

ERBID How's Business Survey

August 2026

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October 2026



Sample and supporting information

This month's survey has a sample of 58 businesses, representing a minimum sample of approximately 79 businesses when self-catering agency properties (10) and respondents representing multiple businesses, outlets or sites (11) 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. Furthermore, in August 2026, Lighthouse has updated the methodology used to de-duplicate properties listed across multiple platforms in order to provide a more accurate view of short-term rental supply. In that month, VisitEngland/VisitBritain also revised the methodology used to calculate occupancy rates to provide a more representative measure of market performance and, as a result, at the time of writing this report the August 2026 data has not yet been published.

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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 – August 2026

Compared to August 2025 businesses reported that:

August 2026 Visitor levels:

Increased 37% / Stayed the same 30% / Decreased 33%

Estimated actual change in visitors +3%

August 2026 Turnover levels:

Increased 49% / Stayed the same 28% / Decreased 23%

Estimated actual change in turnover +4%

September 2026 Outlook is:

Better than last year 31% / Same as last year 36% / Not as good as last year 33%

October 2026 Outlook is:

Better than last year 10% / Same as last year 26% / Not as good as last year 65%

October half-term 2026 Outlook is:

Better than last year 20% / Same as last year 32% / Not as good as last year 48%

Optimism:

Optimism score is 6.14 out of a possible 10

August 2026 Key results

In August 2026, 67% of all businesses in each case reported increased (37%) or level (30%) visitor/customer numbers compared to August 2025 whilst 77% said the same about their turnover (49% increased and 28% level). The overall increase in visitors/customers was estimated at +3% and for turnover it was +4% compared with August 2025 and another good performance this month after the best performance seen in the last 12 months for July 2026.

For September 2026, 67% of businesses expect their bookings to be better than or level with 2025, as do 52% for October half term week, whilst for the month of October as a whole the majority of businesses (65%) expect their bookings to not be as good as October 2025. At 6.14 out of 10.00 the overall optimism score decreased slightly compared to last month (6.34) but remained at the second highest level in the last 12 months.

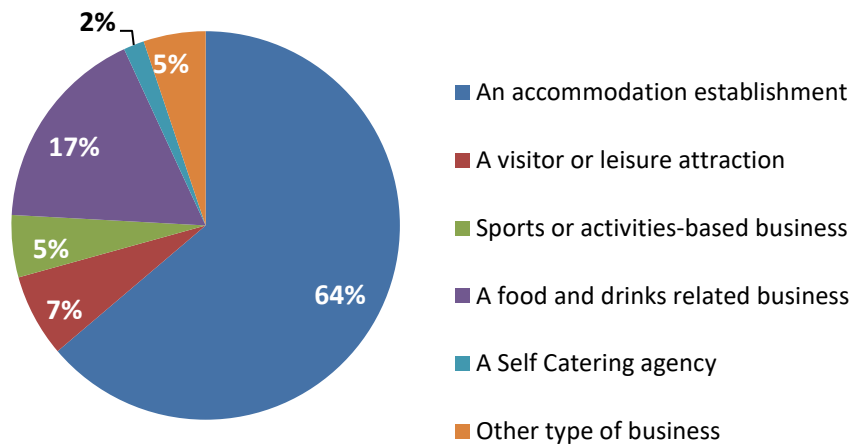
Concerns over the increase in the cost of living generally (66%, same as last month), was once again the number one concern amongst businesses this month. This was followed by rising energy/fuel costs (66%, an increase of 2% compared with last month) increases in other business costs (57%, an increase of 4% compared with last month) and decreasing visitor numbers / booking levels (52%, an increase of 5% compared with last month).

On the positive, some of the feedback received from businesses this month highlights their resilience with many reporting a strong summer season aided by the good weather, healthy visitor demand and an increase in last-minute bookings. Several businesses described 2026 as their best year yet, supported by strong occupancy levels, rising repeat business, positive guest reviews and growing numbers of direct bookings. Looking ahead, many businesses report forward bookings and optimism for the year ahead.

The main challenges highlighted by businesses centred on weaker consumer confidence, rising operating costs and increased pressure on visitor spending. Many operators reported trading below last year's levels, particularly outside the peak summer season, with concerns around shorter booking lead times making forecasting and pricing more difficult. Some also raised concerns about the condition and perception of the town centres, including anti-social behaviour, homelessness and vacant shops, which were felt to impact the visitor experience.

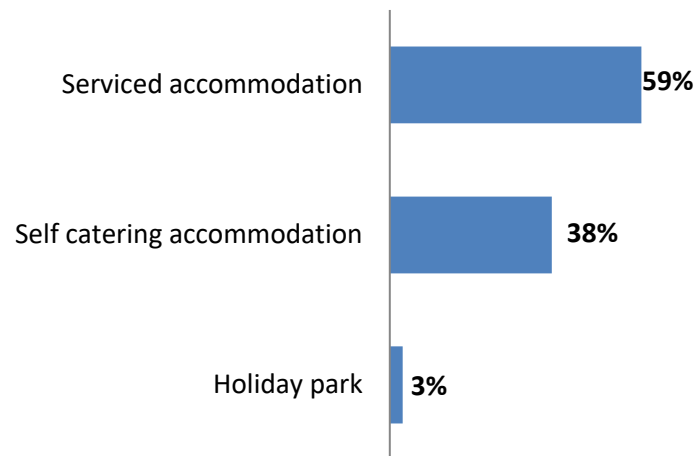
Sample profile, business location and status

BUSINESS TYPE



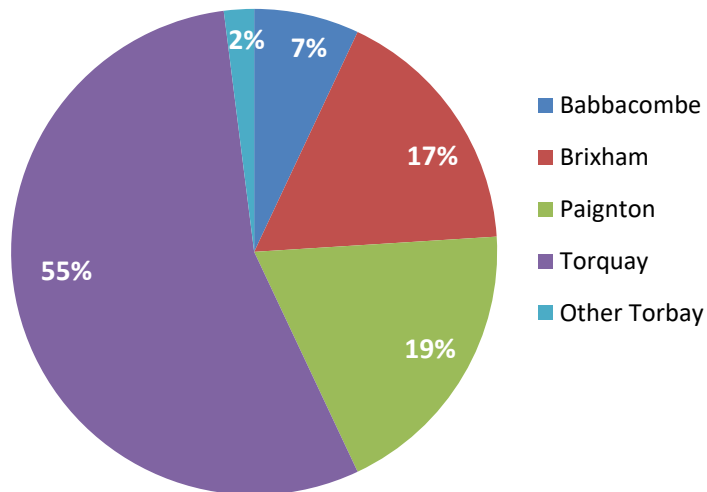
Base: 58

ACCOMMODATION TYPE



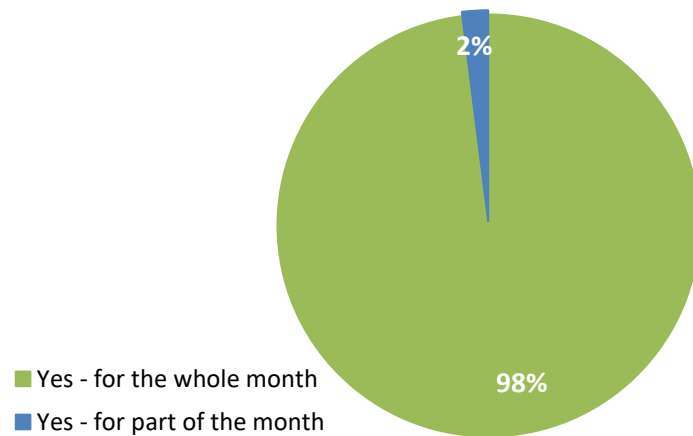
Base: 37

BUSINESS LOCATION



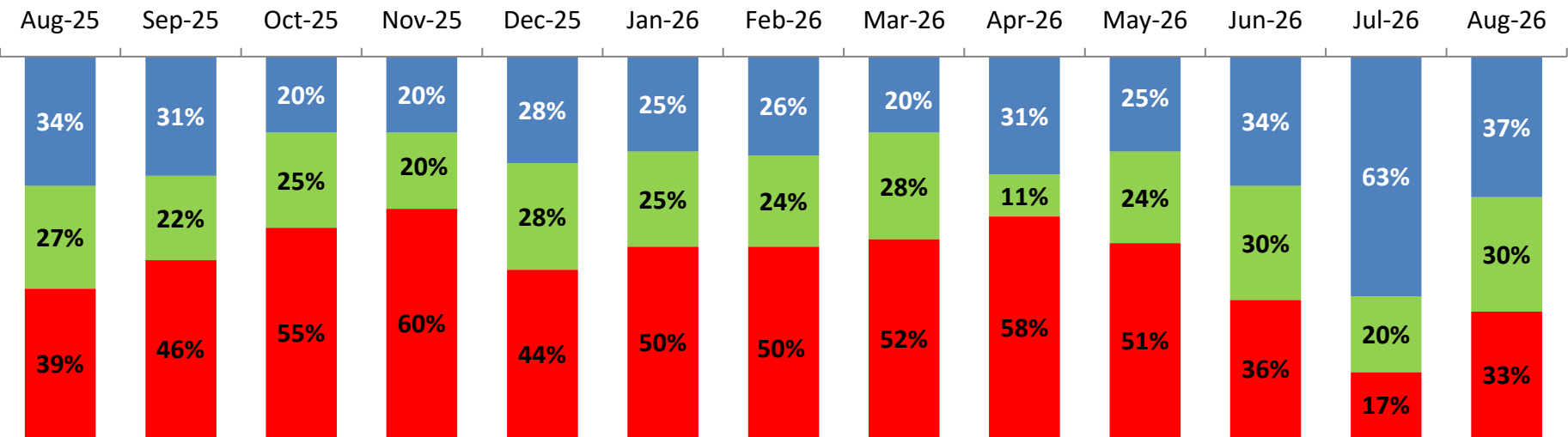
Base: 58

WHETHER OPEN FOR BUSINESS FOR THE MONTH



Base: 58

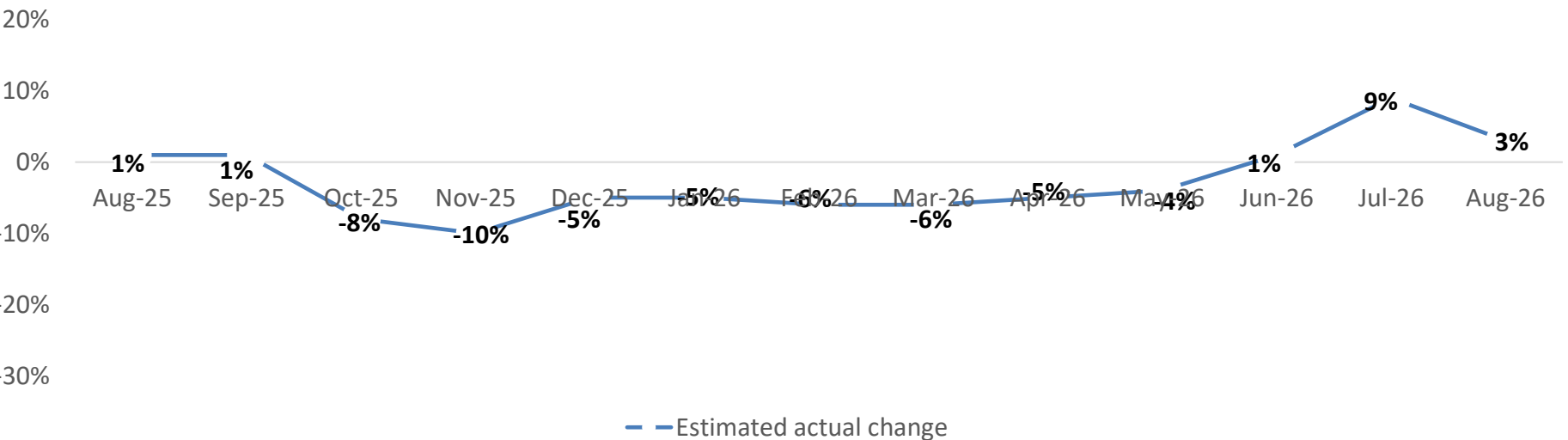
Performance – Number of visitors compared to previous year



*Small sample size – interpret with caution

■ Increased ■ Stayed the same ■ Decreased

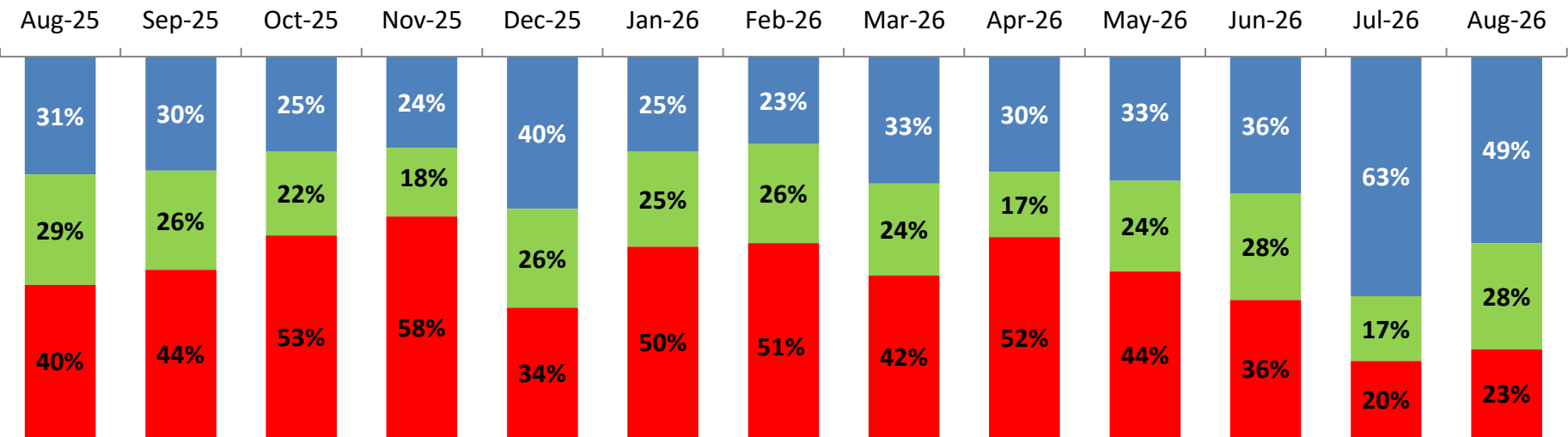
ESTIMATED ACTUAL CHANGE IN VISITORS



*Small sample size – interpret with caution

— Estimated actual change

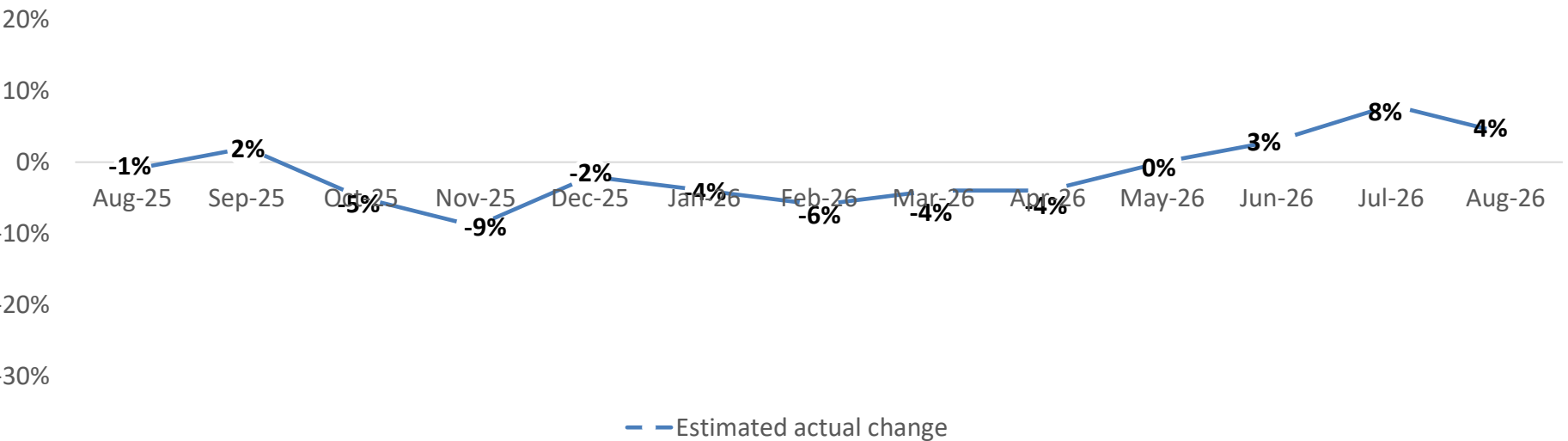
Performance – Turnover compared to previous year



*Small sample size – interpret with caution

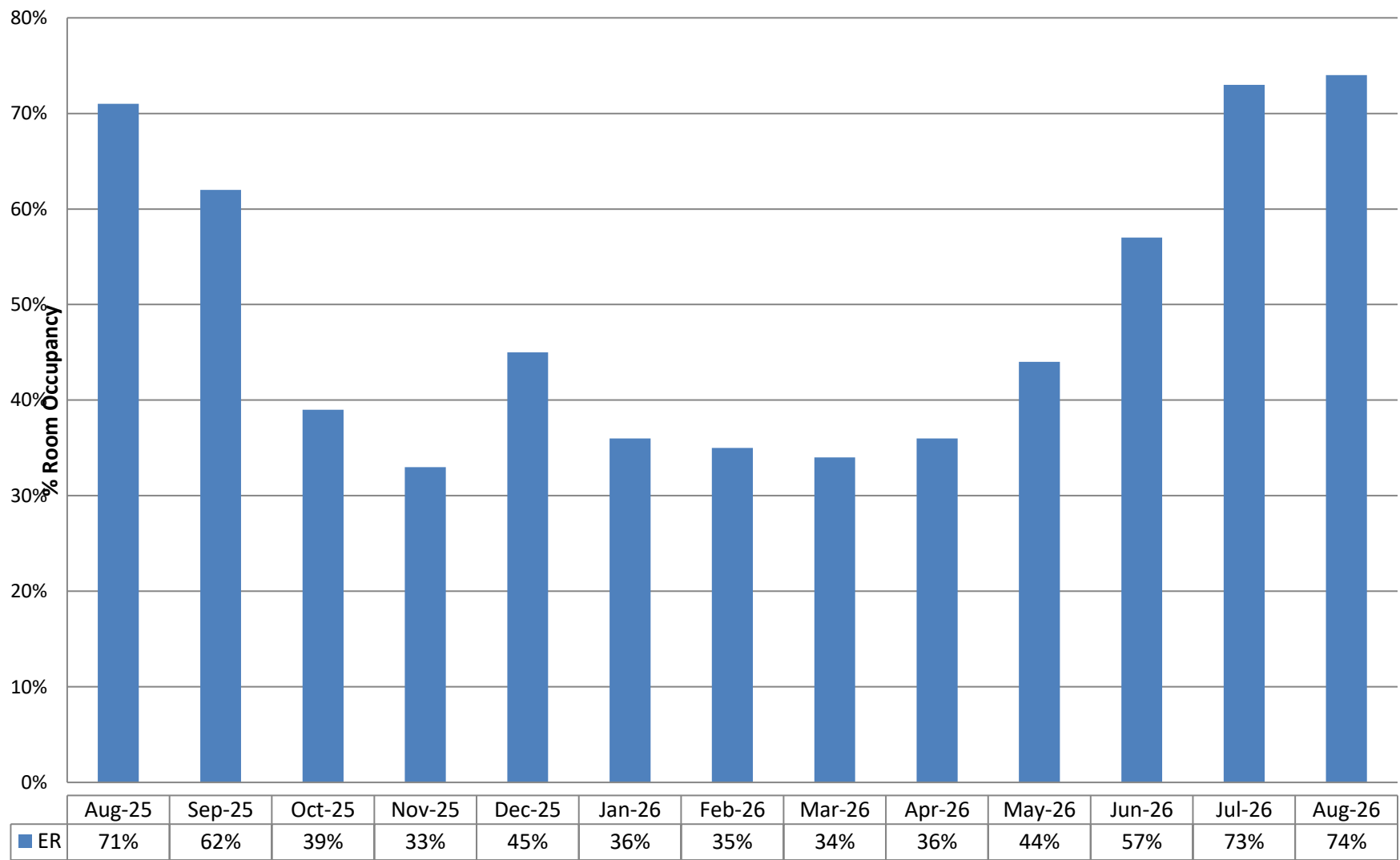
■ Increased ■ Stayed the same ■ Decreased

ESTIMATED ACTUAL CHANGE IN TURNOVER



*Small sample size – interpret with caution

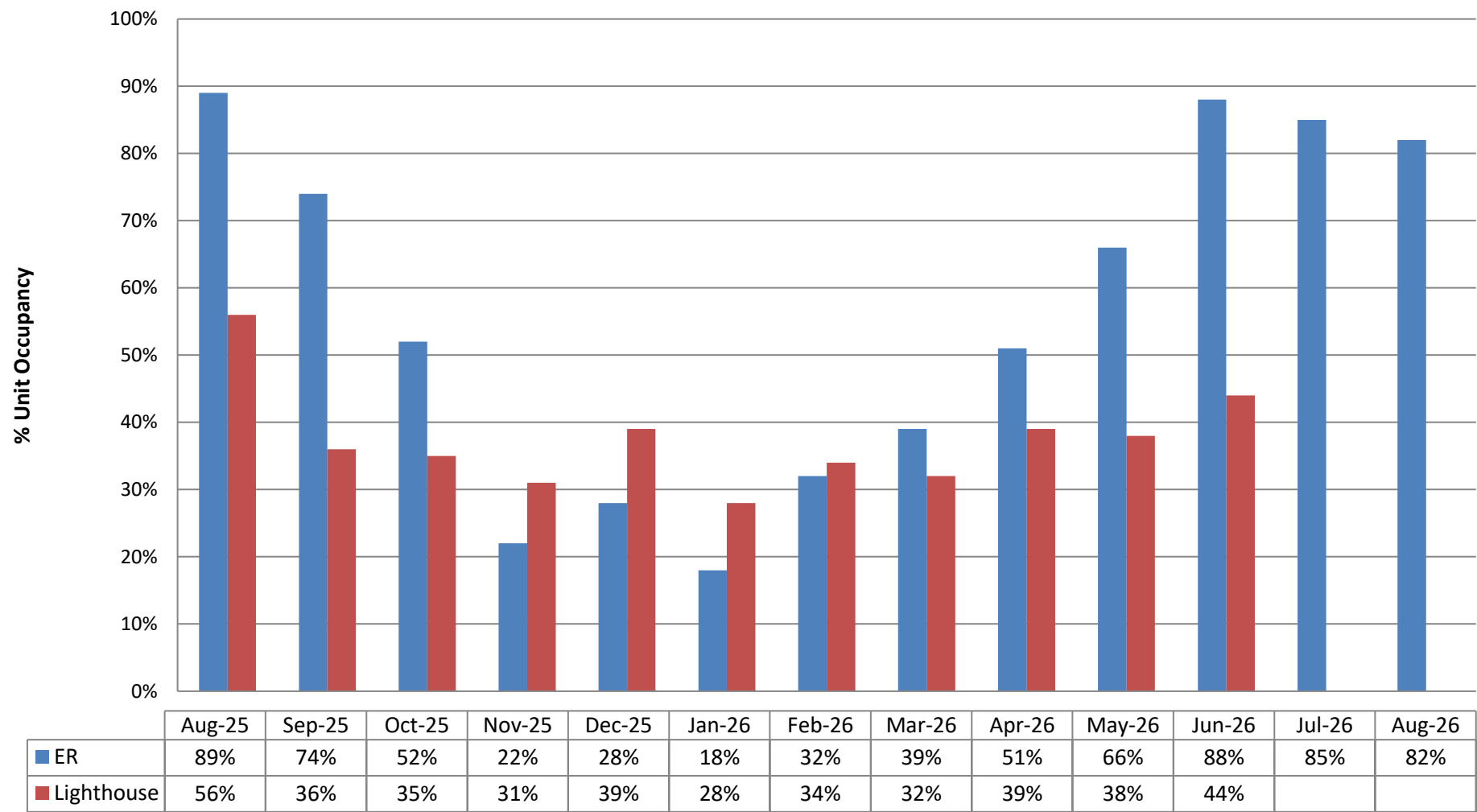
Performance – Serviced Room Occupancy



*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



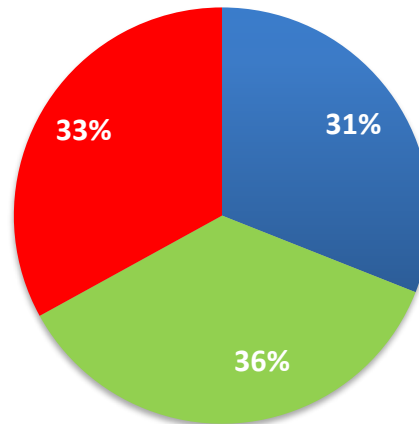
***Small sample size – interpret with caution**

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. Please note that at the time of writing this report the July and August 2026 Lighthouse data is not yet available.

Outlook – Based upon forward booking levels

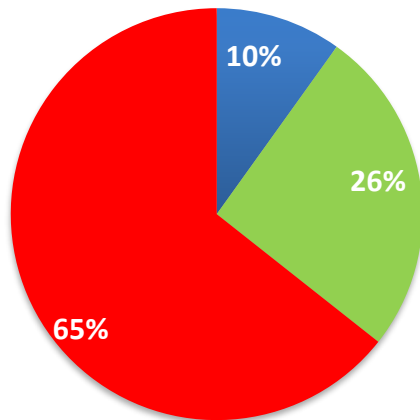
SEPTEMBER 2026



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

Base: 36

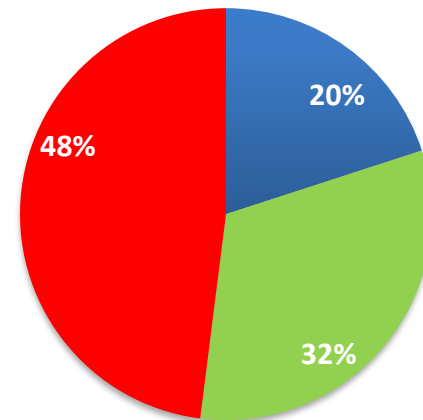
OCTOBER 2026



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

Base: 31

OCTOBER HALF-TERM 2026

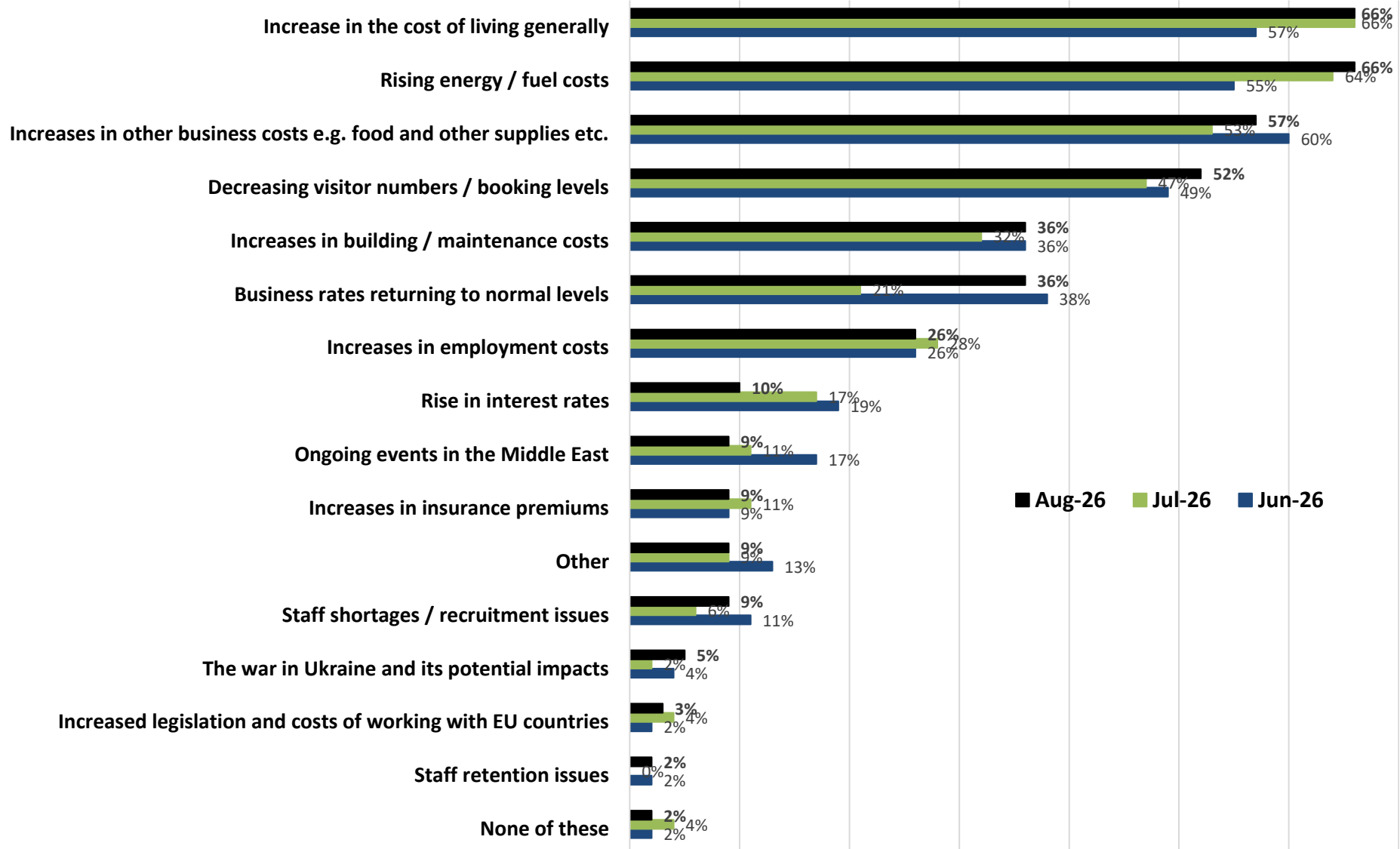


■ Better than last year ■ Same as last year
■ Not as good as last year

Base: 25

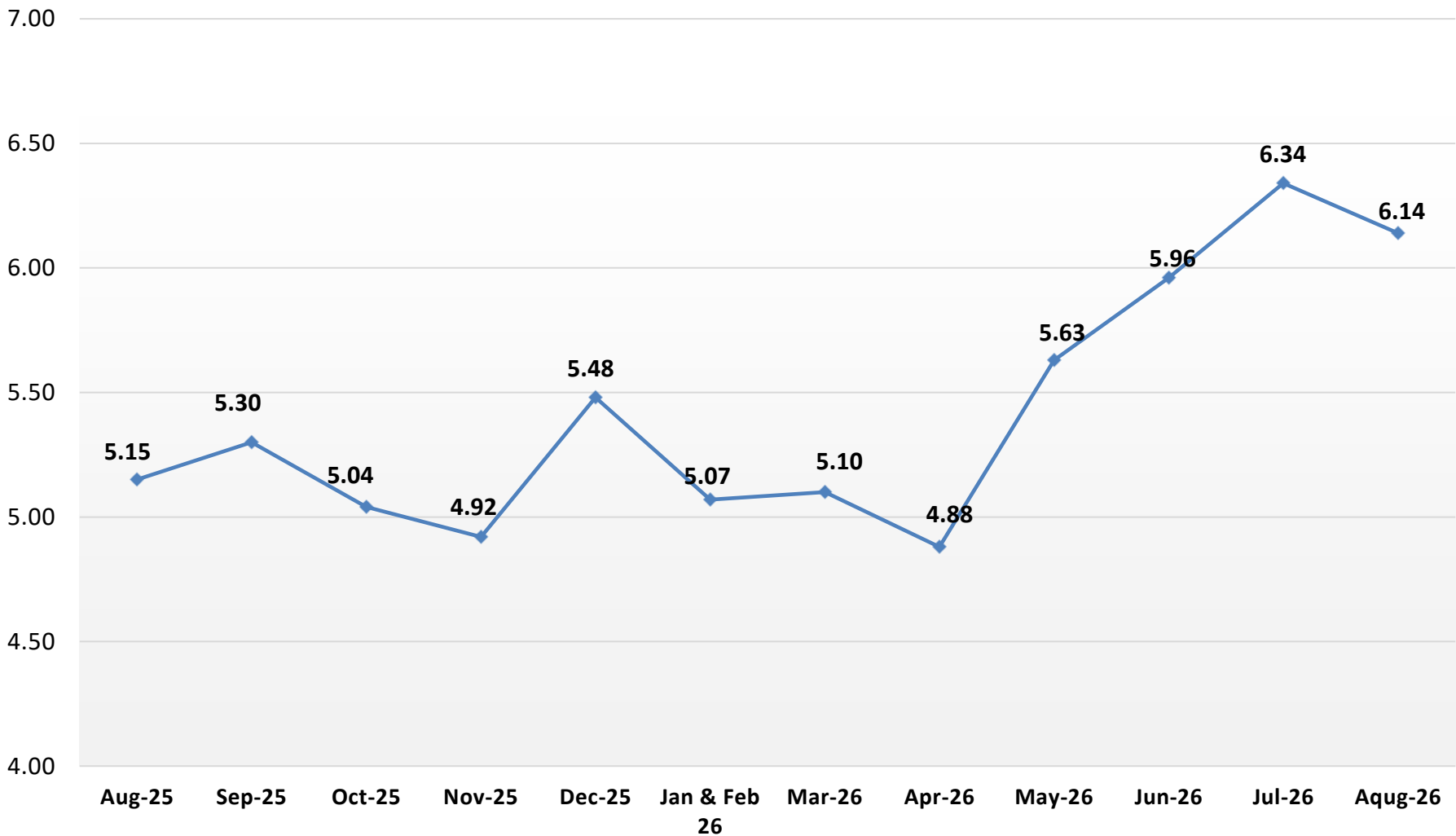
Top 5 business concerns (pre-defined list)

TOP 5 MOST CONCERNING FACTORS FOR BUSINESSES IN THE COMING MONTHS



Business optimism

BUSINESS OPTIMISM (MAXIMUM SCORE OF 10)



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August 2026

