

ERBID How's Business Survey

March 2026



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Sample and supporting information

This month's survey has a sample of 50 businesses, representing a minimum sample of approximately 56 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 – March 2026

Compared to March 2025 businesses reported that:

March 2026 Visitor levels:

Increased 20% / Stayed the same 28% / Decreased 52%

Estimated actual change in visitors -6%

March 2026 Turnover levels:

Increased 33% / Stayed the same 24% / Decreased 42%

Estimated actual change in turnover -4%

April 2026 Outlook is:

Better than 2022 22% / Same as 2022 25% / Not as good as 2022 53%

Whitsun week 2026 Outlook is:

Better than 2022 14% / Same as 2022 37% / Not as good as 2022 49%

May 2026 Outlook is:

Better than 2022 11% / Same as 2022 23% / Not as good as 2022 66%

Optimism:

Optimism score is 5.10 out of a possible 10

March 2026 Key results

In March 2026, 52% of all businesses reported decreased visitor/customer numbers compared to March 2025 whilst, in contrast, 57% said their turnover had increased (33%) or remained the same (24%) compared with the same time last year. The estimated actual change for visitors/customers and turnover for the month were decreases of -6% and -4% respectively.

For April 2026 53% of respondents expect their booking levels to be worse than during the previous year, 49% said the same for the Whitsun half term week and 66% for the month of May. At 5.10 out of 10.00 however, the overall optimism score increased slightly compared to last month.

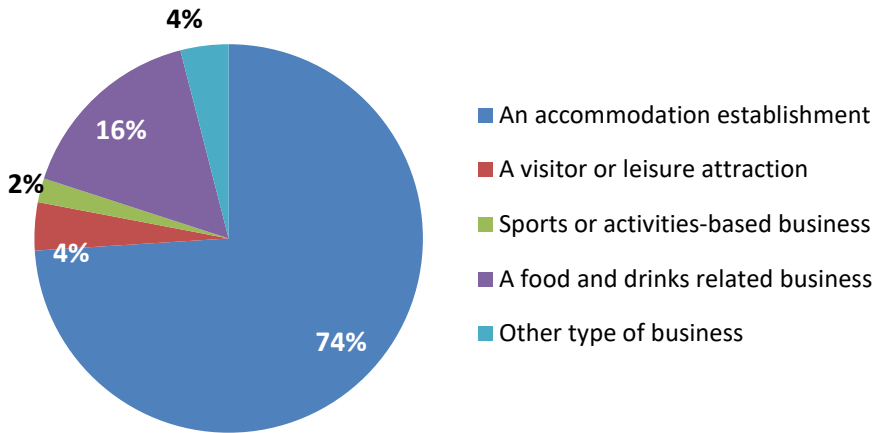
Concerns over rising energy/fuel costs remains the number one concern amongst businesses cited by 76% of businesses (the same proportion as last month). This was followed by increases in the cost of living generally (64%, a decrease of 3% compared with last month), decreasing visitor numbers / booking levels (60%, a decrease of 7% compared with last month) and the increases in other business costs (58%, a decrease of 9% compared with last month).

Despite the overall very challenging operating climate, some businesses did report strong Easter trading and, encouragingly, some newer businesses are establishing themselves and maintaining a forward-looking outlook, while others remain cautiously optimistic that favourable weather and a strong summer season could help recovery.

The comments this month however continue to reveal a number of significant challenges with the most prominent being the impact of rising costs, including energy, wages, business rates and general inflation – all of which are placing severe financial pressure on businesses and, in some cases, threatening their viability. Many reported declining bookings and reduced visitor numbers, particularly outside peak periods, alongside increased reliance on last-minute or discounted bookings. There is also concern about external factors such as the cost-of-living crisis, global events affecting travel confidence and competition within the local accommodation market, all contributing to reduced demand. Operational challenges were highlighted, including staffing pressures, reduced working hours and scaling back or closing parts of businesses, while some raised issues around accessibility, parking and perceptions of safety in certain areas of The Bay. Overall, the feedback reflects a difficult trading environment characterised by uncertainty, falling revenues and concerns about long-term sustainability.

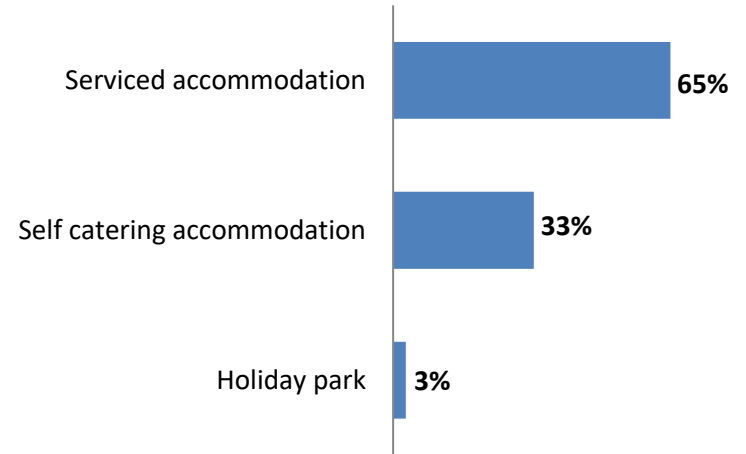
Sample profile, business location and status

BUSINESS TYPE



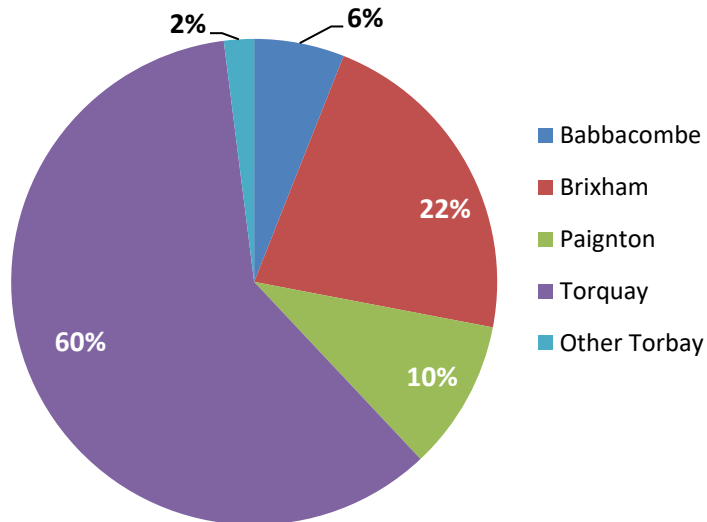
Base: 50

ACCOMMODATION TYPE



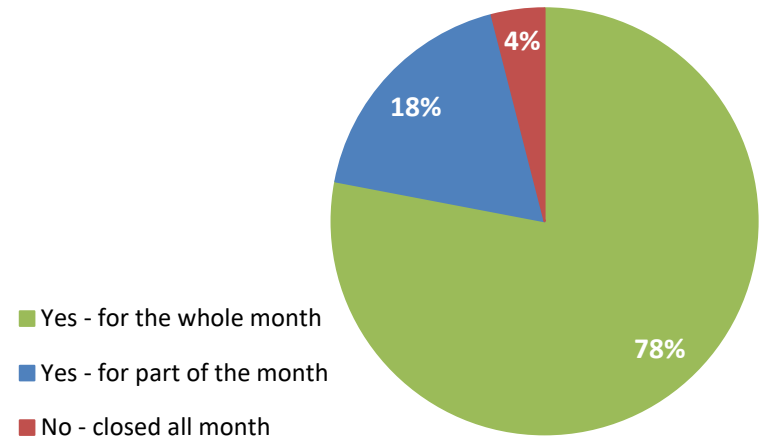
Base: 37

BUSINESS LOCATION



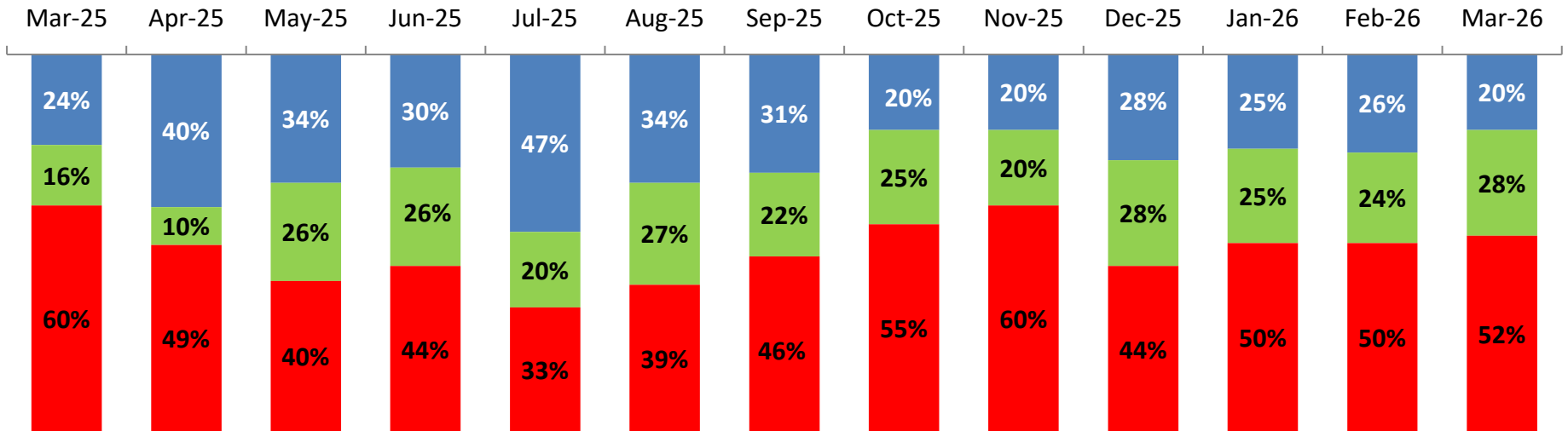
Base: 50

WHETHER OPEN FOR BUSINESS FOR THE MONTH



Base: 50

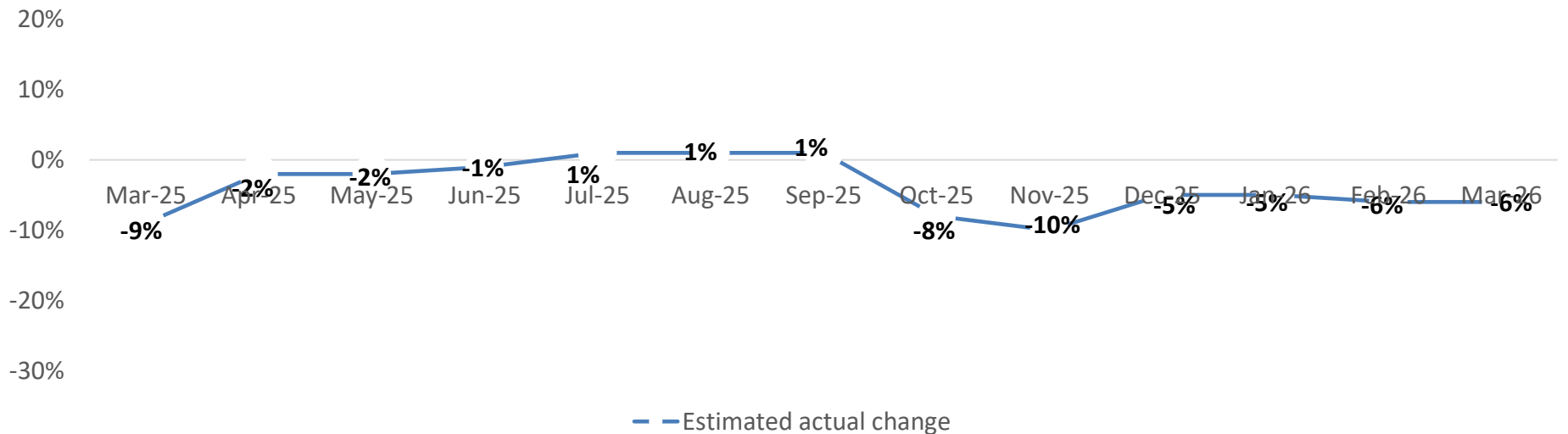
Performance – Number of visitors compared to previous year



*Small sample size – interpret with caution

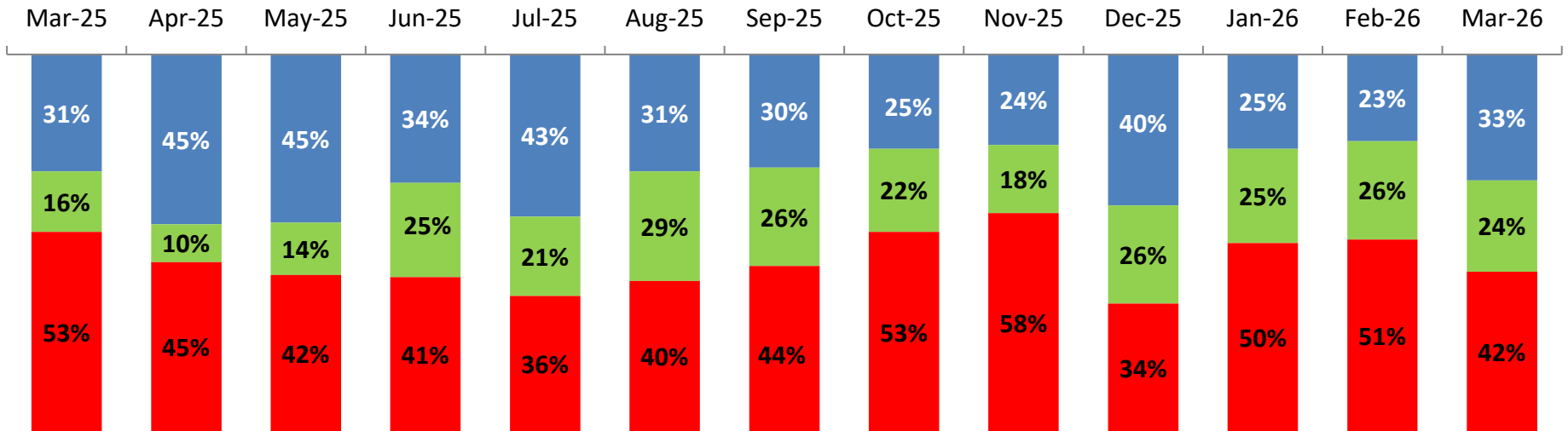
■ Increased ■ Stayed the same ■ Decreased

ESTIMATED ACTUAL CHANGE IN VISITORS



*Small sample size – interpret with caution

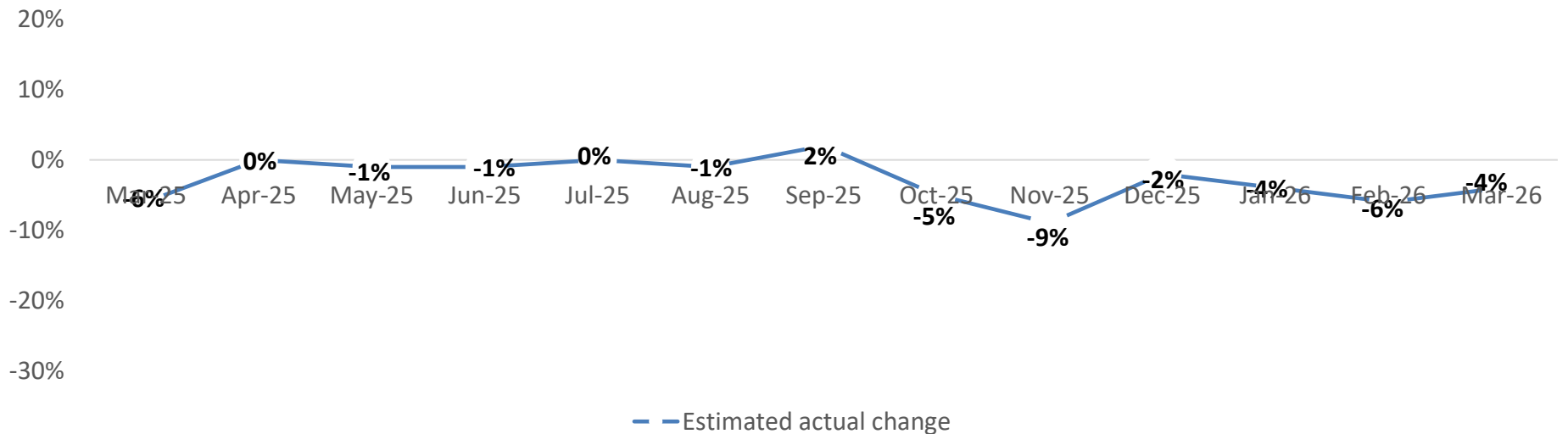
Performance – Turnover compared to previous year



*Small sample size – interpret with caution

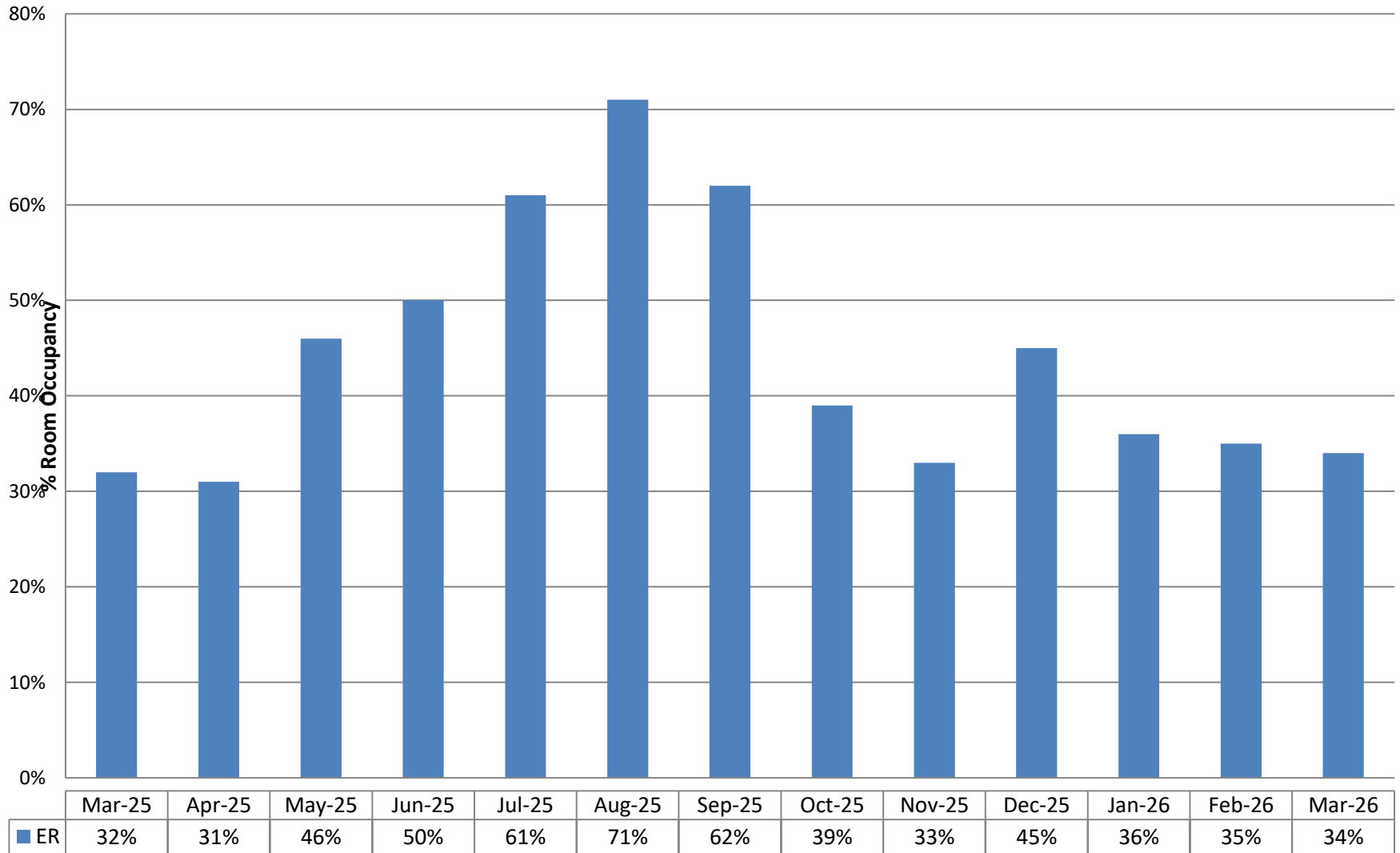
■ Increased ■ Stayed the same ■ Decreased

ESTIMATED ACTUAL CHANGE IN TURNOVER



*Small sample size – interpret with caution

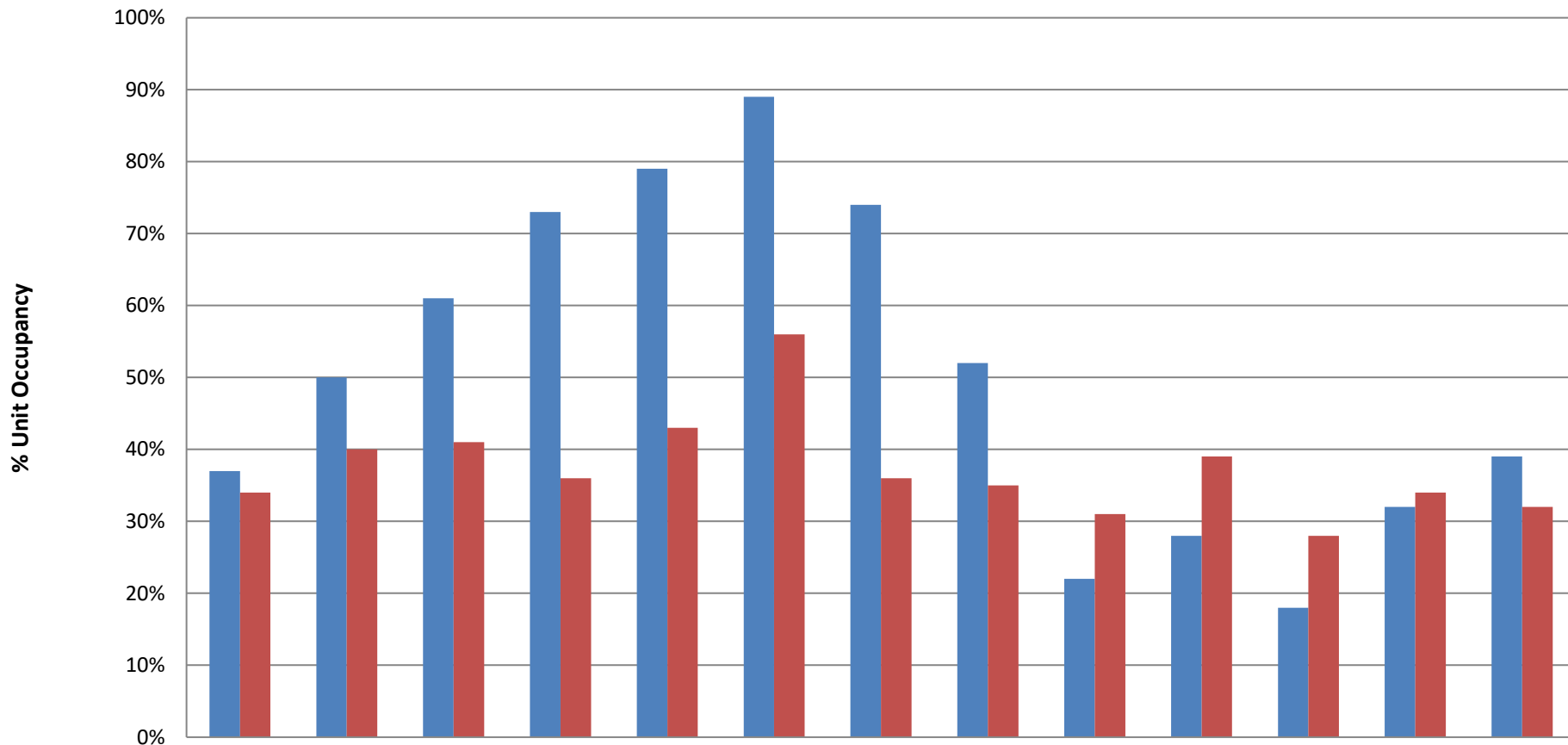
Performance – Serviced Room Occupancy



*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



	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26
ER	37%	50%	61%	73%	79%	89%	74%	52%	22%	28%	18%	32%	39%
Lighthouse	34%	40%	41%	36%	43%	56%	36%	35%	31%	39%	28%	34%	32%

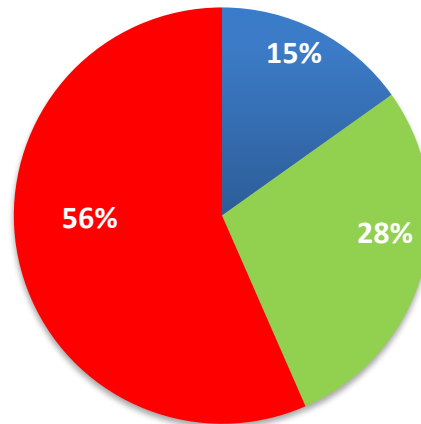
*Small sample size – interpret with caution

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

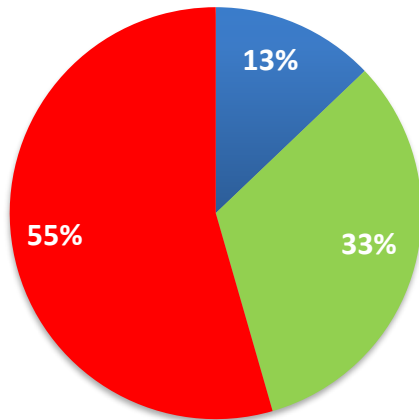
APRIL 2026



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

Base: 36

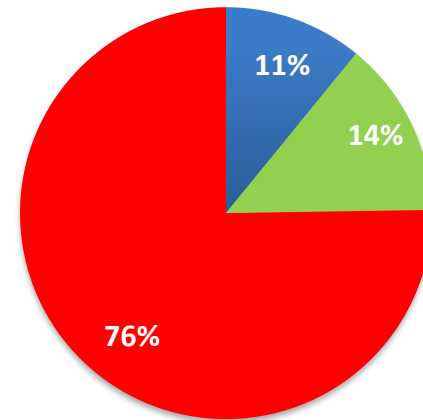
WHITSUN WEEK 2026



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

Base: 35

MAY 2026

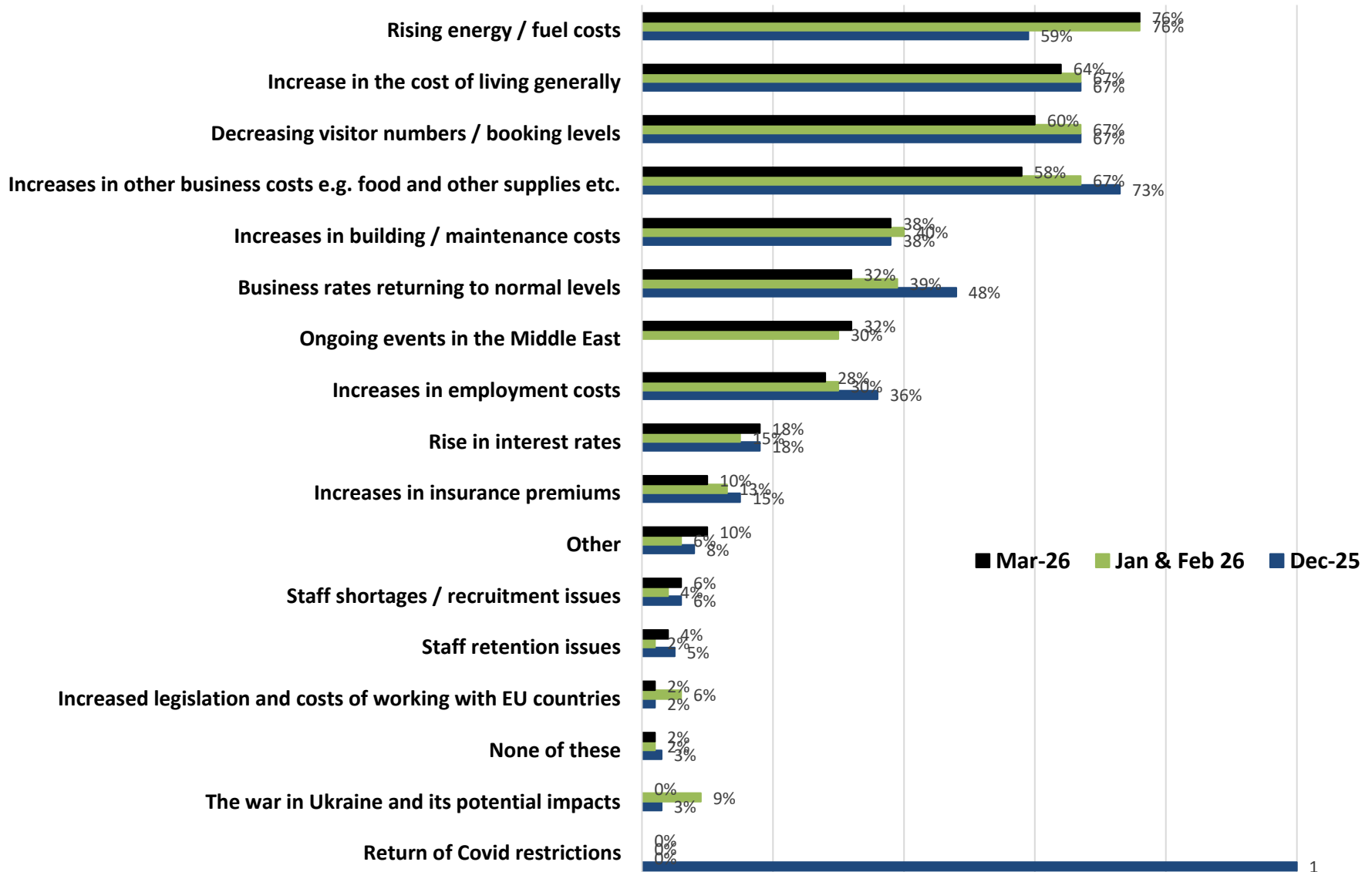


■ Better than last year ■ Same as last year
■ Not as good as last year

Base: 35

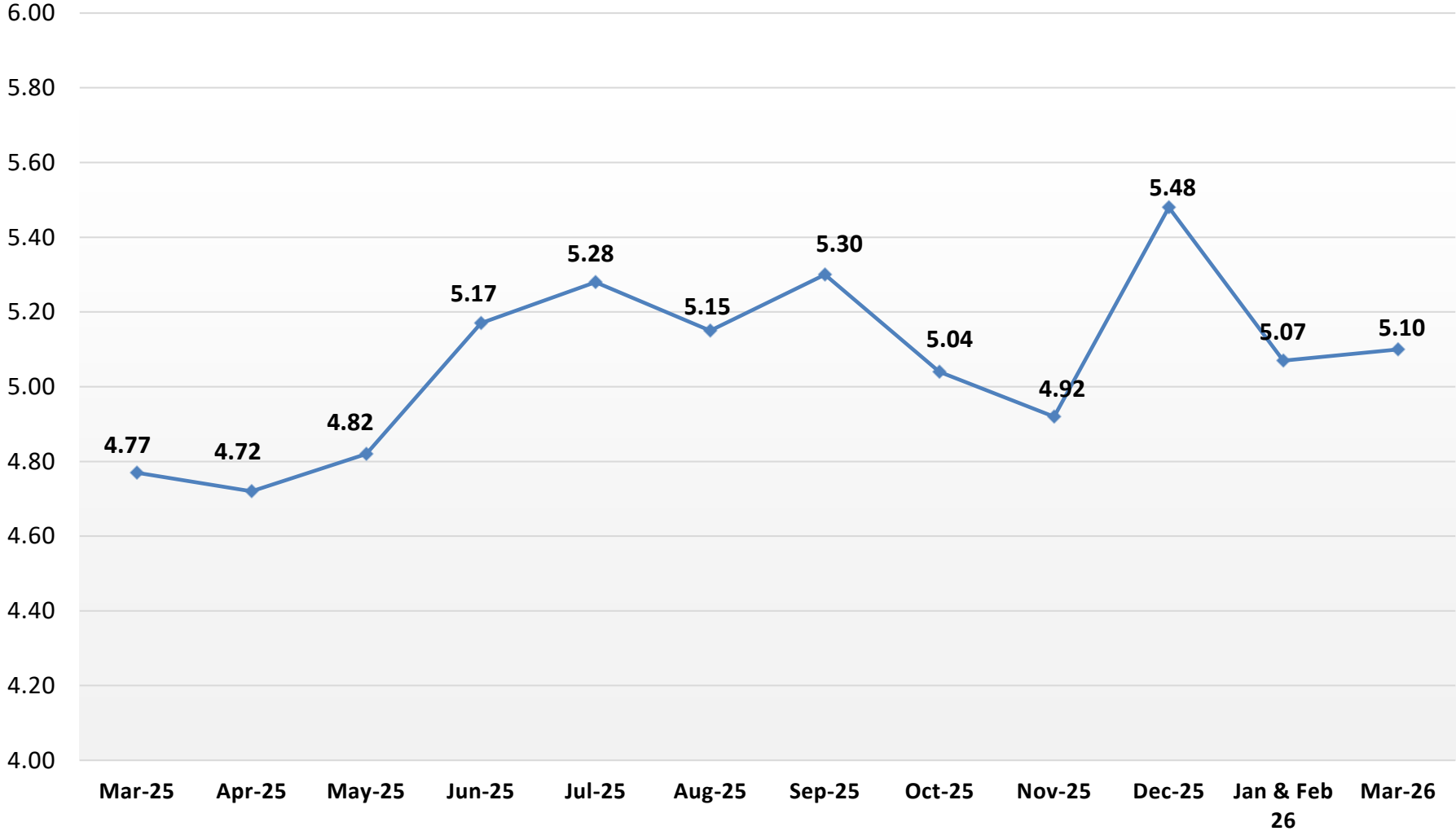
Top 5 business concerns (pre-defined list)

TOP 5 MOST CONCERNING FACTORS FOR BUSINESSES IN THE COMING MONTHS



Business optimism

BUSINESS OPTIMISM (MAXIMUM SCORE OF 10)



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