

## bookingkit Leisure Market Index – November 2025

# Leisure demand stabilises as prices hold and operators enter a new “efficiency phase”

Each month, bookingkit analyses aggregated booking and revenue data from thousands of leisure providers across Europe. The latest insights for November show a market that is now settling into predictable patterns after several years of volatility. Demand remains steady, price levels hold firm, and operators are shifting their focus towards efficiency and value creation.

### Key Insight 1: Ticket volumes stabilise at 2024 levels

After two years of significant fluctuation, overall ticket volumes in November closely align with 2024. The surge of 2023 has clearly normalised, signalling the transition into a more mature market phase. With demand now more predictable, operational efficiency becomes the strongest lever for protecting margins during the winter season.

### Key Insight 2: Revenue remains structurally higher than pre-2024 levels

Despite the usual seasonal decline, average revenue per operator continues to outperform previous years. Even in the low season, revenue levels indicate that consumers are willing to spend more per visit than before the pandemic-driven boom cycle. Instead of discounting, operators should focus on value-driven winter products such as bundled experiences or added-benefit passes.

### Key Insight 3: Price levels prove resilient, growth remains above inflation

November confirms the stability of the new price baseline: the average ticket price remains clearly elevated compared to previous years. Year-over-year growth is moderate but continues to outpace inflation. Pricing therefore remains a viable strategic lever. Operators can confidently maintain or refine differentiated price tiers, particularly around premium or off-peak products.

**Lukas C. C. Hempel, Founder & CEO of bookingkit:** “The leisure market has settled into a new normal: stable demand, strong pricing, and a healthier baseline even during the low season. What we’re seeing now is a market that rewards operational excellence. The providers who focus on efficiency, smart capacity management, and value creation today will be the ones shaping – and benefiting from – the 2026 season.”

**Pictures for media information** can be found in the corresponding [download folder](#).

### **About the bookingkit Leisure Market Index**

The bookingkit Leisure Market Index aggregates anonymised booking and pricing data from thousands of attractions, activity providers and experience operators across Europe. It is released monthly to support operators, journalists and analysts with reliable, real-time sector insights. The Index tracks the following core metrics:

- Revenue: The gross value of ticket sales across all operators
- Tickets: The total number of admission tickets sold
- Price per ticket: How pricing evolves over time and how operators adjust their value propositions

Together, these indicators provide a clear, data-driven view of market dynamics, helping stakeholders identify emerging trends early and understand how consumer demand is shifting.

### **Disclaimer**

The bookingkit Leisure Market Index is based on aggregated and normalised data from bookingkit customers as well as selected public and private sources. While bookingkit strives for accuracy, no guarantee is made regarding completeness or timeliness. The insights reflect bookingkit’s perspective at the time of publication and do not constitute legal, financial or investment advice. All analyses are intended for professional use only.

### **About bookingkit**

bookingkit is Europe's leading booking, marketing & administration solution for operators of attractions, tours and activities, the world's third largest tourism sector. The company's award-winning software (SaaS) provides scalable technology for online booking and marketing across a variety of channels, including international players such as GetYourGuide, Google Things to do, viator/Tripadvisor and TUI musement. In addition, bookingkit helps businesses map a seamless end-to-end process, creating powerful interfaces to other systems - from real-time synchronization of availabilities, email automation and audience flow management to on-site ticket redemption.

bookingkit was founded in 2014 and is now part of the technological foundation of thousands of Attractions across Europe. The company employs around 80 people from diverse backgrounds and manages international teams throughout the entire continent from its headquarters in Berlin.

For more information, please visit [www.bookingkit.com](http://www.bookingkit.com)

### **Press Contact bookingkit**

Frank Scheibe | +49 1577 2588917 | [scheibe@bookingkit.de](mailto:scheibe@bookingkit.de)