ERBID How’s Business Survey

April 2025

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Sample and supporting information

This month's survey has a sample of 68 businesses, representing a minimum sample of approximately 82 businesses when respondents representing self catering agencies, multiple businesses, outlets or sites are also considered.

This latest report also includes data produced by Lighthouse (formerly Transparent Intelligence) for Visit Britain looking at the short term rental* market. This provides useful data across the English Riviera and provides a good comparison to the data produced through the How's Business survey moving forward. Our thanks go to Lighthouse and Visit Britain for making this data freely available for the tourism industry.

Lighthouse tracks over 35 million vacation rental listings worldwide and maintains a proprietary database of hundreds of thousands of reservations tracked by month. Listings on the four major short-term rental platforms are tracked: Airbnb, Booking.com, Vrbo and Tripadvisor. Listings data is deduplicated when the same property is advertised on more than one platform.

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** The UK Government defines a short-term rental property as 'a dwelling, or part of a dwelling, provided by a host to a guest, for use as accommodation other than the guest's only or principal residence, in return for payment, in the course of a trade or business carried on by the host'.*

At a glance – April 2025

Compared to April 2024 businesses reported that:

April 2025 Visitor levels:

Increased 40% / Stayed the same 10% / Decreased 49%

Estimated actual change in visitors -2%

April 2025 Turnover levels:

Increased 45% / Stayed the same 10% / Decreased 45%

Estimated actual change in turnover 0%

Whitsun week 2025 Outlook is:

Better than last year 13% / Same as last year 34% / Not as good as last year 53%

May 2025 Outlook is:

Better than last year 32% / Same as last year 17% / Not as good as last year 51%

June 2025 Outlook is:

Better than last year 11% / Same as last year 23% / Not as good as last year 66%

Optimism:

Optimism score is 4.72 out of a possible 10

April 2025 Key results

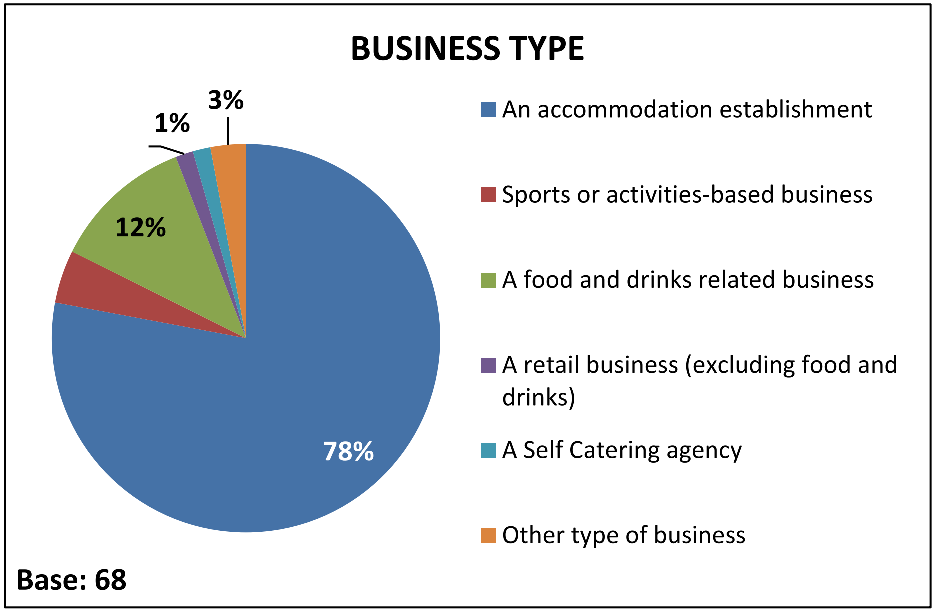
In April 2025, visitor levels showed mixed results, with 40% of businesses seeing an increase, 10% remaining level and 49% experiencing a decline. The overall estimated change in visitor/customer numbers was a decrease of -2% compared with April 2024. Turnover levels followed a similar trend with 45% of businesses reporting growth, 10% maintaining previous levels and 45% seeing a decrease, however, the estimated actual change in turnover remained level at 0%. The timing of Easter (Easter weekend fell in March during 2024 and in April during 2025) clearly had an impact on consumer behavior and the figures indicate fluctuating business performance with gains and losses balancing out.

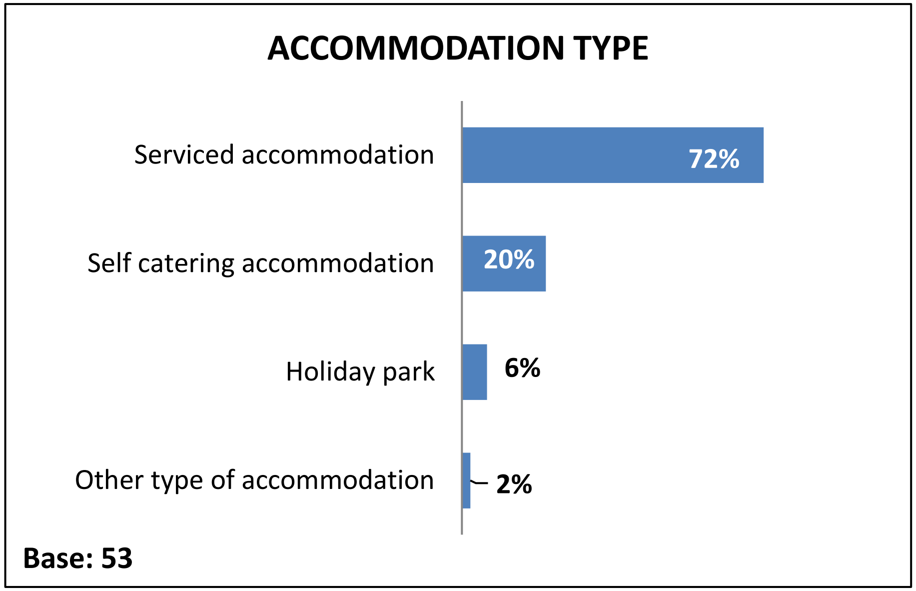
53% of businesses did not anticipate their Whitsun week performance to be as good as 2024 and 51% said the same about their May performance as a whole. In addition, at the time of data collection, 66% of businesses also anticipated a decreased business performance for June 2025 based on their forward bookings. The data suggests that at the time of completing the survey businesses were more hopeful about May, but expectations for Whitsun week and June were predominantly negative compared to last year.

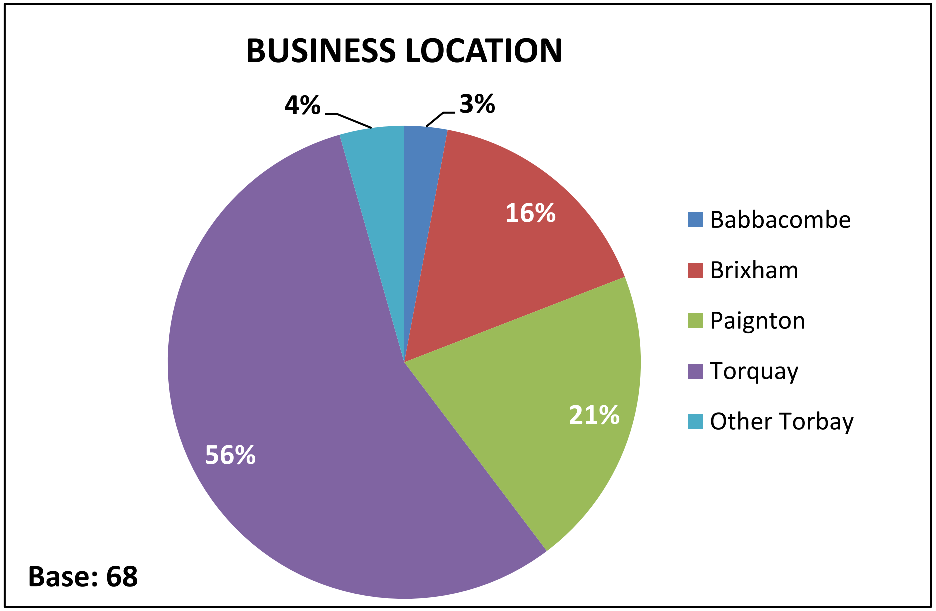
At 76%, businesses are currently most concerned about decreasing visitor numbers/booking levels (an increase of 3% compared with last month), increases in other business costs e.g. food and other business supplies etc. (69%, an increase of 7% compared with last month) increases in the cost of living generally (66%, an increase of 3% compared with last month) and rising energy costs (59%, no change compared with last month). This data suggests that financial pressures, especially related to visitor numbers, rising business expenses and living costs are the most urgent concerns for businesses. At 4.72 out of 10.00 the optimism score decreased slightly compared with last month (4.77).

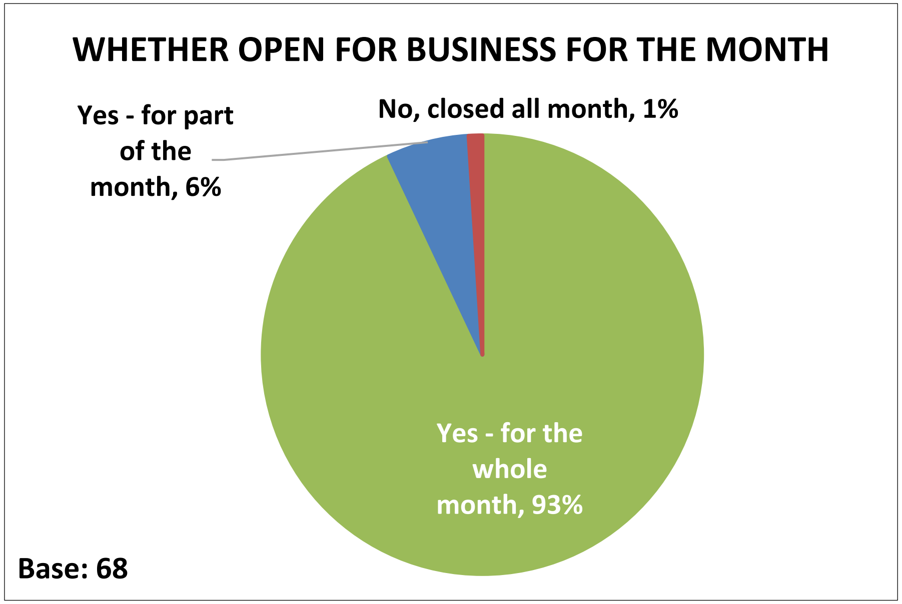
Many businesses continue to report that they are struggling due to financial constraints, rising costs and a decline in visitor numbers and for some, April 2025 was particularly difficult despite Easter. Bookings are becoming increasingly last-minute and, for many, below expected levels for 2025. However, there is the beginning of increased optimism around the Bay with some businesses reporting a good performance over the Easter holidays and an upturn in business levels in recent weeks, albeit at relatively short notice. Some businesses are reporting seeing an increase in footfall along the seafront and are having a good start to the main season.

Sample profile, business location and status

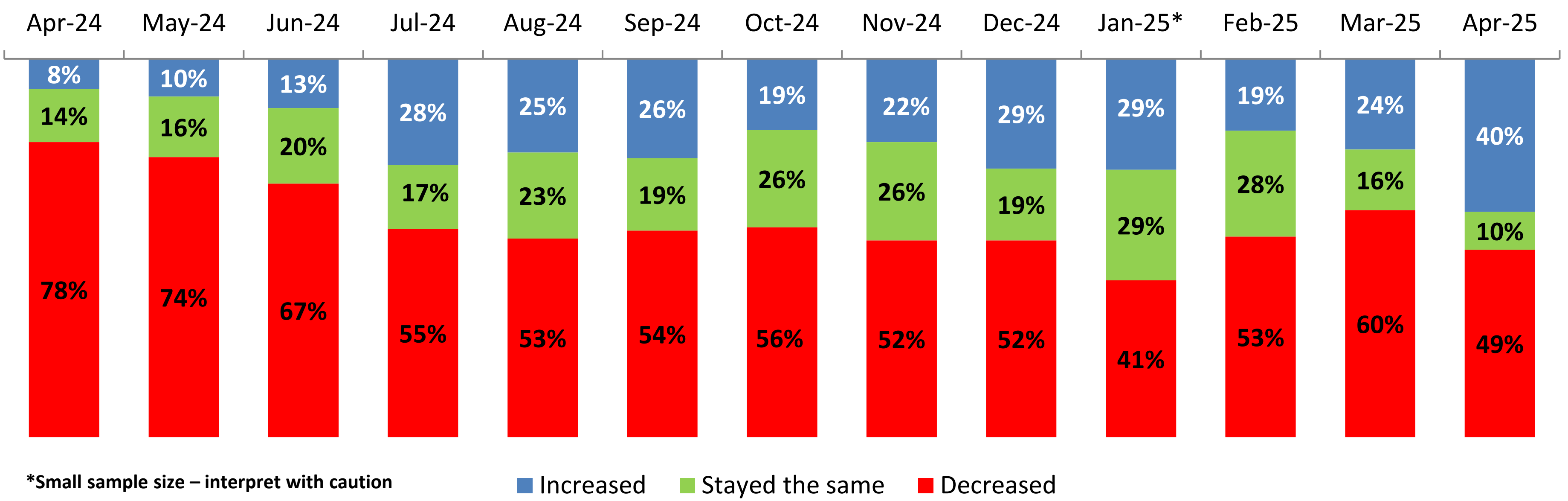




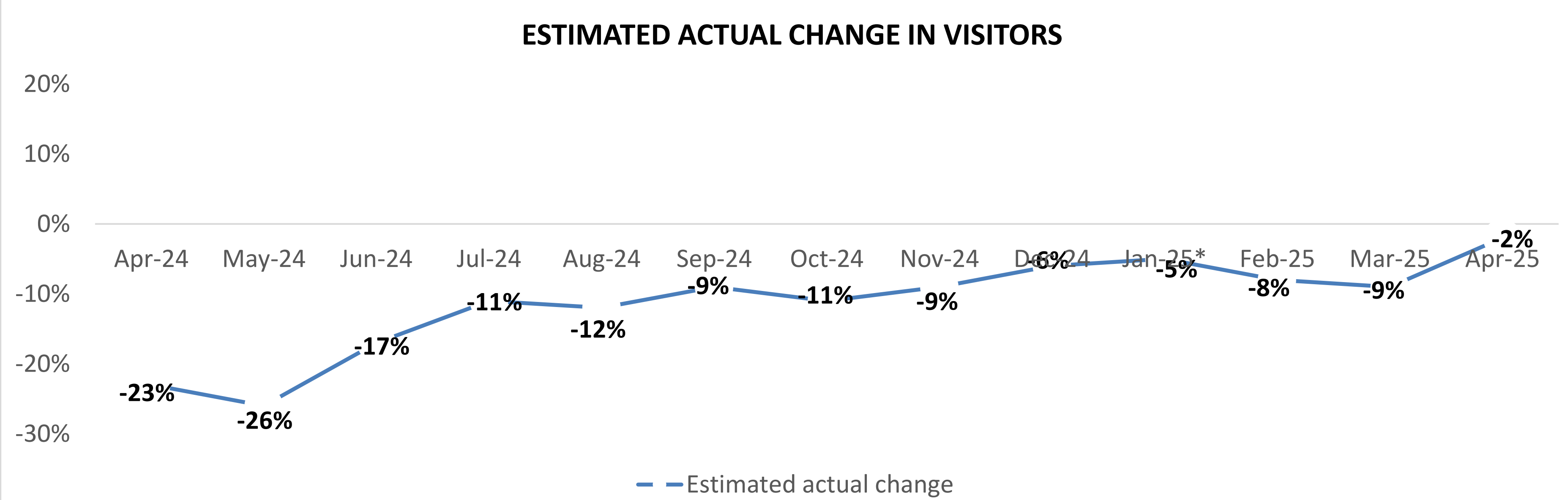




Performance – Number of visitors compared to previous year

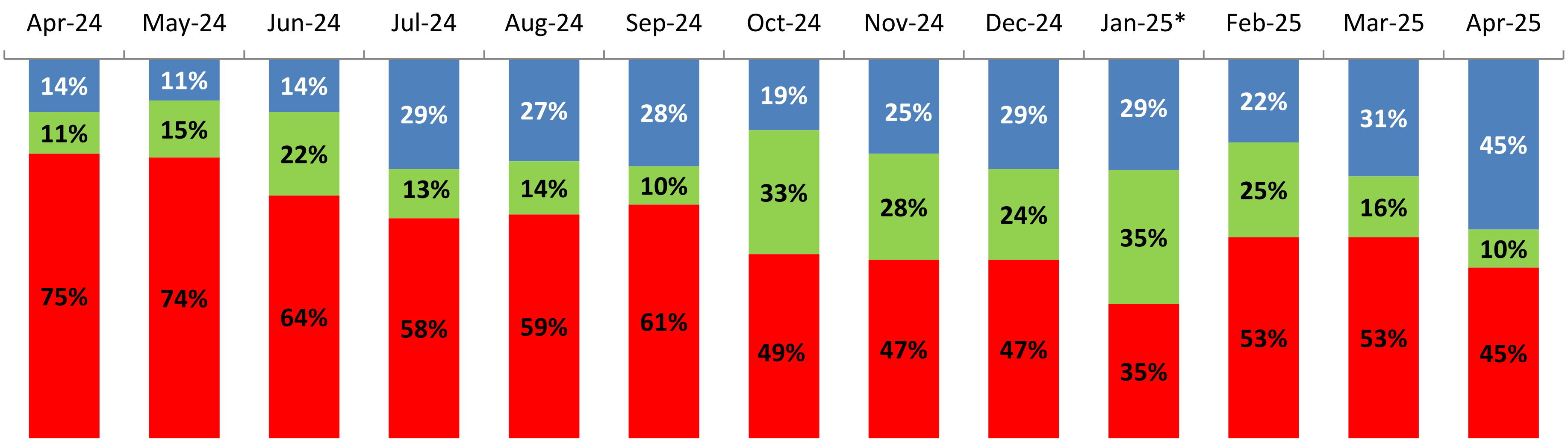


*Small sample size – interpret with caution



*Small sample size – interpret with caution

Performance – Turnover compared to previous year



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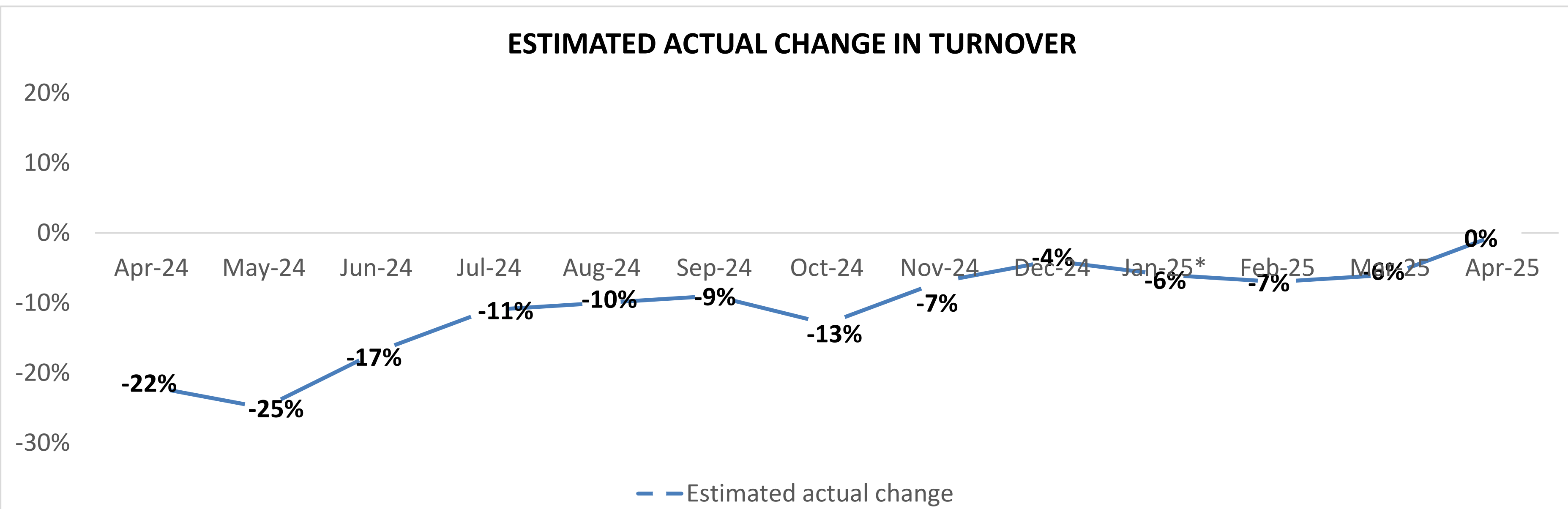
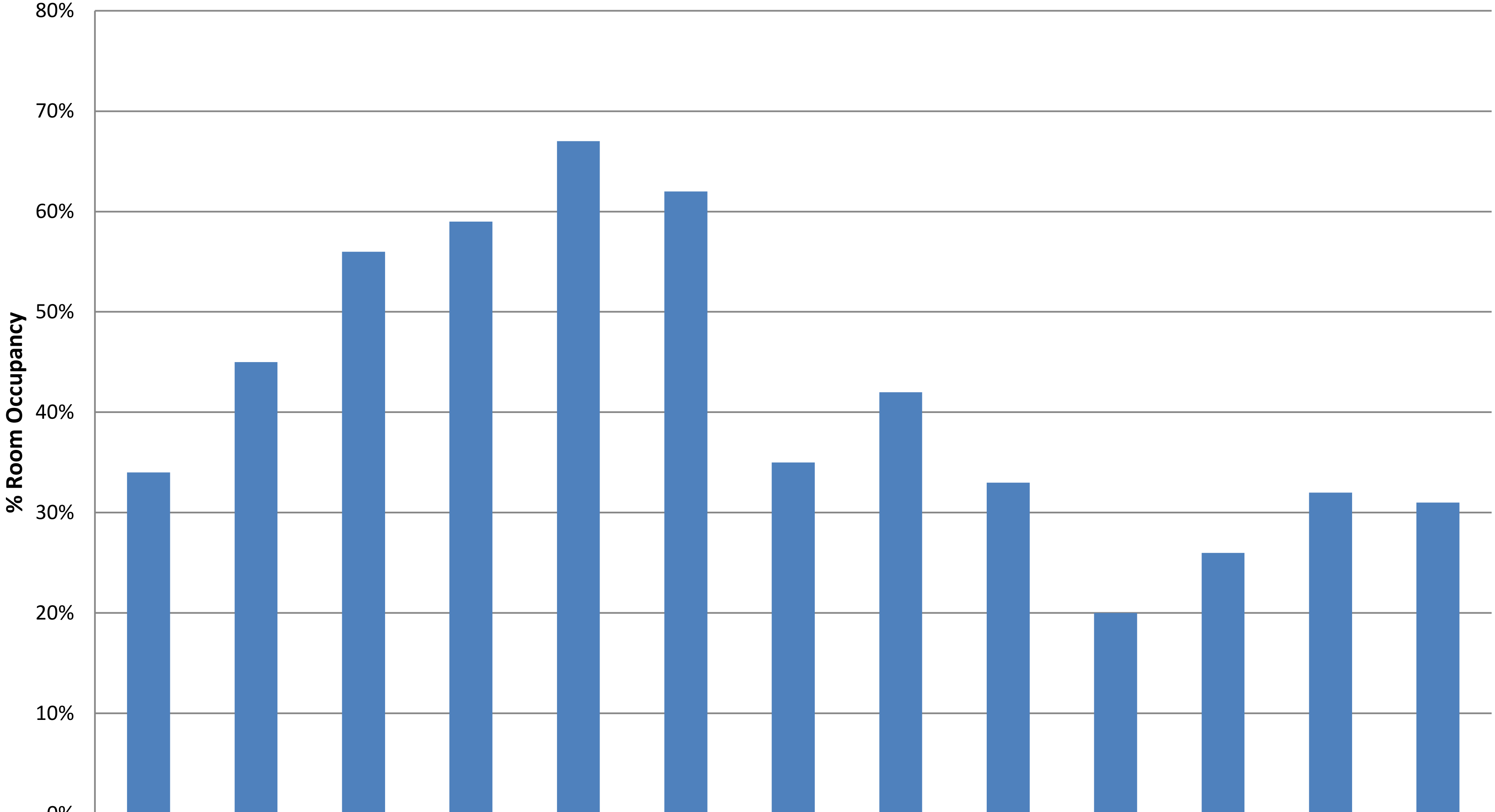


Performance – Serviced Room Occupancy

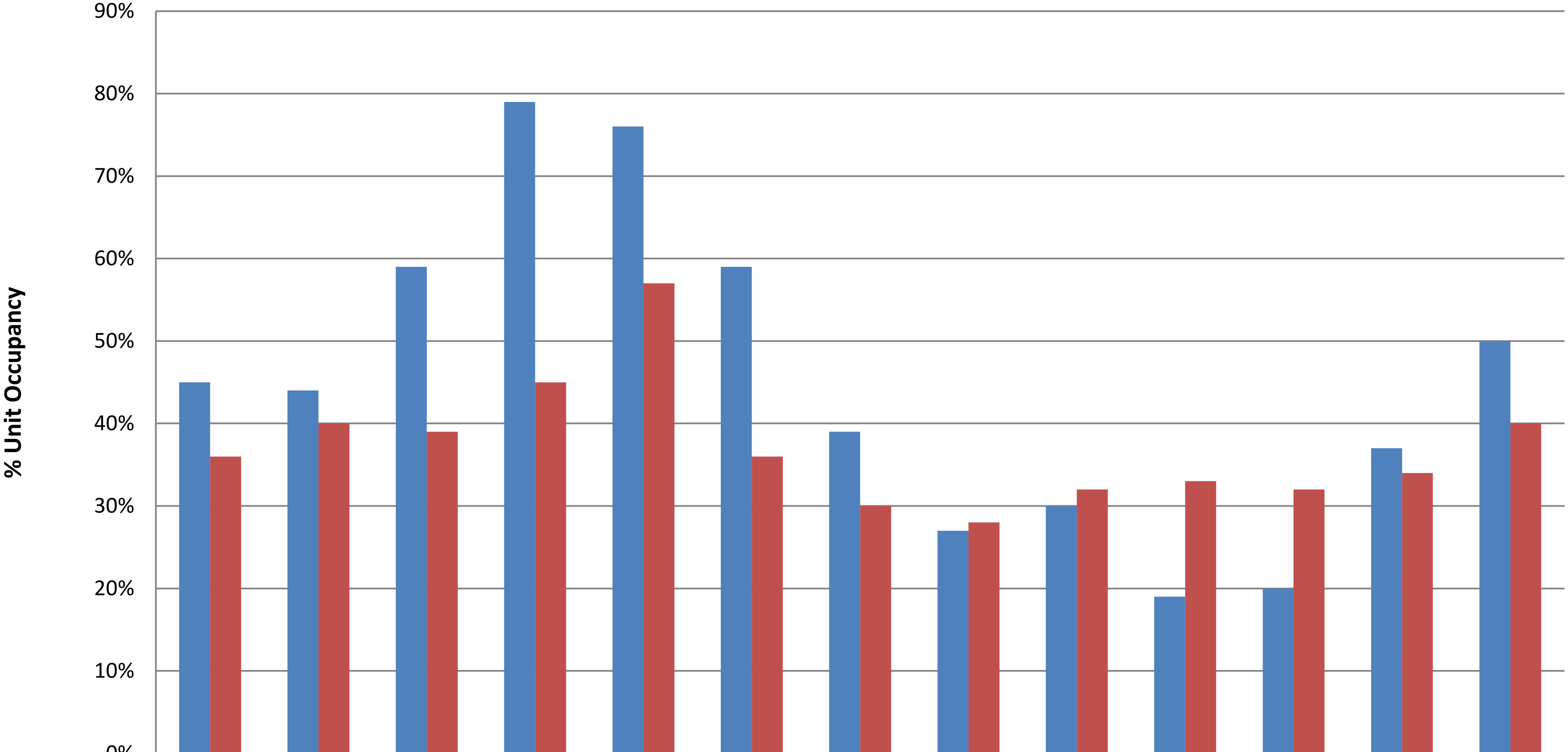


	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25*	Feb-25	Mar-25	Apr-25
ER	34%	45%	56%	59%	67%	62%	35%	42%	33%	20%	26%	32%	31%

***Small sample size – interpret with caution**

It should be noted that the figures provided represent the occupancy rates for those responding to this survey and the results are not weighted to represent regional and county accommodation stocks.

Performance – Self Catering Unit Occupancy



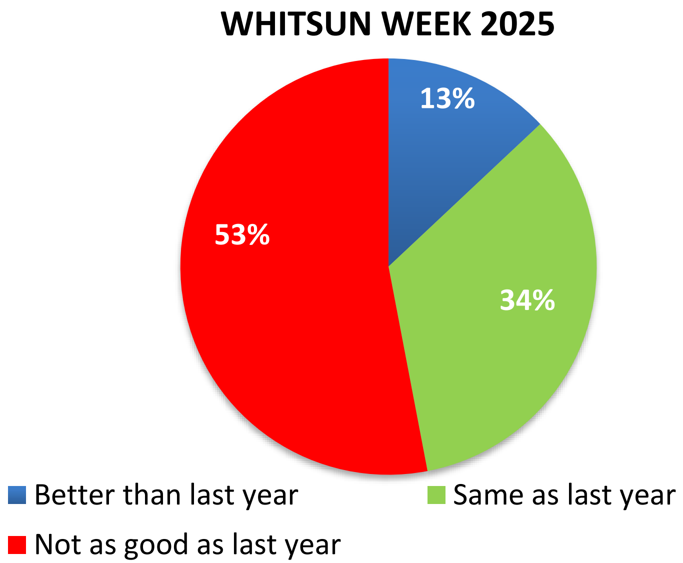
	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25*	Feb-25	Mar-25	Apr-25
ER	45%	44%	59%	79%	76%	59%	39%	27%	30%	19%	20%	37%	50%
Lighthouse	36%	40%	39%	45%	57%	36%	30%	28%	32%	33%	32%	34%	40%

***Small sample size – interpret with caution**

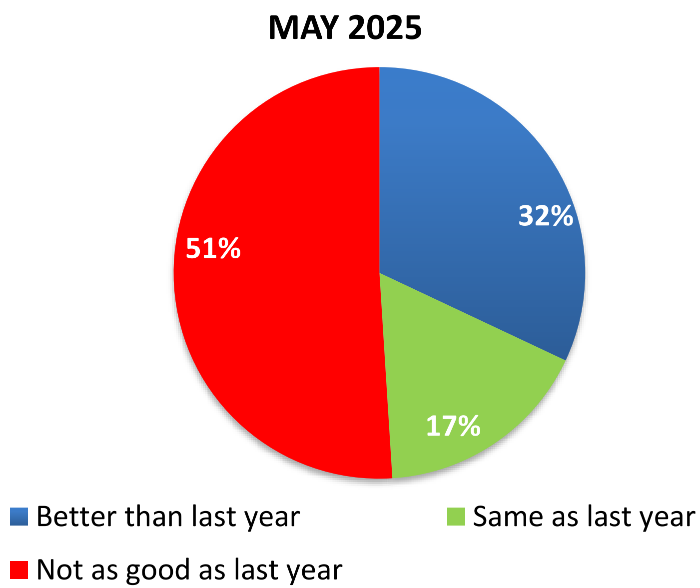
It should be noted that the HB figures provided represent the occupancy rates for those self catering businesses responding to this survey and the results are not weighted to represent regional accommodation stocks.

Lighthouse data represents the short term rental market on the English Riviera.

Outlook – Based upon forward booking levels



Base: 53



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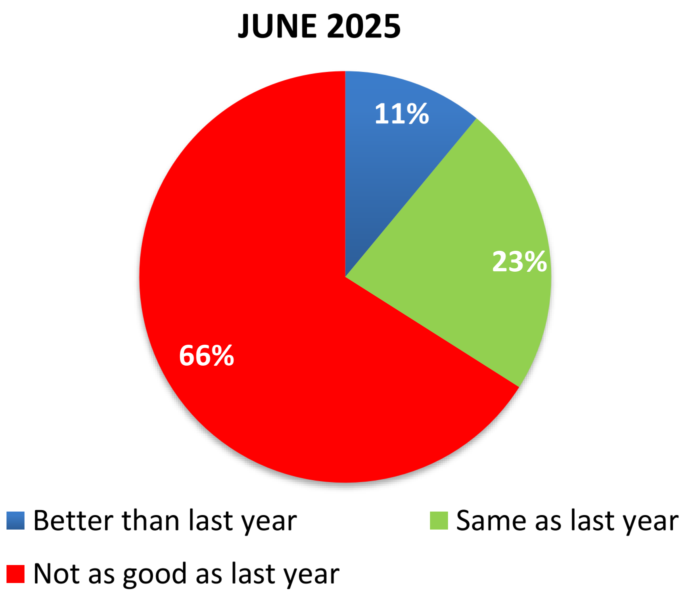
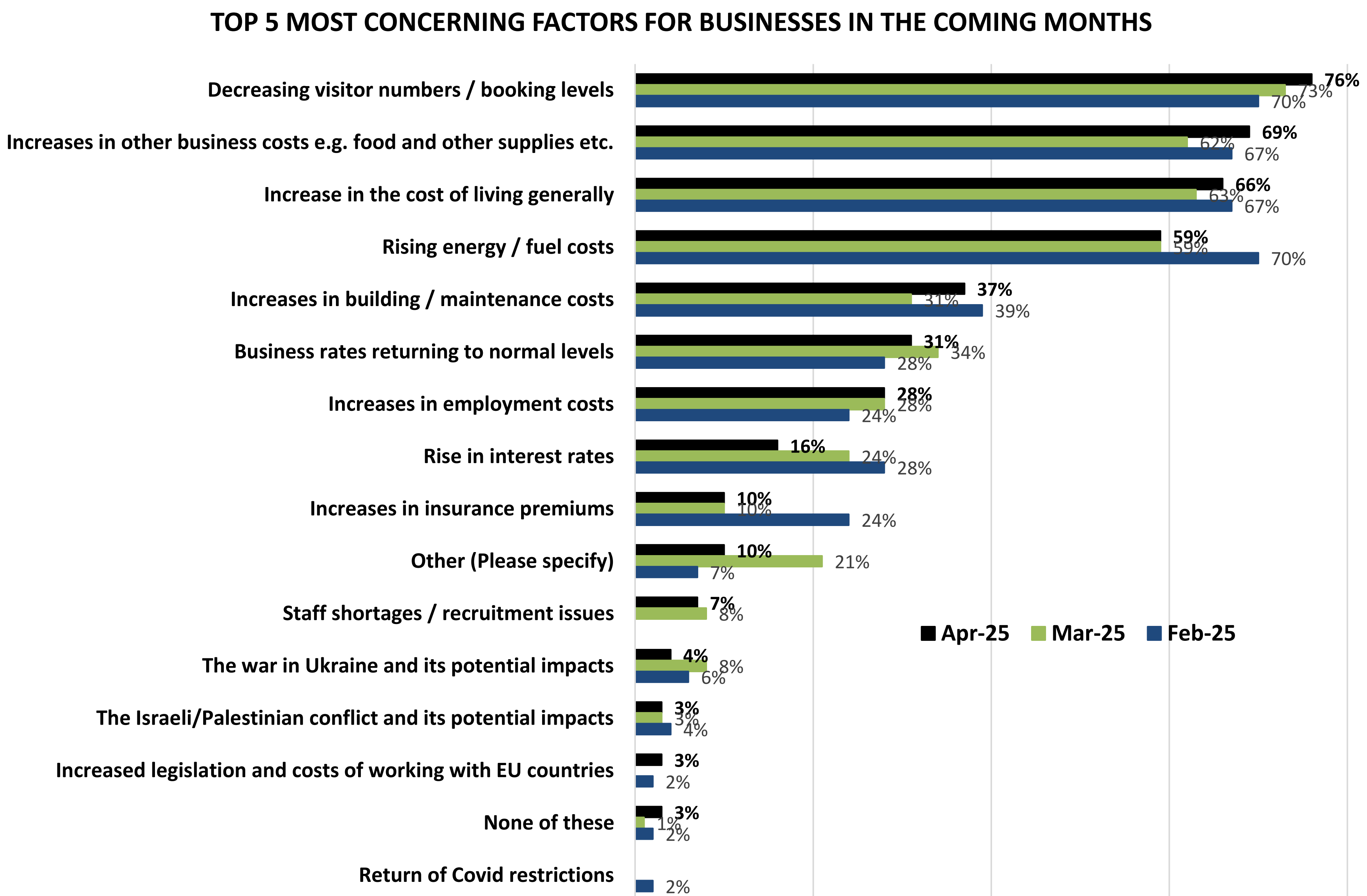
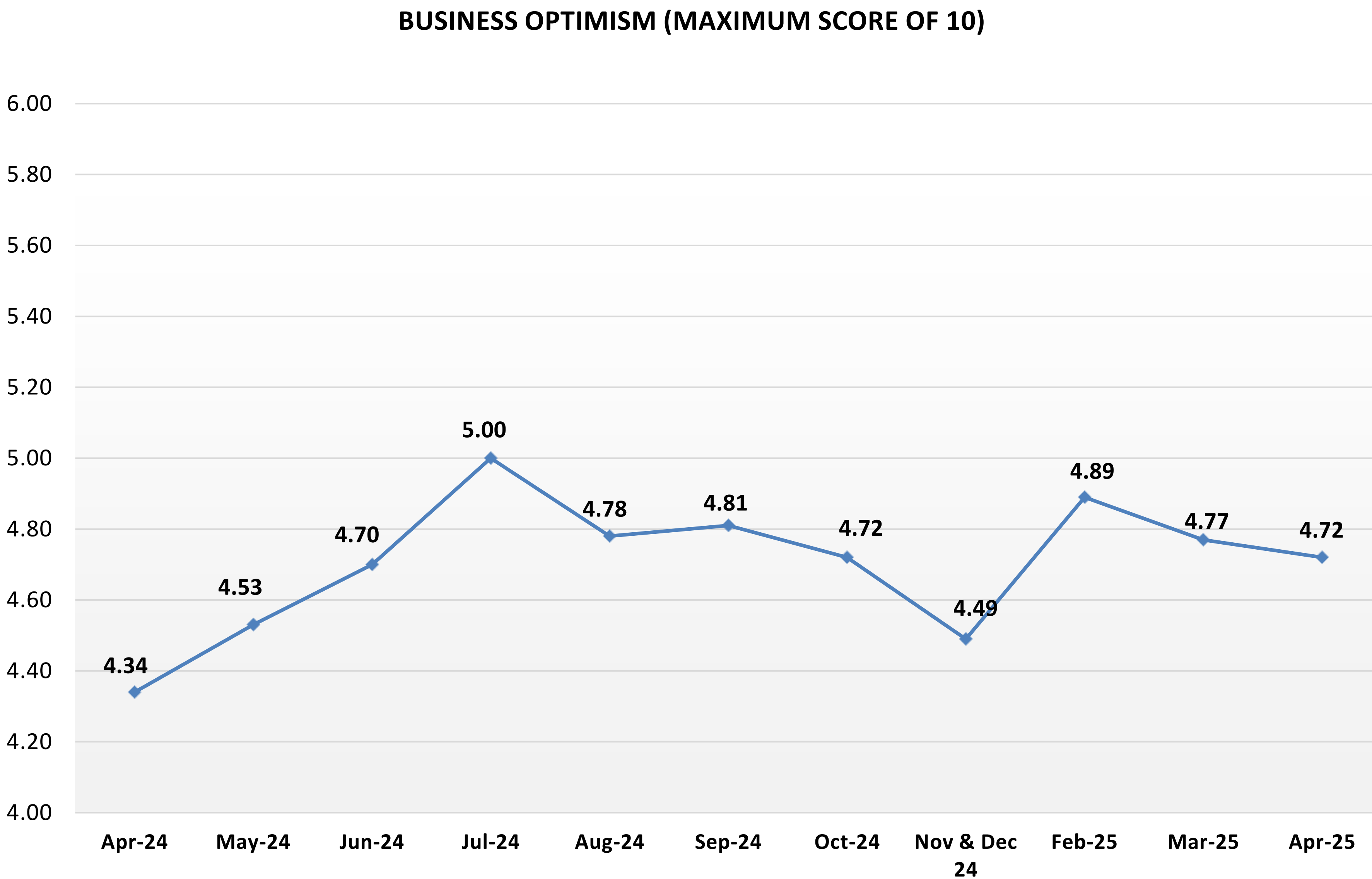


Base: 53

Top 5 business concerns (pre-defined list)



Business optimism



Key results – Sample of other comments on impacts

Bookings are very last minute this year we have less prebooked holidays for 2025 than we would expect at this time of year.

Visitor numbers definitely assisted by dry weather throughout April and the addition of the Fawlty Tours walking experience has introduced a new market.

Business is very slow, although recent weeks have seen an upturn in business at fairly short notice.

The presence of the Torquay's new Premier Inn has been a disaster for our business. We cannot compete with their changeover costs on short stays and it has simply decimated our business.
The costs of local trades also becoming unsustainable - paid £190 last week to change a tap!

March was amazing, Easter hols were good. Since Easter weekend we've been quieter than we'd like despite good weather.

I recognise that visitor numbers are probably down in Torquay, but we are doing fine. I think there is a market for the type of accommodation we offer at the realistic prices we charge. We have many repeat guests that have been coming for years. We will have had this business for 10 years in November and it's always been financially sustainable.

Our business is OK. However, terrible downturn to Paignton this year so far with some existing customers going to new large hotels as it is cheaper!

Whatever marketing you are doing is really working!!! The footfall on the seafront has increased and the spend is there too. Great start to the season.

Our business performance is going reasonably well, however, after speaking to our bank yesterday on our annual review, this is not the case for all accommodation businesses. I do not understand why our accommodations are not doing better. Torquay (where we are based) has many outstanding restaurants and bars with plenty of entertainment. There is so much to do and visit so what is stopping visitors coming?

Financially, we were marginally ahead this April compared to 2024 BUT it really wasn't enough especially since we had a late Easter. When it came to Easter itself, it was pretty dismal and we didn't get anywhere near to being at full occupancy. On top of this increasing operating costs and tax will simply wipe out that little extra we earned and we will actually be worse off than last year. May is looking better and June and July continue to fill up.

Bookings, both current and forward, remain exceptionally weak. We are into May now and are still running half full at weekends. We are only reliably full on bank holidays. Days mid-week when we are completely empty (even in May and with reasonable weather!). This is our fourth year and the bottom seems to have fallen out of the market this season, at least for hotel / B&B type bookings. Our self-catering units are doing okay but demand and supply for serviced rooms seems completely out of sync right now.

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