

**Special Report for Strengthening the Outward Orientation of Businesses:
Tourism, gastronomic and cultural, MICE, city-break**

Executive Summary

SPECIAL REPORT FOR STRENGTHENING THE OUTWARD
ORIENTATION OF BUSINESSES: TOURISM
PROJECT TEAM

Executive Note

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1. The strategic fact: the market grows in value and shifts towards Attica

Travel receipts of the EU-27 came to EUR 497,464.9 million in 2025, 61.4% higher than in 2015, and 58.9% of them originate from residents of other Member States: the target market lies within the single market. Greek receipts reached EUR 23,627.0 million, with an index of 167.3 against 161.4 for the Union. The Region of Attica reached EUR 5,838.2 million, an increase of 125.3% from 2019 against a national 30.0%, and its share rose from 14.3% to 24.7%, to a significant extent as a domestic reallocation and not as a net addition. Expenditure per visit in Attica came to EUR 601.6, up by 57.6% from 2016, while the average duration fell from 5.7 nights in 2019 to 5.0 in 2025. Value is generated by the intensity of expenditure per day, not by duration.

- Receipts from travel for business purposes came to EUR 1,578.0 million (2025), up by 76.3% from 2019, that is, two and a half times faster than the total. It is an approximate indicator and an upper bound of the MICE market and not a measurement of it.
- Leisure covers EUR 20,647.0 million, 87.39% of the total, with a change of 30.0% over the period 2019 to 2025.
- Relative performance is moderate: over the decade Greece gained 0.17 of a percentage point of share in EU-27 receipts, against 2.87 for Spain and 2.09 for Portugal. The index of 167.3 falls short of four of the five Mediterranean comparators: Portugal 250.7, Croatia 211.9, Spain 186.7, Cyprus 182.6.
- The four first-priority markets, the United Kingdom, the United States, Türkiye and Germany, correspond to EUR 2,121.9 million, that is, to 36.3% of the receipts of the Region.
- In none of the three scenarios is the market of 2030 smaller than that of 2025: the range of national receipts extends from EUR 25,453.0 to 33,919.6 million. The question is not whether there will be a market, but at what pace capacity and cost will need to be readjusted.

2. The local reality: a base of food service and services, not a base of accommodation

The local base of the nine municipalities numbers 158 businesses with a turnover of EUR 65.47 million (2023), in a sample of businesses with published financial statements that is not identical with the local fabric. Its composition is decisive for the design: food service concentrates 55.7% of the businesses and 74.6% of the turnover. Accommodation itself is limited, with 12 establishments and 761 beds in the Regional Unit of the West Athens Sector, which covers seven of the nine municipalities, that is, 0.9% of the 82,432 beds of Attica. To these are added 969 beds in 279 short-term rental units in July 2024. Internationalisation therefore concerns existing capacity and not new beds.

The composition of local demand is changing faster than in any other NUTS 3 area of Attica: the share of non-residents in nights spent rose from 23.6% in 2020 to 54.5% in 2024. The scale of the units nevertheless remains small, from five employees in travel agencies to eleven in accommodation, a figure measured at the level of the Region of Attica. At that scale, the cost of international visibility is to a large extent fixed per business, which is why collective schemes perform better than individual initiatives.

Two limitations frame the reading of the local figures and are stated instead of being bypassed. First, municipalities with fewer than ten businesses of the cluster appear without a figure, and two of the nine fall

under the threshold. Second, travel receipts are not broken down below the level of the Region of Attica, so no receipt is allocated to the nine municipalities by a population or any other key. The local dimension is documented through the business register, through the accommodation capacity of the Regional Unit and through nights spent by NUTS 3 area, three routes that declare on each occasion which spatial level applies.

3. The passage through the channel: the decision is taken before arrival

The digital gap is not an estimate, it is measured. Online booking or ordering on the website itself is offered by 25.0% of Greek businesses of the sector against 48.0% in the EU-27, and content in at least two languages is available in 32.4% against 38.0%. All four figures concern 2025 and businesses with ten or more employees across the sector as a whole. The critical point is not the service produced on site, it is visibility before arrival and the position in the channels where the decision is taken.

The second element of access is regulatory and carries dates that do not admit partial coverage. Accessibility of e-commerce services applies from 28.06.2025, the operational specifications of short-term rental from 01.10.2025, the registration number and the transmission of data from 20.05.2026, the substantiation of environmental claims from 27.09.2026 and the new framework for package travel from 29.03.2029. From 27 September 2026 a sustainability label without a certification scheme or establishment by a public authority is not permitted in promotional material, while the exemption of micro enterprises providing services is examined per business against cumulative criteria and is not automatic. Documentation is therefore treated as a condition of access to distribution channels and not as an obligation towards supervision.

The horizon scanning register of the Report records 22 sector signals along six STEEP-V axes, and four of them carry a binding date that does not admit partial coverage, so the time element weighs as much as the numerical one. The same signals also determine the three scenarios. The baseline rests on historically high European demand for nights spent and on the shift of national travel expenditure towards Attica. The upside rests on the faster growth of business travel and on the digitalisation of border controls. The downside rests on the contraction of the average length of stay, on the incorporation of sustainable aviation fuels into transport cost and on the revision of the EU framework for package travel. It is that matching which makes the scenarios traceable through early signals and not a simple variation of pace.

4. Targeting: four source markets, with a ranking that does not follow size

The United Kingdom is the first market with EUR 805.6 million in 2025, up by 221.1% from 2019, with expenditure of EUR 819.9 per visit and a score of 100.0. It is followed by the United States with EUR 726.5 million and a score of 62.9, Germany with 424.5 and 48.6, France with 369.6 and 37.8, Italy with 268.7 and 33.0. The ranking does not follow size: Türkiye ranks third with a score of 53.3 and receipts of only EUR 165.3 million, because it combines high expenditure per visit, EUR 706.1, with rapid growth. Conversely, Cyprus falls by 15.3% and Australia by 28.9%, with scores of 16.0 and 6.2. The score column is a ranking on a scale of 0 to 100 with four weighted criteria and not a forecast of performance. It is noted that receipts by purpose of travel are published only at national level and are not broken down by region, so the business travel segment is not allocated to Attica.

Entry into each of those markets follows five phases over a horizon of twenty-four months from the entry decision, along an axis that counts months and not calendar dates. Compliance and documentation close in months 1 to 3, the choice of market and product in months 3 to 6, the distribution channel and digital readiness in months 5 to 10, the event and the bilateral meetings in months 8 to 14, and consolidation together with the second market in months 15 to 24. The main benefit of the strict sequence shows at the end: the second market starts from the second phase and not from the first, because compliance has already closed. At month 14 a

decision gate is placed with only three possible outcomes, expansion into a second market, repetition of the cycle on corrected terms, or redirection to another market of the first group.

5. Skills: the gap is digital and the participation shortfall is measurable

Participation of persons aged 25 to 64 in education or training over the last four weeks stands at 5.2% in Greece against 13.7% in the EU-27, while accommodation and food service businesses that provided training in digital skills are 3.1% against 9.2% for the Union in 2024. The job vacancy rate of the sector stands at 5.2% against 3.2% for the EU-27. The answer of the Report is not more hours but a different form: short modular units that conclude with a deliverable piece of evidence and not with a certificate of attendance.

The gap is not uniform, it breaks down into twelve distinct requirements with a measured current and required level. Six are numerical and are compared with the European average, the most critical being the operation of an own direct booking channel, where the sector stands at 25.0% against 48.0%, and the basic digital skills of the recruitment pool, at 51.0% against 60.4% in 2025. The remaining six are regulatory and are not compared with an average, they carry a date: substantiation of environmental claims with a certification scheme, accessibility of the sales channel, registration and transmission of short-term rental data, energy performance of the building, the new definition of package travel and HACCP documentation. That distinction also determines the order of priority, because the second group does not admit partial coverage.

6. The six policy measures

Measure	Horizon	Success indicator
Standardised upgrade of the digital commercial channel, with priority to food service	By 2029	Own channel with booking capability, from 25.0% to 48.0%. Content in two languages, from 32.4% to 38.0%
Linking the promotion mechanism with the visitor who stays overnight outside the area	By 2030	Share of non-residents in nights spent in the West Athens Sector, not falling below the 54.5% of 2024
Regulatory documentation as a condition of access to distribution channels	By 29.03.2029	Complete documentation file in 100% of the supported businesses
Collective outreach actions in the four first-priority markets	By 2029	Participation of each business with a complete file, with the four performance figures per event not falling
Targeting of the business travel segment, with an express statistical limit	By 2030	Share of business travel in national receipts, not falling below the 6.68% of 2025
Training in short units with a deliverable piece of evidence	By 2029	158 businesses and 158 staff members. Training in digital skills, from 3.1% to 9.2%

None of the six proposals requires new statistical field research: their progress is measured either in published series updated annually or in standardised evidence produced within the support itself. For two of them monitoring is done exclusively through context indicators, which capture the evolution of the quantity and do not attribute causality to the intervention.

7. Indicative targets, baseline value and target value

Quantity	Baseline value	Target value
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Supported businesses of divisions 55, 56 and 79 (RCO 04)	0 (2026)	158 by 2029, full coverage of the local base
Own channel with direct booking or ordering capability	25.0% (2025)	48.0% by 2029, the EU-27 value of 2025
Complete regulatory documentation file	First self-assessment on entry	100% by 29.03.2029
Travel receipts of the Region of Attica	EUR 5,838.2 million (2025)	EUR 6,931.2 to 7,448.2 million in 2030, baseline scenario

8. The principal risk and the response

The risk is twofold. First, value rests on the intensity of expenditure per day while the average length of stay is contracting, and it is precisely that contraction, together with the incorporation of sustainable aviation fuels into transport cost, that defines the downside scenario. Second, the cost of access, that is, visibility, evidence and position in the channels, does not scale with the size of the unit and weighs disproportionately on a base with five to eleven employees per unit. The response is the collective production of exactly those three, so that the cost that is fixed per business becomes absorbable.

This Note summarises the Special Internationalisation Report of the Outward Orientation Project for tourism. It is not a standalone source: every figure is documented in the Report, together with its primary sources. The single currency is the euro. The bases of the figures are not additive to one another: EU and national figures from Eurostat, bop_its6_det (EBOPS 2010 / BPM6), regional figures and the breakdown by purpose of travel from the Border Survey of the Bank of Greece, local figures in corporate turnover. Receipts from business travel are an approximate indicator and an upper bound of the MICE market, never a measurement of it, and they are not broken down by region. The intervals of the scenarios are ranges of assumption, they carry no probability and they do not constitute confidence intervals. The ranking score is a ranking on a scale of 0 to 100 and not a forecast of performance. Detailed documentation and sources per figure: sections 1.3 and 1.4 and chapters 3 to 6 of the Report.

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Υπηρεσίες Στήριξης Επιχειρήσεων Δυτικής Αθήνας

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Με τη συγχρηματοδότηση
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