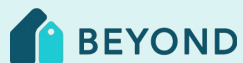


Summer 2026

GREECE



stama®

SHORT-TERM
ACCOMMODATION MANAGERS
ASSOCIATION - GREECE

GREECE - MARKET OVERVIEW 2026

Occupancy Year to Date

41.0%

▲ +7.1% YoY

2025: 38.2%

ADR (EUR) Year to Date

104€

▼ 4.5% YoY

2025: €109

Booking Window (days)

19.8d

▲ +6.1% YoY

2025: 18.6d

Length of Stay (nights)

3.6n

▼ 4.1% YoY

2025: 3.7n

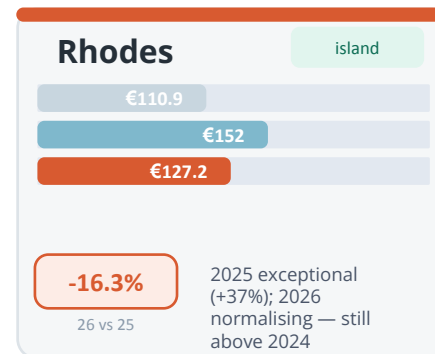
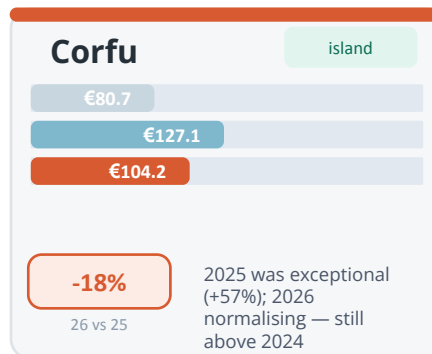
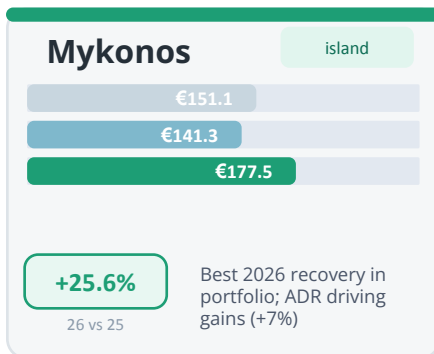
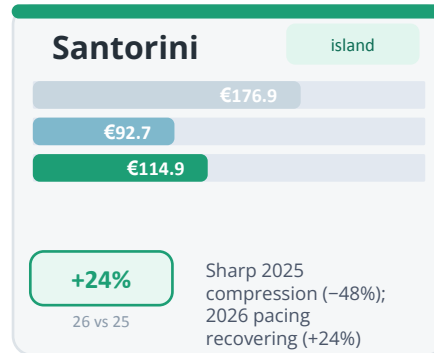
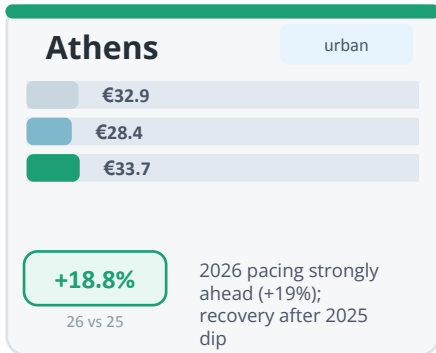


GREECE AT A GLANCE IN 2026

Market	Occupancy YoY*	ADR YoY*	Booking Window (days)	Length of Stay (nights)	Theme
Athens	+11.6%	-7.1%	21.5d	3d	Year-round urban demand; short stays, fast-booking market
Thessaloniki	-3%	-3%	10d	2.6d	City-break market; ADR strongly ahead (+44%) but occupancy softening in June
Crete	+4%	+9%	40d	4.9d	High-ADR seasonal; long lead times; strongest combined occ+ADR island
Mykonos	+21%	+7%	34d	7.8d	Ultra-premium market; ADR and occupancy both pacing ahead; peak demand building earlier
Santorini	+21%	+15%	48d	3.6d	Premium luxury destination; 2026 pacing well ahead; bookings planned far ahead
Corfu	-18%	+6%	21d	3.3d	Peak-heavy island; only island where 2025 outperforms 2026 occupancy; ADR holding
Rhodes	-22%	+23%	32d	5.8d	Event & weekend-driven market; ADR surging but occupancy deficit vs 2025

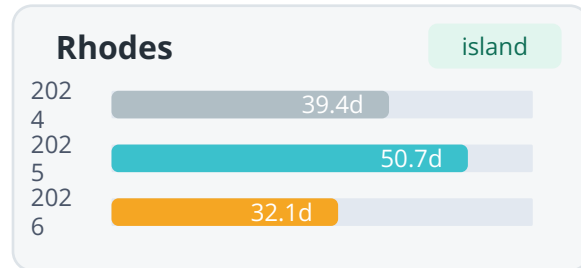
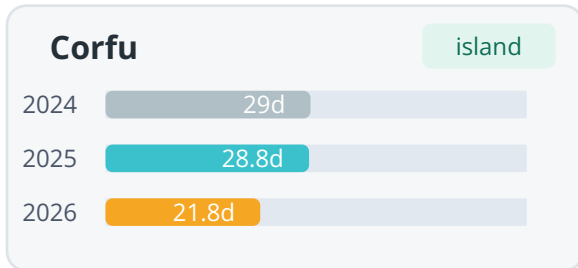
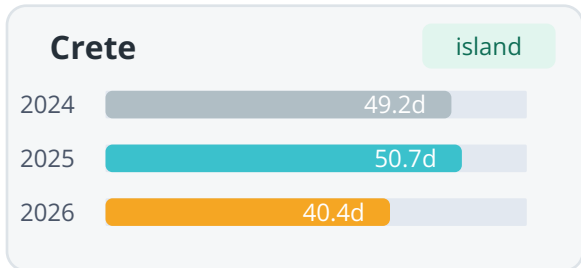
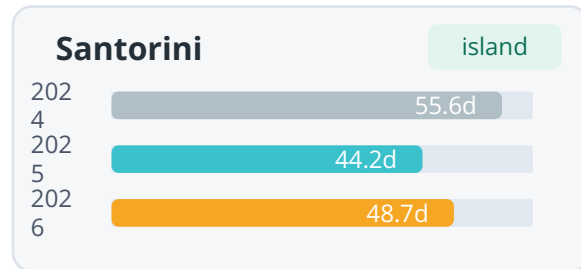
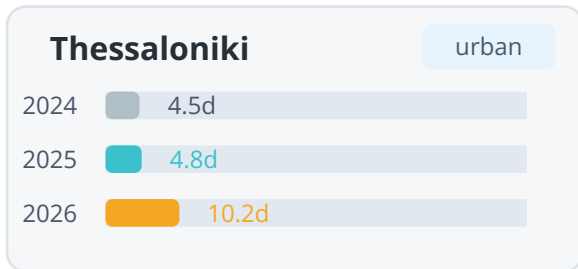
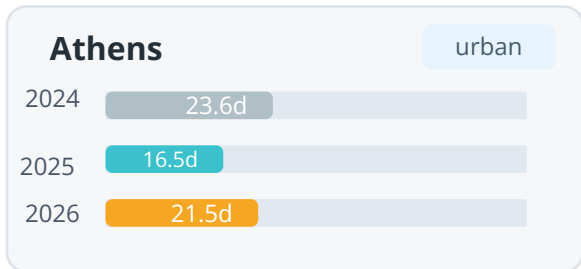
*Summer markets: Occupancy & ADR = 2026 pacing vs 2025. · Urban markets (Athens, Thessaloniki): H1 2026 vs 2025 actuals ·

REVPAN YOY

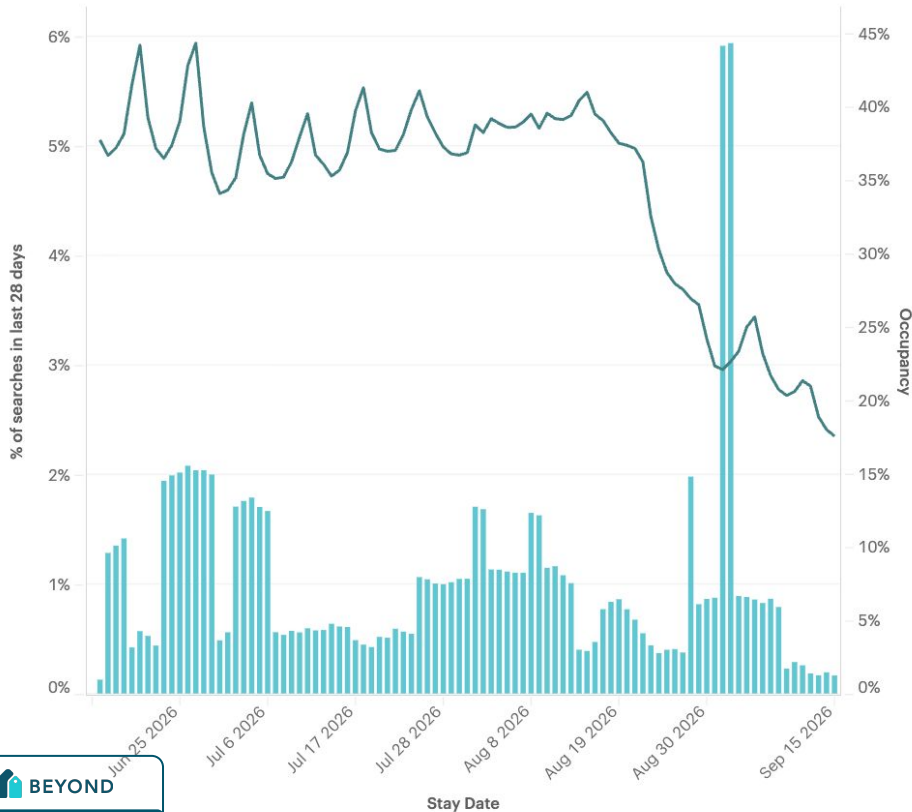


BOOKING LEAD TIME

2024 2025 2026 (YTD)



DEMAND SIGNALS & BOOKING TRENDS



- Search demand peaks early → highest search concentration in late June/early July, with a secondary wave in early August; activity drops sharply after Aug 19.
- Occupancy holds strong through July (~40–43%) then falls steeply post-Aug 28, signalling a compressed booking window into shoulder season.
- Isolated Sep 1 demand spike → searches surge to ~2% against low occupancy (~22%), pointing to an unconverted demand opportunity before the seasonal drop-off.



OCCUPANCY PACING - GREECE

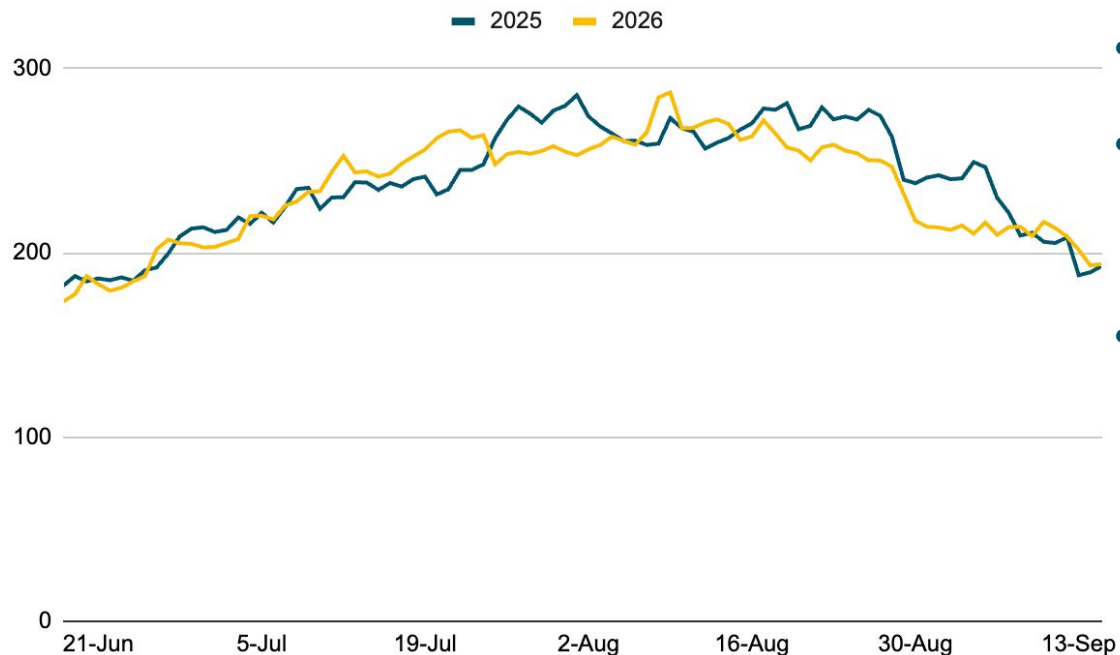


Current Trends:

- 2026 is running ~3-5pp ahead of 2025 through most of June and July, with 2026 consistently above last year through the peak build-up window.
- Both lines decay continuously from late June onward with no recovery peak, confirming the outperformance is real but narrows as shoulder season compresses both years equally.

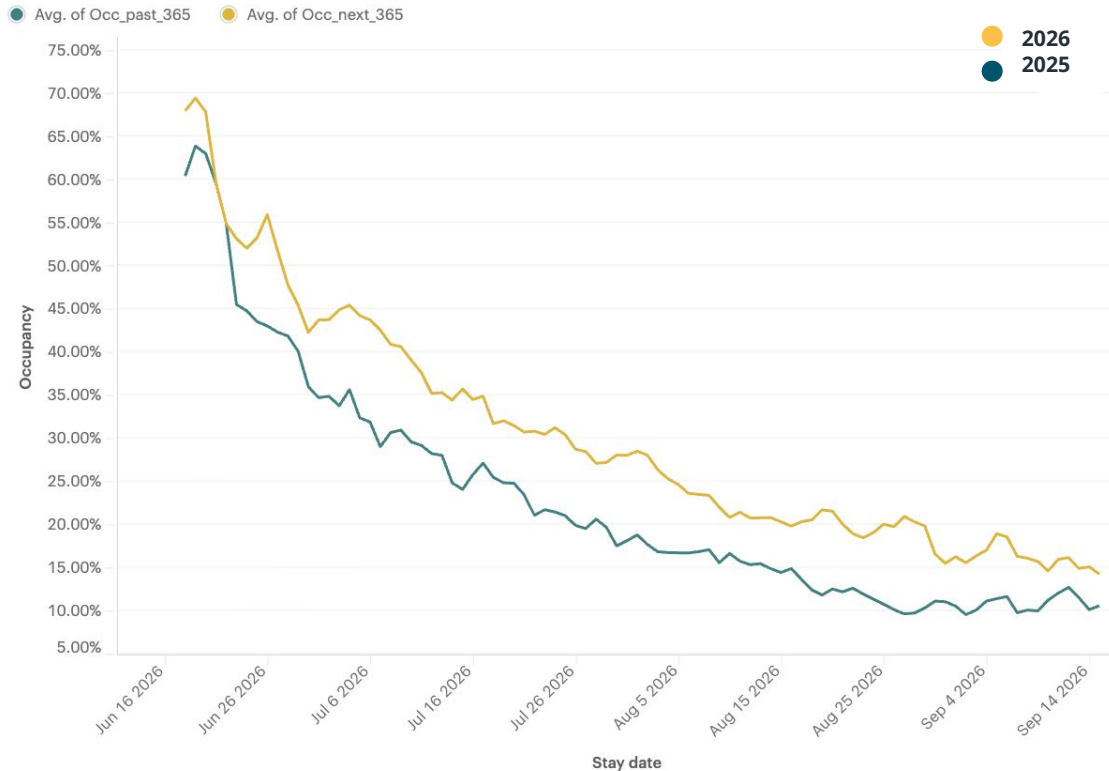
ADR PACING - GREECE

Current Trends:



- 2026 ADR (yellow) is running ahead of last year (teal) through most of July
- Lines converge at peak (Aug 13) and track almost identically through the Aug 27 drop-off → pricing discipline is holding at the top of the season.
- Post-Aug 27 both lines collapse to ~ €190-215 → shoulder ADR compression is structural and mirrors last year exactly; not a 2026-specific problem.

OCCUPANCY PACING - ATHENS



Current Trends:

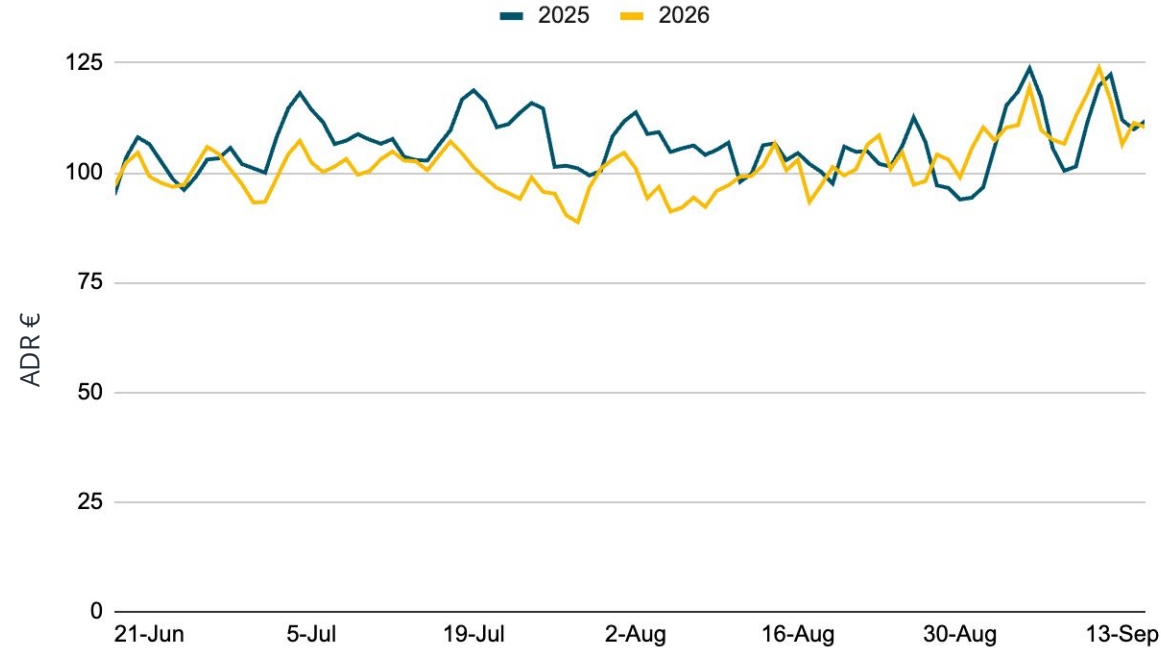
- 2026 is running significantly ahead (~33%) of 2025 throughout the entire period.
- Athens has no summer peak rebound, confirming its urban short-booking-window nature; what's booked in mid-June is the high point, not a build toward August.
- 2026 is structurally ahead at every point in the season.

ADR PACING - ATHENS

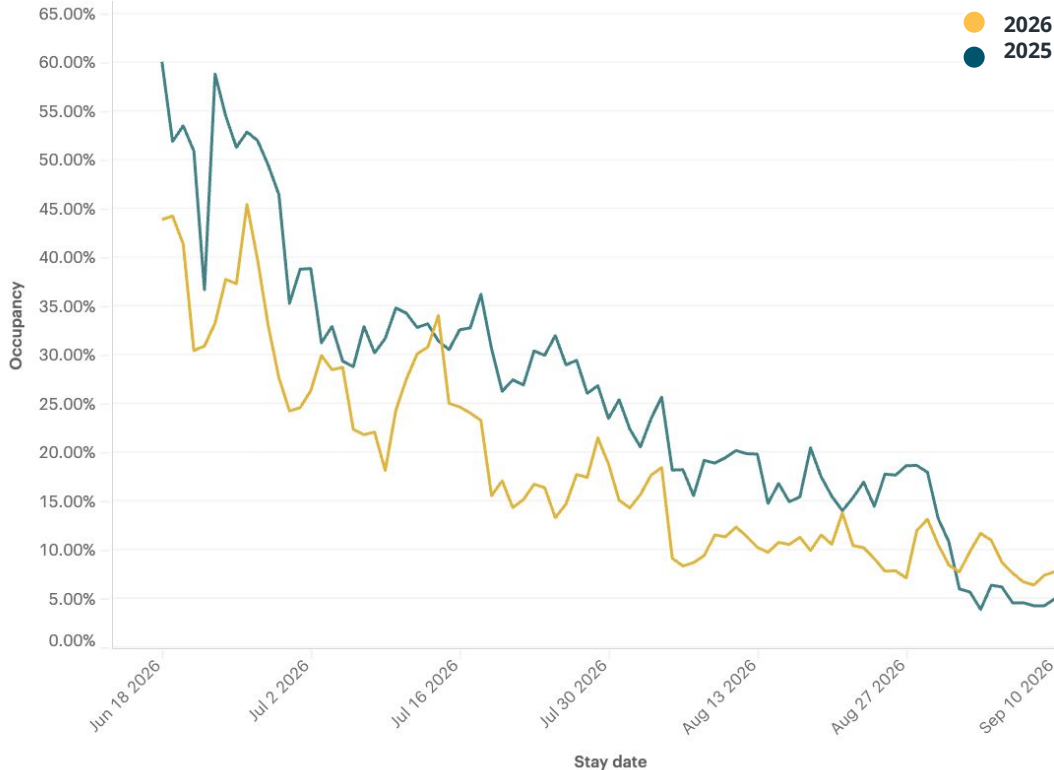


Current Trends:

- 2026 ADR is running slightly below 2025 for most of June–August (~€5–10)
- Both lines converge from late August onward, the only period where 2026 ADR holds parity.
- Athens ADR is remarkably stable, signalling a mature urban market with consistent but undifferentiated pricing.



OCCUPANCY PACING - THESSALONIKI

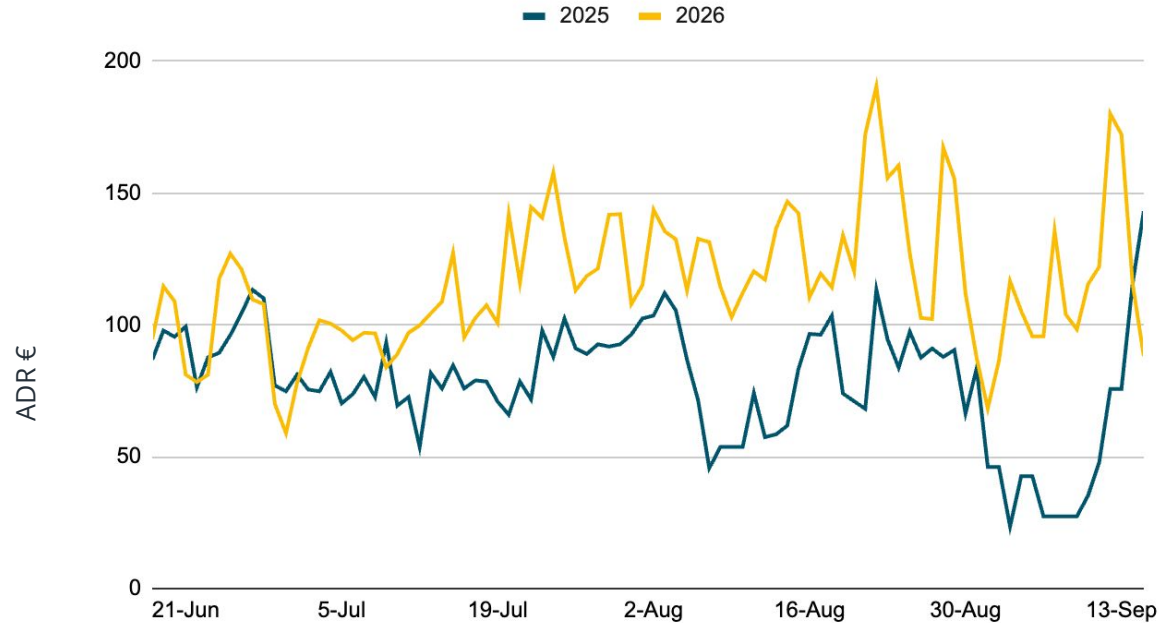


Current Trends:

- 2026 occupancy is consistently 8–12pp below 2025 throughout the summer, indicating weaker demand in Thessaloniki.
- Both years follow a similar seasonal decline, with 2026 tracking below 2025 across most of the period.
- Occupancy only reaches parity by mid-September, when both years fall to similarly low levels.

ADR PACING - THESSALONIKI

Current Trends:



- 2026 ADR is running significantly ahead of 2025 through most of summer (+44%) → gap averages ~€40-50, with 2026 peaking near €195 (mid-Aug) vs 2025 never exceeding ~€115 in the same period.
- High volatility throughout → daily swings of €30-50 on both lines signal inconsistent pricing rather than demand-driven rate movement; rate floors are not being enforced.

OCCUPANCY PACING - SANTORINI



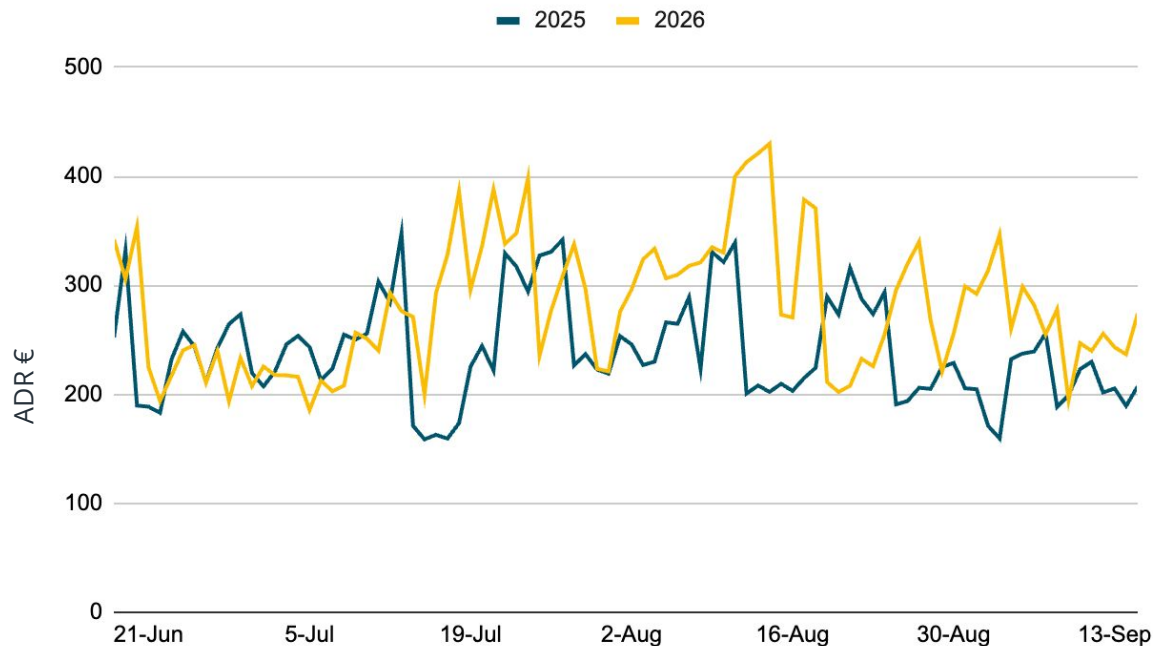
Current Trends:

- 2026 occupancy starts well ahead of 2025 (+21% on average), indicating stronger early demand and bookings.
- The gap narrows through July, with both years tracking at similar occupancy levels for most of the summer.
- A notable uplift appears in mid-September 2026, suggesting stronger late-season demand than in 2025.

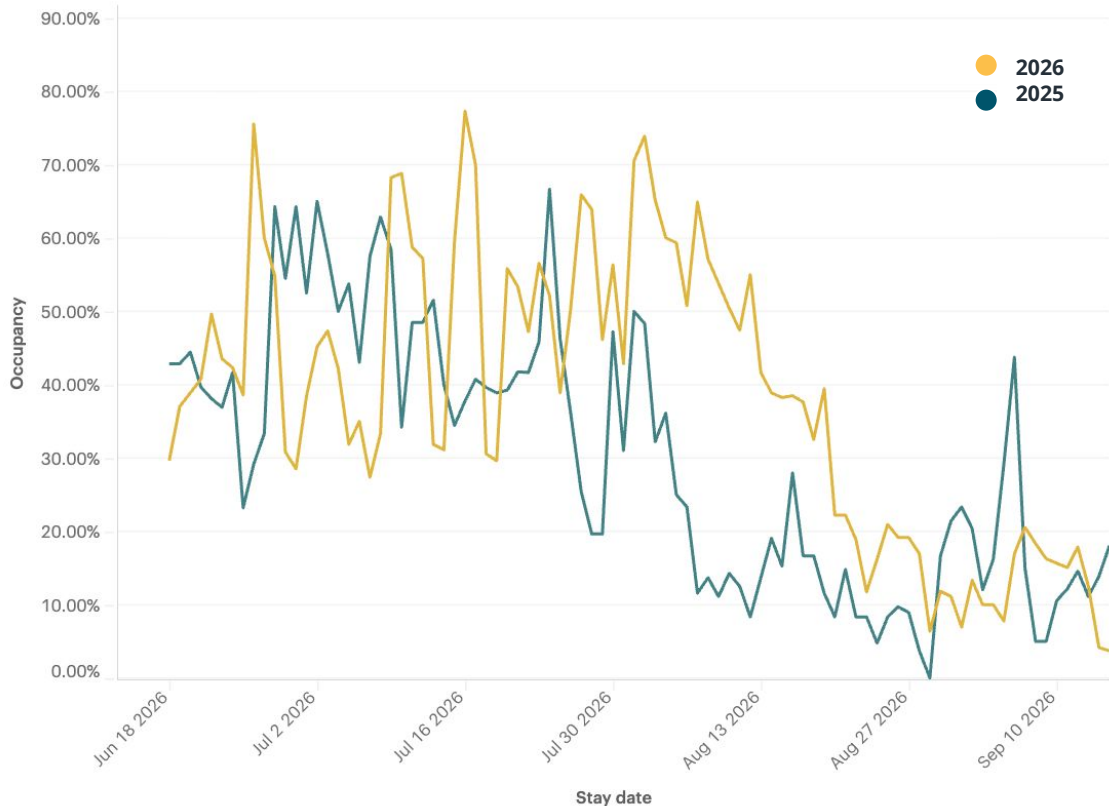
ADR PACING - SANTORINI

Current Trends:

- 2026 ADR is running ahead of 2025 for most of the summer → particularly strong in mid-July and mid-August.
- The convergence confirms structural softness post-Aug 27, but 2026 holds a modest premium even into September.



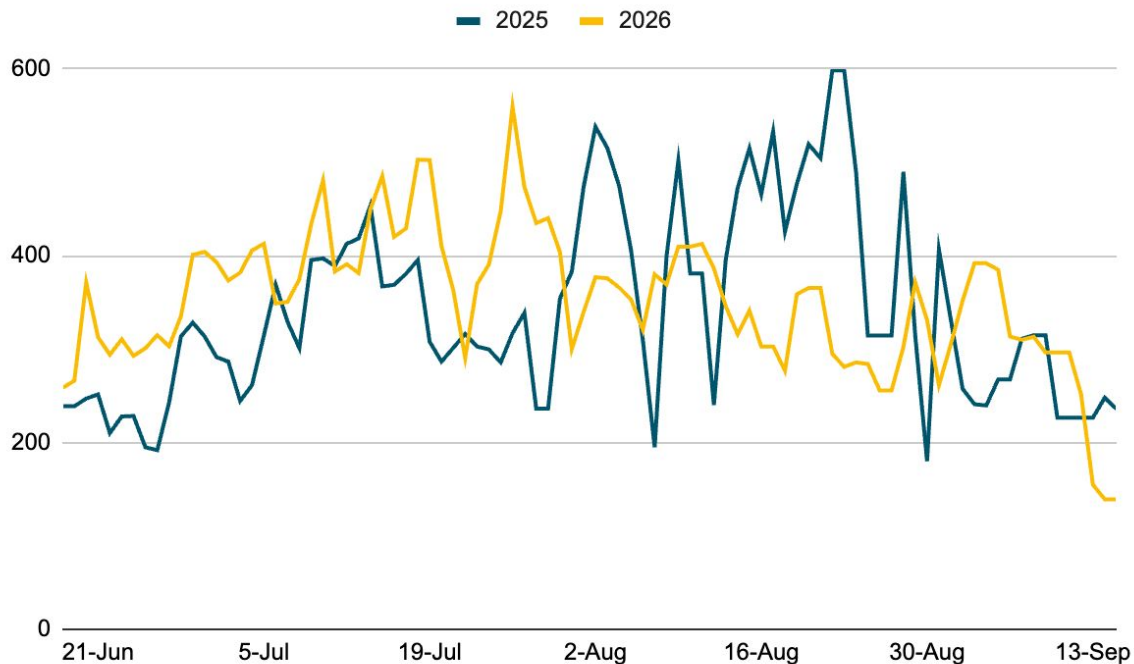
OCCUPANCY PACING - MYKONOS



Current Trends:

- 2026 occupancy is generally ahead (21%) of 2025 through June and July, indicating stronger summer demand.
- Occupancy remains more resilient in August 2026, suggesting a stronger shoulder season than in 2025.
- Both years converge by mid-September, with 2025 slightly outperforming in the final days.

ADR PACING - MYKONOS



Current Trends:

- 2026 ADR is running ahead of 2025 through June and July
- 2026 is building its premium earlier in the season.
- Both lines collapse sharply post-Sep 1 → a significant underperformance in shoulder that compounds the occupancy gap already identified.

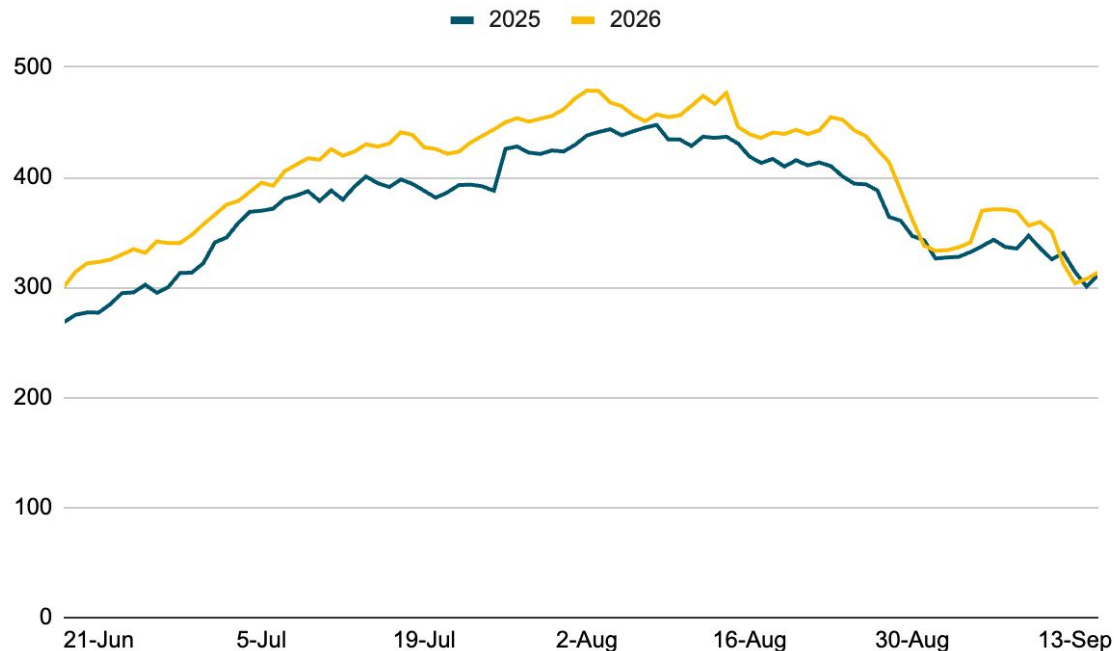
OCCUPANCY PACING - CRETE



Current Trends:

- 2026 and 2025 open virtually identical in late June (~70%) → unlike every other Greek market, Crete shows near-perfect parity at the start of summer, confirming it's the most stable demand market in the portfolio.
- 2026 maintains a narrow ~3-5pp lead through July and early August
- Post-Aug 27 both lines converge tightly at ~37-45%, ending at virtually the same level (~36-38%) by mid-September.

ADR PACING - CRETE



Current Trends:

- 2026 ADR is running consistently ahead of 2025 throughout the entire summer — starting at ~€315 vs ~€270 in late June (+~€45) and maintaining a ~€30-50 premium through peak, confirming Crete hosts are successfully holding higher rates in 2026.
- Both lines peak around Aug 2 before declining in near-perfect parallel through late August → the seasonal arc is identical, just at a higher price level, signalling strong pricing discipline across the market.

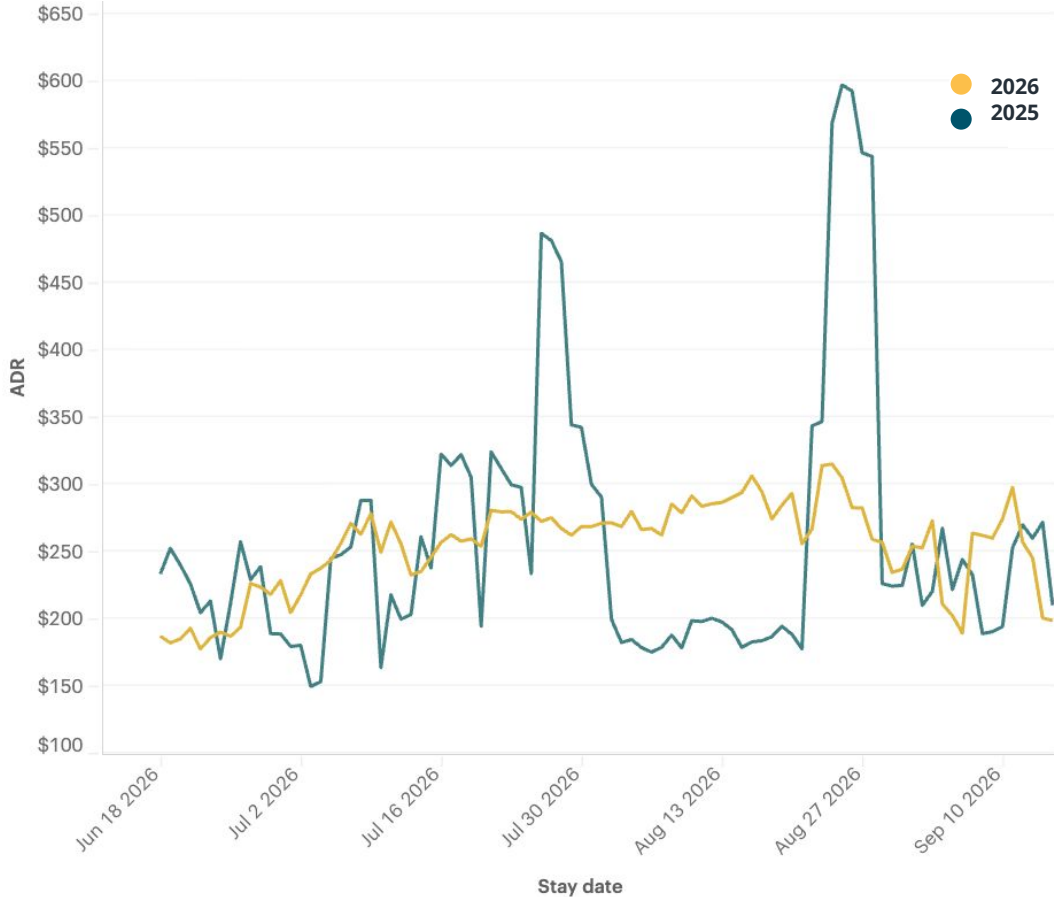
OCCUPANCY PACING - CORFU



Current Trends:

- 2025 is running significantly ahead of 2026 through June and July (~10–15%)
- Post-Aug 27 both lines compress to ~20–25% with high volatility; 2025 ends slightly higher (~27%) vs 2026 (~20%) by mid-September, confirming 2026 trails last year at both ends of the season.
- Corfu is the only island market where 2025 clearly outperforms 2026 in the peak window.

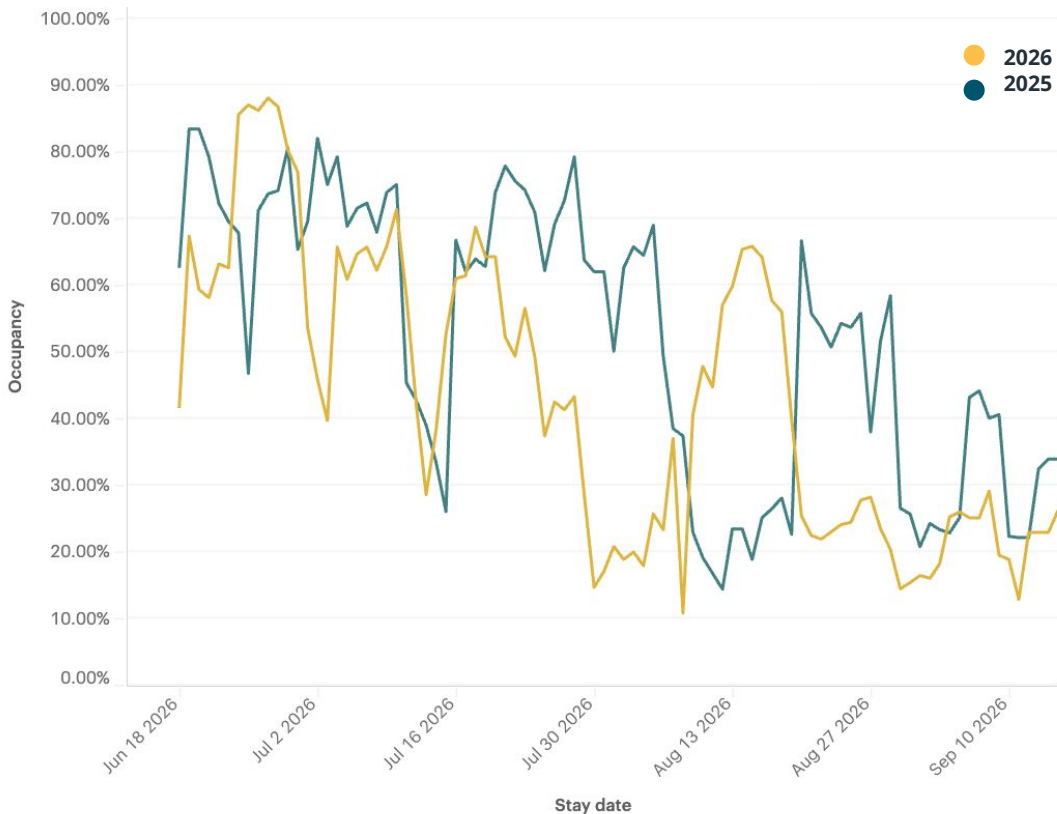
ADR PACING - CORFU



Irrelevant Trends:

- 2026 ADR is running ahead of 2025 through most of June and July, with 2026 holding a more consistent baseline while 2025 shows extreme spikes, which are almost certainly event-driven anomalies, not structural ADR.
- Excluding the 2025 spikes, both lines track closely at \$250–300 through July and early August → the underlying ADR story is near-parity, with 2026 slightly steadier and 2025 more volatile.

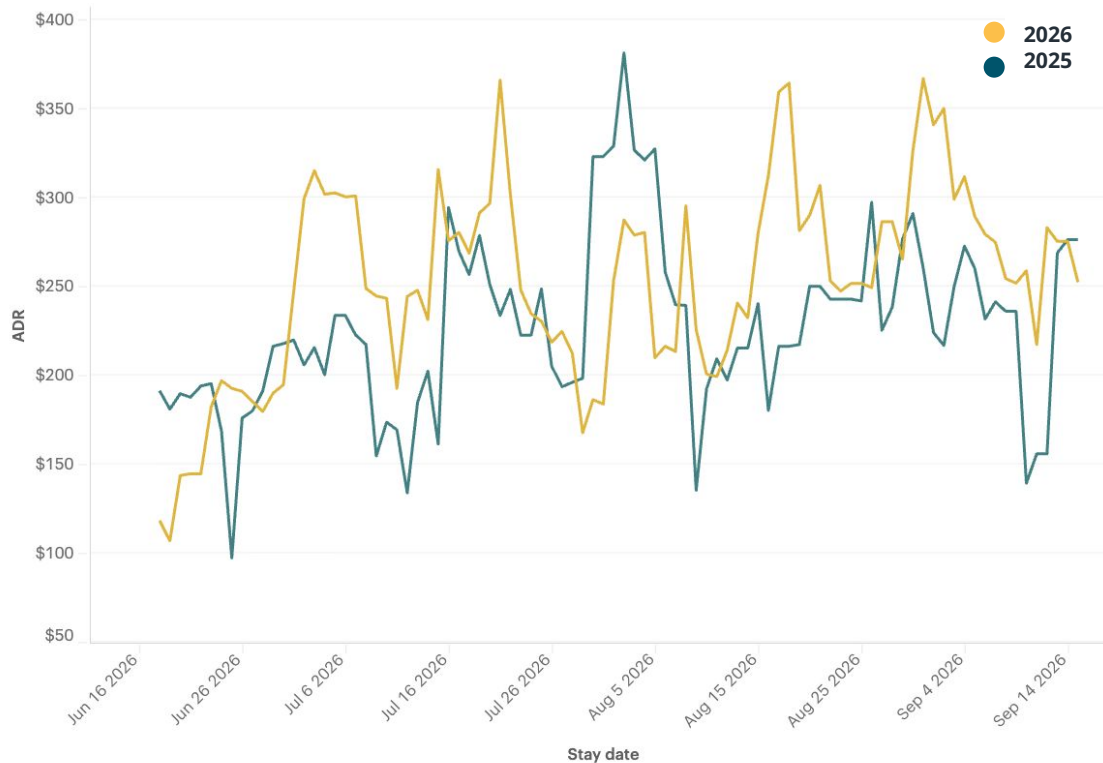
OCCUPANCY PACING - RHODES



Current Trends:

- 2025 is running ahead of 2026 throughout the entire period, maintaining a ~15–20% lead through July before converging mid-season;
- Rhodes is the weakest island market in 2026 alongside Corfu.
- Rhodes is heavily event and weekend-driven → uniform pricing across the week is leaving significant revenue on the table.
- 2026 trails at every point in the season with no recovery window.

ADR PACING - RHODES



Current Trends:

- 2026 ADR is running consistently and significantly ahead of 2025 throughout the entire summer (+23%).
- Rhodes ADR is entirely event and weekend-driven
- 2026 maintains its ADR premium even into September.

THANK YOU



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