Brego
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Leisure Market Insight

December 2025

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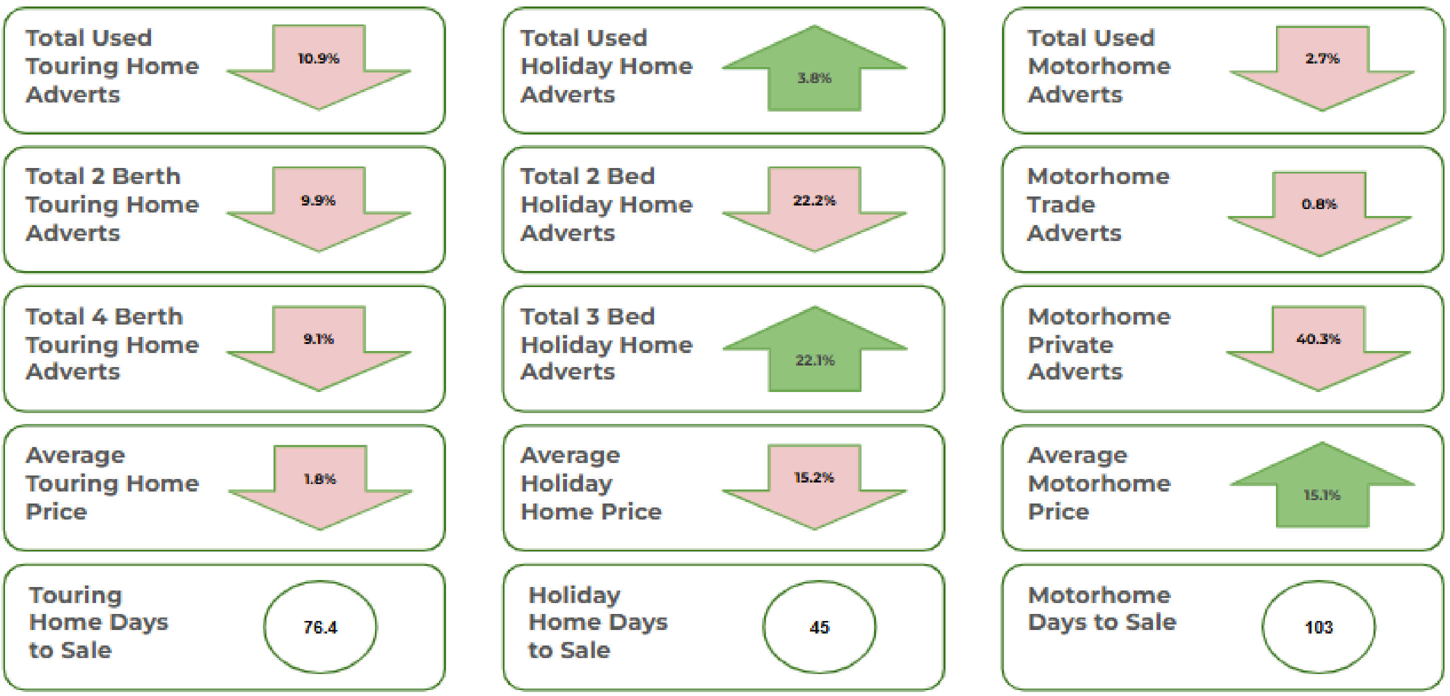
December Monthly Leisure Market Insight

The December Leisure Market Report reviews what happened in the UK Leisure market sectors compared to the previous month and highlights the key areas of the economy that impacted the Leisure sector and economy as a whole during the month.

Key Used Leisure Home Market Indicators

Using the comprehensive and complex whole market Brego data, these are the key market indicators for the month of December when compared with market activity experienced in November:-



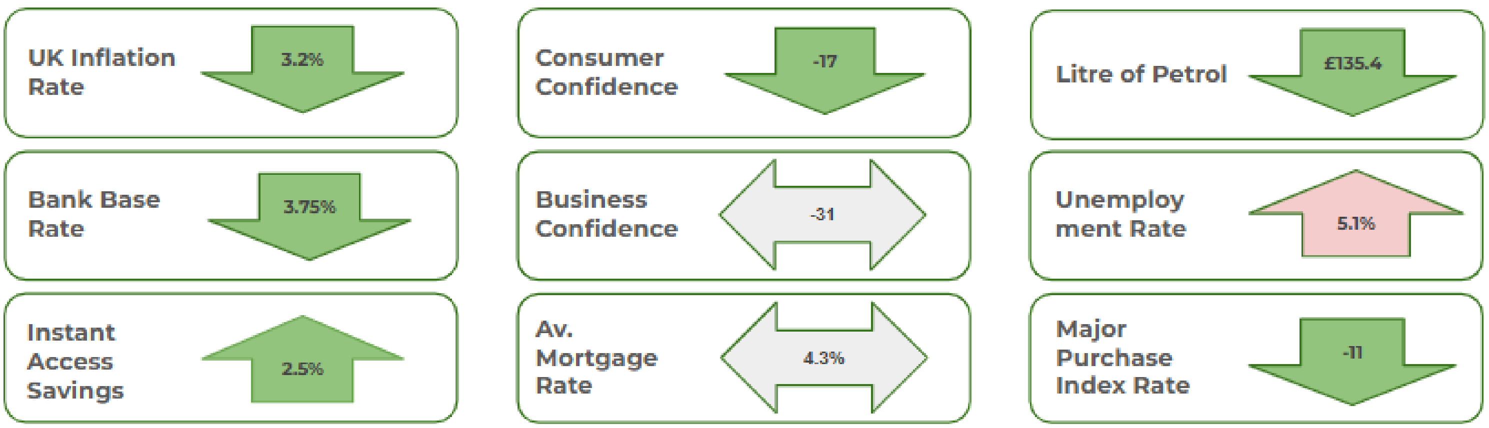
Data Powered by Brego Insight

December is traditionally the quietest month of the year for the Leisure sector as a whole and the month's KPIs largely support the downturn in activity experienced by all verticals. The volume of adverts listed tends to decrease during December as dealers and parks reduce their costs by dropping advertising levels to a yearly low and that has certainly been the case for Touring Homes and Motorhomes and Campers. The slight anomaly in December was an upturn in the number of Holiday Homes on sale with a recorded 3.8% increase in adverts, many of which were for 3 bed models.

The most notable change has been recorded in the average days to sale which have increased across the board. Touring Homes took an extra 29.2 days to sell, whilst the extra 19.7 extra days taken to sell a Holiday Home was less damaging. Motorhomes and Campers suffered the worst taking on average an extra 37.7 days longer to sell which for some may seem a surprise given this vertical often has more balanced data across the year due to the nature of the product.

In addition, the sales data reveals that sales dropped by 31.5% for Touring Homes, 9.5% for Holiday Homes and 25.4% for Motorhomes and Campers. With the New Year upon us, let's hope that we see an upturn during January as consumer confidence grows and thoughts move from the festive season to leisure pursuits.

Key UK Economic Indicators



Data Courtesy of Trading Economics, Gemini AI and www.gov.uk

Following the budget announcements at the end of November, there was a more positive outlook for the economy during December. Of specific note was the somewhat unexpected drop in the rate of inflation, which brought great relief to the government as well as the general working population. This in turn triggered the Bank of England to reduce the base rate to 3.75% which is the lowest it has been since February 2023.

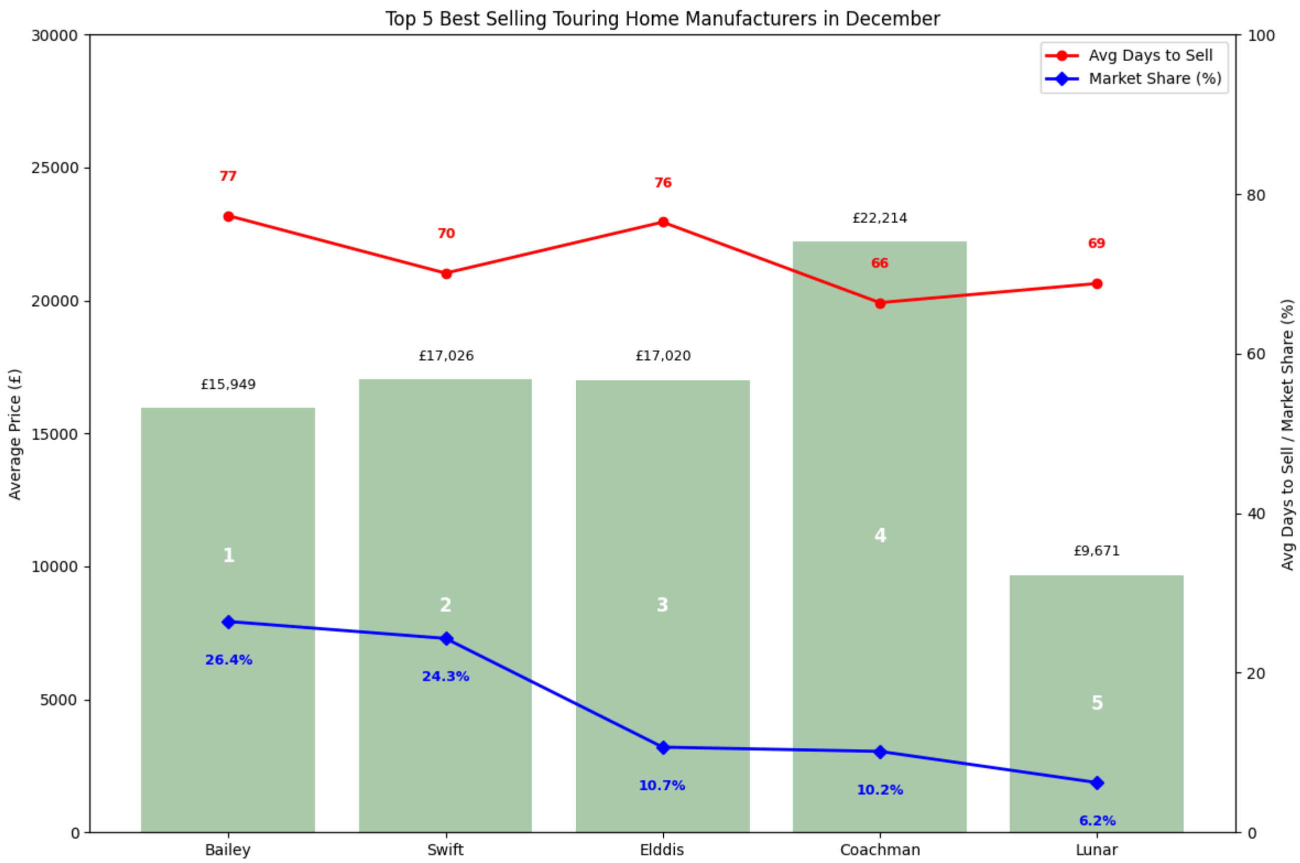
In addition, consumer confidence improved by 2 points and the expectation was for consumer spending to increase over the course of the month. The drop in the major purchase index rate also suggested that December could have been an impressive period for retailers nationwide.

However, this has not been the case and despite the positive KPIs these did not translate into reality. Reports show that consumers remained nervous and focussed on value driven products rather than returning to normal spending patterns. This included shopping at value supermarkets for groceries and for many larger purchases there was a tendency to fund these using “buy now - pay later” options.

In addition, Barclays reported that consumer spending in 2025 dropped by 2.3% when compared with 2024. There were also many sources including Barclays that have reported that card spending dropped by a milder 0.2%.

Top 5 Best Selling Touring Home Manufacturers

The chart below shows the Top 5 best selling Touring Home manufacturers in the UK in December 2025. The average price is above the bar and the average days to sale is shown by the red line and the percent of market share is shown by the blue line.



Data Powered by Brego Insight

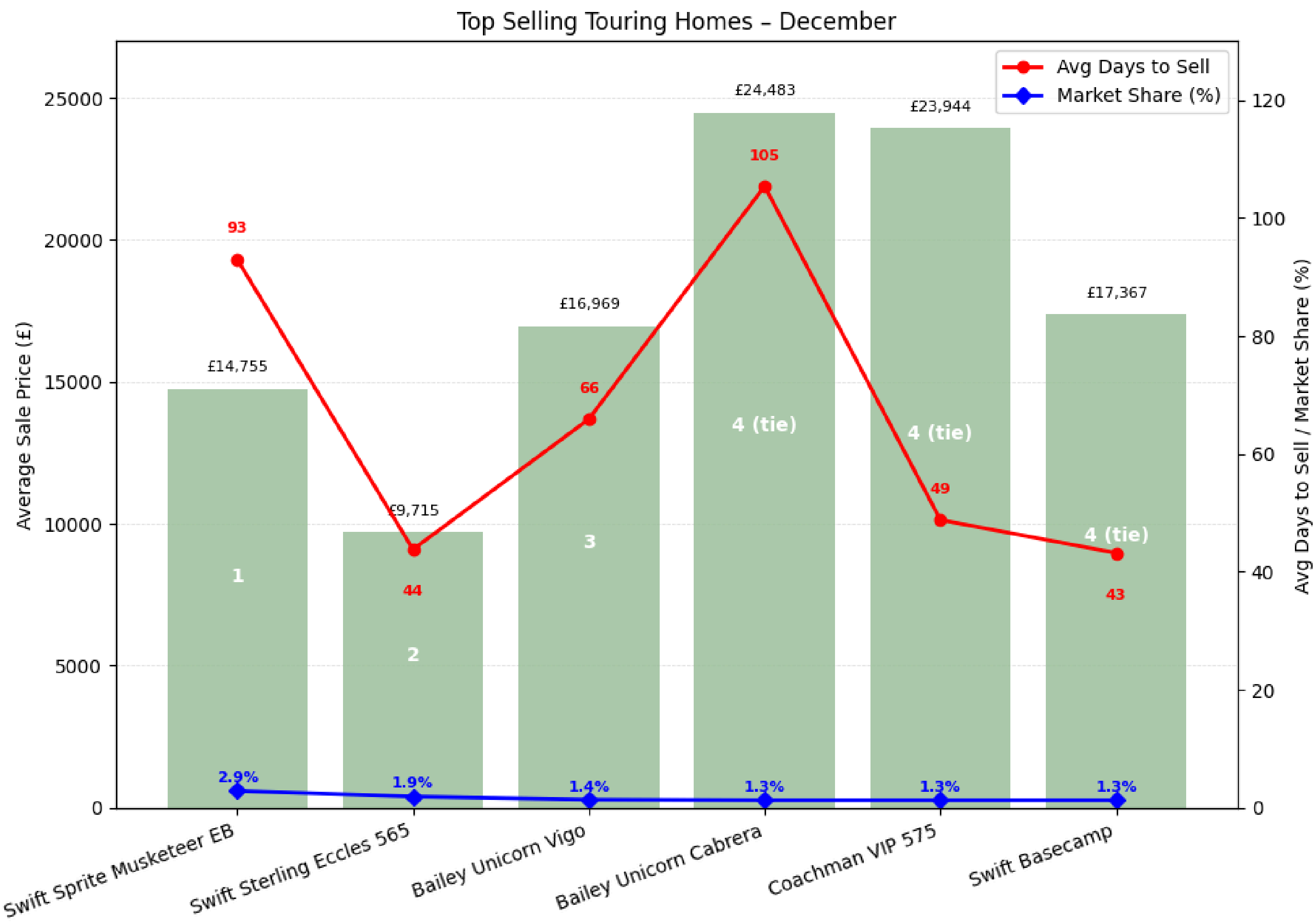
December shows that the Top 5 selling Touring Home Manufacturers remained the same as they had been for the last 2 months and unlike in November the order has also remained the same.

However, there have been some subtle changes in the data with all but Coachman experiencing a drop in the average price. In addition Bailey increased market share by 0.9 of a percentage point at the expense of Swift that lost 0.7 of a percentage point. Elddis and Coachman also improved market share whilst Lunar lost 0.8 of a percentage point.

Sales for the Top 5 dropped for the month by just less than 30% on the November figure and the average price across the Top 5 dropped by 1.7% to £16,376. Looking at the days to sale and for December the average increased from 54.3 to 71.8 compared to November which is quite a big shift.

Top 5 Best Selling Touring Homes

The chart below shows the Top 5 best selling Touring Homes in December 2025. The average price is shown above the bar and the days to sale shown on the red line with the percent of market share on the blue line.



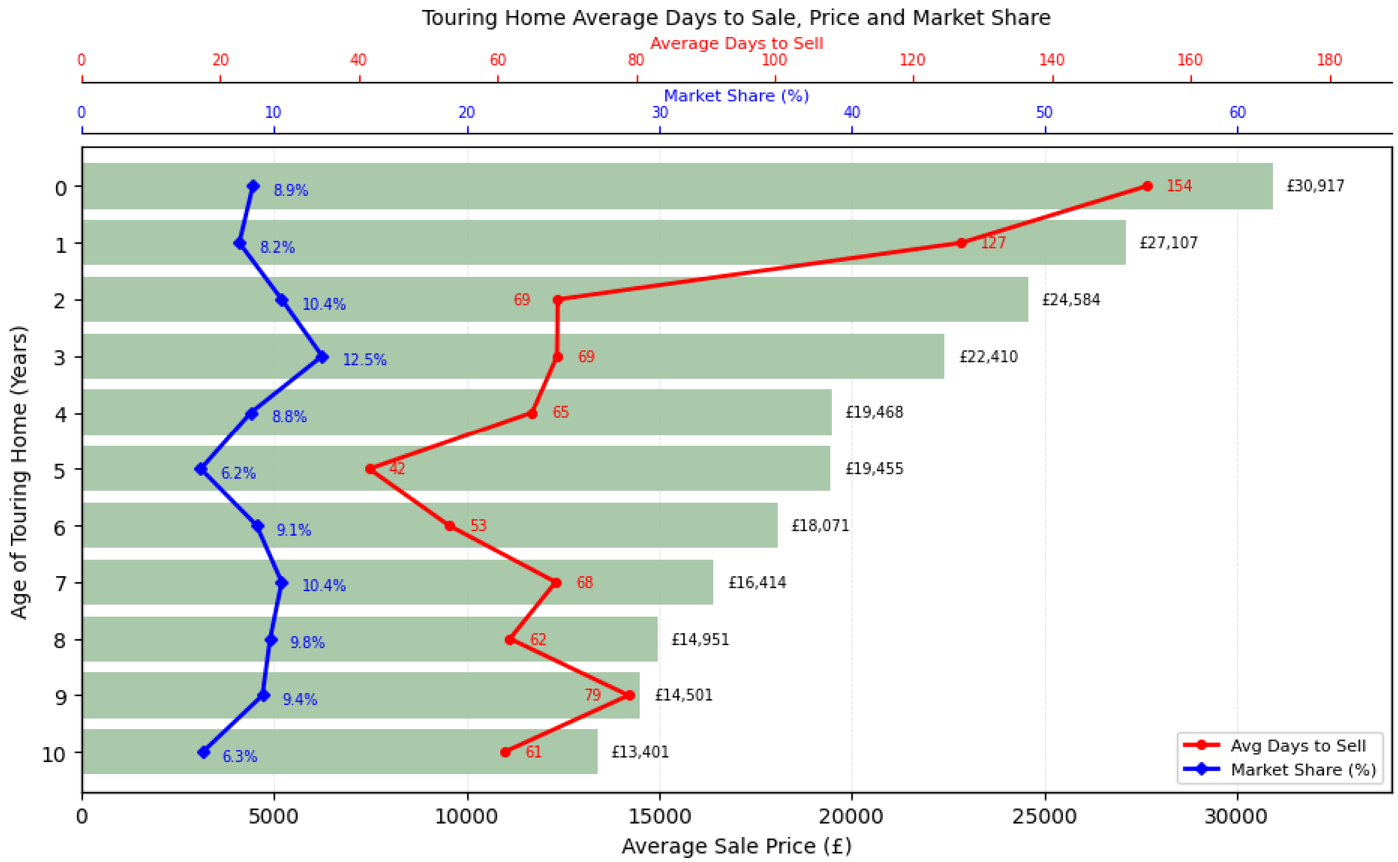
Data Powered by Brego Insight

December saw 3 new models enter the Top 5 with just the Swift Sprite Musketeer retaining its top spot and the Swift Basecamp coming in at a tied fourth place. Indeed 3 models tied for fourth spot hence the chart shows 6 Touring Homes and not 5. Swift did keep 3 of the Top 6 spots with the entry of the Sterling Eccles 565. The average price of the Musketeer dropped by £1,481 suggesting more older models were sold whereas the Basecamp average price shifted down by just £176.

Baailey swapped out last month's Unicorn Cadiz and Seville models for the Vigo and Cabrera, the latter is often in the Top 5. Of note is that the overall average days to sale for these Top 6 models increased from 54.3 days to 71.8.

Touring Home Average Days to Sale and Average Price

The data in this chart shows the average retail price at the end of the bar and average days to sell on the red line with a percent of market share on the blue line. The data covers Touring Homes by age up to 10 years old.



Data Powered by Brego Insight

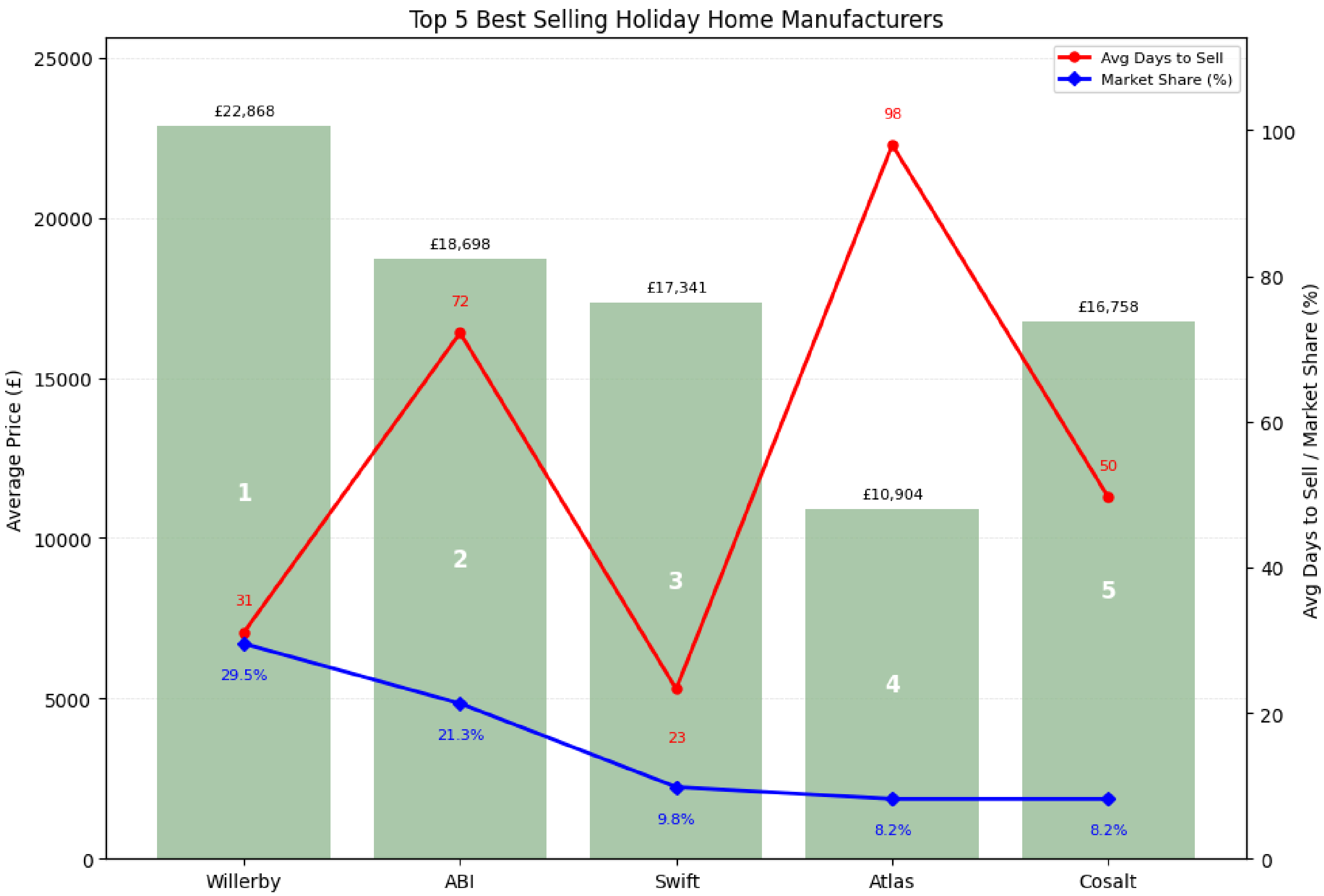
This chart surfaces the activity in the market by age of the Touring Home and is interesting in that unlike previous months the average price declines consistently with age, which is what one might expect to always be the case. However, it is often distorted by the number of higher value units in the market specifically around the 5 year old mark.

Of note is that Touring Home sales up to 10 years old declined by 33% during December although the average sale price declined by just 0.5 of a percentage point suggesting there has been little tactical pricing activity to try and push the market which is a positive and sensible strategy.

The market share has varied slightly for certain ages, although generally remained consistent to the November data. There was a 1.8 percentage point increase for 1 year old units and 2.5 for 3 years old models. This has largely been at the expense of 5 year old market share which dropped by 1.3 percentage points to 6.2%.

Top 5 Best Selling Holiday Home Manufacturers

This chart shows the Top 5 best selling Holiday Home manufacturers in the UK in December 2025. The average price is above the bar with the average days to sale shown by the red line and the percent of market share is shown by the blue line.



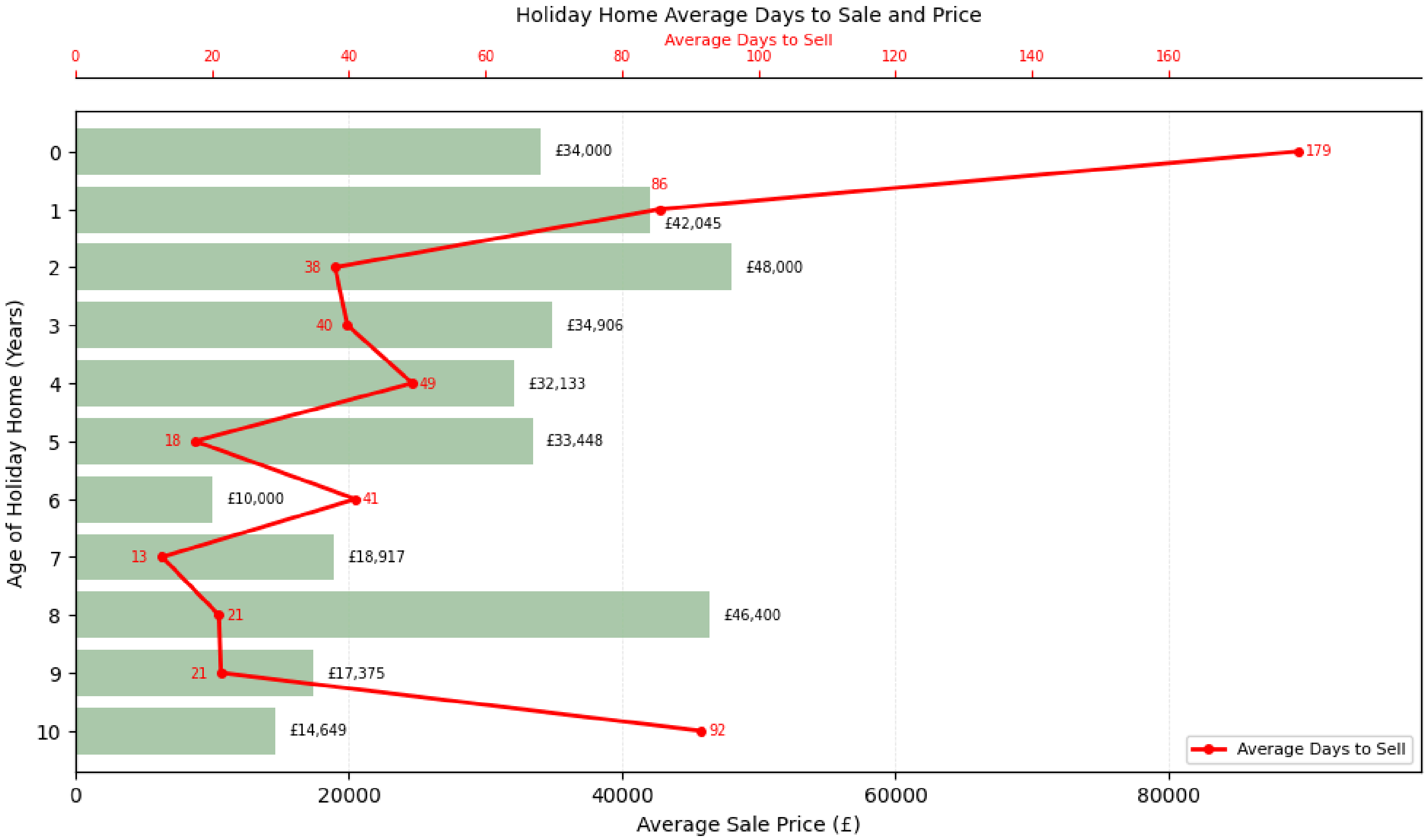
Data Powered by Brego Insight

The Top 5 selling manufacturers have remained the same for December although Atlas and Cosalt reversed positions as they also did during November. However market share has changed for all brands with ABI enjoying the largest gain taking an extra 4.2% of the market. Atlas improved by 1.6 percentage points and the biggest loss was experienced by Swift that declined to 9.8% although they did maintain their third spot.

Overall used sales for the month dropped by 16% in comparison to November which is quite a bit higher than the 9.9% experienced by the whole market. The sector also suffered a 17% drop in average price to £17,314. On a more positive note the days to sale for the Top 5 increased by just 6.6 days compared to 19.7 for the whole Holiday Home market.

Holiday Home Average Days to Sale and Average Price

The data in this chart shows the average retail price at the end of the bar and average days to sell on the red line with the percent of market share on a blue line. This data is for Holiday Homes by age up to 10 years old.



Data Powered by Brego Insight

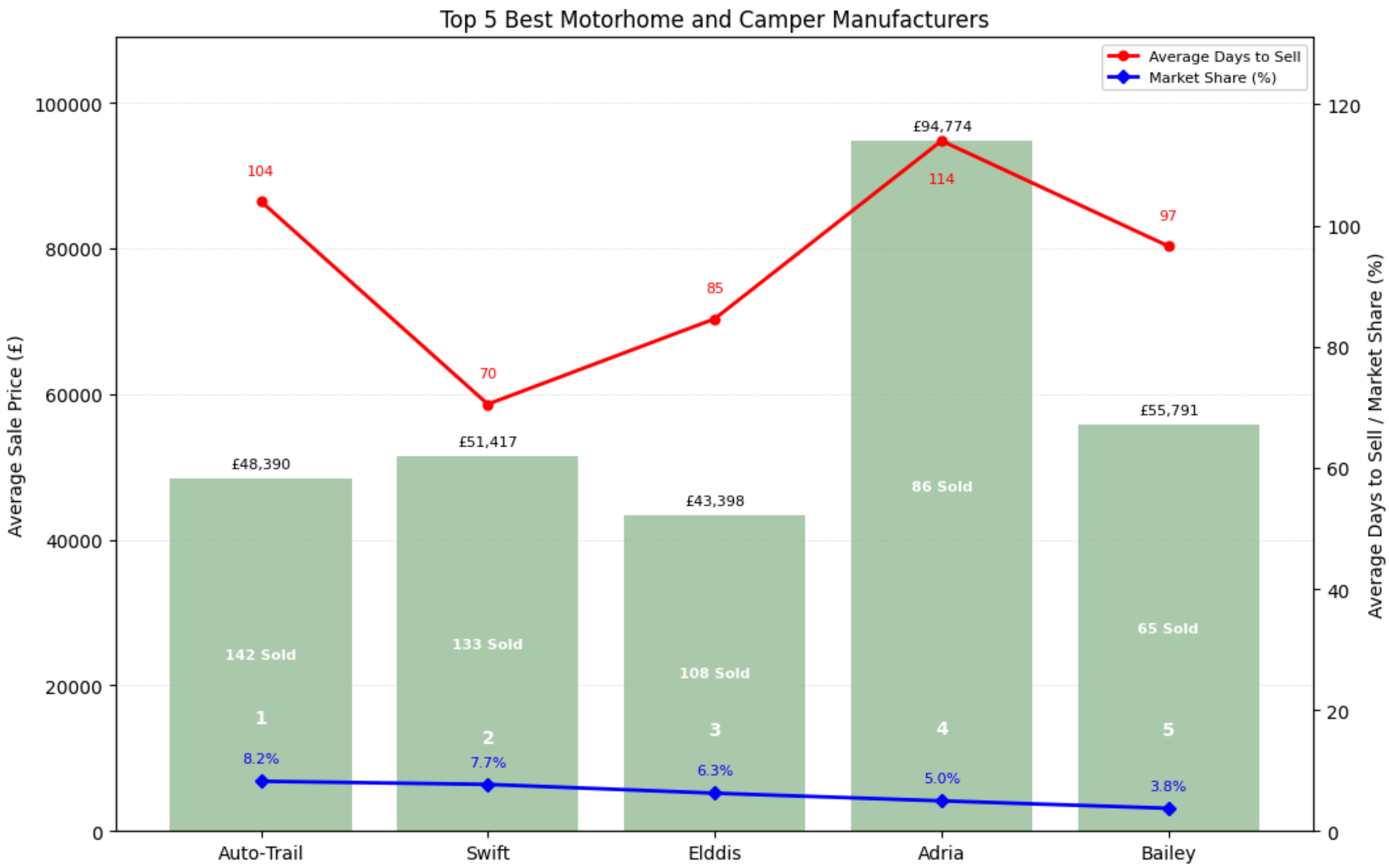
This data reflects the unique market conditions often experienced during the quieter months of the year and is immediately evident by the inconsistency of the average sale price by age. For example the average sale price of 8 year old Homes jumped from £22,500 in November to £46,400 in December. Overall the average price dropped by 20.6 percentage points to £30,170

In addition the average days to sale were also very inconsistent although the market as whole did improve by 8 days to 27. From a market share perspective there were also some big changes from November to December, the largest being an increase of 9.1 percentage points for 3 year old Homes.

The answers to these anomalies can be found using the unique AI driven Brego Insight tool in the dealer platform.

Top 5 Motorhome and Camper Manufacturers

The chart below shows the Top 5 best selling Motorhome and Camper manufacturers in the UK in December 2025. The average price is above the bar. The average days to sale is shown by the red line and the percent of market share is shown by the blue line.



Data Powered by Brego Insight

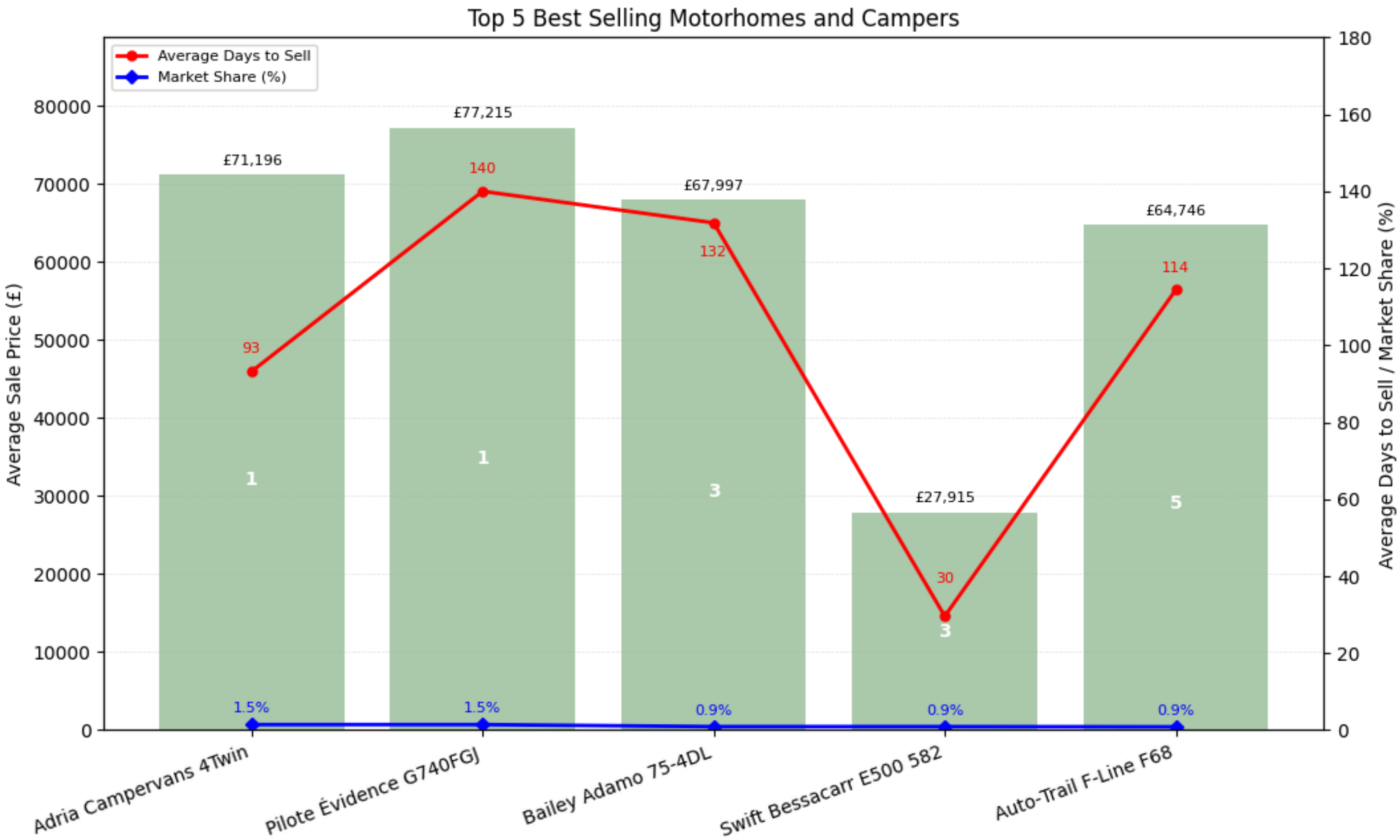
Overall sales for the Top 5 dropped by 30.5 percentage points which was 5.4 percentage points greater than the whole market. The Top 5 also saw a decline of 1.2 percentage points of whole market share to 31% and a jump in the average days to sale 20.4 days.

The December Top 5 data also shows a few changes in the market with Roller Team dropping out of fifth spot to be replaced by Adria who took fourth spot from Bailey. From a market share perspective Auto Trail saw the largest decline of 1.5 percentage points followed by Swift with 0.8 of a percentage point.

Of specific note is the very high average sale price for the Adria brand at £94,774 which is £38,983 higher than Bailey who had the second highest average sale price. Overall the average sale price for the Top 5 increased by 16.7 percentage points.

Top 5 Best Selling Motorhomes and Campers

This chart shows the Top 5 best selling Motorhomes and Campers in December 2025. The average price is shown above the bar and the days to sale shown on the red line and the percent of market share by the blue line.



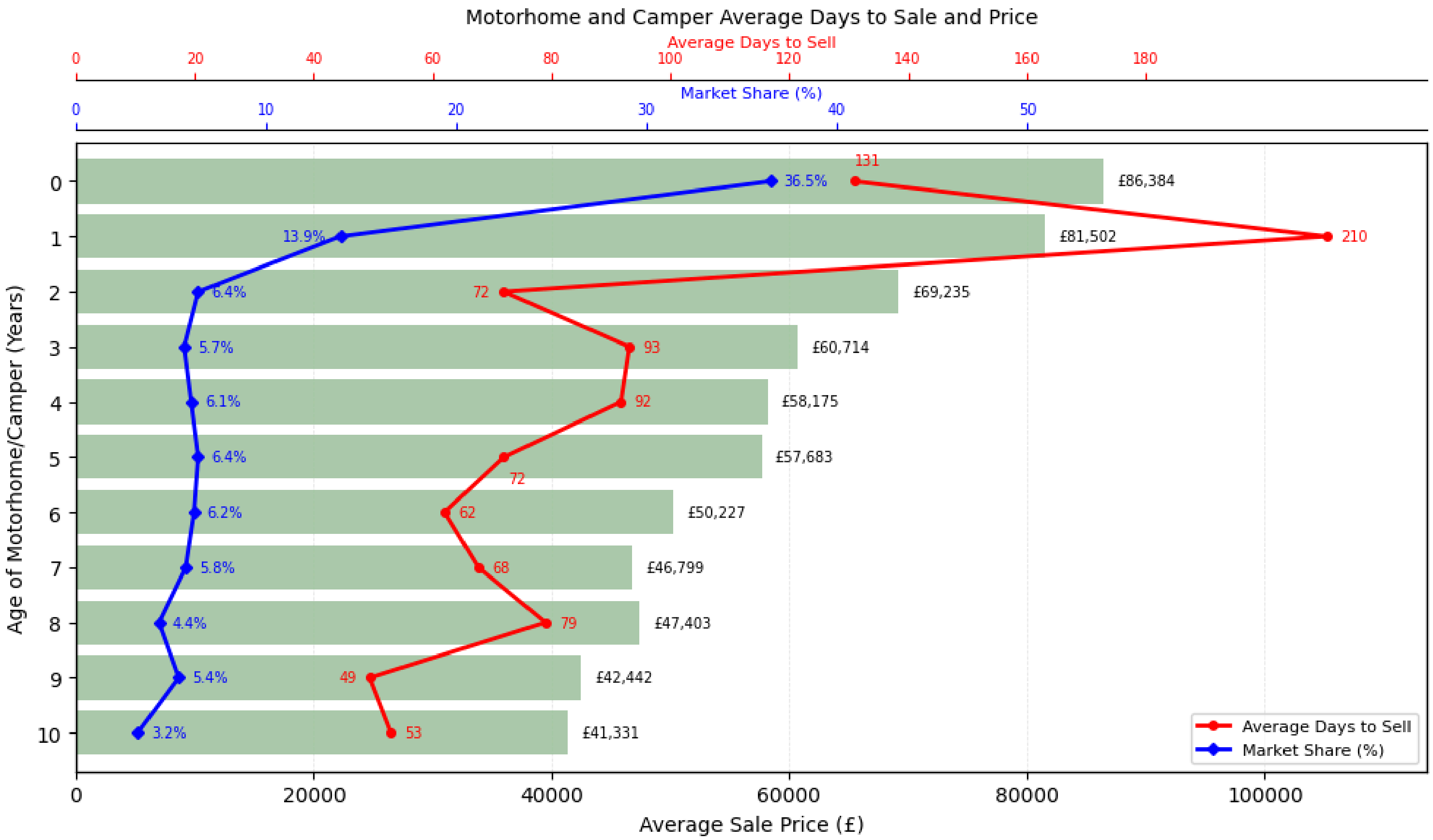
Data Powered by Brego Insight

Looking at individual sales success in December, there was just 1 new entry from Auto Trail in the form of the F-Line F68 with its large rear U shape seating area proving popular. The Adria 4Twin jumped to first spot knocking the Bessacar E 500 to fourth spot. It is worth highlighting that sales volume for the Adria was almost exactly the same in December as they were in November, whereas the Bessacar sold just over half the volume it did in the preceding month. The Pilote jumped from fifth spot to second spot with similar sales to the previous month.

Overall market share for the Top 5 increased by just 0.1 percentage point whilst the average price increased by 12.9% and sales declined by 23%. Days to sale increased by 36.1.

Motorhome and Camper Average Days to Sale and Average Price

The data in this chart shows the average retail price at the end of the bar and average days to sell on the red line with the percent of market share on the blue line for Motorhomes and Campers by age up to 10 years old.



Data Powered by Brego Insight

A far more stable data set than that of the Holiday Home market vertical with a generally steady decline in average sale price over the years. The only real anomaly in the chart is the average sale price for 8 year old units which is slightly higher than that of the 7 year old Motorhomes and Campers. From a days to sale perspective the average for a 1 year old vehicle is particularly high at 210 days although overall the average for up to 10 year old models increased by 10.8 days.

Market share did change markedly, specifically for sub 1 year old models which jumped from 23% in November to 36.5% in December and is likely due to some pre-registration of some vehicles to clear the stock for the new models coming in 2026.

Overall, sales dropped by 22% and the average price increased by 3.2%.

Summary

Generally speaking the market in December performed as would be expected of what is usually the quietest month of the year. Consumer confidence may have improved slightly and the economic summary showed stability which will in all likelihood help activity as we move into 2026. However, consumers stayed away from major leisure purchases as they focussed on the festive period.

It will be very interesting to see what happens during January. Will the consumer return with an open wallet or as many expect will the sector have to wait for February and the upcoming Caravan, Camping and Motorhome Show at the NEC in Birmingham.

All the data in this report is available to subscribers using the Brego Platform which now benefits from a cutting edge AI driven Insight platform to help bring detail and clarity to the complex UK Leisure market.