

OFF-SEASON TOURISM EMERGES AS DRIVER OF SUSTAINABLE GROWTH IN SOUTHERN EUROPE



Nowhere is the shift clearer than in Europe, where off-season tourism is being reimagined as vital opportunities. A recent analysis from Data Appeal Mabria - presented at the 2026 Seasonality Summit - frames shoulder periods not as gaps, but foundations. Instead of fading after summer, places across southern regions aim to stretch visitor numbers evenly through the calendar. By doing so,

pressure on cities eases when heat and crowds peak. Resilience grows because income spreads beyond just a few hot months.

Looking at visitor arrivals in Italy, Spain, Greece, Croatia, and Portugal, the study shows uneven movement against seasonal peaks. Some nations now draw interest beyond peak months, yet several still lean almost entirely on summertime visits.

Spain Leads the Shift Away from Summer Travel Dependence

Spain leads among the five countries in spreading out its visitor numbers across months, only having slightly more than half of arrivals during the period from May through September. **Closely behind comes Portugal, where a bit over 54 percent of travelers arrive within those warmer months.** Italy reports nearly 59 percent seen in that span, placing it further along toward concentration. On the opposite end sit Greece and Croatia - both still relying heavily on peak summer travel, recording shares above seventy-two percent. Still, early trends suggest Greece may be extending its appeal into shoulder periods. A shift appears underway there.

Travel patterns are shifting, shaped by seasonal trends that now draw more visitors during quieter months. Campaigns help nudge interest, though personal choices play a role too. A move away from peak times reflects new priorities. Preferences adapt, influenced by both messaging and lifestyle changes. Not all trips align with holidays anymore - timing spreads out across the year.

Events and Improved Connectivity Fuel Off-Season Demand

Outside the high season, many gatherings help keep visitor numbers steady. The data shows between 53% and 72% of activities happen when travel is slower, while attendance ranges from 58% to 73% during those times. Because of this shift, festivals, business-related trips, and similar draws are making a difference in balancing yearly visitation patterns.

Growth in flight links could drive additional movement. From October through December 2026, airlines across the five nations should make available around 96.64 million seats - an uptick of 4.6% versus 2025's figures. Leading the rise, Greece anticipates an 11th-month jump near 10.7%, while Spain trails slightly at 5.4%; Italy follows behind with 4.2%. In contrast, Portugal shows a dip, forecasting a small fall of 2.5%. With broader reach comes potential - hotel managers may now draw travelers from abroad even when summer ends.

Low Season as a Profitability Lever for Hotels

Winter months bring shifting guest patterns, reshaping profit potential for adaptable properties. Couples from neighboring regions fill rooms between January and March, leaning toward moderately priced stays. As autumn deepens into early winter, travelers arrive from familiar Western European countries - staying longer, spending more. These guests typically choose premium lodging options. Seasonal shifts like these open pathways to stronger returns - not by chance, but through responsive planning.

Off-season tourism is attractive to certain groups more than others - senior travelers, those working remotely across borders, people taking brief trips within nearby regions. Hotels notice this pattern, respond by refining how they price rooms, adjust services based on guest profiles, craft stays that feel individual even when demand dips. Because of these moves, room bookings stay steadier when business usually slows. Income becomes less erratic, easier to forecast, mainly due to focused planning during quieter months.

Price Advantage and the Growing Appeal of Climate and Experiences

Winter 2026 saw noticeably cheaper stays compared to summer 2025. Rates dipped most for top-tier lodging - almost 30%. Three-star options dropped by about a quarter; four-star ones, slightly less.

Because of this gap, traveling outside peak months looks more appealing when budget matters. Savings like these shift how people view timing.

Warm conditions across Southern Europe give certain countries an advantage. Not just sunny days, but timing matters - Italy, Spain, and Greece see mild periods during late winter, spring, and fall that frequently exceed what visitors anticipate. Because of layered travel options - art, food, outdoor exploration, physical activities - regions adapt more easily, reshaping what they present to tourists. As a result, business stays steady long after peak season ends.

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