Country Park (C) (DoR)
The Point (C)

Fareham
The Royal Armouries at Fort Nelson (C) (DoR)
Haven House Visitor Centre (C)
Westbury Manor Museum (C)
Titchfield Haven National Nature Reserve (C)
Portchester Castle (DoR)

Gosport
Gosport Museum (C)
Royal Navy Submarine Museum (C) (DoR)
Gosport Gallery (C) *(closed all year)*

New Forest
Beaulieu National Motor Museum/Abbey (C)
Breamore House & Countryside Museum (C)
Bucklers Hard (DoR)
Calshot Castle (DoR)
Exbury Gardens (C)
Furzey Gardens (C)
New Forest Cider (C)
New Forest Museum & Visitor Centre (C)
Rockbourne Roman Villa

Portsmouth
Charles Dickens' Birthplace Museum
Cumberland House Natural History Museum
The D Day Museum & Overlord Embroidery (C) (DoR)
Eastney Beam Engine House
Portsmouth Historic Dockyard (C) (DoR)
Playzone
Portsmouth City Museum (C)
Royal Garrison Church
Royal Marines Museum (C) (DoR)
Southsea Castle & Museum (DoR)

North Hampshire
Basing House Ruins (C) (DoR)
Highclere Castle & Gardens (C)
Milestones Museum
Whitchurch Silk Mill (C)
The Willis Museum of Basingstoke
The Vyne (C)
The Anvil
Army Medical Services Museum (C) (DoR)
Aldershot Military Museum (C) (DoR)
Army Physical Training Corps Museum (DoR)
Farnborough Recreation Centre
Parachute Regiment & Airbourne Forces Museum (DoR)

Southampton
Museum of Archaeology (C)
John Hansard Gallery
Medieval Merchant's House (C)
Southampton City Art Gallery (C)
Southampton Maritime Museum (C)

Test Valley
Andover Museum
Museum of Army Flying (C) (DoR)
Broadlands (C) (DoR)
The Hawk Conservancy (C)
Mottisfont Abbey House & Gardens (C)
Romsey Abbey
Romsey Signal Box
The Sir Harold Hillier Gardens & Arboretum (C)
Museum of the Iron Age (DoR)

Winchester
Avington Park
Bishop's Waltham Palace (C)
Guildhall Gallery
The Gurkha Museum (C) (DoR)
Hinton Ampner Gardens
Intech – Hampshire Technology Centre (C)
The Kings Royal Hussars Museum (C) (DoR)
Light Infantry Museum (DoR)
Marwell Zoological Park (C)
Royal Green Jackets Museum (DoR)
The Royal Hampshire Regiment Museum & Memorial Garden (DoR)
Westgate Museum (C) (DoR)
Winchester Cathedral/ Visitor & Education Centre
Winchester City Museum

(C)= constant attraction (DoR)= Defence of the Realm

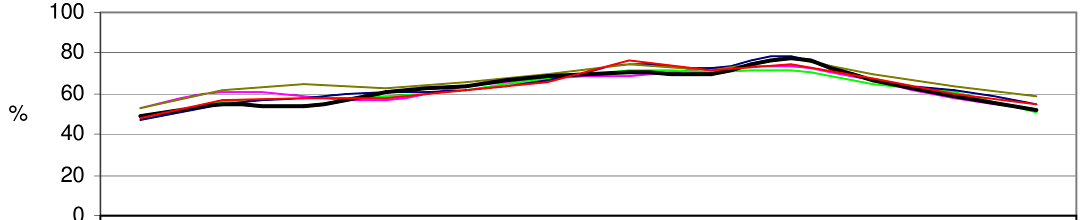
APPENDIX 5: WEATHER TRENDS 2001-2006

		2001	2002	2003	2004	2005	2006
JAN	Temp (Ave. Degrees C)	3.8	5.7	4.4	5.3	6.0	4.4
	Sun (Ave. Hours)	2.6	1.5	2.6	1.9	2.2	1.7
	Rain (mm)	75	76	103	99	39	23
	Raindays (>=1mm)	11	14	12	17	10	
FEB	Temp (Ave. Degrees C)	5.0	7.1	4.1	5.4	4.2	3.7
	Sun (Ave. Hours)	3.2	2.9	3.5	2.8	2.5	2.4
	Rain (mm)	79	93	63	37	25	57
	Raindays (>=1mm)	12	16	7	8	7	
MAR	Temp (Ave. Degrees C)	5.8	7.7	7.6	6.5	7.0	5.2
	Sun (Ave. Hours)	2.5	3.5	5.7	3.5	3.1	3.5
	Rain (mm)	98	45	28	45	51	58
	Raindays (>=1mm)	16	9	5	11	8	
APR	Temp (Ave. Degrees C)	8.1	9.3	9.6	9.4	9.3	9.1
	Sun (Ave. Hours)	5.0	6.8	6.4	5.0	5.0	5.1
	Rain (mm)	82	43	36	78	50	39
	Raindays (>=1mm)	16	8	7	13	11	
MAY	Temp (Ave. Degrees C)	12.5	11.9	12.0	12.0	11.8	12.6
	Sun (Ave. Hours)	7.7	6.3	6.2	6.4	7.2	3.4
	Rain (mm)	38	84	55	54	33	96
	Raindays (>=1mm)	6	14	12	12	8	
JUNE	Temp (Ave. Degrees C)	14.4	14.4	16.0	16.1	16.0	16.2
	Sun (Ave. Hours)	7.7	6.1	7.3	7.2	7.2	9.1
	Rain (mm)	32	44	59	58	35	20
	Raindays (>=1mm)	6	9	10	9	7	
JULY	Temp (Ave. Degrees C)	17.2	16.1	17.5	16.0	17.3	20.3
	Sun (Ave. Hours)	7.0	6.0	6.1	5.6	6.5	10.0
	Rain (mm)	67	77	64	64	62	39
	Raindays (>=1mm)	9	11	10	9	9	
AUG	Temp (Ave. Degrees C)	17.2	17.1	18.6	17.7	16.7	16.9
	Sun (Ave. Hours)	6.4	5.7	7.2	6.0	7.8	5.8
	Rain (mm)	70	48	14	127	55	61.9
	Raindays (>=1mm)	11	8	2	15	8	
SEPT	Temp (Ave. Degrees C)	13.7	14.4	14.6	15.0	15.8	17.5
	Sun (Ave. Hours)	4.5	5.7	6.5	5.7	5.4	3.5
	Rain (mm)	61	32	19	40	40	70.9
	Raindays (>=1mm)	12	4	4	9	8	
OCT	Temp (Ave. Degrees C)	13.8	10.5	9.4	10.9	13.6	13.7
	Sun (Ave. Hours)	3.7	3.3	4.6	3.3	3.4	3.6
	Rain (mm)	114	115	54	127	98	117
	Raindays (>=1mm)	16	14	9	17	13	
NOV	Temp (Ave. Degrees C)	7.5	8.8	8.3	7.8	6.4	8.5
	Sun (Ave. Hours)	2.7	2.1	2.5	1.8	3.3	3.6
	Rain (mm)	52	146	93	43	53	107
	Raindays (>=1mm)	10	20	13	9	8	
DEC	Temp (Ave. Degrees C)	3.8	5.9	5.1	5.4	4.2	6.7
	Sun (Ave. Hours)	2.9	1.1	1.8	1.8	2.4	1.6
	Rain (mm)	31	121	85	53	68	108
	Raindays (>=1mm)	7	16	13	8	7	

NB: 'Raindays' are defined as the number of days in the month when 1mm or more of rainfall was recorded.
Figures courtesy of the Met Office

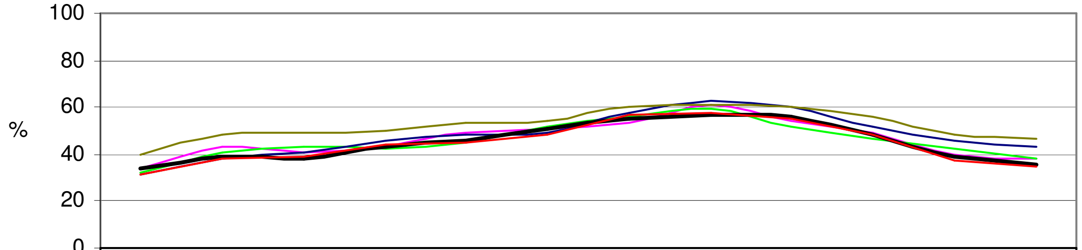
APPENDIX 6: OCCUPANCY GRAPHS

Figure A1: All serviced accommodation
Average Room Occupancy (%) - Hampshire



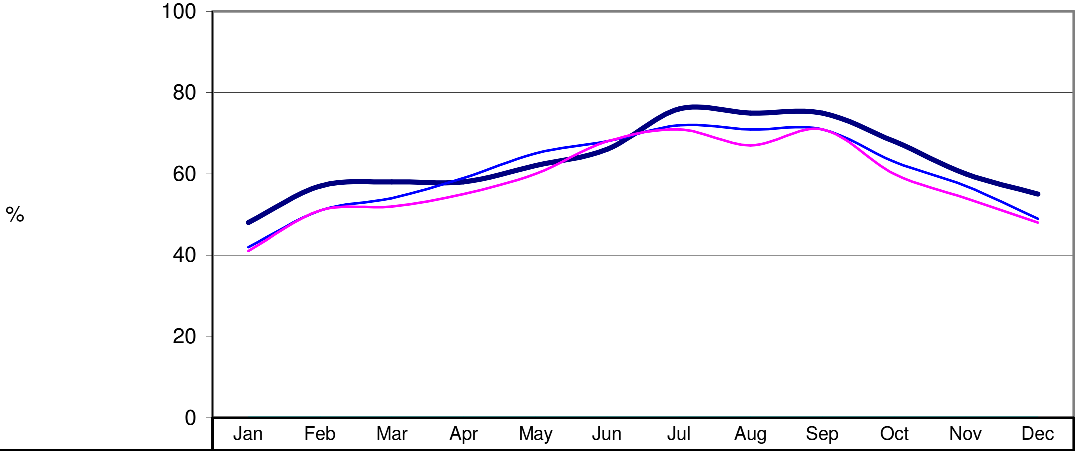
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	53	61	59	57	64	68	69	73	74	67	58	52
2002	48	56	58	59	62	68	72	71	72	65	61	51
2003	47	55	58	61	62	67	75	73	78	67	62	55
2004	53	62	65	63	66	70	75	72	77	70	64	59
2005	49	55	54	61	64	69	71	70	77	67	59	52
2006	48	57	58	58	62	66	76	72	75	68	60	55

Figure A2: All serviced accommodation
Average Bed Occupancy (%) - Hampshire



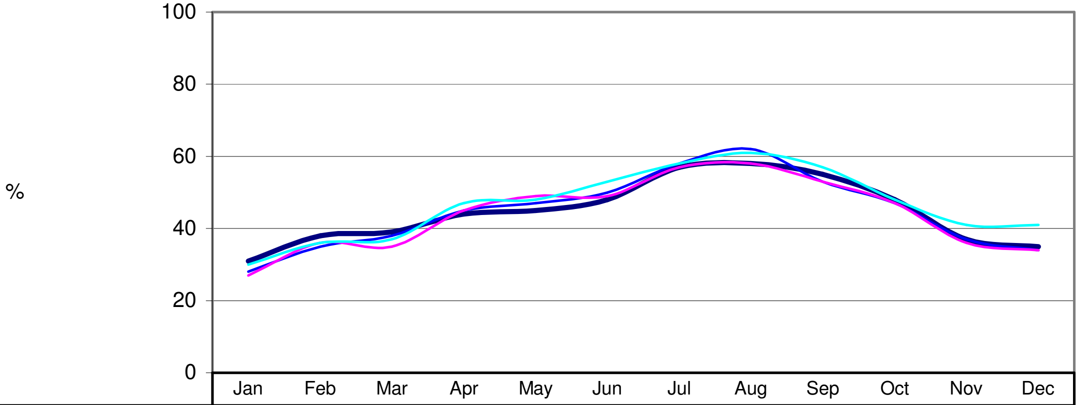
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	34	43	41	43	49	51	53	61	54	49	40	38
2002	32	41	43	42	45	52	56	59	52	47	42	38
2003	31	38	41	46	48	49	58	63	60	52	46	43
2004	40	48	49	50	53	54	60	61	60	56	48	47
2005	34	39	38	43	46	51	55	57	56	48	39	36
2006	31	38	39	44	45	48	57	58	55	48	37	35

Figure A3: All serviced accommodation
Average Room Occupancy (%)



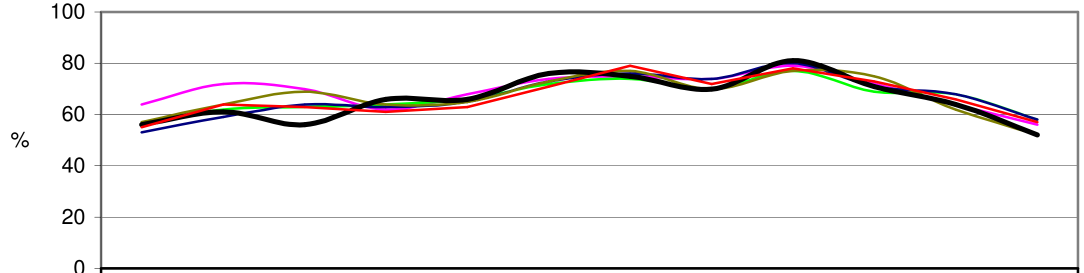
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hampshire	48	57	58	58	62	66	76	75	75	68	60	55
Southern Region	42	51	54	59	65	68	72	71	71	63	57	49
South East Region	41	51	52	55	60	68	71	67	71	60	54	48
England	0	0	0	0	0	0	0	0	0	0	0	0

Figure A4: All serviced accommodation
Average Bed Occupancy (%)



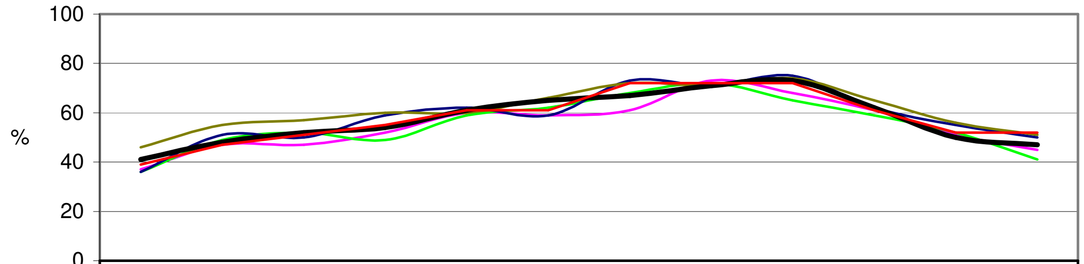
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hampshire	31	38	39	44	45	48	57	58	55	48	37	35
Southern Region	28	35	38	45	47	50	58	62	53	47	37	34
South East Region	27	36	35	45	49	49	57	58	53	47	36	34
England	30	36	37	47	48	53	58	61	57	48	41	41

Figure A5: All serviced accommodation
Average WEEKDAY Room Occupancy (%) - Hampshire



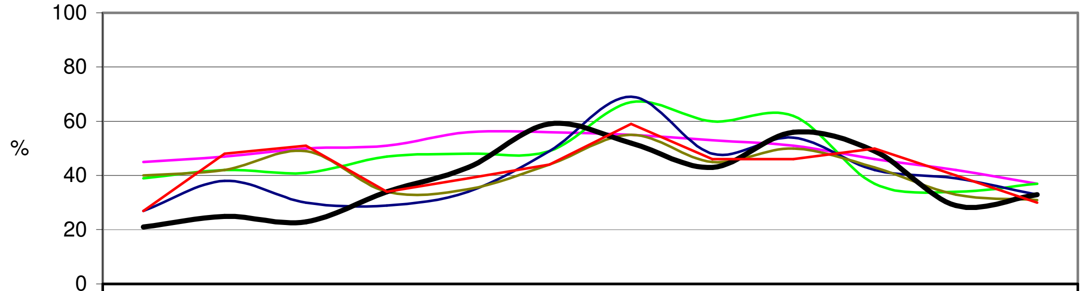
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	64	72	70	62	68	74	75	74	79	72	64	56
2002	56	62	63	64	66	72	74	70	77	69	68	58
2003	53	59	64	63	65	73	76	74	80	71	68	58
2004	57	64	69	64	65	73	77	70	77	75	62	52
2005	56	61	56	66	66	76	75	70	81	71	64	52
2006	55	64	63	61	63	71	79	72	78	73	66	57

Figure A6: All serviced accommodation
Average WEEKEND Room Occupancy (%) - Hampshire



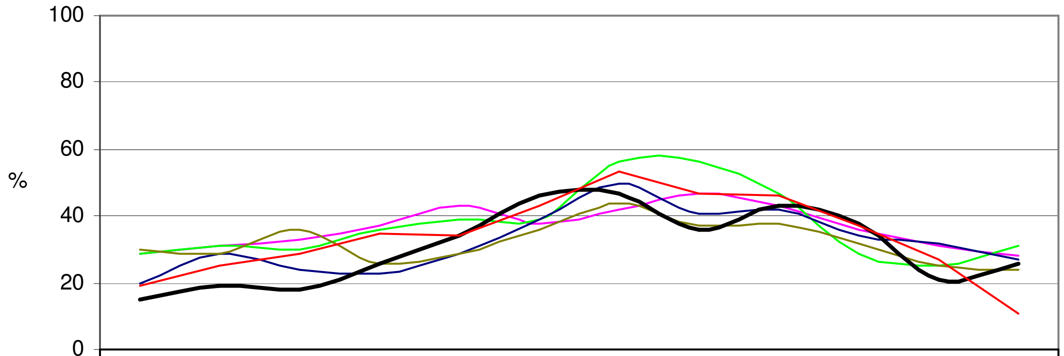
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	37	47	47	52	60	59	61	73	68	61	51	45
2002	36	49	52	49	59	62	68	72	65	59	52	41
2003	36	51	50	59	62	59	73	71	75	62	55	50
2004	46	55	57	60	60	66	72	71	74	65	56	51
2005	41	48	52	54	61	65	67	71	73	62	50	47
2006	39	47	51	55	61	61	72	72	72	61	52	52

Figure A7: All serviced accommodation
Average Room Occupancy (%) - East Hampshire



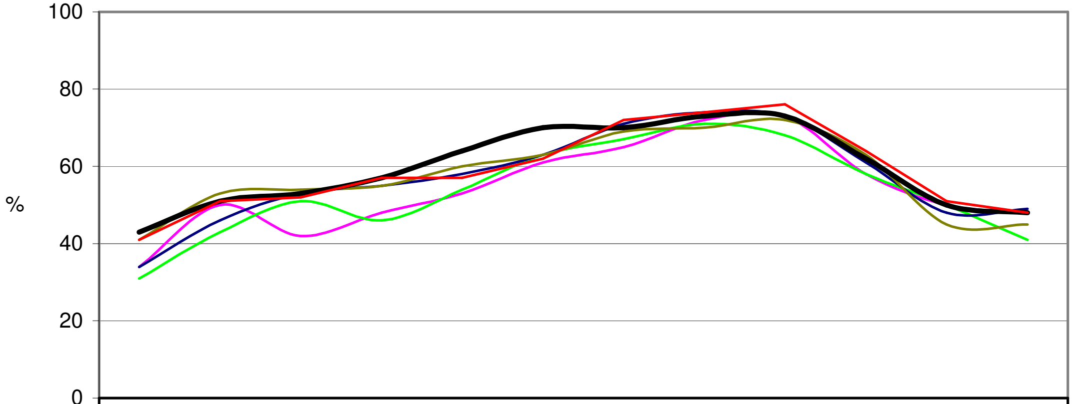
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	45	47	50	51	56	56	55	53	51	46	42	37
2002	39	42	41	47	48	49	67	60	62	37	34	37
2003	27	38	30	29	34	49	69	48	54	42	39	33
2004	40	42	49	34	35	44	55	45	50	43	33	31
2005	21	25	23	34	43	59	52	43	56	49	29	33
2006	27	48	51	34	39	44	59	46	46	50	40	30

Figure A8: All serviced accommodation
Average Bed Occupancy (%) - East Hampshire



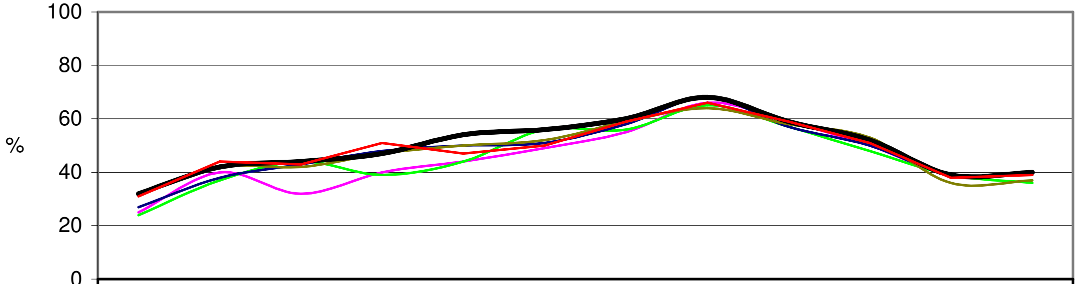
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	29	31	33	37	43	38	42	47	43	36	31	28
2002	29	31	30	36	39	39	56	56	47	29	25	31
2003	20	29	24	23	29	39	50	41	42	34	32	27
2004	30	29	36	26	29	36	44	37	38	32	25	24
2005	15	19	18	26	34	46	47	36	43	38	21	26
2006	19	25	29	35	34	43	53	47	46	37	27	11

Figure A9: All serviced accommodation
Average Room Occupancy (%) - New Forest



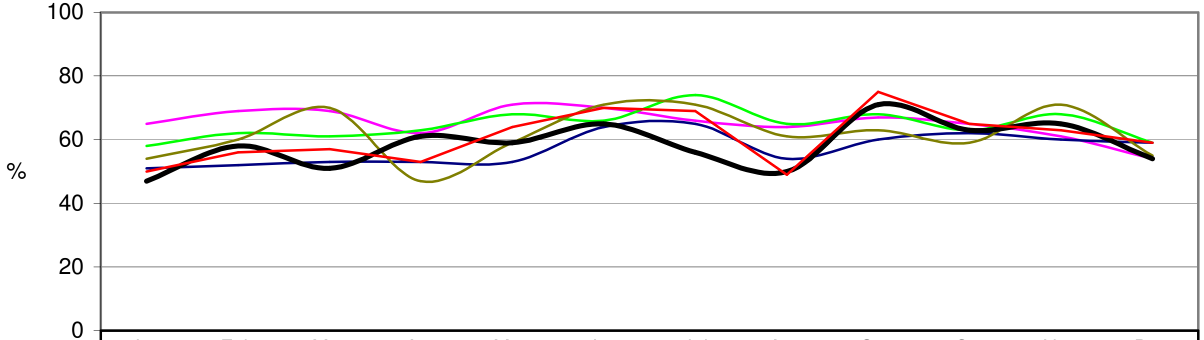
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	34	50	42	48	53	61	65	72	73	58	50	48
2002	31	43	51	46	54	63	67	71	68	58	50	41
2003	34	46	53	55	58	63	71	74	73	61	48	49
2004	41	53	54	55	60	63	69	70	72	63	45	45
2005	43	51	53	57	64	70	70	73	73	62	50	48
2006	41	51	52	57	57	62	72	74	76	64	51	48

Figure A10: All serviced accommodation
Average Bed Occupancy (%) - New Forest



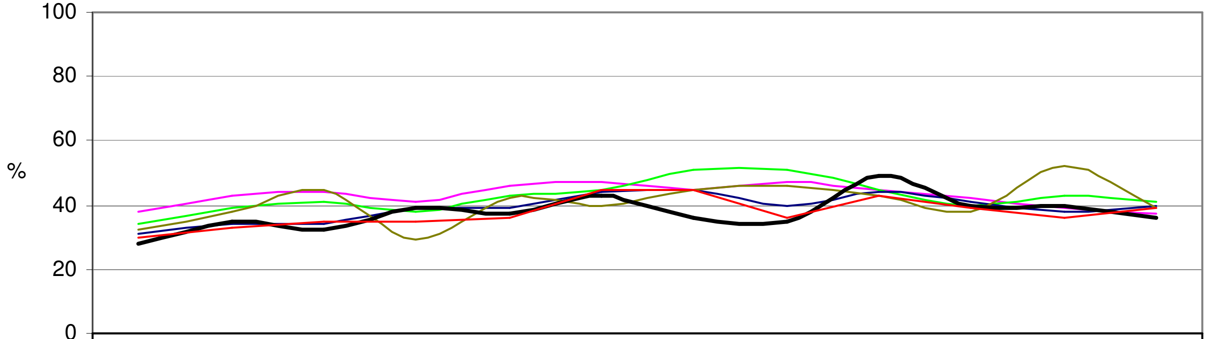
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	25	40	32	40	44	49	55	66	59	50	39	40
2002	24	37	44	39	44	56	56	65	57	48	39	36
2003	27	38	43	48	50	51	58	68	57	50	39	40
2004	32	42	42	47	50	52	59	64	58	53	36	37
2005	32	42	44	47	54	56	60	68	59	52	39	40
2006	31	44	43	51	47	50	59	66	59	51	38	39

Figure A11: All serviced accommodation
Average Room Occupancy (%) - North Hampshire



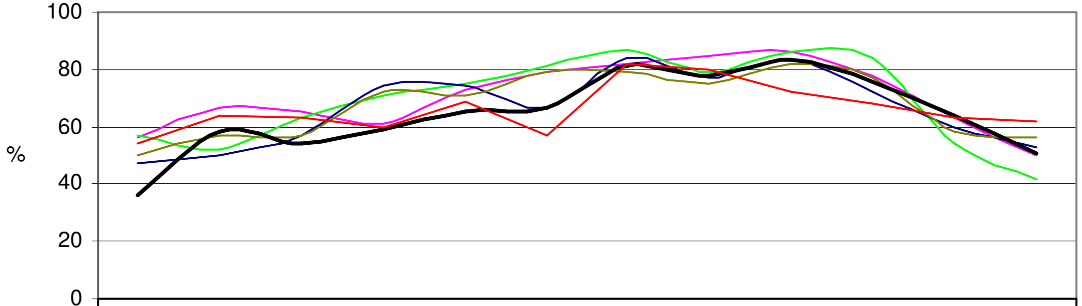
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	65	69	69	62	71	70	66	64	67	65	61	54
2002	58	62	61	63	68	66	74	65	68	63	68	59
2003	51	52	53	53	53	64	65	54	60	62	60	59
2004	54	60	70	47	59	71	71	61	63	59	71	55
2005	47	58	51	61	59	65	56	50	71	63	65	54
2006	50	56	57	53	64	70	69	49	75	65	63	59

Figure A12: All serviced accommodation
Average Bed Occupancy (%) - North Hampshire



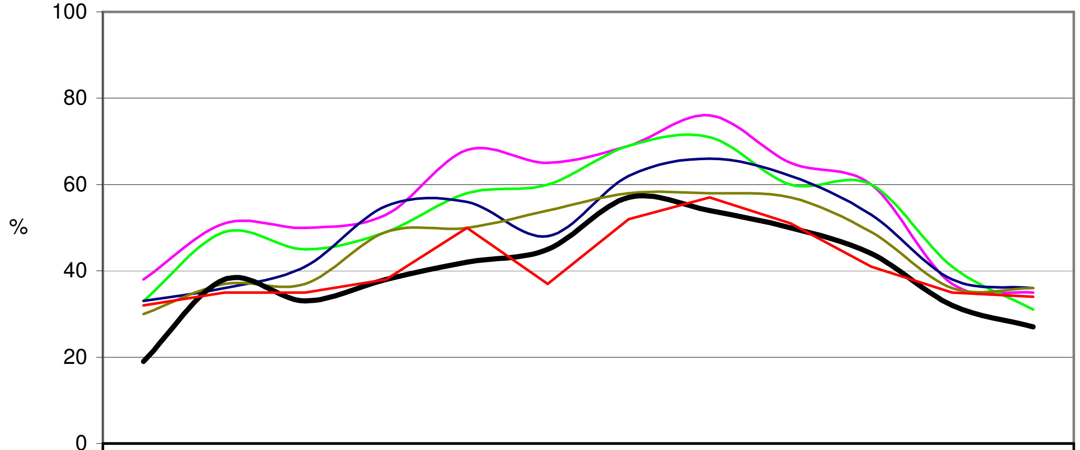
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	38	43	44	41	46	47	45	47	45	42	39	37
2002	34	39	41	38	43	45	51	51	45	40	43	41
2003	31	34	34	39	39	44	45	40	44	41	38	40
2004	32	38	45	29	42	40	45	46	43	38	52	39
2005	28	35	32	39	37	43	36	35	49	40	40	36
2006	30	33	35	35	36	45	45	36	43	39	36	39

Figure A13: All serviced accommodation
Average Room Occupancy (%) - Portsmouth



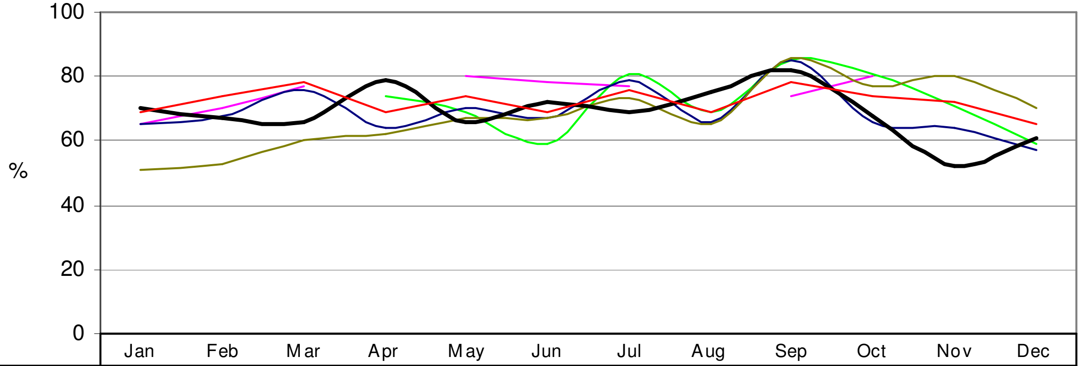
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	56	67	65	61	73	79	82	85	86	78	63	50
2002	57	52	63	71	75	81	87	79	86	84	54	42
2003	47	50	57	74	74	67	84	77	83	72	60	53
2004	50	57	57	72	71	79	79	75	82	77	58	56
2005	36	58	54	59	65	67	81	78	83	76	64	51
2006	54	64	63	60	69	57	82	80	72	68	63	62

Figure A14: All serviced accommodation
Average Bed Occupancy (%) - Portsmouth



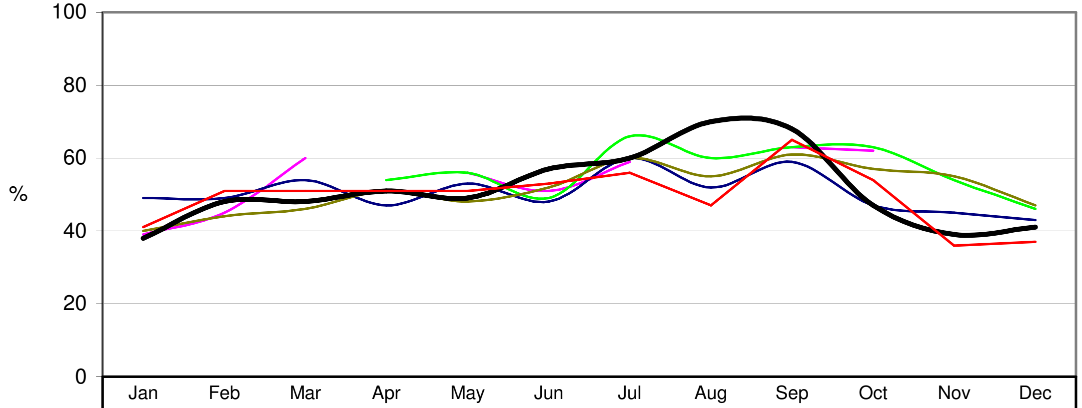
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	38	51	50	53	68	65	69	76	65	60	37	35
2002	33	49	45	49	58	60	69	71	60	60	41	31
2003	33	36	41	55	56	48	62	66	62	53	38	36
2004	30	37	37	49	50	54	58	58	57	49	36	36
2005	19	38	33	38	42	45	57	54	50	44	32	27
2006	32	35	35	38	50	37	52	57	51	41	35	34

Figure A15: All serviced accommodation
Average Room Occupancy (%) - Southampton



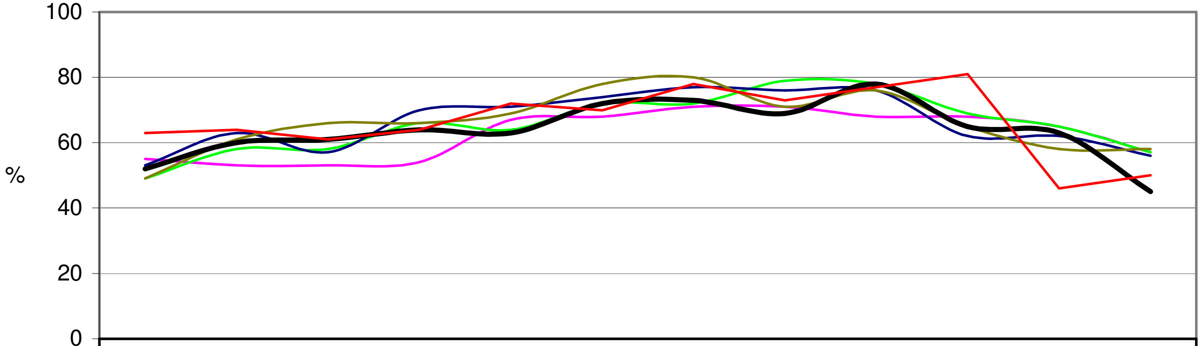
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	65	70	77		80	78	77		74	80		
2002				74	69	59	81	69	85	81	71	59
2003	65	68	76	64	70	67	79	66	85	66	64	57
2004	51	53	60	62	67	67	73	65	86	77	80	70
2005	70	67	66	79	66	72	69	75	82	68	52	61
2006	69	74	78	69	74	69	76	69	78	74	72	65

Figure A16: All serviced accommodation
Average Bed Occupancy (%) - Southampton



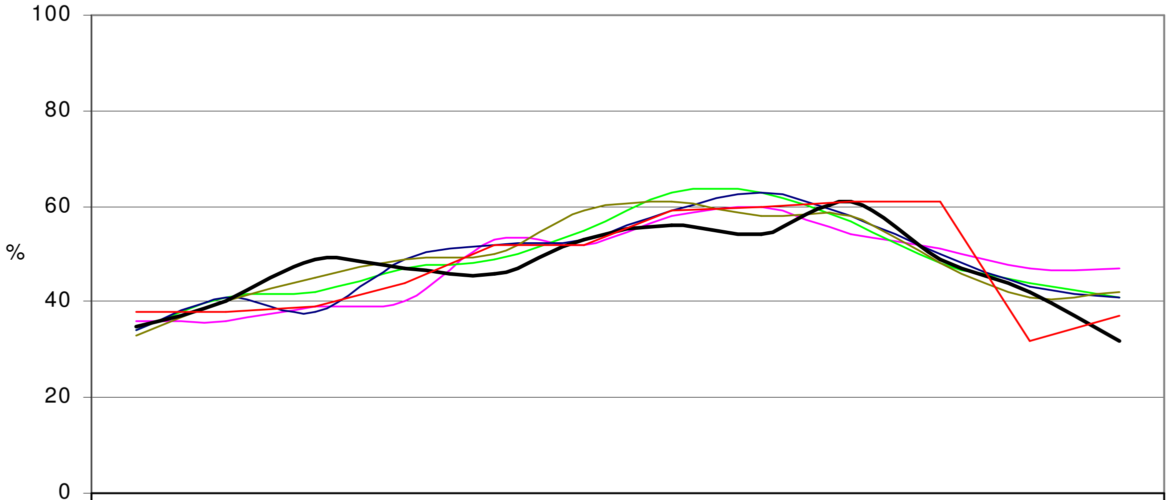
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	39	45	60		56	51	59		63	62		
2002				54	56	49	66	60	63	63	54	46
2003	49	49	54	47	53	48	60	52	59	47	45	43
2004	40	44	46	51	48	52	60	55	61	57	55	47
2005	38	48	48	51	49	57	60	70	68	47	39	41
2006	41	51	51	51	51	53	56	47	65	54	36	37

Figure A17: All serviced accommodation
Average Room Occupancy (%) - Test Valley



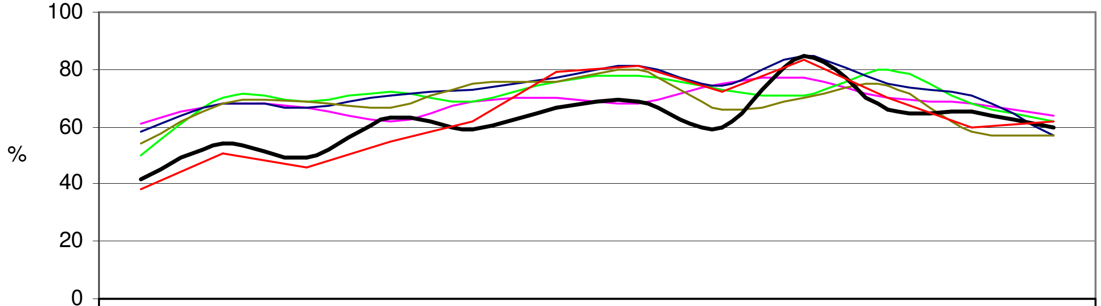
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	55	53	53	54	67	68	71	71	68	68	65	57
2002	49	58	58	66	64	72	72	79	78	69	65	57
2003	53	63	57	70	71	74	77	76	76	62	62	56
2004	49	61	66	66	69	78	80	71	76	65	58	58
2005	52	60	61	64	63	72	73	69	78	65	63	45
2006	63	64	61	64	72	70	78	73	77	81	46	50

Figure A18: All serviced accommodation
Average Bed Occupancy (%) - Test Valley



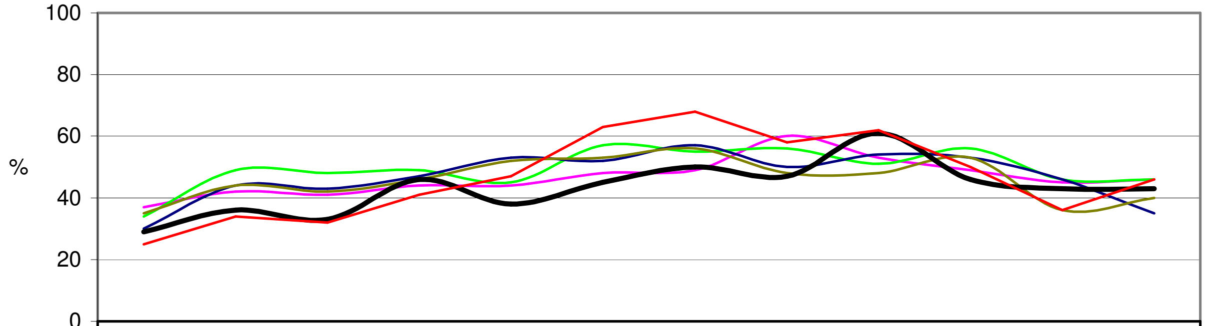
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	36	36	39	40	53	52	58	60	54	51	47	47
2002	34	41	42	47	49	55	63	63	57	48	44	41
2003	34	41	38	49	52	53	59	63	58	50	43	41
2004	33	40	45	49	50	59	61	58	58	48	41	42
2005	35	40	49	47	46	53	56	54	61	49	42	32
2006	38	38	39	44	52	52	59	60	61	61	32	37

Figure A19: All serviced accommodation
Average Room Occupancy (%) - Winchester



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	61	68	67	62	69	70	68	75	77	70	68	64
2002	50	70	69	72	69	76	78	73	71	80	68	62
2003	58	68	67	71	73	77	81	74	85	75	71	57
2004	54	68	69	67	75	76	80	66	70	74	58	57
2005	42	54	49	63	59	67	69	60	85	66	65	60
2006	38	51	46	55	62	79	81	72	83	70	60	62

Figure A20: All serviced accommodation
Average Bed Occupancy (%) - Winchester



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	37	42	41	44	44	48	49	60	53	49	45	46
2002	34	49	48	49	45	57	55	56	51	56	46	46
2003	30	44	43	47	53	52	57	50	54	53	46	35
2004	35	44	42	46	52	53	56	48	48	53	36	40
2005	29	36	33	46	38	45	50	47	61	46	43	43
2006	25	34	32	41	47	63	68	58	62	50	36	46

APPENDIX 7: ATTRACTION COMMENT SHEETS

Hampshire Tourism Trends
January - March Comments

Code	Attraction	Comment
17112	Whitchurch Silk Mill	Active Marketing for this time of year
17215	Gilbert Whites House	March not as good as last year due to timing of Easter
17228	Queen Elizabeth Country Park	Weather \ same events as last year
17304	Eastleigh Lakeside Railway	Poor weather
17404	Haven House Visitor Survey	Major building works throughout February & March 2006
17606	Army Medical Services Museum	Staff shortage caused us to postpone group visits for February to March instead.
17821	Furzey Gardens	Very cold start to the season & Easter failing in April
17906	Portsmouth Historic Dockyard	February half term
18002	Army Physical Training Corps Museum	The extra visitors in March is due to two organised visits from schools
18210	Mottisfont Abbey Garden, House & Estate	Continued inability to persuade HCC that Mottisfont needs more brown signs, we continue to lose visitors as a result.
18212	Romsey Abbey	With no exhibitions and late Easter possibly visitors to Abbey affected. Also very poor weather this winter.
18213	Romsey Signal Box	January – two special events for invited guests, hence low numbers.
18310	Guildhall Gallery	During the month of February, we had a number of workshops involving groups of children.
18317	Light Infantry Museum	Childrens education programme has raised the profile of the museum with return visits by children and accompanying adults.
18337	Cathedral Visitor Centre	Last year Easter fell in March – This year it is in April

Hampshire Tourism Trends
April - June Comments

Code	Attraction	Comment
17118	The Vyne	Visitor figures are down compared to last year – weather we assume.
17228	Queen Elizabeth Country Park	Having an Easter in the financial year makes all the difference (10k est). Poor weather in May did not make a difference which is strange, up 17% April – June compared to last year.
17236	Uppark	Cold weather at start of the season, unpredictable since.
17310	Netley Chapel	Chapel entrance charges.
17819	Exbury Gardens	Late Easter (April 2006 – Easter occurred in March 2005). Wettest May since 1979 severely dented figures in what is our busiest month of the year. Cold weather, warm and dry in June, plus a major event, boosted our figures.
18105	John Hansard Gallery	Limited opening in April. Very wet weather in May.
18210	Mottisfont Abbey Garden	Weather. Lack of Brown Tourist signs.
18311	The Gurkha Museum	June was not good due to the World Cup and other sporting events.
18312	Hampshire Technology Centre	Hot weather in June reduced visitor numbers. Two large events in area caused congested roads (hi-fi music festival & moto GP) visitors would avoid area.
18317	Light Infantry Museum	Full time attendant has been ill since April, so weekend opening has been patchy and no Sunday opening at all.
18213	Romsey Signal Box	Due to health and safety concerned over current state of access to signal box, visitors were discouraged during this period by withdrawal of normal on street promotion of attraction.
17831	New Forest Cider	Easter in April instead of March
17105	Highclere Castle & Gardens	High number of free admissions influenced by disabled groups
18212	Romsey Abbey	Late Easter in April probably improved this year's figures. Although spring figures seem to be reducing each year slightly unless there are special events..

July - September Comments

Code	Attraction	Comment
17105	Highclere Castle & Gardens	No general Sunday opening, but two special events on Sunday with castle opening
17118	The Vyne	August – extra through school holidays – hardly any groups though – parents & children make up fo the shortfall for groups in August
17215	Gilbert White's House	Programme on BBC4 about Gilbert White in June Excellent weather Article on museum in Country Life
17236	Uppark	Extreme heat in July adversely affected visitor numbers against prior year and budget. August and September have been on budget.
17302	Botley Flour Milling Co	Due to reasons previously stated we are unable to be open to private tours and did not participate in national heritage w/e hence the visitors were less than previous years
17310	Netley Chapel	Entrance to Chapel tower closed
17504	Royal Navy Submarine Museum	Believe that millennium tower is a competitor for 'recreational fund'
17606	Army Medical Services Museum	Attended Aldershot Army show to raise profile with local audience which may have impacted on July figures, but August very poor – maybe lack of children's activities/special events for summer holidays
17804	Beaulieu Motor Museum	Economy weaker than is being admitted Weather
17819	Exbury Gardens	Opening of sister attraction 'Exbury Maize Maze' assisted visitors to gardens, fine weather in July/August, growth in size of special events.
17821	Furzey Gardens	The continued good weather
17902	Charles Dickens Museum	Children under thirteen are admitted free with an adult all year round
17904	The D Day Museum	Children under thirteen accompanied by an adult are admitted free during the school summer holidays
17911	Playzone	Very hot/warm weather June - September
17914	Portsmouth City Museum	Museum is free of charge
17920	Southsea Castle	Children under thirteen are admitted free with an adult all year round
17939	Square Tower	Square Tower has not been open during August – free admission
17940	Spinnaker Tower	Always affected by the weather & transport issues – difficult to get into gun Wharf Quays on busy days.
18002	Army Physical Training Museum	APTC association re-union weekend held at army school physical training in September
18213	Romsey Signal ox	Two days in September were "Heritage open days" with significant extra publicity and extended opening hours
18310	Guildhall Gallery	We get more visitors during the school holidays

18311	The Gurkha Museum	An exhibition was staged in August providing an exceptional visitor returni
18313	Hinton Ampner Gardens	Please note national trust members not counted as payers July became very hot putting off some people and August was hot typical weather;l
18329	Westgate Museum	Numbers down on this time last year due to very hot weather City centre location
18332	Winchester City Museum	Numbers down on this time last year due to very hot weather City centre location
18210	Mottisfont Abbey Garden, House	July was too hot, August was too cold, net results were 10% down on 2005f
18212	Romsey Abbey	In July 05 we had Romsey Arts Festival bringing many extra people to Romsey and the Abbey. In Sept 06 we had 3 days of a flower festival in the abbey which brought in probably an additional 2000+ people

Hampshire Tourism Trends
October - December Comments

Code	Attraction	Comment
17125	The Anvil	December – pantomime
17202	Alice Holt Woodland Park	Weather and xmas hols reduced numbers; half term & xmas activities increased numbers
17228	Queen Elizabeth Country Park	Changeable weather
17302	Botley Flour Milling Company	Very difficult to take visitors around – insurance changes & renovation work have made access difficult. Likely to continue for next 12 months
17303	Bursledon Windmill	Shut since beginning of December due to staff sickness, so hard to calculate how many days open this quarter.
17310	Netley Chapel	Entrance to Chapel Tower closed; December Xmas Fayre – no entrance charge
17404	Have House Visitor Centre	Weather disappointing in December which affected visitor numbers
17408	Titchfield Haven Nature Reserve	Wet December weather affected visitors going around reserve
17606	Army Medical Services Museum	Oct & Nov had falling visitor numbers perhaps due to xmas build up; perhaps increasing negative image of army political influence due to Iraq/Afganistan
17703	Staunton Country Park	Good weather during Oct half term; positive press coverage; won ‘The News’ best park in Nov – local press reader’s poll; events including Halloween, tree week and xmas
17814	Calshot Castle	Weather
17819	Exbury Gardens	‘Return free’ vouchers operator in Oct and Nov. Gardens closed 5th Nov and reopened for 6 days for Santa Specials in Dec. Good weather in Oct although Autumn colours were late.
17831	New Forest Cider	During Oct we hold a cider pressing open weekend which increases visitor numbers
17837	Rockbourne Roman Villa	Just for school groups – closed Oct-April
18004	The Parachute Regiment and Airborne Forces Museum	Could be result of not being open Sundays and Bank Hols. Weather, competition from other attractions, unable to promote through lack of funds, as Regiment has relocated people think Museum has closed/gone too.
18109	Southampton City Art Gallery	Dec – gallery closed 24th-27th & January – 1st-3rd
18202	Museum of Army Flying	Added local competition; lack of permanent curator meant fewer added attractions
18212	Romsey Abbey	Excellent Oct; Nov and Dec above average for last 10 years
18213	Romsey Signal Box	Very poor weather for Dec open day
18310	Guildhall Gallery	11 children’s workshops in Nov; closed 24th-26th Dec; Oct – 2 children’s workshops and ‘drop in and draw’ day
18316	The Kings Royal Hussars Musem	More school visits than in previous years; better advertised and more interesting half term programme; ‘Veterans Day’ in October
18317	Light Infantry Museum	Closed for greater number of days due to staff illness
18325	The Royal Hampshire Regiment Museum and Memorial Garden	Weekend closing from end of Oct
18337	Cathedral Visitor Centre Education Centre	Hosted a 10 day Xmas market from 1-10 Dec and an ice rink from 1 Dec – 7 Jan 0. Brought an additional 200,000 (?) visitors through the Cathedral grounds over 5 weeks