

ERBID How's Business Survey

April 2026



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Sample and supporting information

This month's survey has a sample of 65 businesses, representing a minimum sample of approximately 71 businesses when respondents representing multiple businesses, outlets or sites (6) 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 South West region 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 three major short-term rental platforms are tracked: Airbnb, Booking.com and Vrbo. Listings data is deduplicated when the same property is advertised on more than one platform.

From September 2025 onwards, Lighthouse has made a change to their methodology. Since November 2024, Tripadvisor has stopped supporting direct bookings for short-term rental properties, instead redirecting users to other platforms. This firstly means that some listings remained searchable but not bookable, and additionally, redirects to other platforms have created duplicates in Lighthouse's supply database. Therefore, Tripadvisor listings have been removed from all historical data, retaining only Airbnb, Booking.com and Vrbo ensures a more reliable view of the bookable short-term rental market. The occupancy data provided in this report has been updated accordingly as a result.

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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 2026

Compared to April 2025 businesses reported that:

April 2026 Visitor levels:

Increased 31% / Stayed the same 11% / Decreased 58%

Estimated actual change in visitors -5%

April 2026 Turnover levels:

Increased 30% / Stayed the same 17% / Decreased 52%

Estimated actual change in turnover -4%

May 2026 Outlook is:

Better than last year 41% / Same as last year 20% / Not as good as last year 39%

June 2026 Outlook is:

Better than last year 22% / Same as last year 24% / Not as good as last year 53%

July 2026 Outlook is:

Better than last year 20% / Same as last year 27% / Not as good as last year 53%

Optimism:

Optimism score is 4.88 out of a possible 10

April 2026 Key results

In April 2026, 58% of all businesses reported decreased visitor/customer numbers compared to April 2025, whilst 52% said the same for their turnover and most likely as a result of the timing of Easter and school holidays along with the difference in weather between the two years. The overall decreases estimated were -5% for visitors/customers and -4% for turnover compared with April 2025.

For May 2026, 61% of respondents expect their booking levels to be level or better than May 2025, whilst for June and July 53% of businesses in each case expect their booking to decrease compared with the same months last year. At 4.88 out of 10.00 the overall optimism score decreased compared to last month.

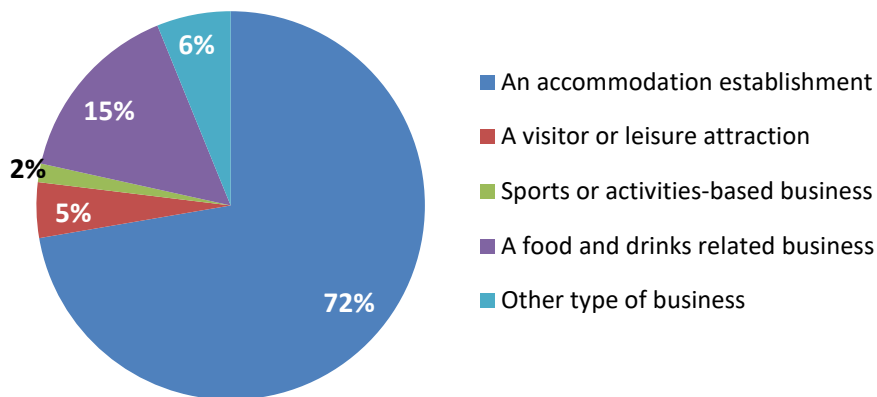
Concerns over the increases in other business costs (71%, an increase of 13% compared with last month) was the number one concern amongst businesses this month. This was followed by rising energy/fuel costs (66%, a decrease of 10% compared with last month), increases in the cost of living generally (62%, a decrease of 2% compared with last month) and decreasing visitor numbers / booking levels (60%, no change compared with last month).

Despite the ongoing challenging operating climate, some businesses did report that they have seen some good trading periods over Easter and a boost from the sunny weather conditions in May. There are also signs of resilience amongst some operators with late bookings helping to fill previously quiet periods and some businesses expecting their summer performance to match or slightly exceed last year.

Overall, however, the comments this month highlight a strongly negative outlook across the sector with businesses reporting declining demand, reduced occupancy and shorter stays coupled with rising operating costs, staffing expenses and high VAT impacting significantly on their revenue. External factors are also a major concern including government policy, as well as broader economic pressures such as the cost-of-living crisis. Additionally, businesses point to local issues impacting visitor appeal, including anti-social behaviour, cleanliness, reduced attractions and parking challenges. Overall, many respondents express serious concerns about their business viability, with some facing closures, forced sales, or questioning their ability to survive the next 12 months.

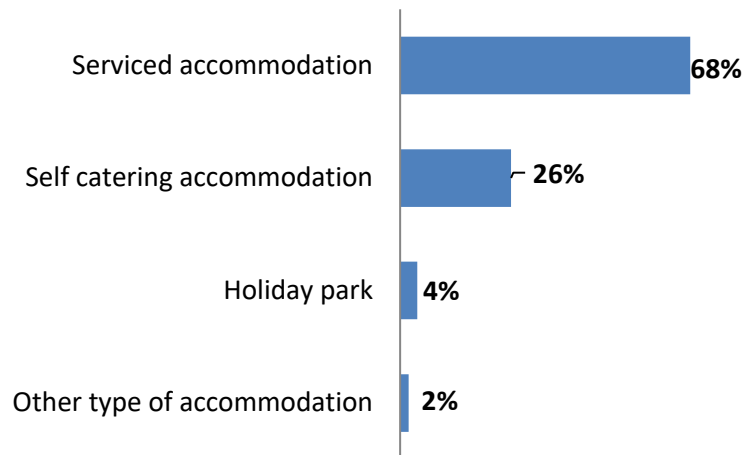
Sample profile, business location and status

BUSINESS TYPE



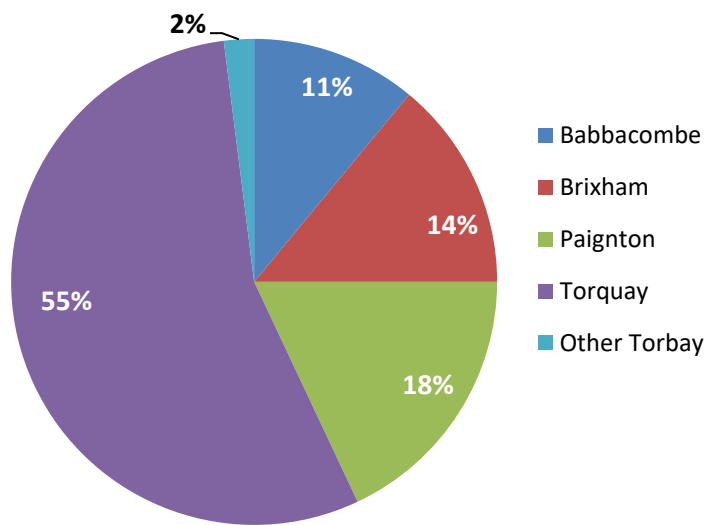
Base: 65

ACCOMMODATION TYPE



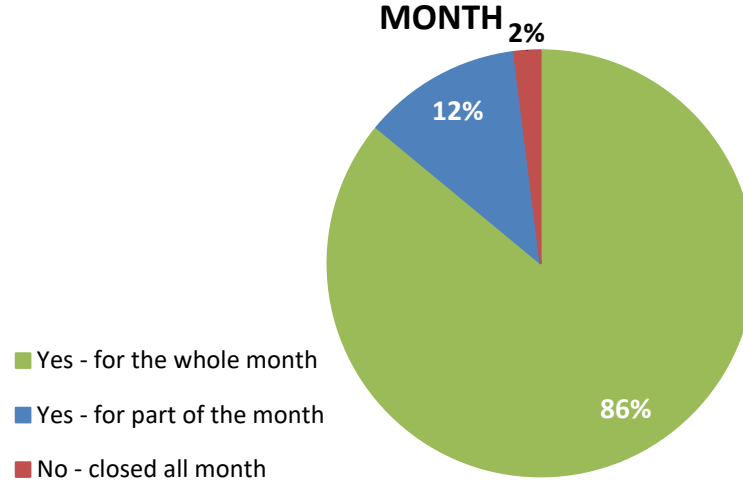
Base: 47

BUSINESS LOCATION



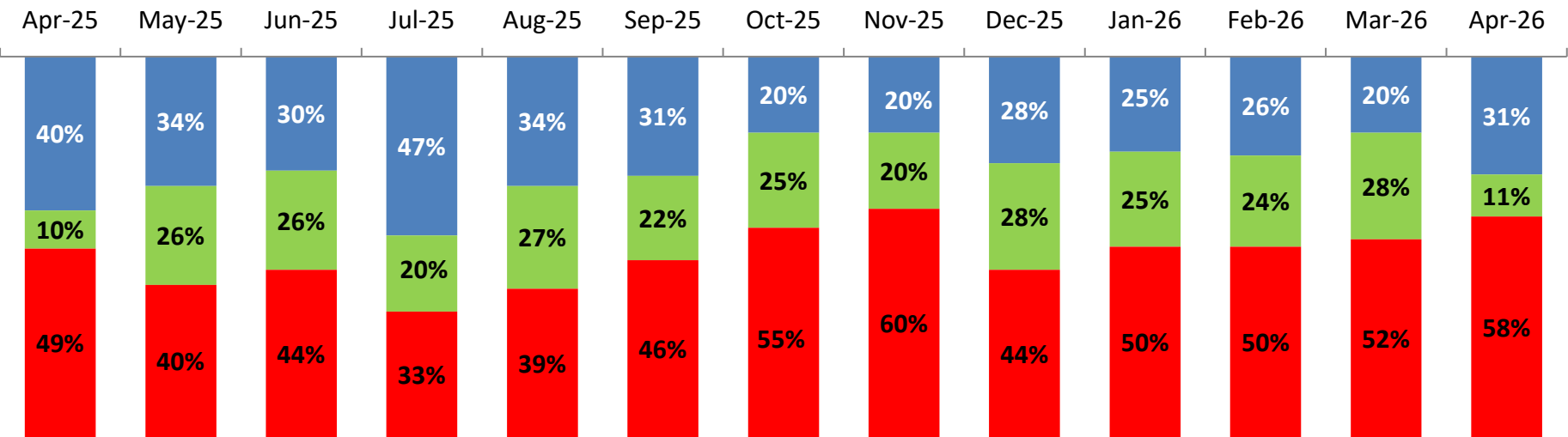
Base: 65

WHETHER OPEN FOR BUSINESS FOR THE MONTH



Base: 65

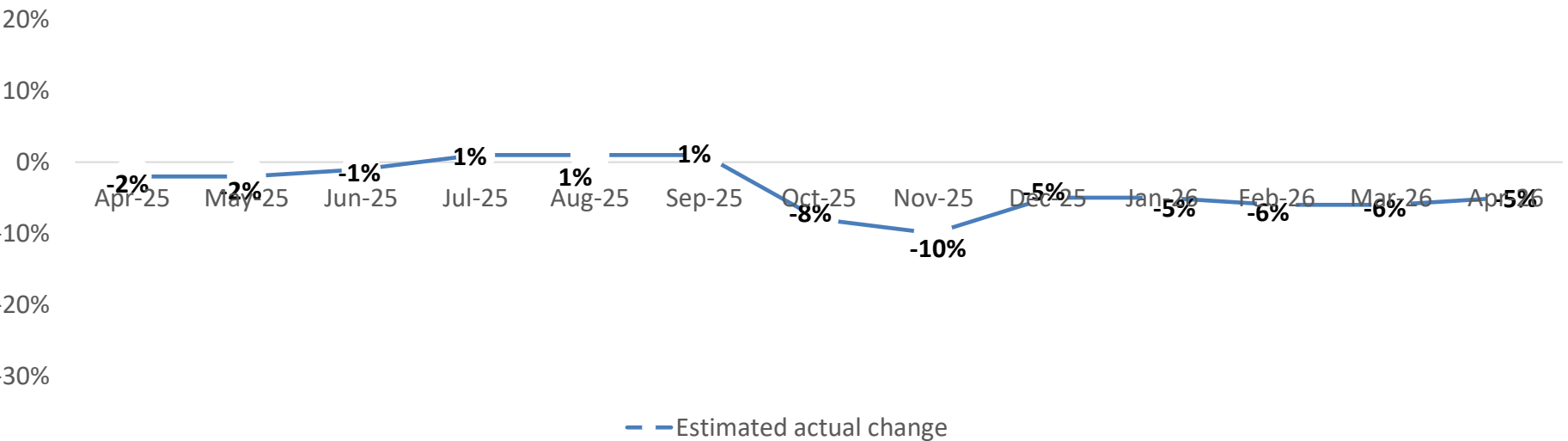
Performance – Number of visitors compared to previous year



*Small sample size – interpret with caution

■ Increased ■ Stayed the same ■ Decreased

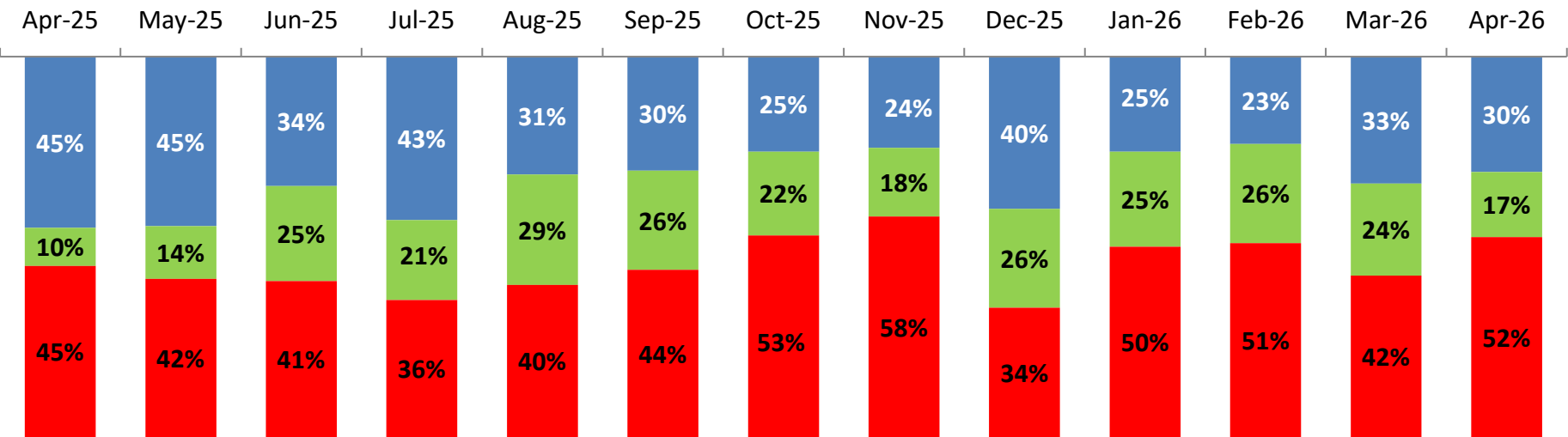
ESTIMATED ACTUAL CHANGE IN VISITORS



*Small sample size – interpret with caution

— Estimated actual change

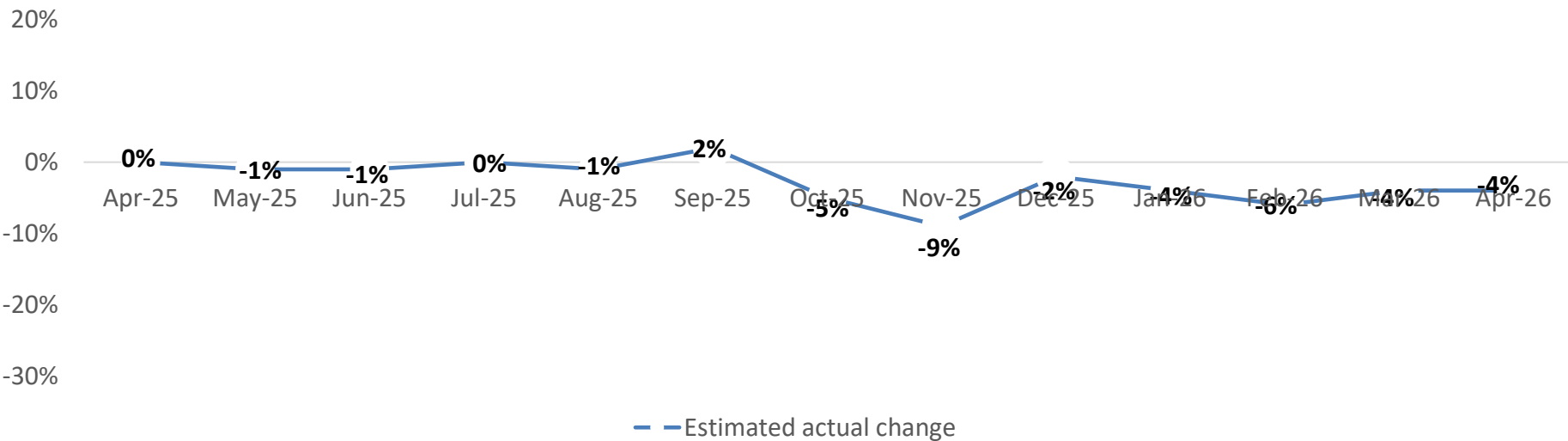
Performance – Turnover compared to previous year



*Small sample size – interpret with caution

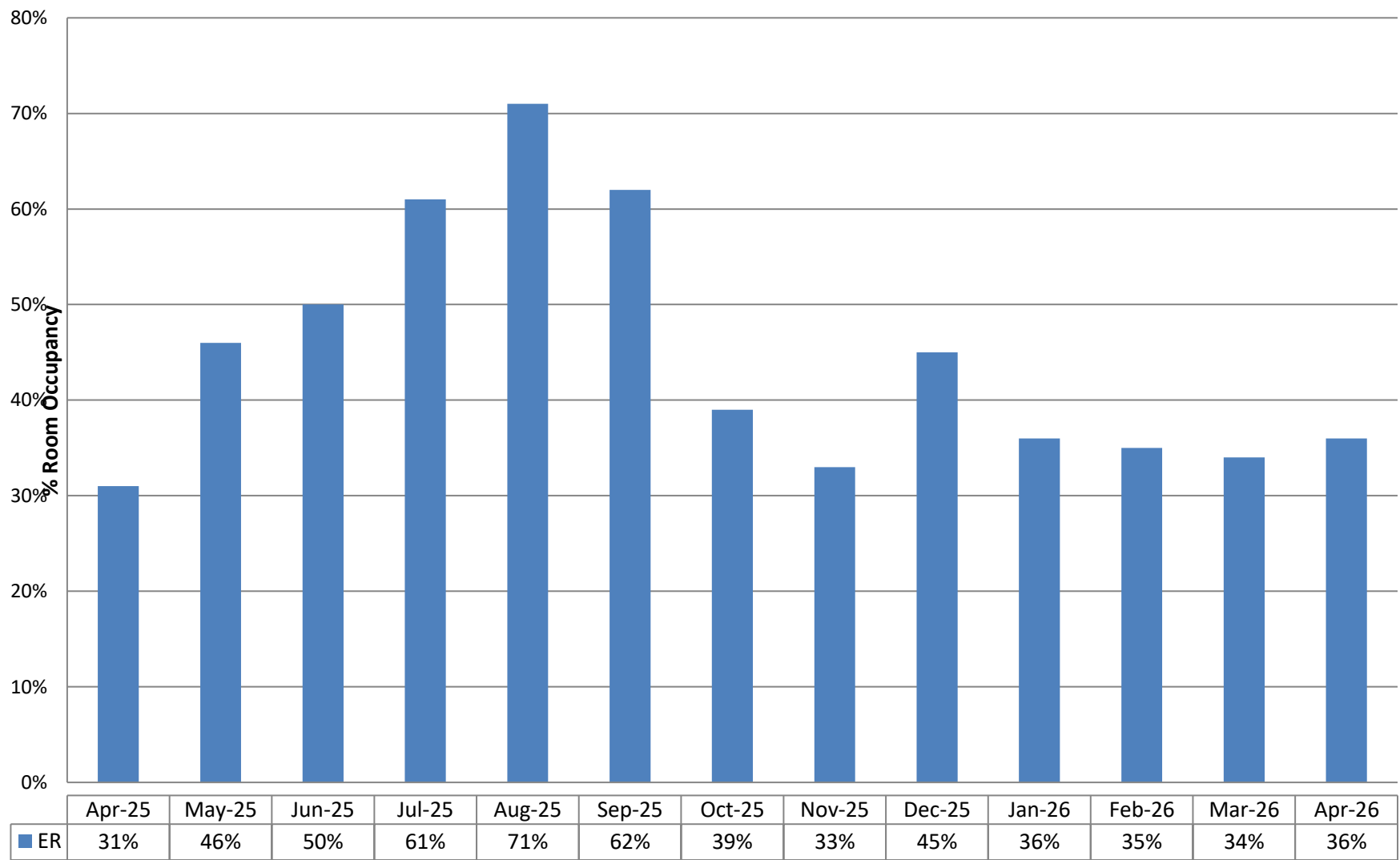
■ Increased ■ Stayed the same ■ Decreased

ESTIMATED ACTUAL CHANGE IN TURNOVER



*Small sample size – interpret with caution

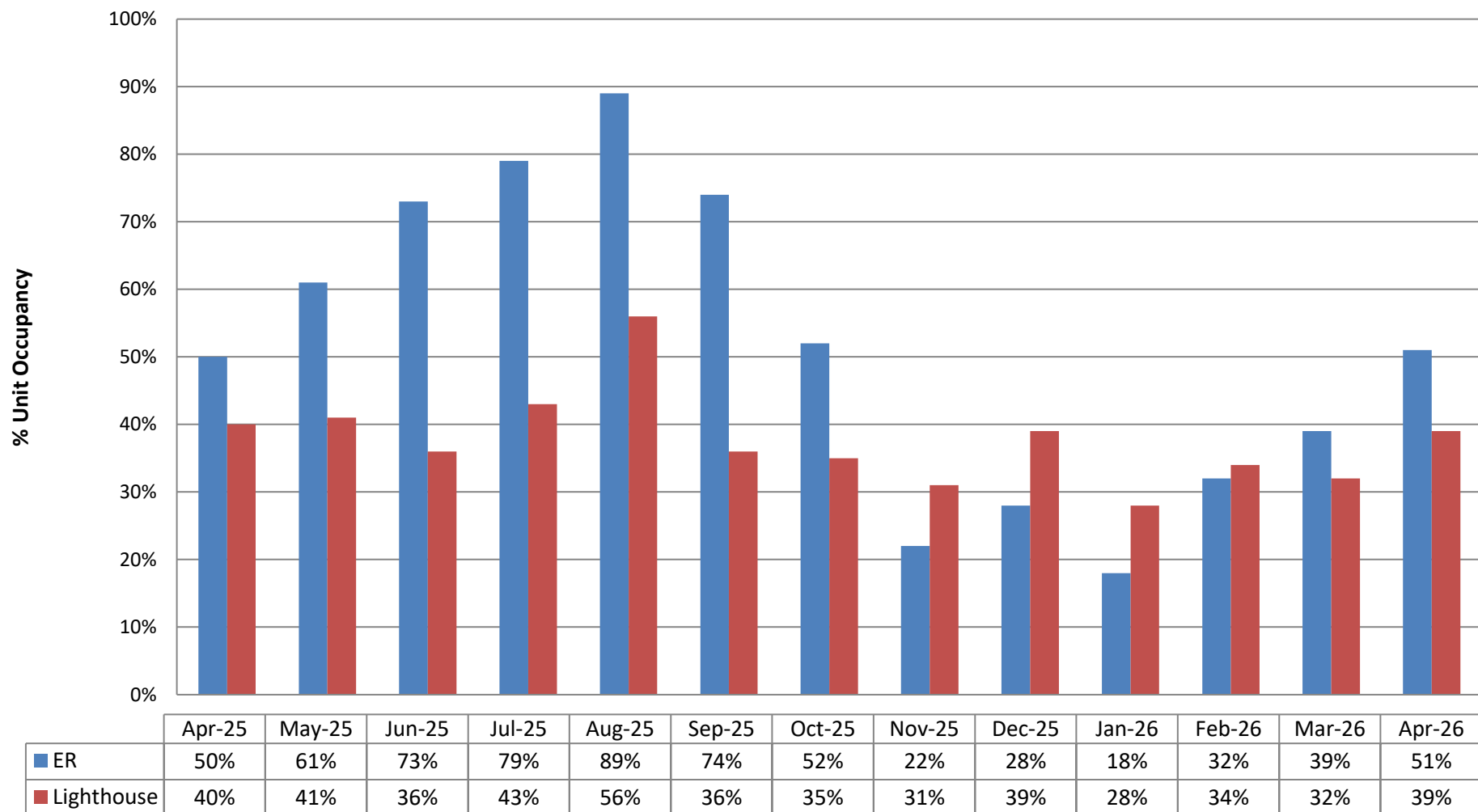
Performance – Serviced Room Occupancy



*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



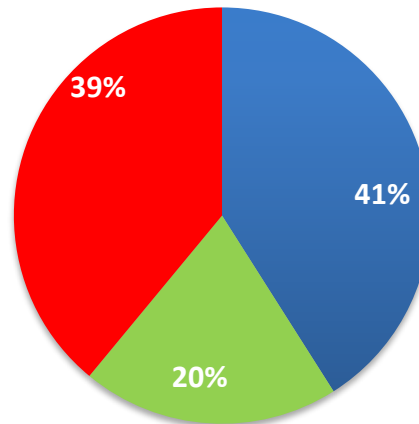
***Small sample size – interpret with caution**

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

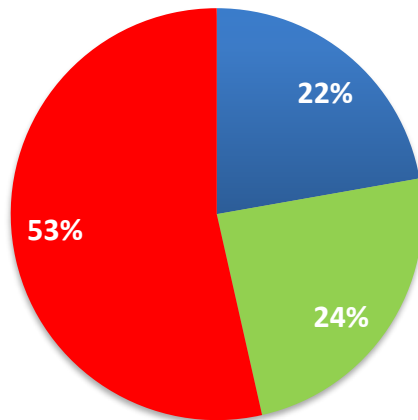
MAY 2026



■ Better than last year ■ Same as last year
■ Not as good as last year

Base: 46

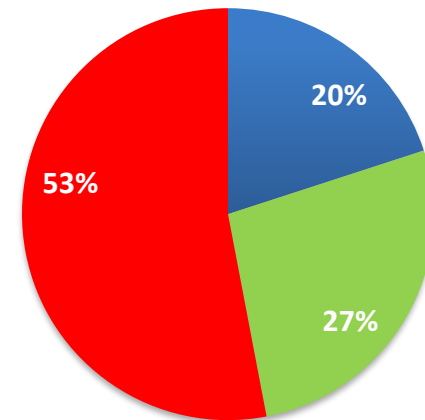
JUNE 2026



■ Better than last year ■ Same as last year
■ Not as good as last year

Base: 45

JULY 2026

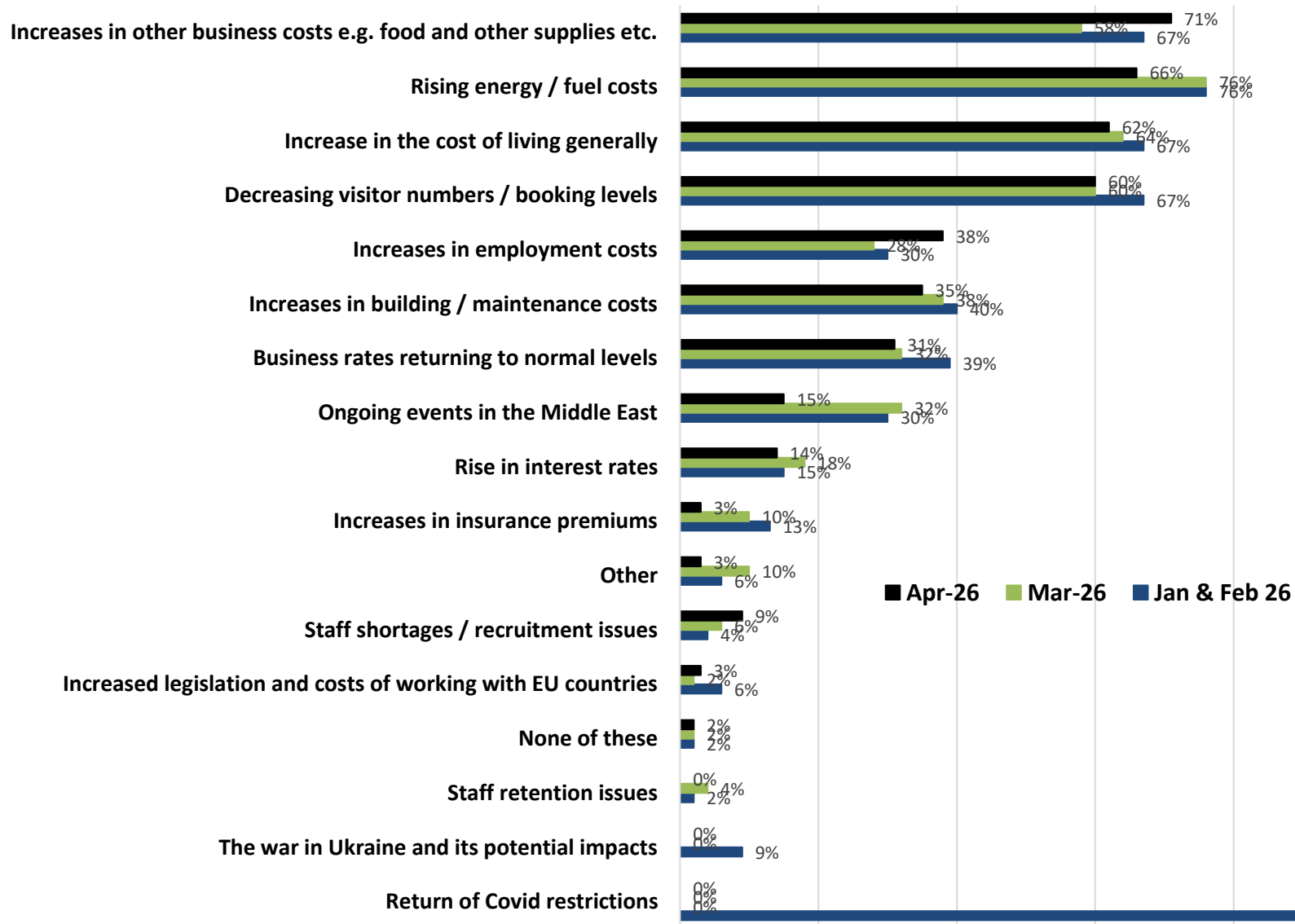


■ Better than last year ■ Same as last year
■ Not as good as last year

Base: 45

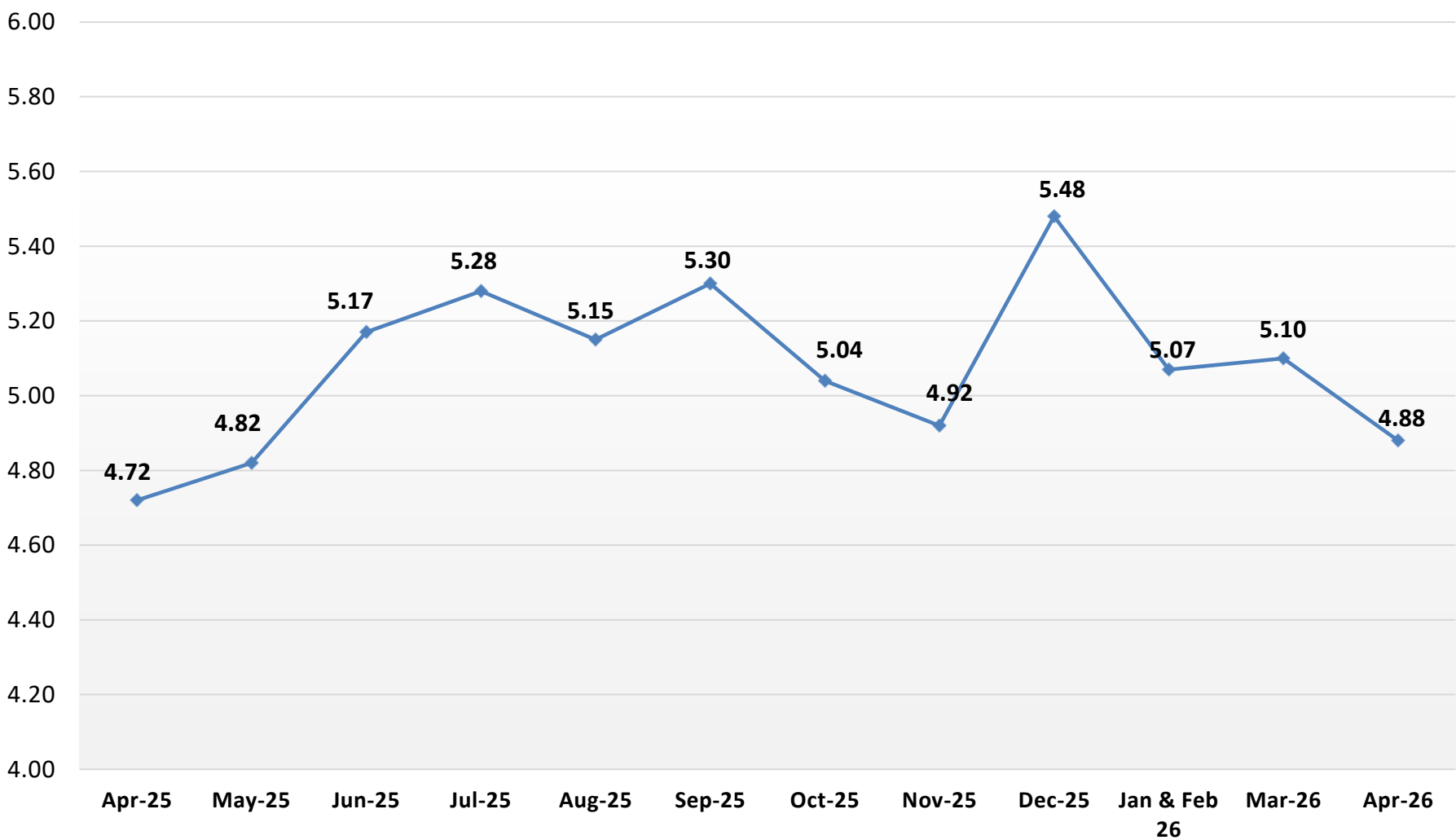
Top 5 business concerns (pre-defined list)

TOP 5 MOST CONCERNING FACTORS FOR BUSINESSES IN THE COMING MONTHS



Business optimism

BUSINESS OPTIMISM (MAXIMUM SCORE OF 10)



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