ERBID How's Business Survey

September 2026

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November 2026







Sample and supporting information

This month's survey has a sample of 50 businesses, representing a minimum sample of approximately 54 businesses when 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 September 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 to September 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 – September 2026

Compared to September 2025 businesses reported that:

September 2026 Visitor levels:

Increased 44% / Stayed the same 26% / Decreased 30%

Estimated actual change in visitors +4%

September 2026 Turnover levels:

Increased 47% / Stayed the same 29% / Decreased 24%

Estimated actual change in turnover +6%

October 2026 Outlook is:

Better than last year 20% / Same as last year 37% / Not as good as last year 43%

October half-term 2026 Outlook is:

Better than last year 12% / Same as last year 33% / Not as good as last year 55%

November 2026 Outlook is:

Better than last year 27% / Same as last year 23% / Not as good as last year 50%

Optimism:

Optimism score is 5.92 out of a possible 10

September 2026 Key results

In September 2026, 70% of all businesses in each case reported increased (44%) or level (26%) visitor/customer numbers compared to September 2025 whilst 76% said the same about their turnover (47% increased and 29% level). The overall increase in visitors/customers was estimated at +4% and for turnover it was +6% compared with September 2025 and it was the second best performing month for the resort for the last 12 months.

For October 2026, 57% of businesses expect their bookings to be better than or level with 2025, as do 50% for November 2025, whilst for October half term week the majority of businesses (55%) expect their bookings to not be as good as the same period in 2025. At 5.92 out of 10.00 the overall optimism score decreased slightly compared to last month (6.14) but remained at the fourth highest level in the last 12 months.

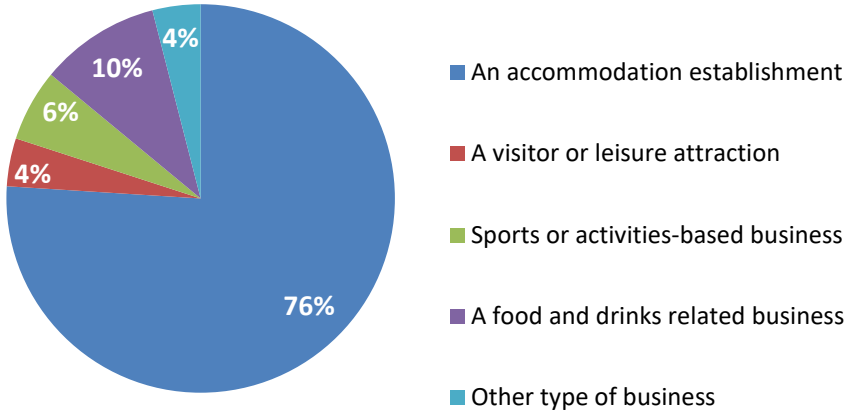
Concerns over rising energy/fuel costs (72%, an increase of 6% compared with last month) was the number one concern amongst businesses this month. This was followed by the increase in the cost of living generally (68%, an increase of 2% compared with last month), increases in other business costs (48%, a decrease of 9% compared with last month), decreasing visitor numbers / booking levels (46%, a 6% decrease compared with last month) and increases in building/maintenance costs (42%, a, increase of 6% compared with last month).

Some businesses reported a number of positive developments this month, including resilient visitor numbers, strong summer trading and growth in their turnover and guest numbers. The good weather, popular events such as the Agatha Christie Festival and efforts to diversify and enhance their visitor offerings were all credited with supporting demand. Some businesses highlighted longer stays, increased visitor spending, strong customer reviews and the value of repeat visitors, while others expressed satisfaction with current trading levels and confidence in the progress they are making.

Nonetheless, many businesses on the English Riviera expressed significant concerns again this month about rising operating costs, including wages, business rates, regulation and other overheads, which are placing increasing pressure on already tight profit margins. Many reported weaker trading than previous years, particularly outside the peak summer season, with disappointing performance in the key shoulder months, high cancellation rates and reduced visitor demand. Several respondents highlighted concerns about the wider economic climate, the condition of the town centres, ongoing infrastructure disruptions and the long-term viability of hospitality businesses in the resort. A number of businesses described taking measures to remain afloat, while some indicated they were considering selling, closing or leaving the sector altogether due to the mounting financial pressures.

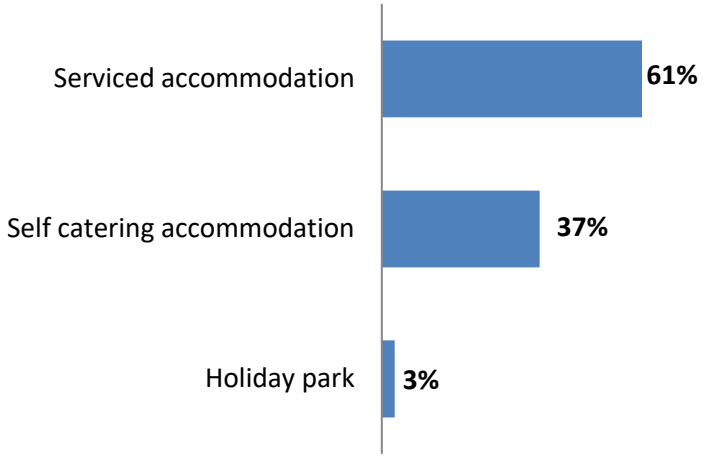
Sample profile, business location and status

BUSINESS TYPE



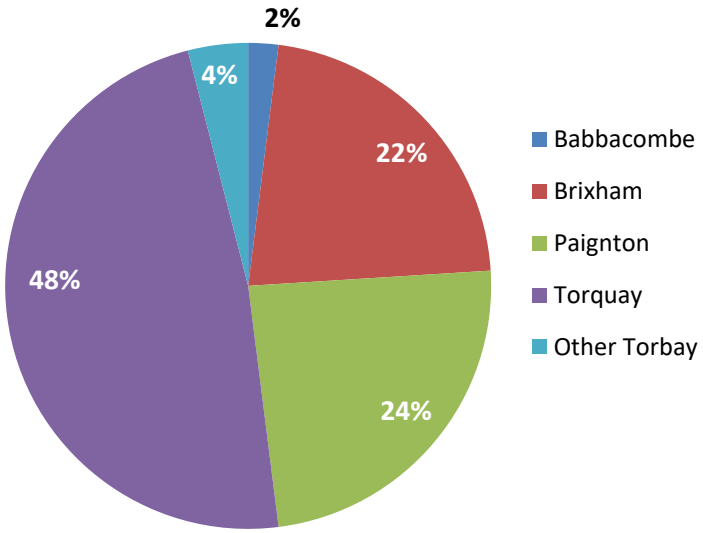
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ACCOMMODATION TYPE



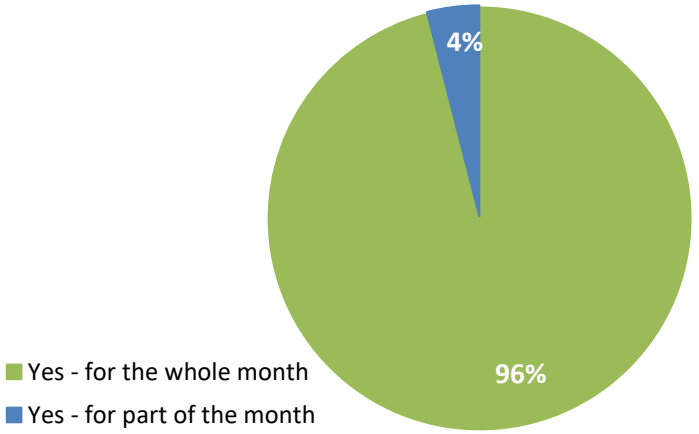
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BUSINESS LOCATION



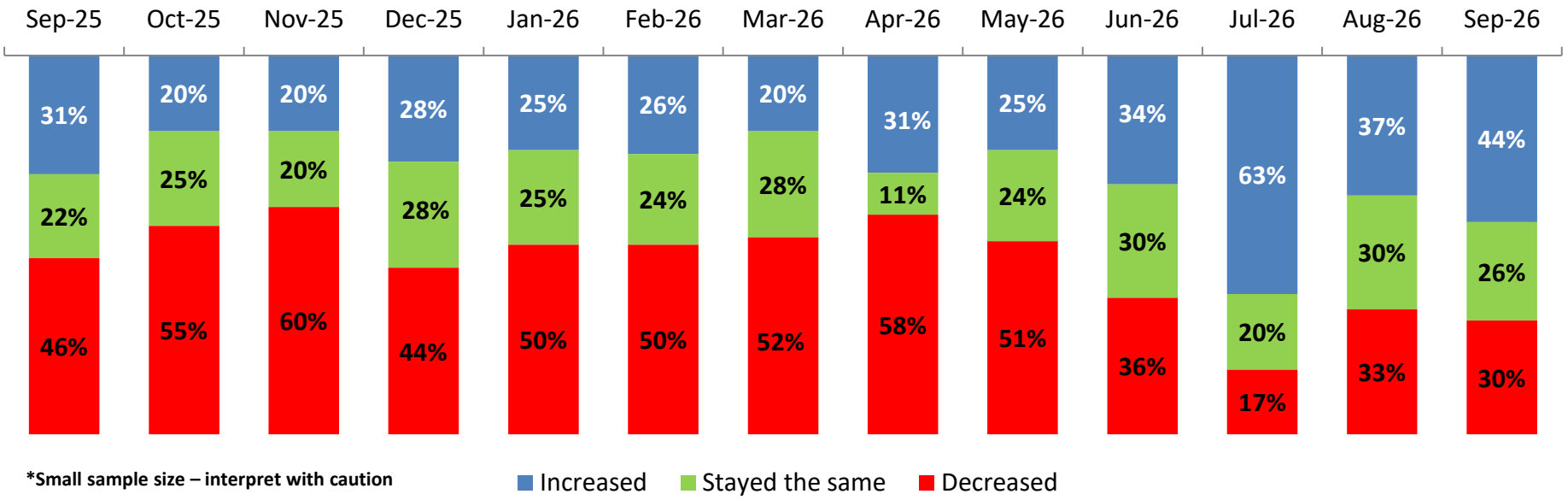
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WHETHER OPEN FOR BUSINESS FOR THE MONTH

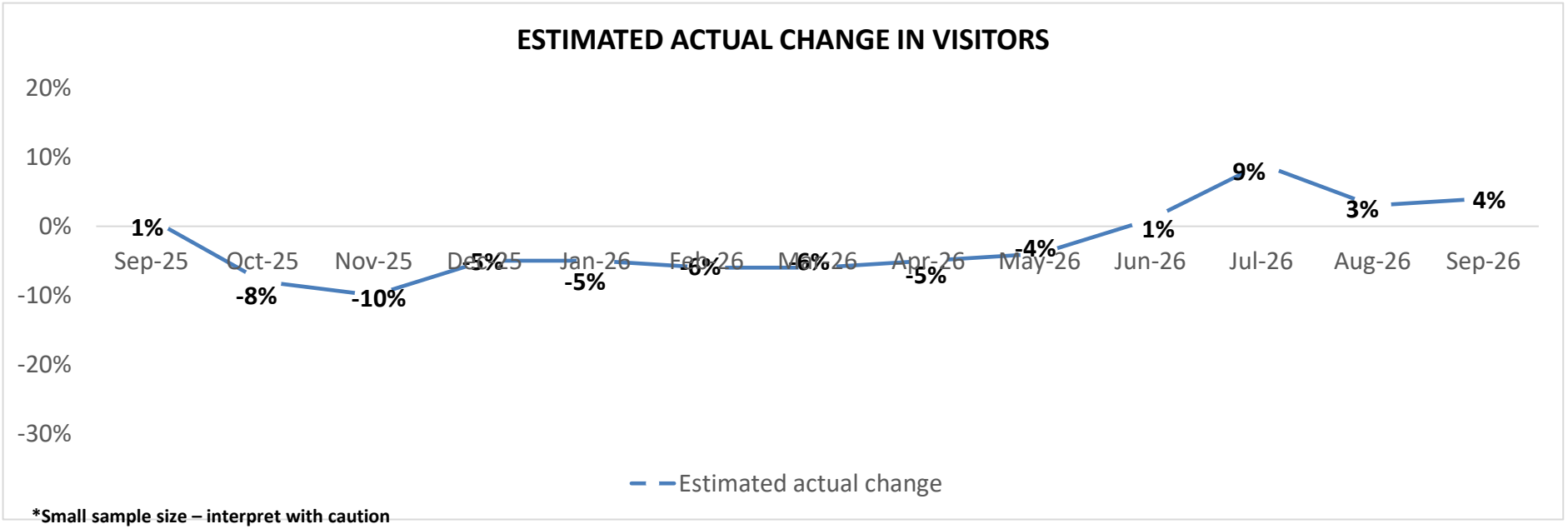


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Performance – Number of visitors compared to previous year

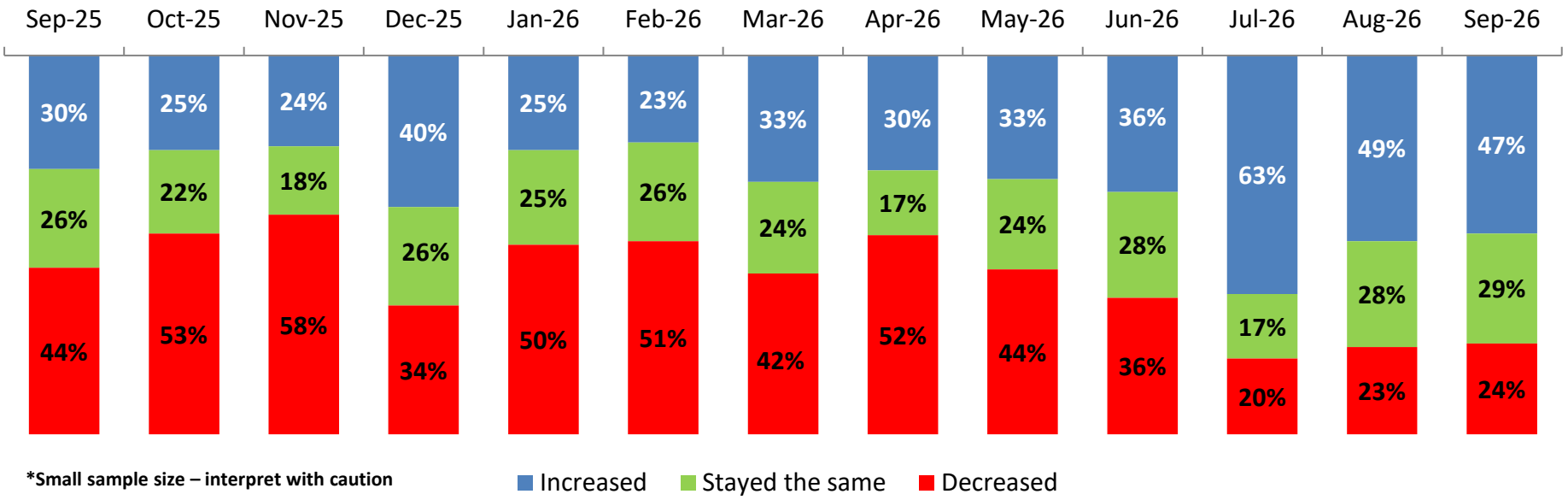


*Small sample size – interpret with caution

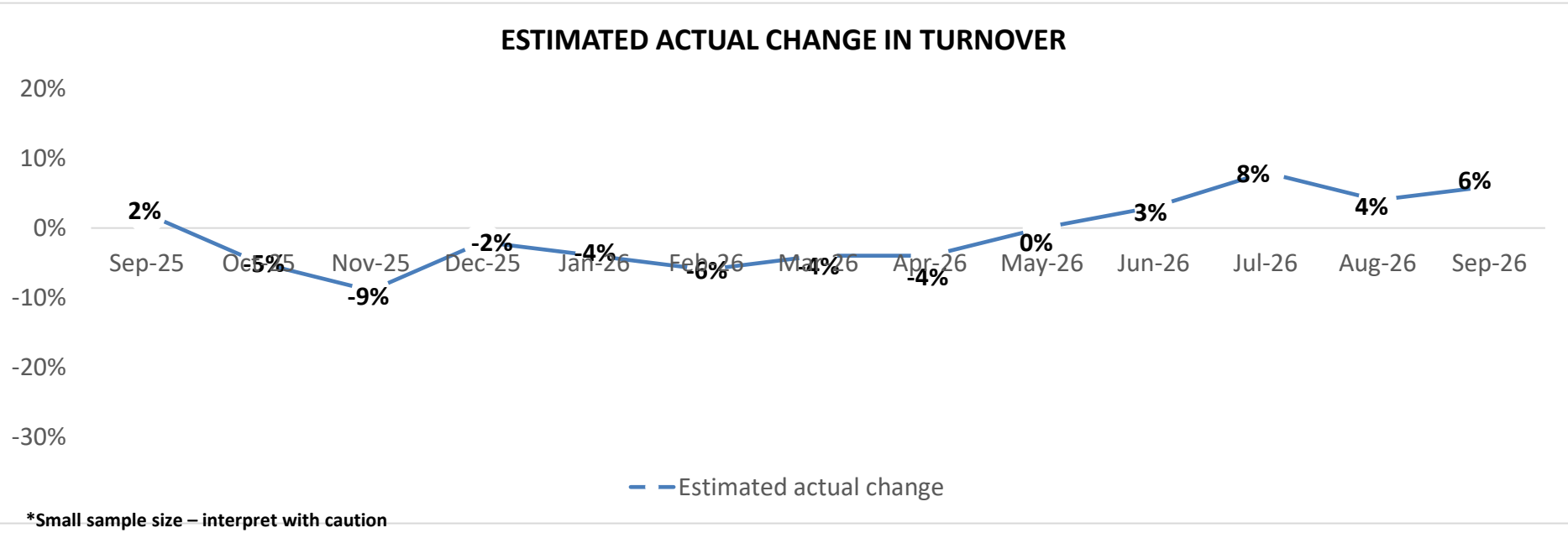


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Performance – Turnover compared to previous year

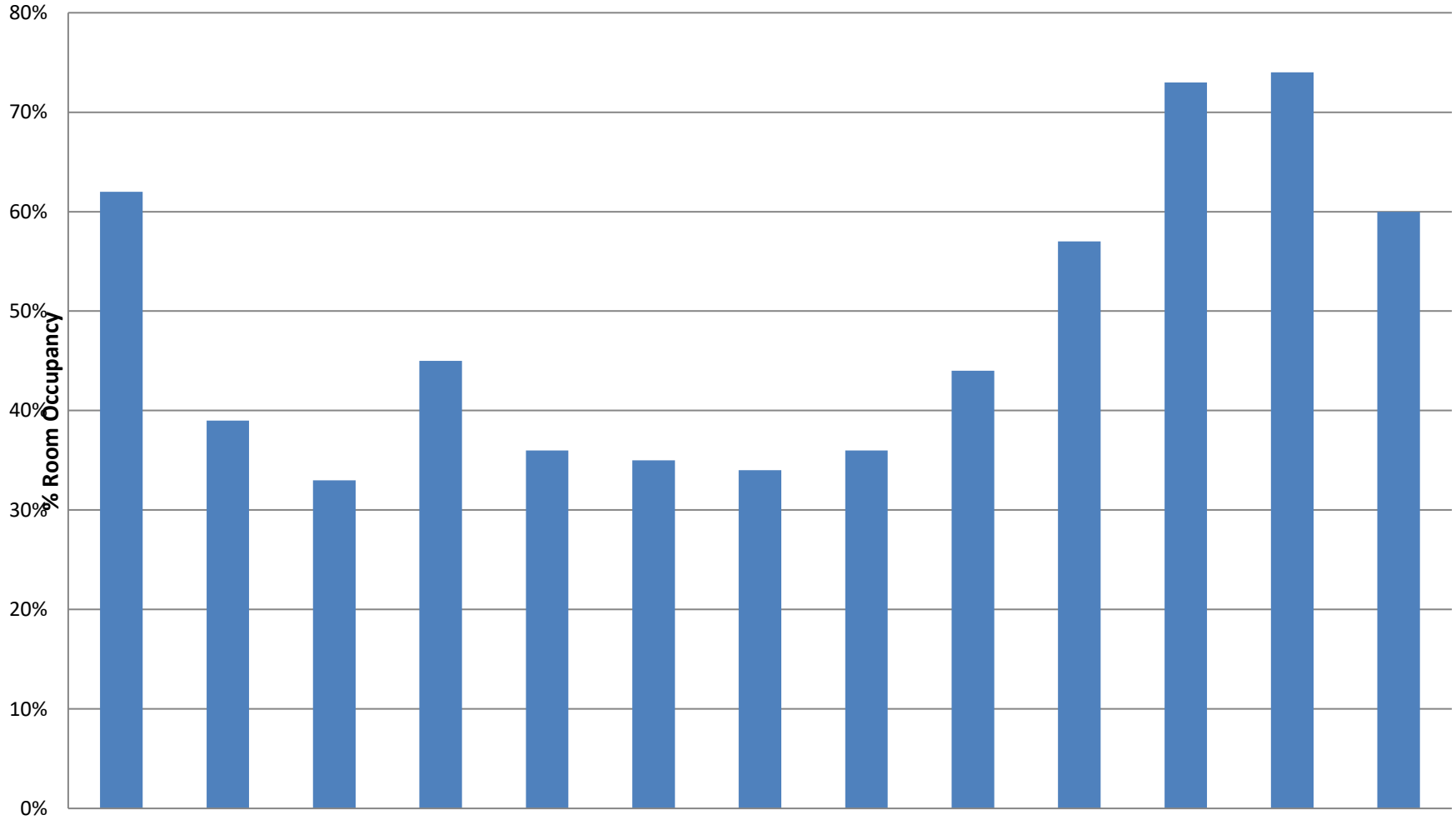


*Small sample size – interpret with caution



*Small sample size – interpret with caution

Performance – Serviced Room Occupancy

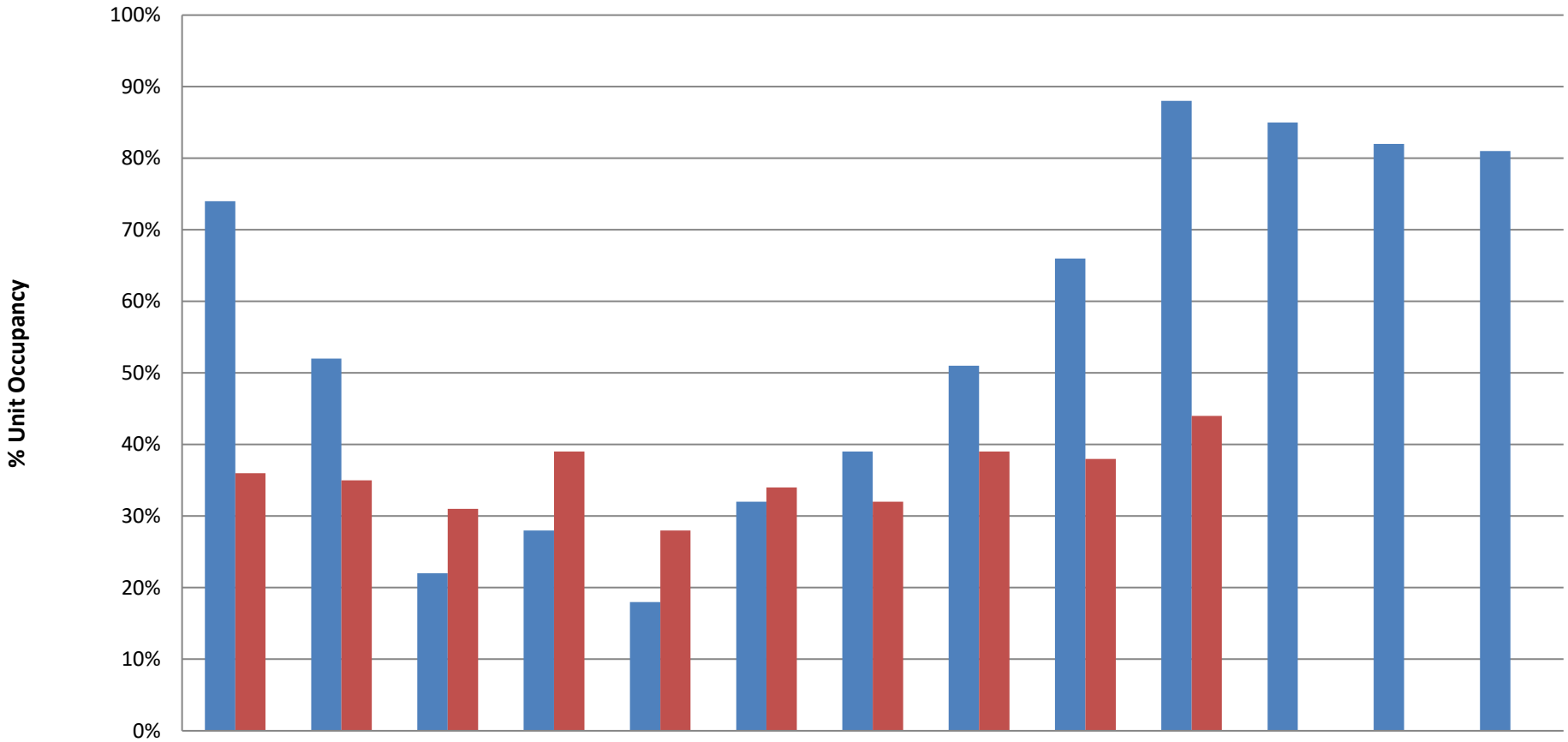


	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26
ER	62%	39%	33%	45%	36%	35%	34%	36%	44%	57%	73%	74%	60%

*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



	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26
ER	74%	52%	22%	28%	18%	32%	39%	51%	66%	88%	85%	82%	81%
Lighthouse	36%	35%	31%	39%	28%	34%	32%	39%	38%	44%			

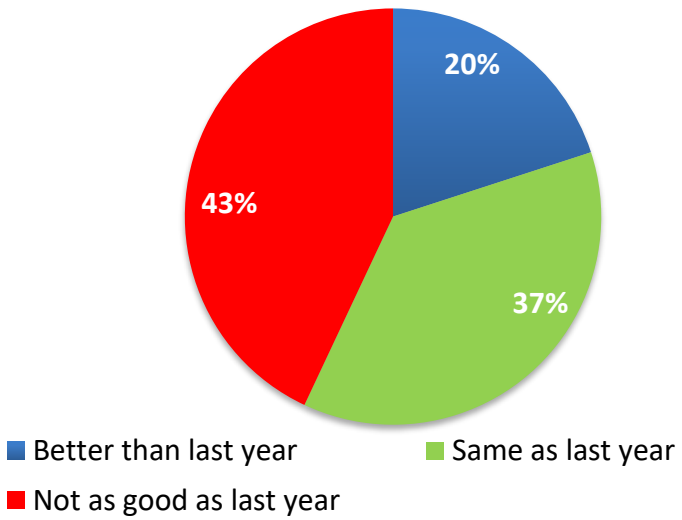
*Small sample size – interpret with caution

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

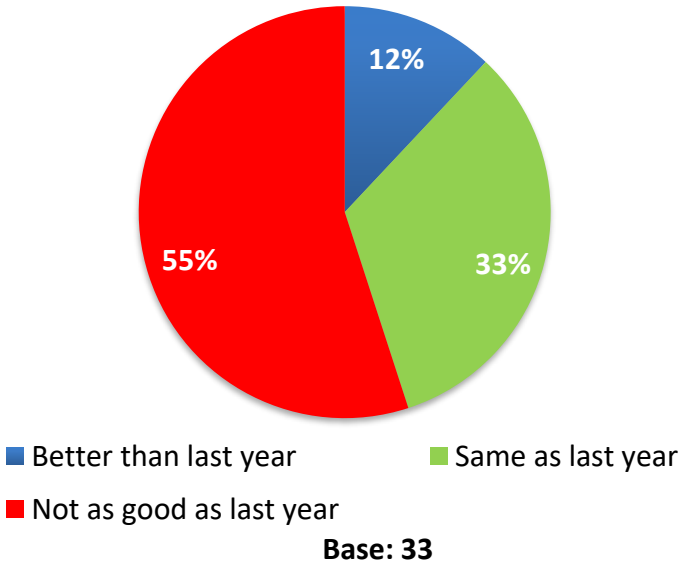
Outlook – Based upon forward booking levels

OCTOBER 2026



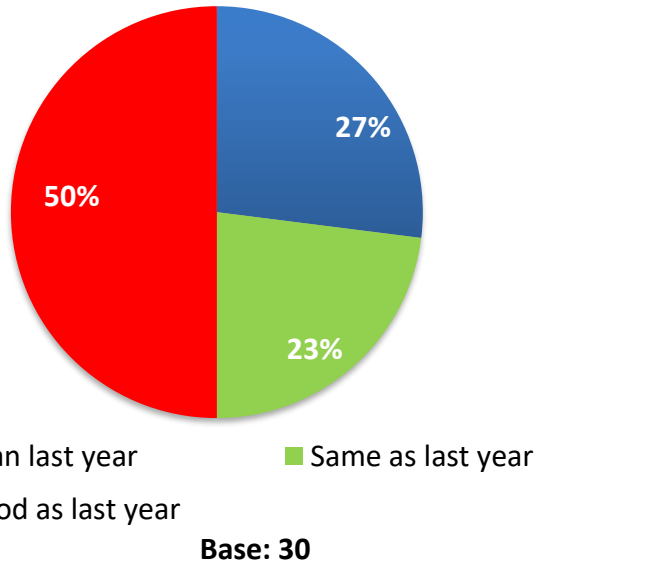
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OCTOBER HALF-TERM 2026



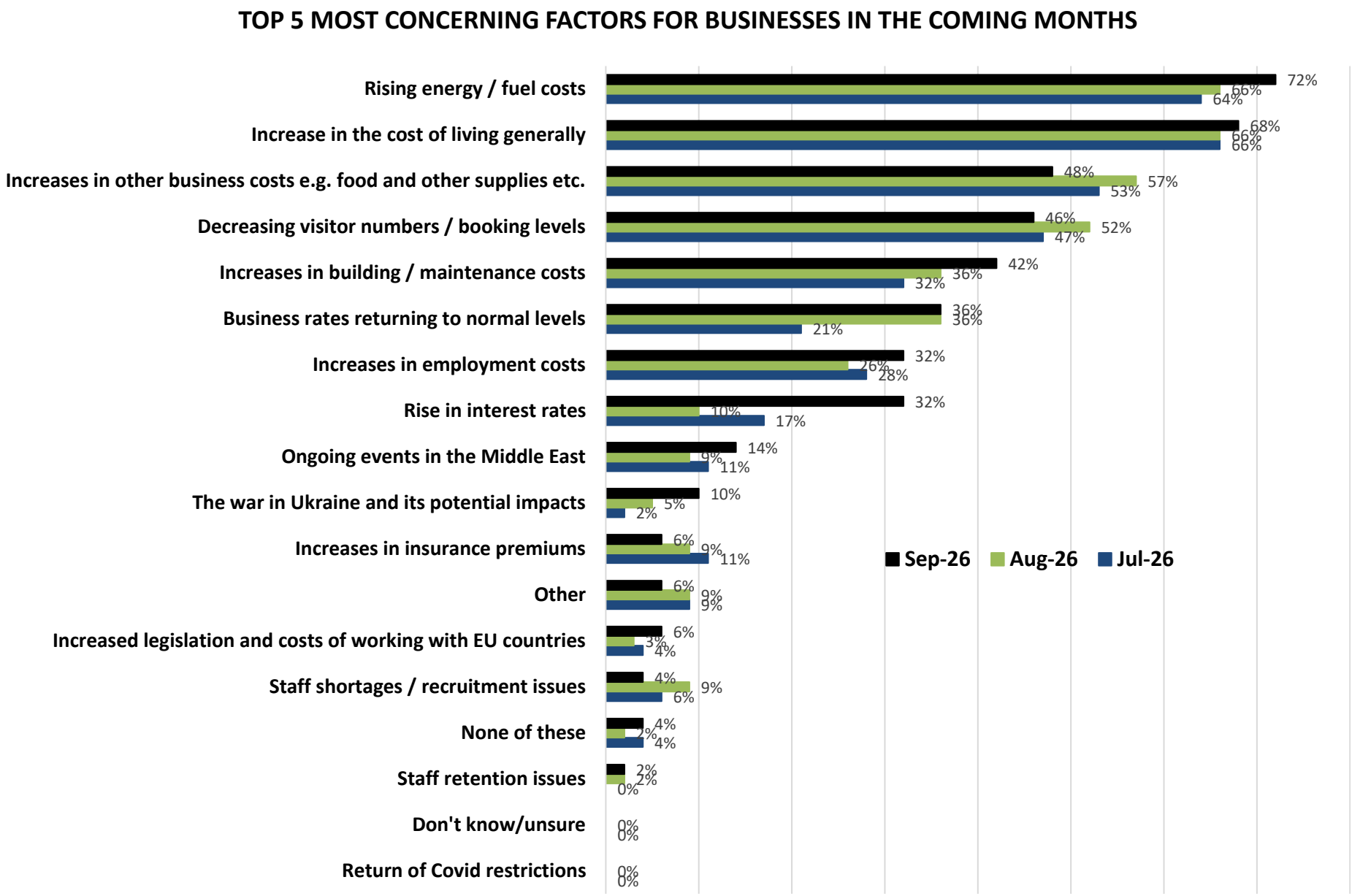
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NOVEMBER 2026

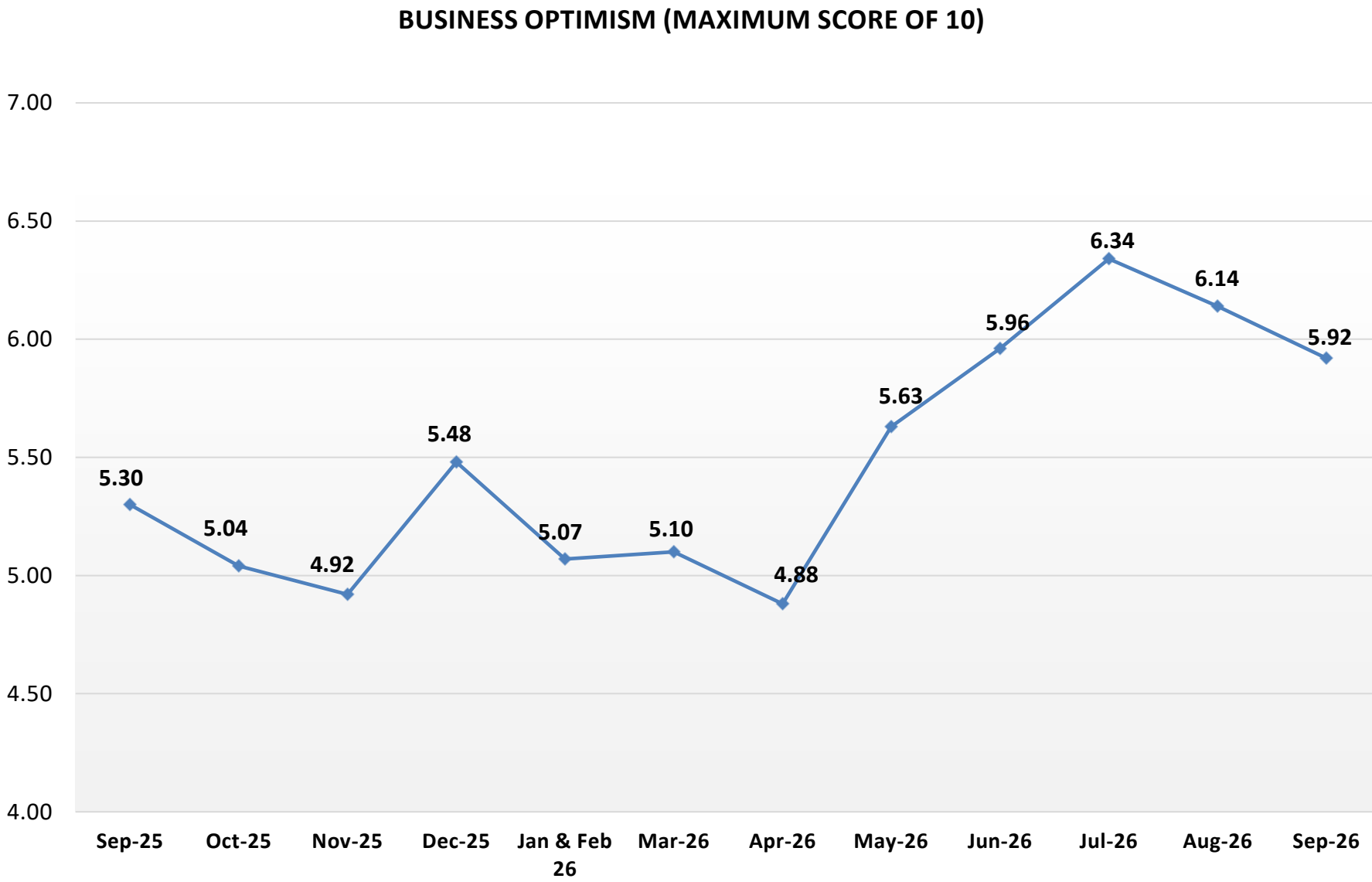


Base: 30

Top 5 business concerns (pre-defined list)



Business optimism



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