

bookingkit Leisure Market Index – March 2026 / Q1 2026

Record Q1 2026: Geopolitical shifts drive European leisure demand as visitor-led growth returns for the first time since 2024

Each month, bookingkit analyses aggregated booking and revenue data from thousands of leisure providers across Europe. The latest insights for March and the full first quarter of 2026 reveal a significant inflection point: Q1 revenue reaches record highs as geopolitical uncertainty redirects travel budgets toward European destinations, ticket sales surge to match the historic peaks of early 2024, and – for the first time in two years – growth is driven by rising visitor numbers rather than higher prices.

Key Insight 1: Q1 revenue hits a record high as travelers redirect budgets to Europe

The escalating Middle East conflict is reshaping European travel flows. With long-haul routes increasingly perceived as risky, travelers are redirecting their international vacation budgets toward European leisure destinations, decisively pushing Q1 2026 revenue to all-time highs. This is not incremental growth; it represents a structural reallocation of spending power into the European experience economy. Operators who move quickly to create and market exclusive, high-ticket packages are best positioned to capture the expanded budgets of travelers rerouting their plans to the region. The key question now is whether this Q1 momentum will carry through the rest of 2026, making it critical for operators to optimize their core offerings, sales channels, and entire ticketing process immediately.

Key Insight 2: Visitor numbers surge toward record territory

The redirection of travel demand toward European destinations pushed March 2026 ticket sales rapidly upward, successfully matching the historic volume peaks of early 2024. Across the full first quarter, visitor numbers decisively outperformed 2025 levels. However, they still fall slightly short of the 2024 volume peaks – a gap that underscores an important message: operators must continue to invest in the quality of their experiences to ensure they capture maximum value from every single booking. Teams and booking systems need to be fine-tuned to convert the rising interest into confirmed sales.

Key Insight 3: Price stabilisation confirmed, growth now comes from visitors, not price increases

For the first time since early 2024, Q1 prices did not increase. This definitively aligns with the broader price stabilisation trend confirmed since late 2025 and marks a pivotal shift in market dynamics: growth is no longer being driven by higher ticket prices, but by more visitors walking through the door. While this is a positive signal for market health, the sustainability of both visitor volumes and price levels remains uncertain. Operators should not take current conditions for granted. Instead, they must optimize their website booking flows and ensure their products are instantly available across all possible sales channels to secure revenue regardless of how the market evolves.

Lukas C. C. Hempel, Founder & CEO of bookingkit: "Q1 2026 marks a turning point for the European leisure market. Geopolitical uncertainty is redirecting significant travel budgets into our sector, and for the first time in two years, growth is being powered by rising visitor numbers rather than price increases. This is an enormous opportunity. But it comes with a clear mandate: operators who optimize their booking flows, expand their channel presence and invest in high-value experiences now will be the ones who define performance in 2026. The window to act is open and it won't stay open forever."

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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