Employment in Tourism and in the Other Sectors of the Greek Economy, 2014-2023

Executive Summary

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Dr. Aris Ikkos, ISHC
Research Director

Serafim Koutsos
Analyst

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1. Introduction

The aim of the present study is to record the evolution of employment in Accommodation and Catering and Other Sectors of the Greek economy, by type of employment (full-time - part-time), age and gender. The study is based on the data of the Labour Force Survey (LFS) of ELSTAT and the reference period is from 2014 to 2023. Regarding the Labour Force Survey, we note the following:

- The Labour Force Survey is a sample survey conducted by ELSTAT.
- Employed persons are defined as persons aged 15 years and over who, in the reference week, either worked for pay or profit for at least one hour, worked in the family business, or did not work but had a job or business from which they were temporarily absent.
- Although part of the catering activity is not related to tourism, the seasonality of the employment data in catering is identical to the seasonality of Greek tourism. Therefore, we consider the activity of catering as a branch of tourism. We also note that there are other tourism activities (e.g. transport, travel agencies) that are included in other categories and are not recorded in the data of this survey.

2. Summary

- Accommodation and Catering Services recorded a marginal decrease in employment in Q3 (peak quarter of tourism activity) of 2023 compared to 2022 (-0.8%, from 445.1 thous. in 2022 to 441.4 thous. in 2023), while Other Sectors recorded an increase (+1.2%, from 3.8 thous. in 2022 to 3.8 thous. in 2023). However, the number of persons employed in 2023 is higher than pre-pandemic levels (+2.9% from 429.2 thous. in 2019 to 441.4 thous. in 2023). At the same time, Other Sectors (3.8 mil.) also recorded the highest number of employees during the period under review.
- On an annual basis, employment in Accommodation and Catering Services increased over the period 2014-2023, at an average annual rate of +2.8%. This trend was interrupted in 2020 and 2021, due to the pandemic and its impact on the tourism industry (-15.0% employment in 2021 compared to 2019), to return almost to pre-pandemic levels in 2022 (-1.4%, from 381.9 thous. in 2019 to 376.7 thous. in 2022) and marginally exceed them in 2023 (+0.2%, from 381.9 thous. in 2019 to 382.6 thous. in 2023).
- However, the contribution of Accommodation and Catering Services to employment rose from 9.4% in Q3 2014 to 10.4% in Q3 2023, down slightly from pre-pandemic levels (10.8%) and at 2017 levels. Overall, in Q3 2023, employment in Accommodation and Catering Services represents 10.1% of full-time and 14.2% of part-time employment.
- Part-time employment in Greece, both in Accommodation and Catering Services (12.2%) and in Other Sectors (7.0%) is comparatively lower than in the EU-27 (29.7% and 18.2% respectively).
- The main age groups of employees in Accommodation and Catering Services are 45-64 (Q3 2023: 34.1%) and 30-44 years old (Q3 2023: 34.2%), representing 68.4% of employees.
- From 2014 to 2023 an increase is observed in Q3 in the percentage of employed persons in the age groups 15-24 (from 12.2% to 15.1%), 45-64 (from 28.6% to 34.1%) and 65+ (from 1.3% to 2.8%), confirming that Accommodation and Catering Services offer employment opportunities to groups of the population that do not have easy access to the labour market.
- The majority of those employed in both Accommodation and Catering Services and Other Sectors are men. However, the proportion of women in Accommodation and Catering Services (Q3 2023: 47.3%) is comparatively higher than in Other Sectors (Q3 2023: 42.2%) due to the proportionally higher growth in Accommodation and Catering Services (33.8% vs. 17.4%).

- In the period 2014-2018, uninsured work overall was on a downward trend, which turned upward in 2019 and 2020, downward again in 2021 and 2022 and upward again in 2023. Overall, the uninsured work rate declined from 3.8% in 2014 to 2.9% in 2023. In the accommodation sector it increased from more or less 1.5% between 2014 and 2021 to 3.0% in 2022 and 4.2% in 2023. In Catering it was on a downward trend between 2014 (7.3%) and 2022 (4.1%) to rise in 2023 (5.6%). Other sectors followed a similar pattern to Catering, with a declining trend between 2014 and 2022 (from 3.8% to 2.5%) to rise in 2023 (2.7%).
  In 2023, uninsured workers in Accommodation represented 3.5% (4.2 th.) of all uninsured workers, in Catering 13.0% (15.9 th.) and in other sectors 83.5% (101.7 th.).
- The Regions of Attica (25.3%) and Central Macedonia (15.5%) record the highest shares of employees in Accommodation and Catering services for 2023, followed by the tourism Regions of Crete (11.1%) and South Aegean (9.0%).
- Regarding the number of employees in Accommodation for 2023, the Regions of Crete (19.5%), South Aegean (18.9%) and Attica (14.8%) recorded the highest percentages, while the highest percentages were recorded in the Regions of Attica (29.0%) and Central Macedonia (16.6%).
- The Regions of Ionian Islands (28.1%), South Aegean (26.1%), Crete (16.8%), Epirus (11.2%) and Peloponnese (10.6%) had the highest employment rates in Accommodation and Catering Services as a percentage of total employment in the respective Region.

3. Annex

Table 3: Distribution of employees per Region, 2014-2023

Region	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Attica	1.325.885	1.335.896	1.360.251	1.365.990	1.378.527	1.442.366	1.471.711	1.506.223	1.575.373	1.563.782
Central Macedonia	563.396	600.756	618.813	625.984	642.050	642.691	638.820	643.027	682.713	703.299
Thessaly	233.501	229.766	232.656	250.915	253.253	253.248	252.071	257.653	269.582	260.123
Western Greece	200.887	206.191	205.424	216.814	218.181	214.683	216.616	230.668	241.144	254.077
Crete	212.215	209.134	220.538	234.804	247.255	252.984	231.493	230.649	250.519	253.501
Eastern Macedonia & Thrace	194.990	197.901	200.661	205.778	213.366	214.647	203.593	200.305	213.617	222.467
Peloponnese	188.666	193.237	196.287	204.979	208.186	211.431	213.930	212.001	216.391	221.607
Central Greece	173.081	181.007	178.370	187.970	191.250	194.168	188.853	192.212	209.080	214.962
South Aegean	123.825	132.339	129.786	127.722	131.570	132.973	117.636	117.433	126.107	132.029
Epirus	103.946	105.272	106.539	104.635	108.934	112.748	108.753	103.875	117.833	122.039
Western Greece	82.470	81.243	81.094	84.525	86.248	87.085	87.116	89.665	89.020	94.028
North Aegean	62.263	64.967	67.369	69.374	70.949	74.817	72.813	71.920	74.565	75.798
Ionian Islands	71.113	72.984	75.771	73.186	78.252	77.188	72.074	72.349	74.689	75.748
Total	**3.536.240**	**3.610.693**	**3.673.559**	**3.752.674**	**3.828.021**	**3.911.030**	**3.875.479**	**3.927.980**	**4.140.633**	**4.193.460**

Source: Labour Force Survey ELSTAT - Processing INSETE Intelligence

Table 4: Distribution of employees per Region in the Accommodation and Catering Services sector, 2014-2023

Region	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Attica	85.759	90.092	97.547	91.664	98.146	114.249	112.969	106.621	103.344	96.666
Central Macedonia	45.533	48.067	50.565	48.069	46.841	48.442	45.564	44.408	58.051	59.177
Crete	31.169	34.974	34.985	35.072	38.855	39.913	30.447	26.819	35.555	42.465
South Aegean	31.337	28.263	30.074	32.319	35.100	36.836	27.136	26.802	30.288	34.497
Peloponnese	16.281	17.526	17.157	20.459	17.489	20.796	20.903	14.362	22.231	23.494
Thessaly	13.062	19.958	23.071	26.668	22.002	20.408	19.323	20.408	25.155	22.118
Ionian Islands	12.054	14.697	17.435	19.380	22.373	19.378	14.633	19.177	21.546	21.294
Western Greece	15.882	19.829	16.785	18.331	20.441	18.330	15.414	19.712	18.233	21.244
Central Greece	11.916	14.099	15.214	17.744	14.800	17.066	16.532	12.881	17.199	17.967
Eastern Macedonia & Thrace	12.291	16.728	16.441	14.919	17.128	18.323	14.138	11.898	17.868	15.103
Epirus	9.522	9.741	8.722	12.095	14.451	13.216	10.951	9.003	11.926	13.712
Western Greece	6.263	5.800	5.398	5.752	5.830	5.753	6.907	5.735	5.293	7.603
North Aegean	6.054	5.763	7.784	8.221	8.270	9.144	8.717	6.643	9.995	7.257
Total	**297.122**	**325.539**	**341.177**	**350.692**	**361.726**	**381.856**	**343.635**	**324.468**	**376.684**	**382.597**

Source: Labour Force Survey ELSTAT - Processing INSETE Intelligence

Table 5: Distribution of employees in Accommodation per Region, 2014-2023

Region	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Crete	14.100	15.149	15.605	18.892	20.428	19.251	12.203	13.473	16.879	19.515
South Aegean	20.221	16.133	14.620	19.121	19.861	21.647	15.610	18.969	18.092	18.941
Attica	12.193	10.429	14.760	12.563	13.704	14.061	12.067	16.490	16.771	14.852
Ionian Islands	6.668	9.223	7.672	8.848	10.922	9.624	6.690	9.387	11.951	12.863
Central Macedonia	8.159	8.149	9.472	8.120	8.686	8.187	5.672	10.232	11.396	12.275
Peloponnese	3.405	3.088	3.625	4.797	3.989	5.224	6.808	5.236	5.192	5.396
Thessaly	2.014	2.694	3.039	3.097	5.104	3.568	1.929	2.633	3.676	3.212
Central Greece	1.719	1.490	948	1.598	2.146	3.289	2.294	878	1.769	2.967
Western Greece	2.346	3.190	2.744	2.537	2.510	2.504	948	1.943	2.278	2.920
Epirus	1.964	1.827	1.849	2.197	2.754	1.943	1.357	2.022	3.182	2.590
Eastern Macedonia & Thrace	1.791	2.884	2.601	2.007	2.103	2.479	2.615	1.839	2.096	2.407
North Aegean	1.735	1.456	2.662	3.400	2.511	1.764	1.566	1.723	2.711	2.197
Western Greece	266	145	98	291	781	918	435	611	580	179
Total	**76.582**	**75.858**	**79.694**	**87.470**	**95.500**	**94.459**	**70.193**	**85.437**	**96.571**	**100.314**

Source: Labour Force Survey ELSTAT - Processing INSETE Intelligence

Table 6: Distribution of employees in Catering Services per Region, 2014-2023

Region	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Attica	73.566	79.663	82.787	79.101	84.442	100.188	100.902	90.130	86.573	81.814
Central Macedonia	37.375	39.918	41.093	39.948	38.155	40.255	39.892	34.175	46.655	46.901
Crete	17.069	19.825	19.380	16.180	18.427	20.662	18.245	13.346	18.676	22.950
Thessaly	11.047	17.264	20.032	23.571	16.898	16.840	17.394	17.774	21.478	18.906
Western Greece	13.536	16.639	14.041	15.794	17.931	15.826	14.466	17.769	15.955	18.324
Peloponnese	12.876	14.438	13.532	15.662	13.500	15.572	14.095	9.126	17.039	18.098
South Aegean	11.116	12.130	15.454	13.198	15.239	15.189	11.526	7.833	12.196	15.556
Central Greece	10.197	12.610	14.266	16.146	12.654	13.777	14.238	12.003	15.430	15.000
Eastern Macedonia & Thrace	10.499	13.845	13.840	12.911	15.025	15.845	11.523	10.059	15.772	12.696
Epirus	7.557	7.914	6.873	9.898	11.697	11.273	9.594	6.981	8.744	11.122
Ionian Islands	5.386	5.474	9.763	10.532	11.451	9.754	7.943	9.790	9.596	8.431
Western Greece	5.996	5.655	5.300	5.460	5.049	4.836	6.472	5.123	4.713	7.424
North Aegean	4.319	4.307	5.122	4.820	5.758	7.380	7.152	4.920	7.284	5.060
Total	**220.540**	**249.681**	**261.484**	**263.222**	**266.227**	**287.398**	**273.443**	**239.031**	**280.113**	**282.283**

Source: Labour Force Survey ELSTAT - Processing INSETE Intelligence

Table 7: Distrbution of employees in Other Sectors per Region, 2014-2023

Region	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Attica	1.240.126	1.245.804	1.262.704	1.274.326	1.280.381	1.328.117	1.358.742	1.399.602	1.472.029	1.467.116
Central Macedonia	517.863	552.689	568.248	577.915	595.209	594.249	593.255	598.619	624.662	644.122
Thessaly	217.619	209.937	215.872	232.584	232.812	234.918	236.657	237.245	244.427	238.005
Western Greece	195.935	191.608	203.381	214.344	229.766	232.188	210.590	210.956	222.911	232.832
Crete	169.718	171.217	170.439	181.742	179.326	174.770	186.168	203.830	214.964	211.036
Eastern Macedonia & Thrace	182.700	181.173	184.220	190.859	196.238	196.324	189.456	188.408	195.750	207.364
Peloponnese	175.604	173.279	173.216	178.311	186.184	191.023	194.608	197.639	194.160	198.113
Central Greece	161.027	166.310	160.935	168.590	168.877	174.791	174.219	179.331	191.881	196.994
Epirus	94.425	95.531	97.817	92.539	94.483	99.532	97.801	94.872	105.907	108.327
South Aegean	92.488	104.076	99.712	95.403	96.469	96.137	90.500	90.631	95.818	97.532
Western Macedonia	76.208	75.443	75.696	78.773	80.418	81.331	80.209	83.930	83.727	86.425
North Aegean	65.059	67.221	67.987	64.966	69.982	68.044	63.357	65.277	64.570	68.542
Ionian Islands	50.347	50.867	52.155	51.630	56.150	57.750	56.281	53.172	53.143	54.454
Total	**3.239.118**	**3.285.154**	**3.332.382**	**3.401.982**	**3.466.295**	**3.529.174**	**3.531.844**	**3.603.513**	**3.763.949**	**3.810.863**

Source: Labour Force Survey ELSTAT - Processing INSETE Intelligence

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