

bookingkit Leisure Market Index - December 2025

Record-breaking Q4 2025 confirms the end of seasonality and marks a new phase of year-round profitability

Each month, bookingkit analyses aggregated booking and revenue data from thousands of leisure providers across Europe. The latest insights for December and the full fourth quarter of 2025 confirm a decisive shift in market dynamics: Q4 closes as the strongest fourth quarter on record, winter demand proves structurally resilient, and pricing has fully stabilised at a sustainable growth level. The traditional concept of a pronounced "off-season" is rapidly losing relevance.

Key Insight 1: Q4 revenue reaches an all-time high, winter becomes a profit driver

Q4 2025 delivered the highest fourth-quarter revenue on record, outperforming both 2023 and 2024. What was once considered a quiet end-of-year phase has now evolved into a significant revenue engine. High-value winter bookings increasingly compensate for the highly competitive summer months, proving that the industry has successfully expanded its profit window. December revenue itself remained structurally above the 2023 baseline, confirming that severe winter revenue drops are becoming a thing of the past.

Key Insight 2: Ticket volumes confirm year-round demand, Q4 hits a three-year high

Ticket sales rebounded strongly in December, closing the gap to match peak volume levels from late 2024. Across the full fourth quarter, ticket volumes reached a three-year high, reversing the slower trends observed earlier in 2025. This late-year surge demonstrates that consumer demand is both stable and reliable, even as the post-pandemic travel boom continues to normalise. Operators who remained visible and active throughout December benefited from the strongest relative volume growth of the year.

Key Insight 3: Pricing stabilises as volatility fades, growth settles at ~7%

After several years of sharp price fluctuations, year-over-year volatility has clearly ended. By the close of 2025, price growth has normalised at a healthy and consistent 6.9%. This confirms the emergence of a mature pricing environment in which operators can maintain higher yield floors without relying on erratic double-digit increases. Value preservation, rather than aggressive price inflation, is now the dominant pricing strategy.

Lukas C. C. Hempel, Founder & CEO of bookingkit: "The fourth quarter of 2025 marks a turning point for the leisure market. Winter is no longer a gap to be managed, but a profit phase in its own right. Stable demand, record Q4 revenue and predictable pricing show that the market has matured. Operators who treat the entire year as an active business period – and focus on efficiency, smart capacity use and value creation – are entering 2026 from a position of real strength."

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

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