

ERBID How's Business Survey

July 2026

Published by The South West Research Company Ltd

September 2026



Sample and supporting information

This month's survey has a sample of 47 businesses, representing a minimum sample of approximately 60 businesses when self-catering agency properties (9) and respondents representing multiple businesses, outlets or sites (4) 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 July 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 July 2026 data has not yet been published.

The content of this document is researched, verified and provided exclusively by the South West Research Company Ltd. and is for general use only and is not intended to amount to advice on which you should rely. The South West Research Company do not accept any liability for any loss or damage arising from the use of, or reliance on the information.

* 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 – July 2026

Compared to July 2025 businesses reported that:

July 2026 Visitor levels:

Increased 63% / Stayed the same 20% / Decreased 17%

Estimated actual change in visitors +9%

July 2026 Turnover levels:

Increased 63% / Stayed the same 17% / Decreased 20%

Estimated actual change in turnover +8%

August 2026 Outlook is:

Better than last year 38% / Same as last year 35% / Not as good as last year 26%

September 2026 Outlook is:

Better than last year 34% / Same as last year 28% / Not as good as last year 38%

October 2026 Outlook is:

Better than last year 15% / Same as last year 27% / Not as good as last year 58%

Optimism:

Optimism score is 6.34 out of a possible 10

July 2026 Key results

In July 2026, 63% of all businesses in each case reported increased visitor/customer numbers and turnover compared to July 2025. The overall increase in visitors/customers was estimated at +9% and for turnover it was +8% compared with July 2025 – by far the best performance seen in the last 12 months.

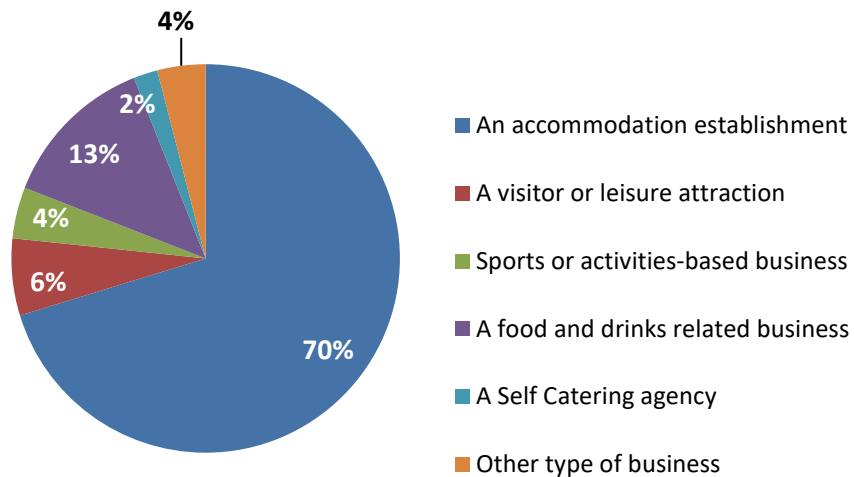
For August 2026, 73% of respondents expect their booking levels to be better or level than the same period in 2025, whilst 62% said the same for their September 2026 bookings. For October 2026 however, 58% of businesses expect their bookings to decrease compared with the same month/period last year. At 6.34 out of 10.00 the overall optimism score increased compared to last month (5.96) and was at its highest level in the last 12 months.

Concerns over the increase in the cost of living generally (66%, an increase of 9% compared with last month), was the number one concern amongst businesses this month. This was followed by rising energy/fuel costs (64%, an increase of 9% compared with last month) increases in other business costs (53%, a decrease of 7% compared with last month), decreasing visitor numbers / booking levels (47%, a decrease of 2% compared with last month) and increases in building/maintenance costs (32%, an increase of 4% compared with last month).

Businesses comments this month highlighted a number of positive trends, including a strong recovery in trading levels during the month driven by the excellent weather, increased staycation demand, returning guests, positive reviews, rising booking levels compared with last year and growing forward bookings for next year. Several businesses reported their best occupancy levels since 2021, strong overall visitor numbers and higher demand from first-time and international visitors with some guests even extending their stays after discovering the destination. Overall, there was a sense that the summer season has provided a much-needed boost to confidence and revenues after a difficult start to the year.

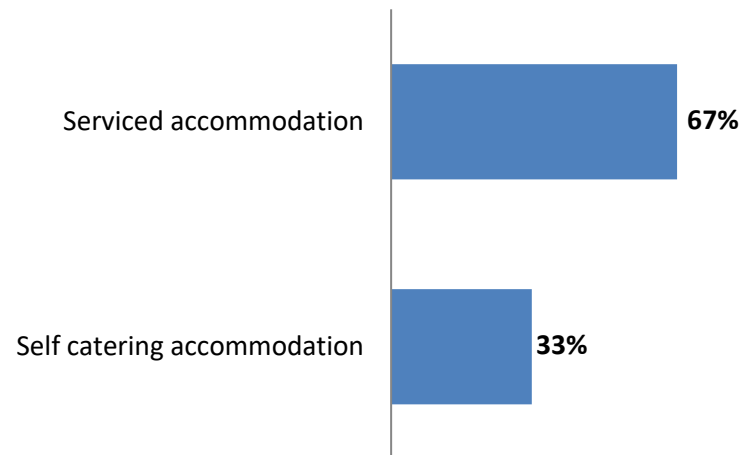
Sample profile, business location and status

BUSINESS TYPE



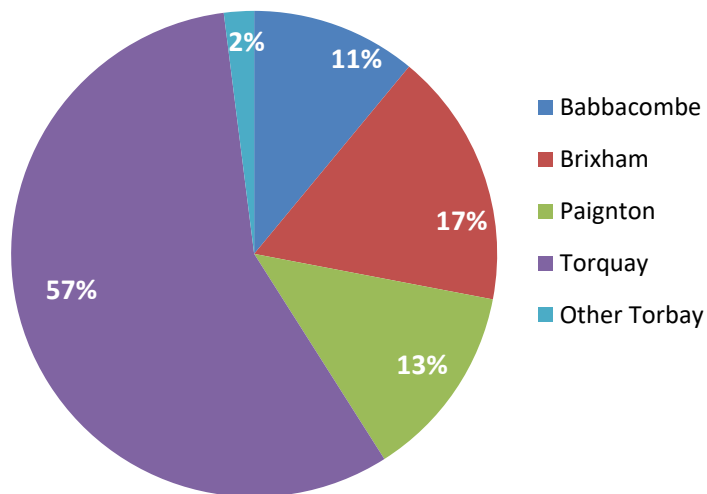
Base: 47

ACCOMMODATION TYPE



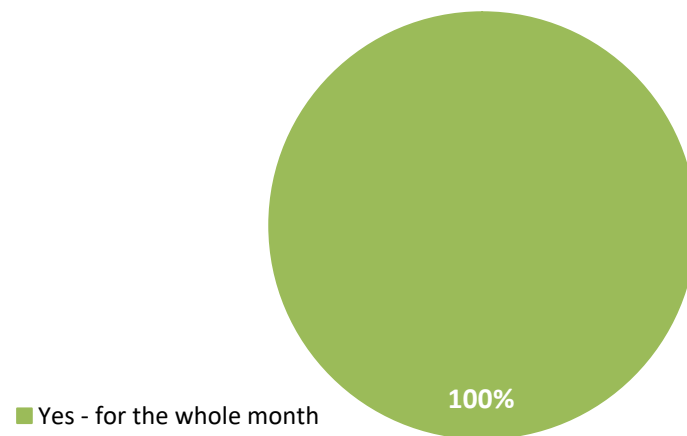
Base: 33

BUSINESS LOCATION



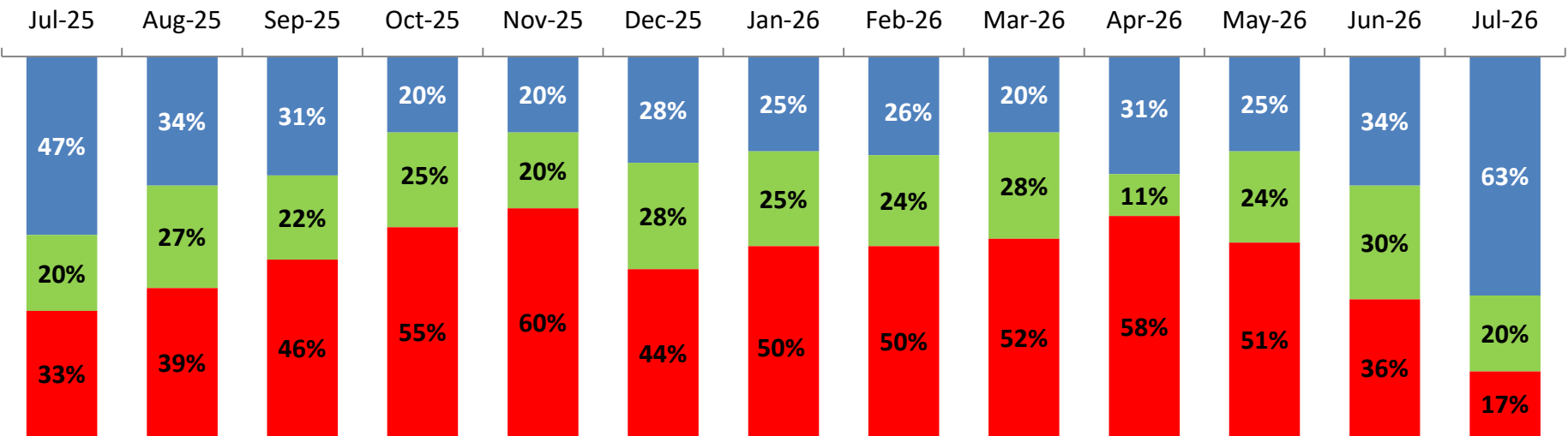
Base: 47

WHETHER OPEN FOR BUSINESS FOR THE MONTH



Base: 47

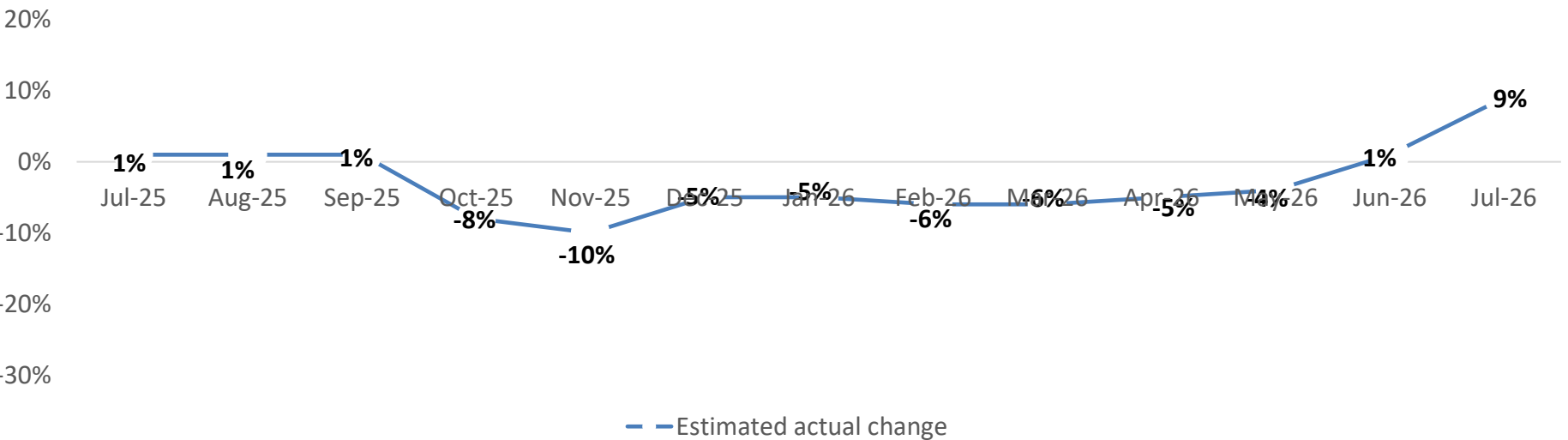
Performance – Number of visitors compared to previous year



*Small sample size – interpret with caution

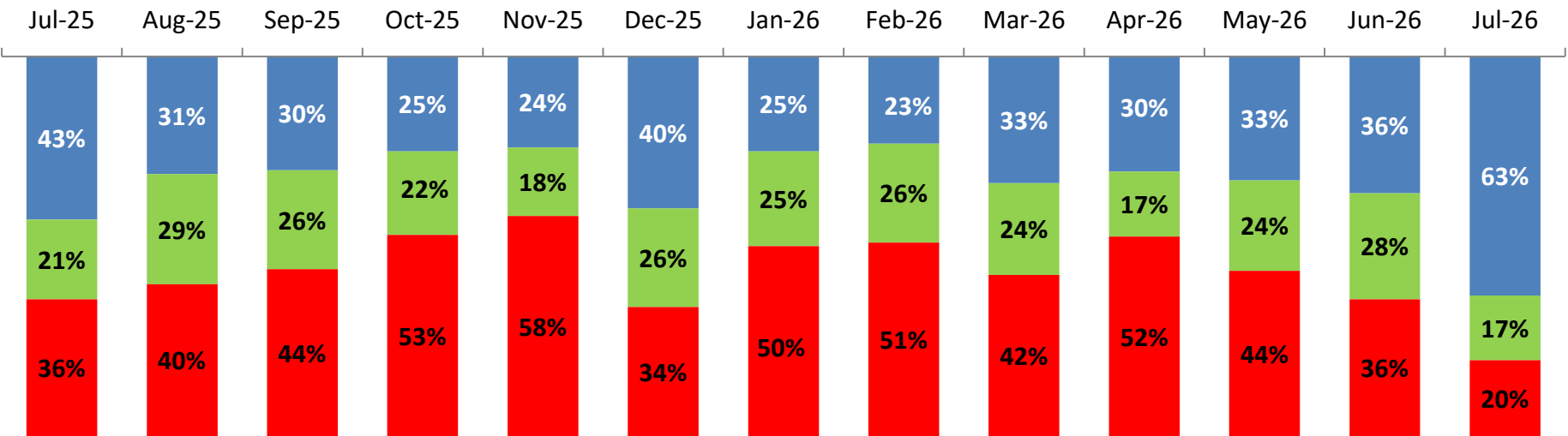
■ Increased ■ Stayed the same ■ Decreased

ESTIMATED ACTUAL CHANGE IN VISITORS



*Small sample size – interpret with caution

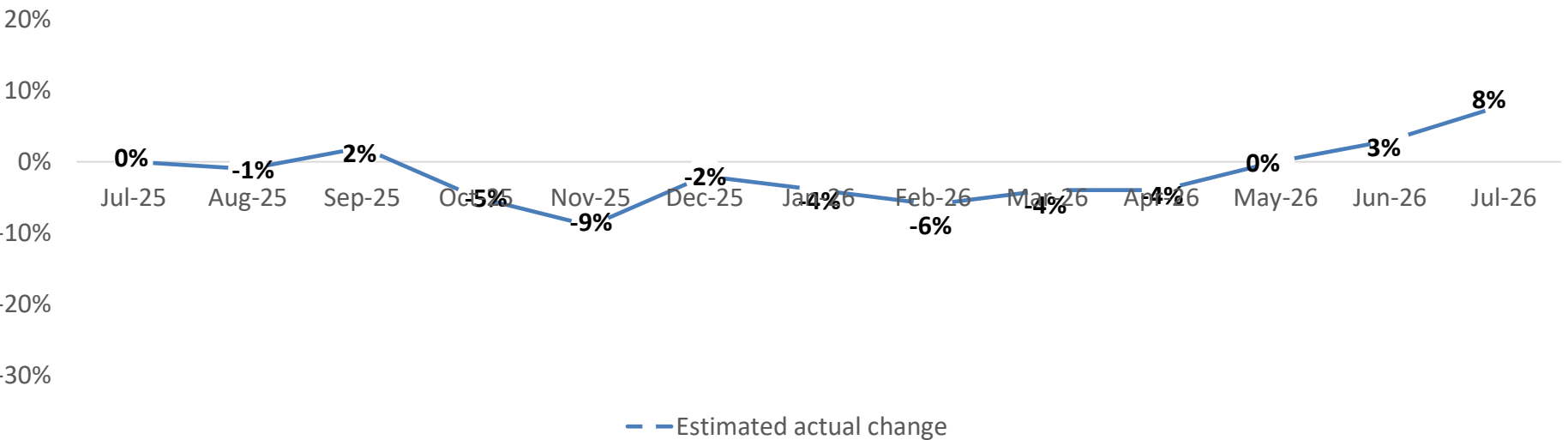
Performance – Turnover compared to previous year



*Small sample size – interpret with caution

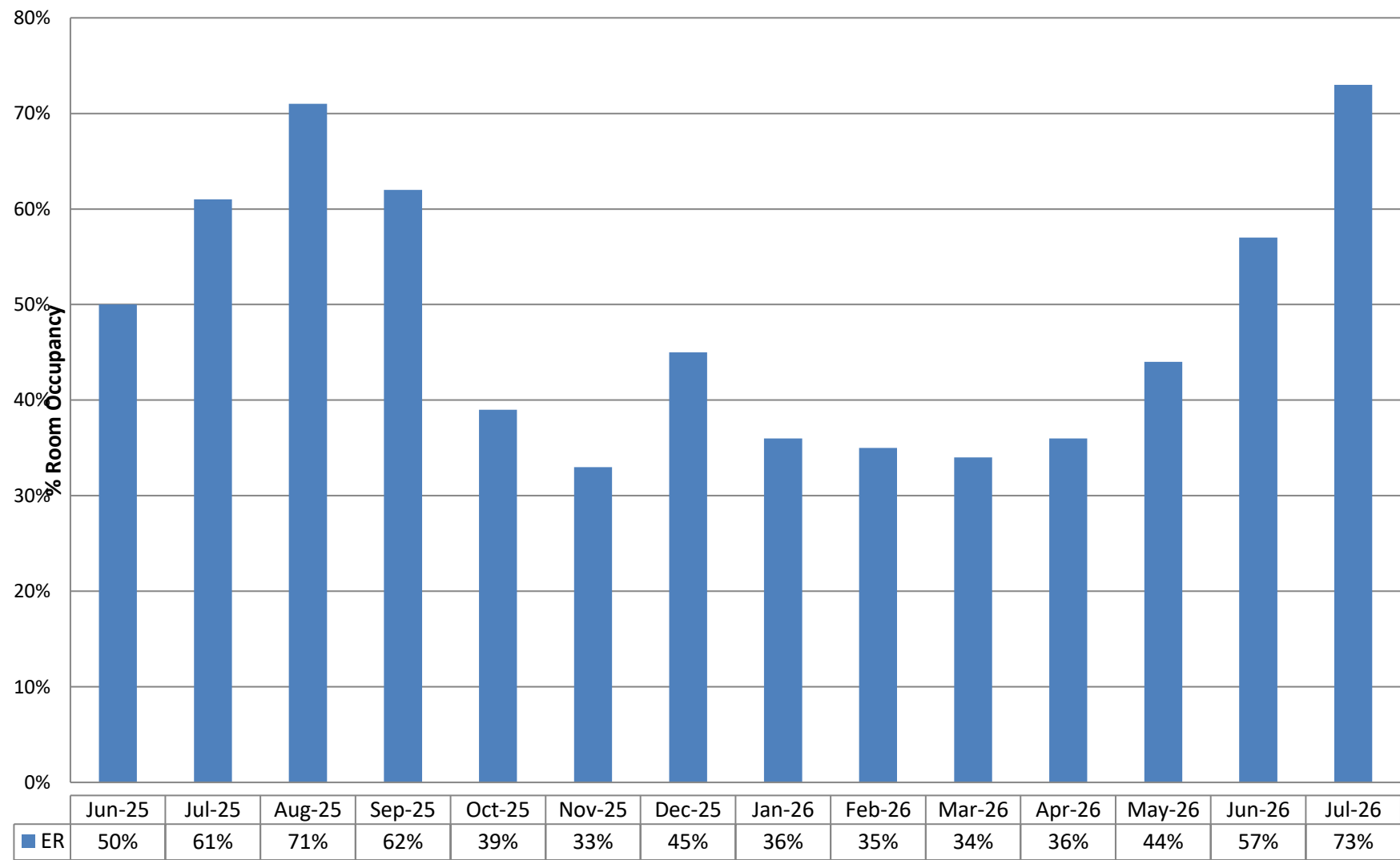
■ Increased ■ Stayed the same ■ Decreased

ESTIMATED ACTUAL CHANGE IN TURNOVER



*Small sample size – interpret with caution

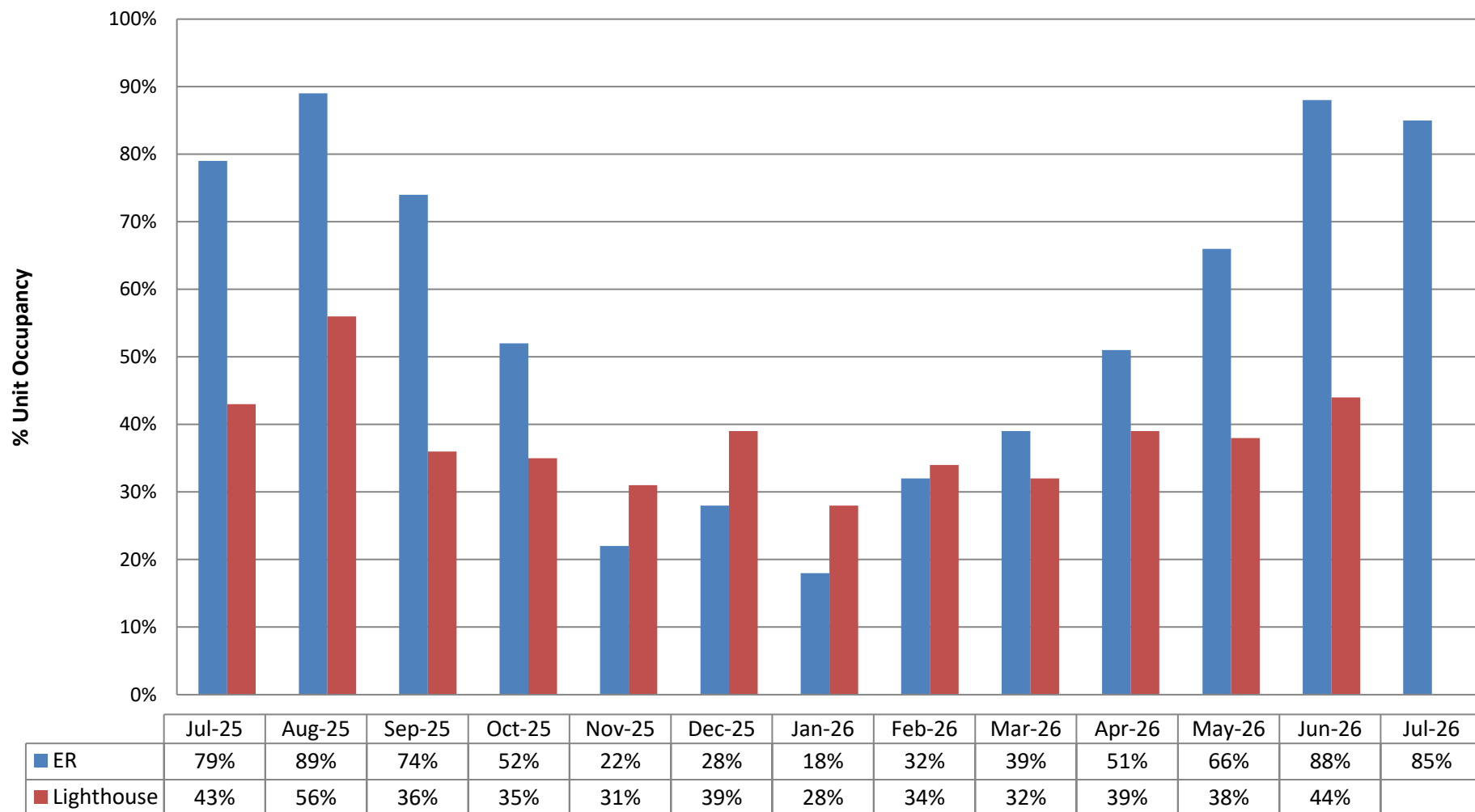
Performance – Serviced Room Occupancy



*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



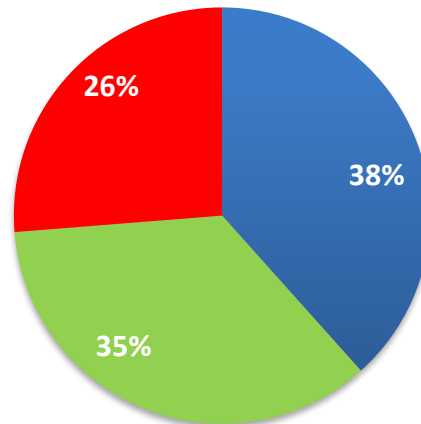
***Small sample size – interpret with caution**

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 2026 Lighthouse data is not yet available.

Outlook – Based upon forward booking levels

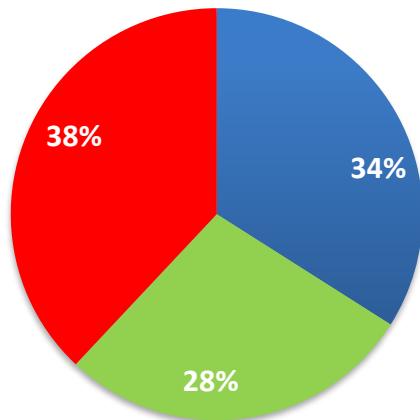
AUGUST 2026



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

Base: 34

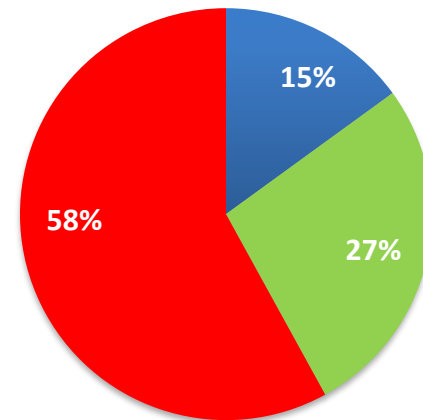
SEPTEMBER 2026



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

Base: 32

OCTOBER 2026

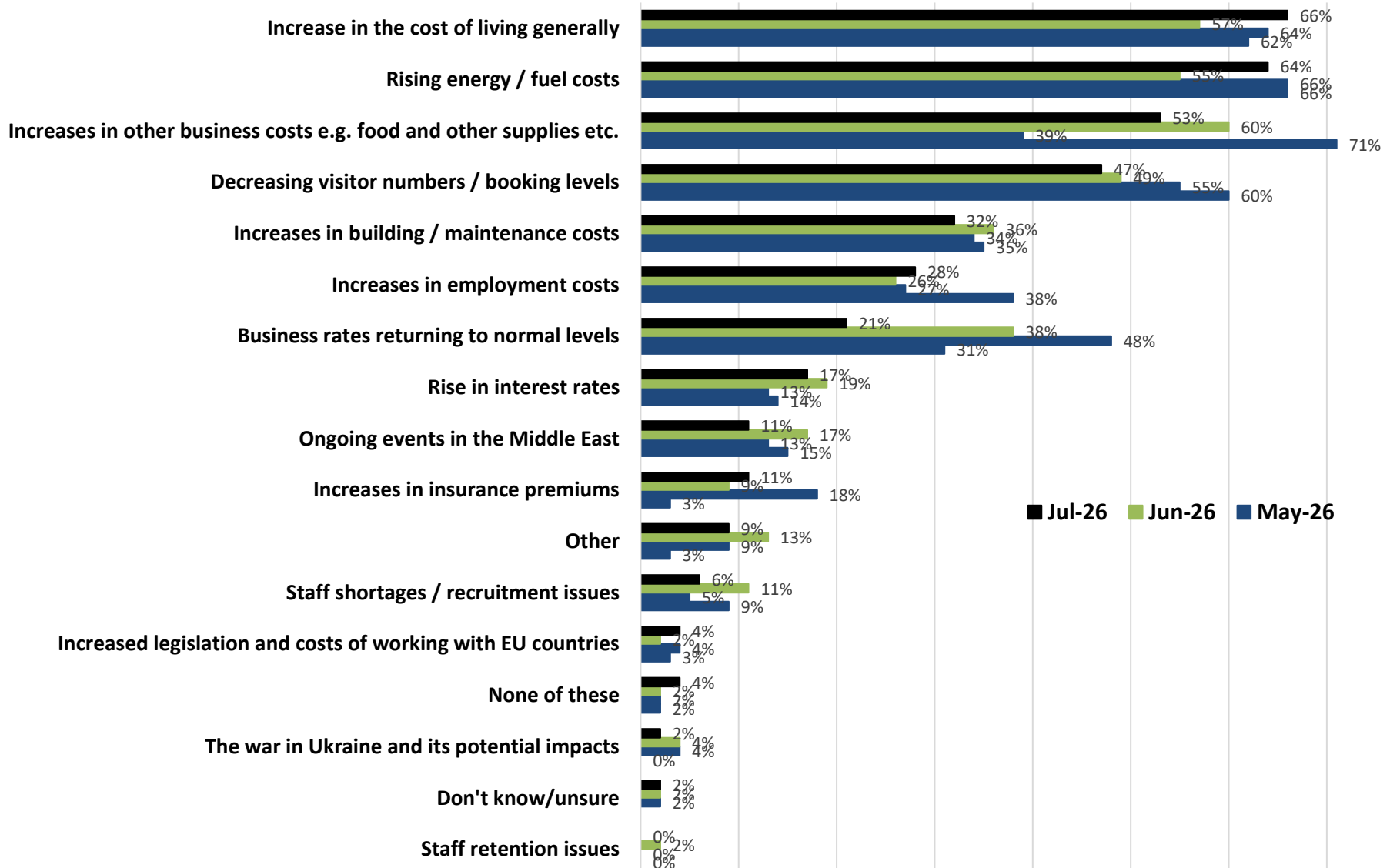


■ Better than last year ■ Same as last year
■ Not as good as last year

Base: 26

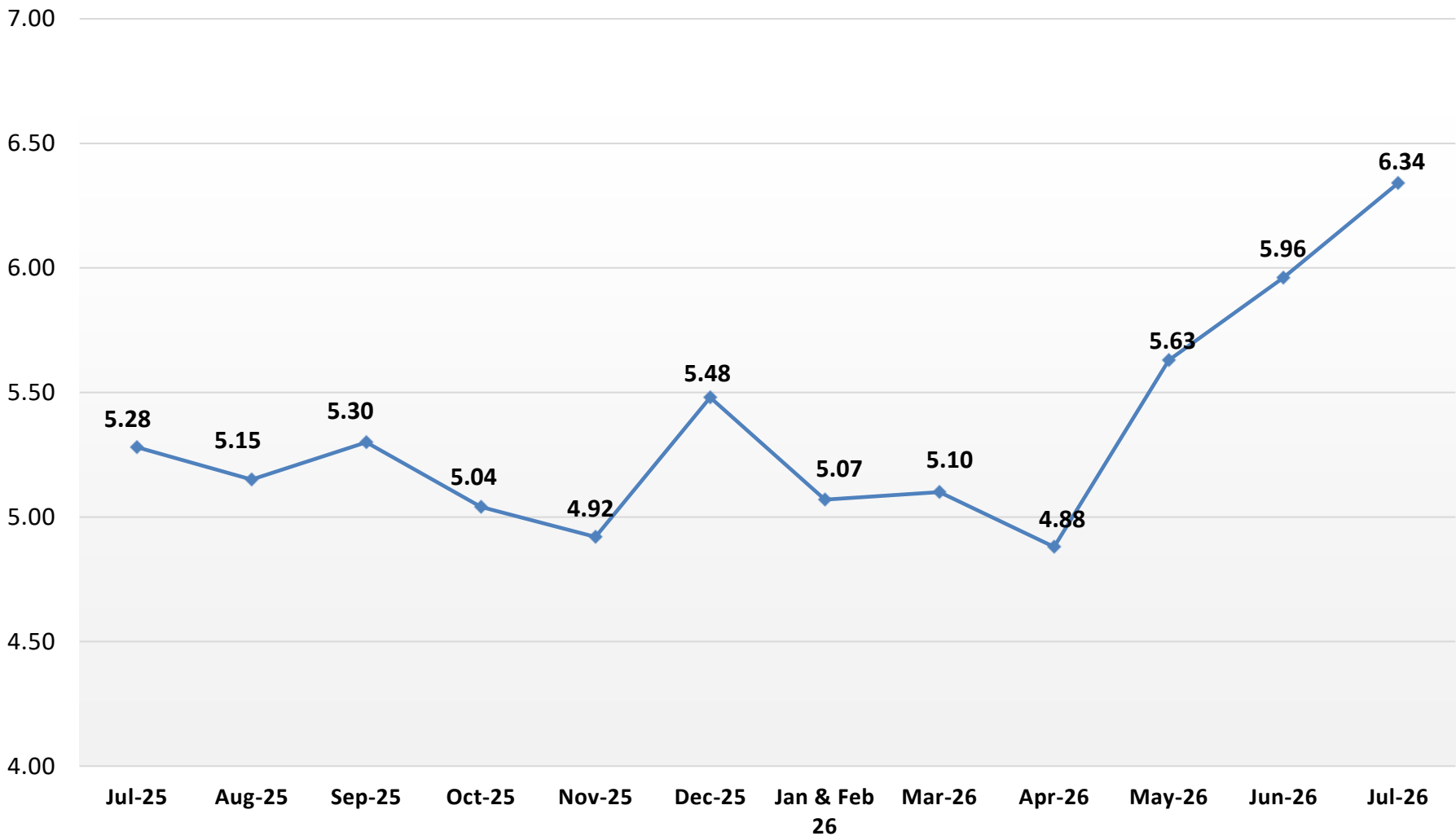
Top 5 business concerns (pre-defined list)

TOP 5 MOST CONCERNING FACTORS FOR BUSINESSES IN THE COMING MONTHS



Business optimism

BUSINESS OPTIMISM (MAXIMUM SCORE OF 10)



ERBID How's Business Survey

July 2026

