ERBID How’s Business Survey

June 2026

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Sample and supporting information

This month's survey has a sample of 47 businesses, representing a minimum sample of approximately 52 businesses when respondents representing multiple businesses, outlets or sites (5) 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.

** 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 – June 2026

Compared to June 2025 businesses reported that:

June 2026 Visitor levels:

Increased 34% / Stayed the same 30% / Decreased 36%

Estimated actual change in visitors +1%

June 2026 Turnover levels:

Increased 36% / Stayed the same 28% / Decreased 36%

Estimated actual change in turnover +3%

School summer holidays 2026 Outlook is:

Better than last year 17% / Same as last year 41% / Not as good as last year 41%

August 2026 Outlook is:

Better than last year 17% / Same as last year 38% / Not as good as last year 45%

September 2026 Outlook is:

Better than last year 17% / Same as last year 31% / Not as good as last year 52%

Optimism:

Optimism score is 5.96 out of a possible 10

June 2026 Key results

In June 2026, 64% of all businesses reported increased (34%) or level (30%) visitor/customer numbers compared to June 2025, and the same proportion said the same about their turnover (36% increased and 28% stayed the same) during the same period. The overall increase in visitors/customers was estimated at +1%, whilst turnover increased by +3% compared with June 2025.

For the school summer holidays 2026, 58% of respondents expect their booking levels to be level or better than the same period in 2025, whilst 54% said the same for their August 2026 bookings. For September however, 52% of businesses expect their bookings to decrease compared with the same month/period last year. At 5.96 out of 10.00 the overall optimism score however, increased compared to last month (5.63).

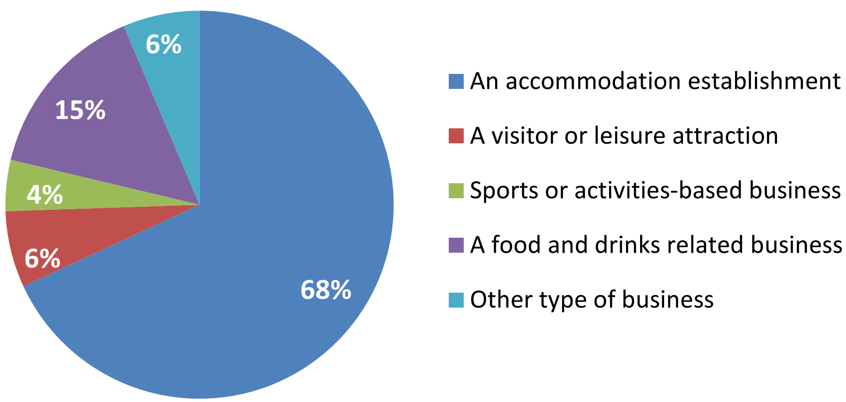
Concerns over increases in other business costs e.g., food and other supplies etc. was the number one concern amongst businesses this month (60%, an increase of 21% compared with last month). This was followed by increases in the cost of living generally (57%, a decrease of 7% compared with last month), rising energy/fuel costs (55%, a decrease of 11% compared with last month) and decreasing visitor numbers / booking levels (49%, a decrease of 6% compared with last month).

Despite ongoing concerns about booking patterns and local challenges, some businesses report that their August bookings are generally performing well, particularly for accommodation providers, and there is confidence that further late bookings may boost autumn performance. Businesses have also noted a growing number of visitors choosing UK holidays due to extreme temperatures overseas and international uncertainty, with many first-time visitors and returning guests rediscovering Torquay after many years. While lead times remain short, there is optimism that demand is still present, particularly when weather conditions are favourable, and investment in seafront improvements is also recognised as a positive step for the area.

However, overall there remains ongoing uncertainty in trading conditions and the challenges affecting visitor confidence. Many businesses reported weaker than expected performance, particularly in June, with shorter booking lead times, increased cancellations, shorter stays and concerns about declining autumn and winter bookings. Respondents frequently highlighted anti-social behaviour and noise issues as factors damaging the area's reputation and discouraging repeat visits, particularly for families and older visitors. High parking charges, paid public toilets and concerns over local infrastructure were seen as negatively impacting visitor numbers and spending.

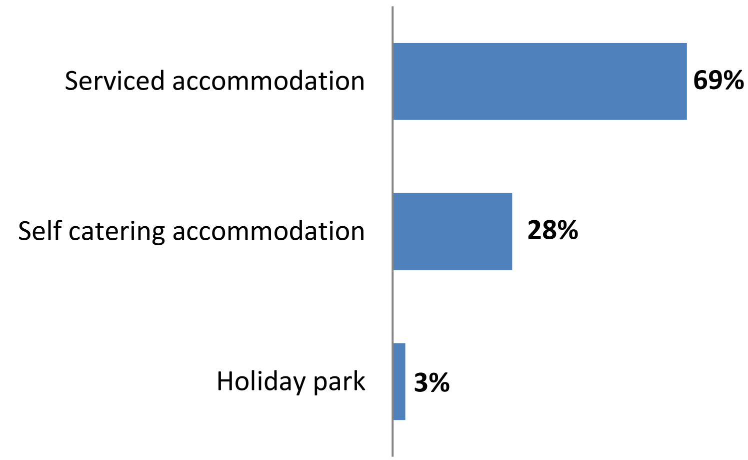
Sample profile, business location and status

BUSINESS TYPE



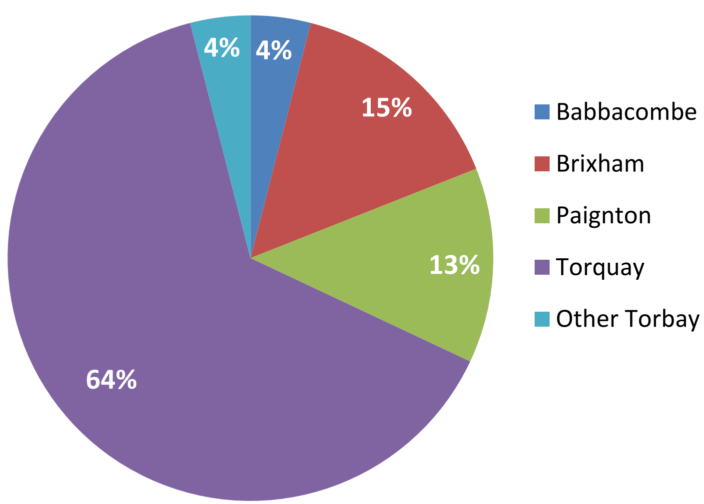
Base: 47

ACCOMMODATION TYPE



Base: 32

BUSINESS LOCATION



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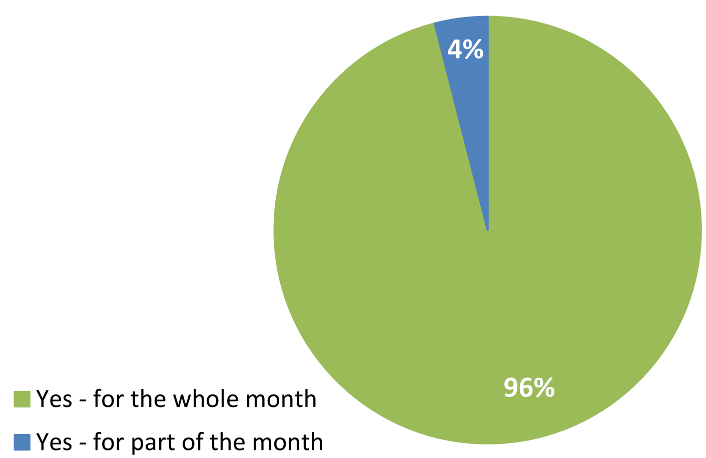
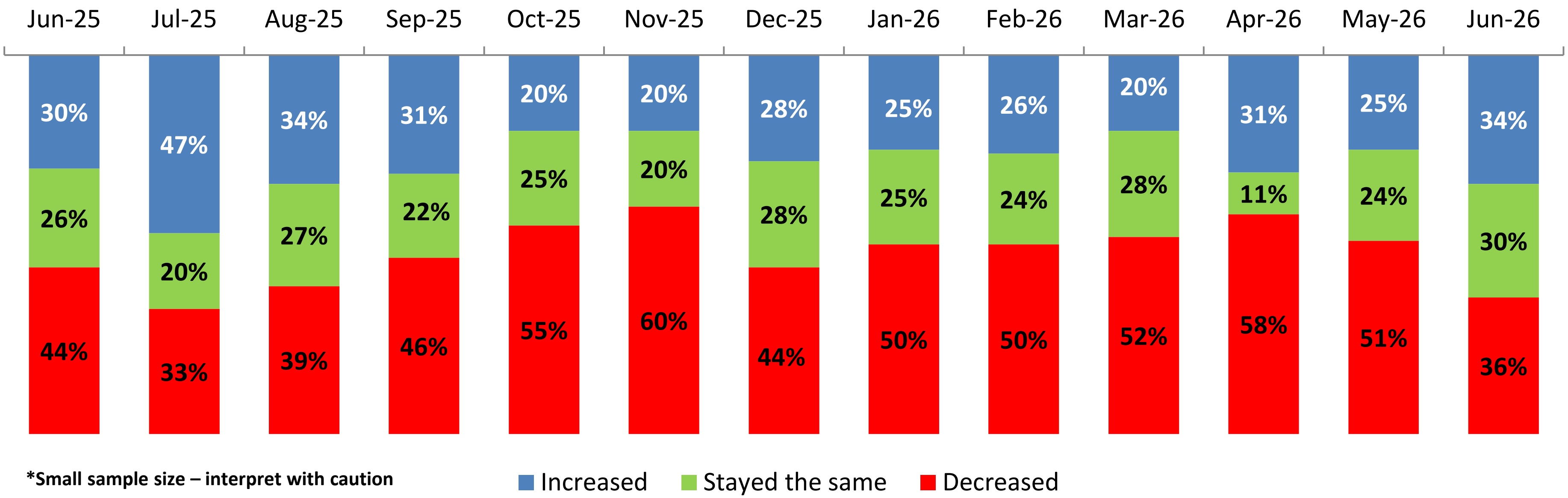
WHETHER OPEN FOR BUSINESS FOR THE MONTH

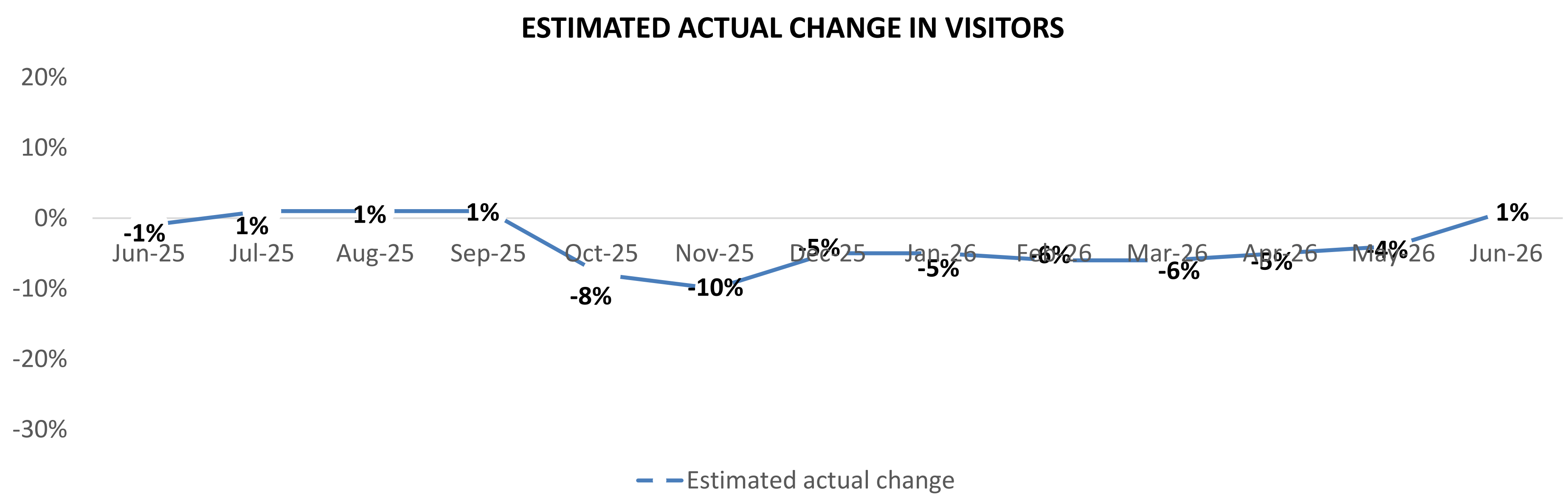


Base: 47

Performance – Number of visitors compared to previous year

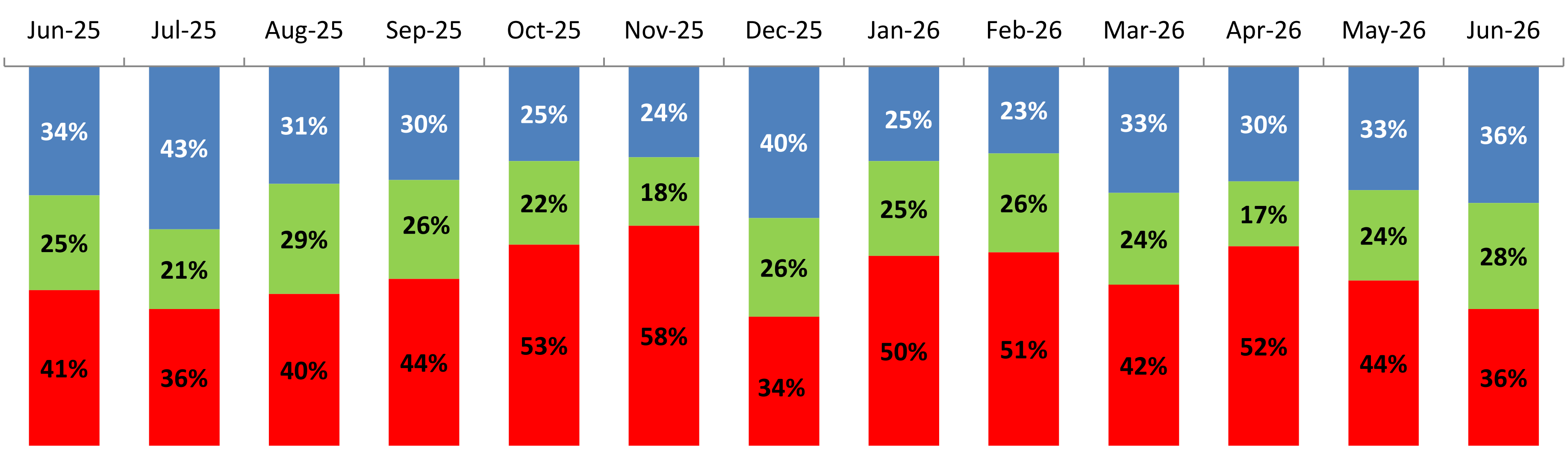


*Small sample size – interpret with caution

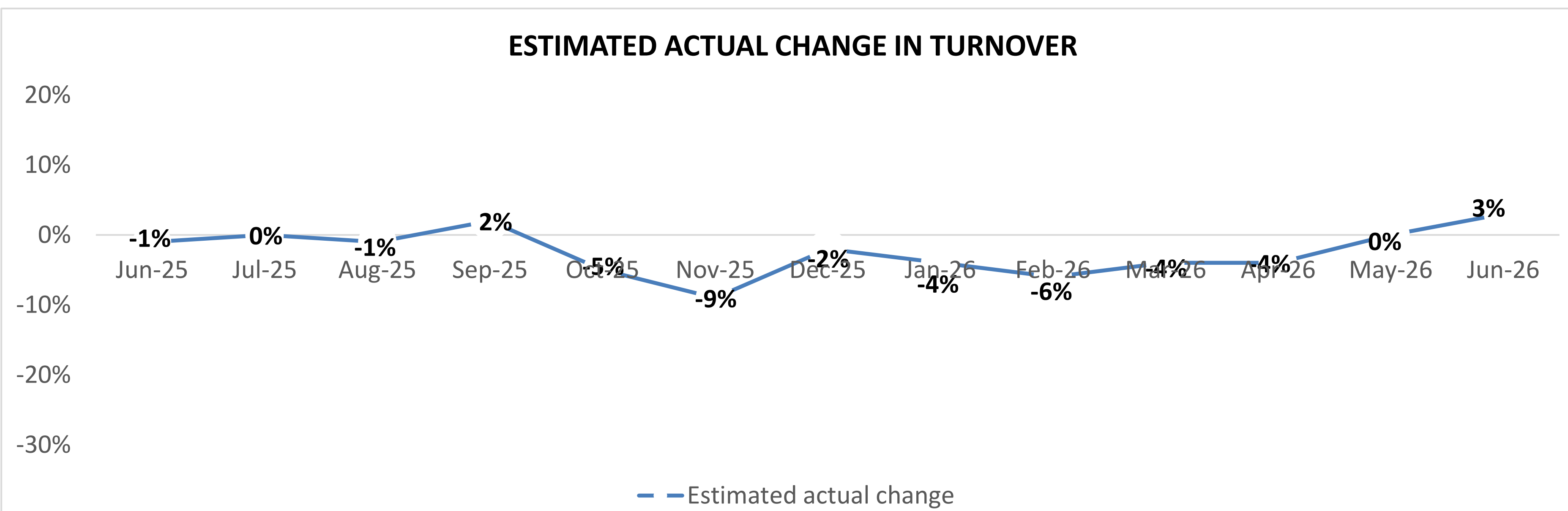


*Small sample size – interpret with caution

Performance – Turnover compared to previous year

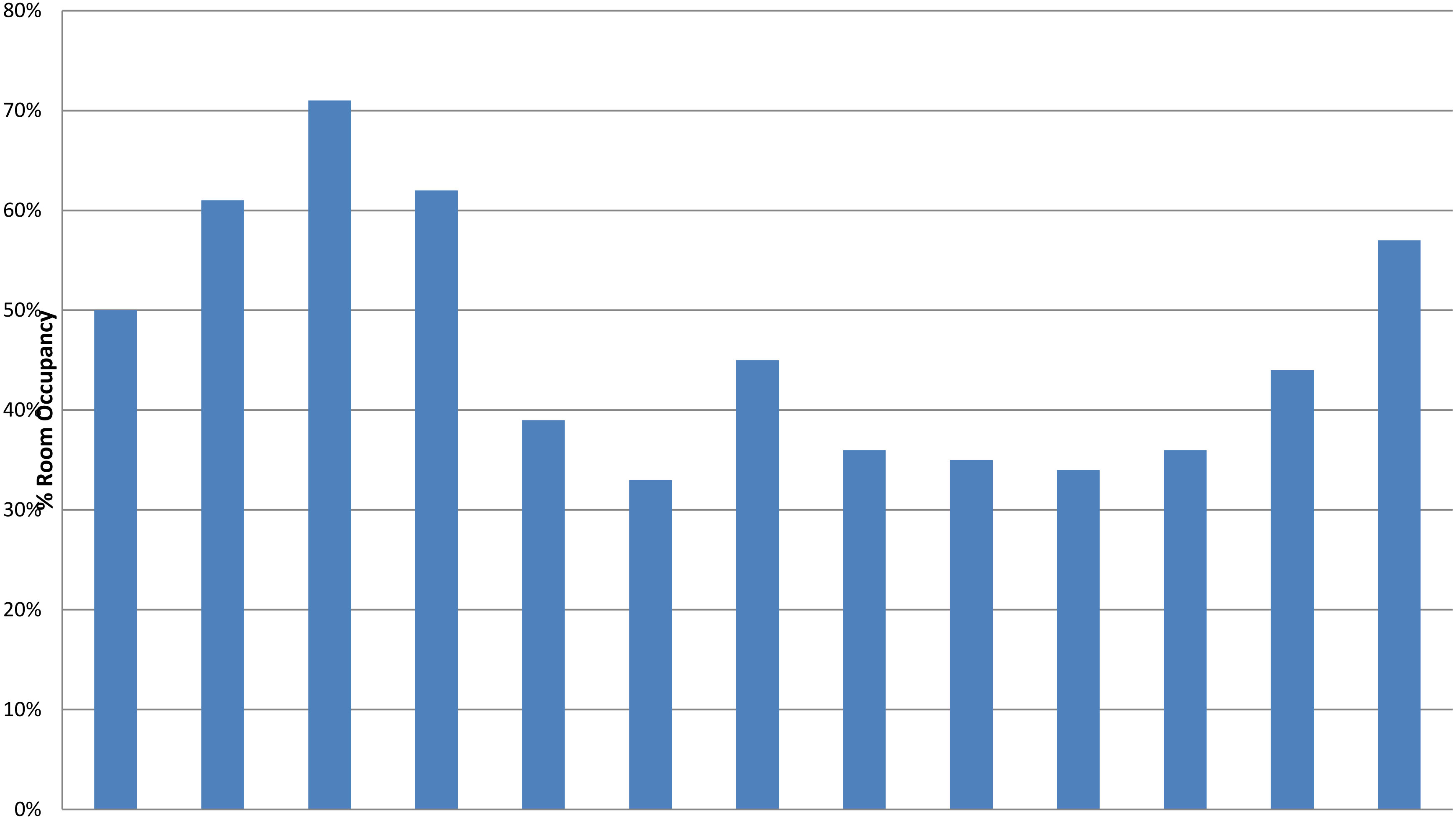


*Small sample size – interpret with caution



*Small sample size – interpret with caution

Performance – Serviced Room Occupancy

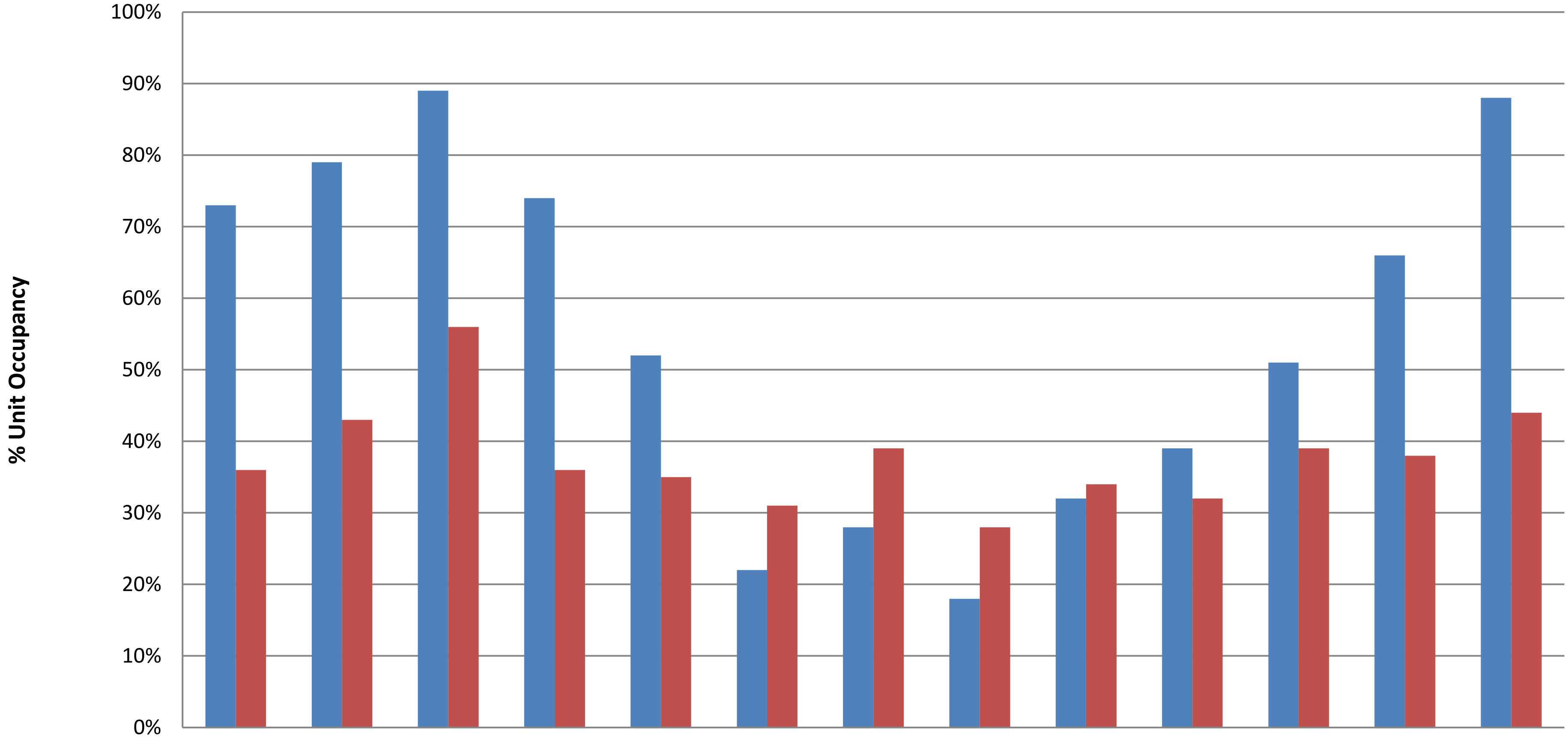


	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26
ER	50%	61%	71%	62%	39%	33%	45%	36%	35%	34%	36%	44%	57%

***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



	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26
ER	73%	79%	89%	74%	52%	22%	28%	18%	32%	39%	51%	66%	88%
Lighthouse	36%	43%	56%	36%	35%	31%	39%	28%	34%	32%	39%	38%	44%

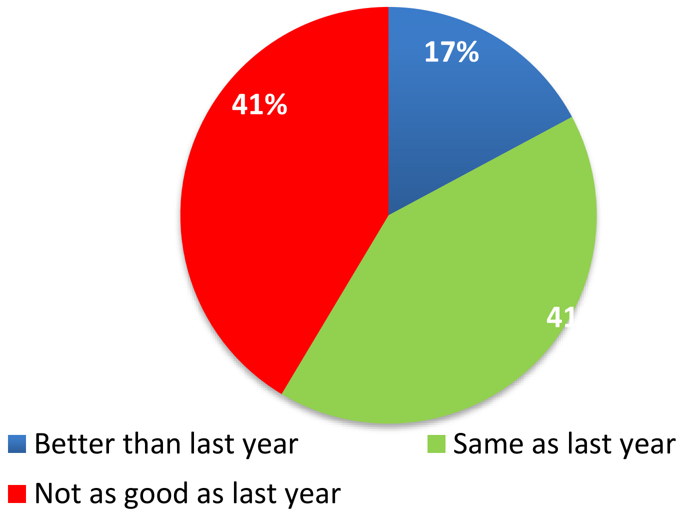
***Small sample size – interpret with caution**

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.

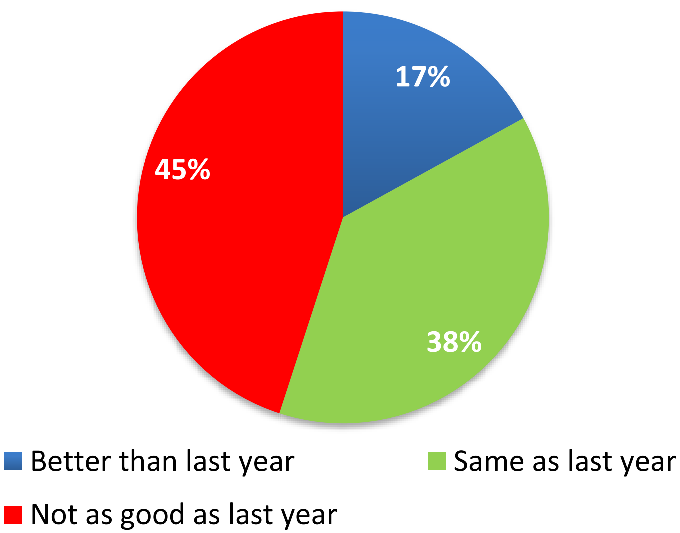
Outlook – Based upon forward booking levels

SCHOOL SUMMER HOLIDAYS 2026



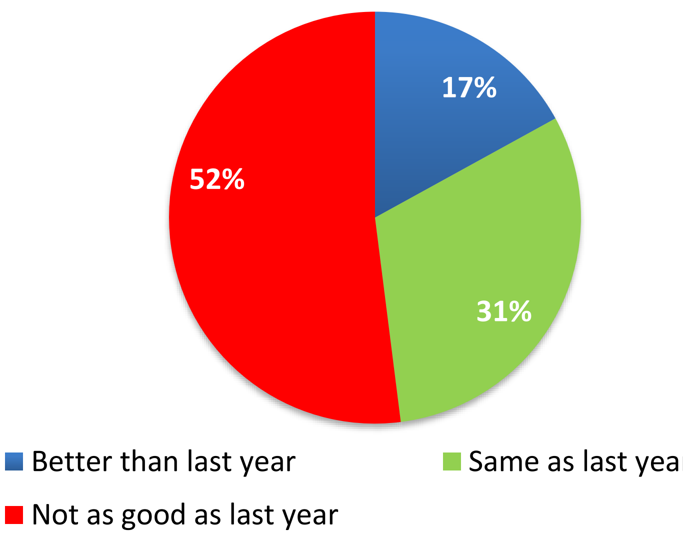
Base: 29

AUGUST 2026



Base: 29

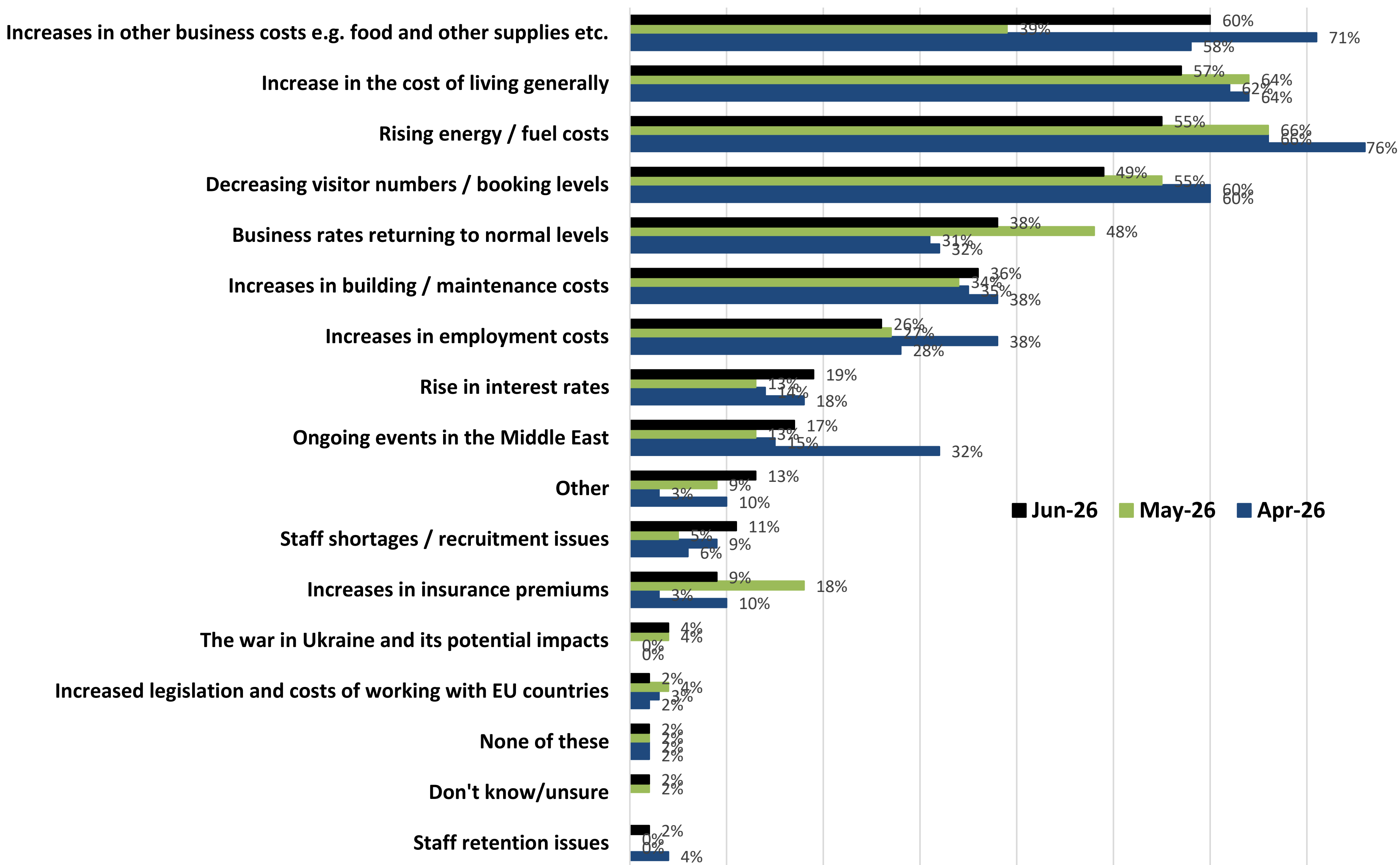
SEPTEMBER 2026



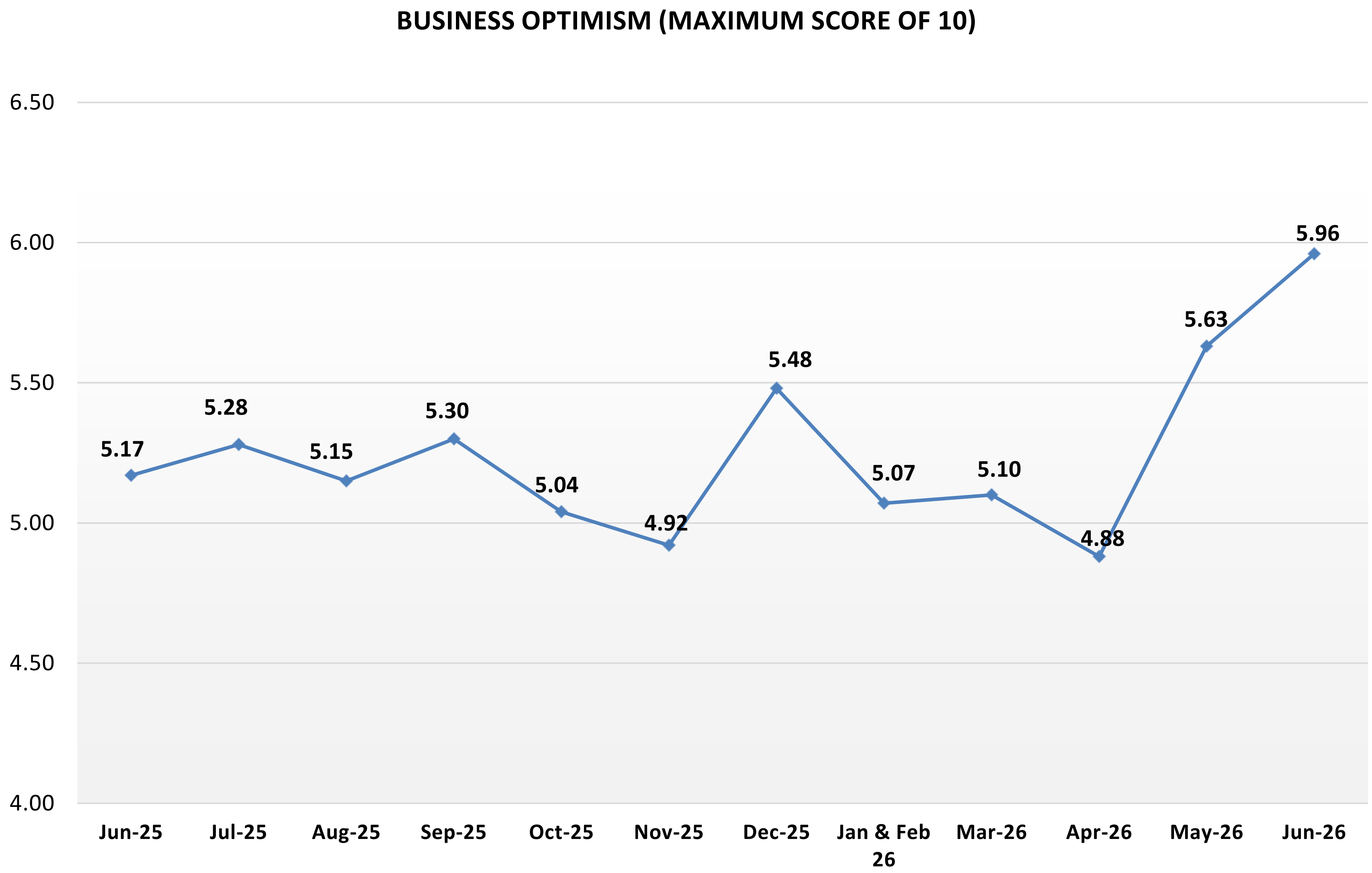
Base: 29

Top 5 business concerns (pre-defined list)

TOP 5 MOST CONCERNING FACTORS FOR BUSINESSES IN THE COMING MONTHS



Business optimism



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