Employment in Tourism and in the Other Sectors of the Greek Economy, 2019-2025

Executive Summary

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1. Introduction

The aim of the present study is to record the evolution of employment in Accommodation and Catering services 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 2019 to 2025. 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 services activity is not related to tourism, the seasonality of the employment data in catering services is identical to the seasonality of Greek tourism. Therefore, we consider the activity of catering services 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

Overall Employment Overview

- In 2025, employment in the Accommodation and Catering Services reached 400.3 thousand employees (the second-highest level after 2024), recording an increase of +4.8% compared to 2019 (CAGR +0.8%). The upward trend was temporarily interrupted in 2020 and 2021 due to the COVID-19 pandemic and its impact on the tourism industry (employment in 2021 was -15.0% compared to 2019).
- In Q3 2025, a record high of 475.2 thousand employees was recorded (+5.3% vs Q3 2024).
- Other Sectors (3.9 million employees) also reached a record high in 2025, with a faster growth rate (+11.6% compared to 2019, CAGR +1.8%).
- The Accommodation and Catering Services account for 9.2% of total annual employment and 10.8% in Q3.

Full-Time vs Part-Time Employment

- Full-time employment in Accommodation and Catering Services increased by +15.5% between 2019 and 2025, reaching 362 thousand employees. An equivalent percentage increase in full-time employment was also observed in Other Sectors during the same period.
- Part-time employment in Accommodation and Catering Services declined sharply by -44.0% (from 68.3 thousand in 2019 to 38.3 thousand in 2025), decreasing from 17.9% of sectoral employment in 2019 to 9.6% in 2025. A significant decline in part-time employment, though to a lesser extent (-31.7%), was also observed in Other Sectors (from 292.3 thousand in 2019 to 199.5 thousand in 2025).
- Greece has the 4th lowest part-time employment rate in the Eurozone (5.5%), with rates of 9.6% in Accommodation and Catering Services and 5.1% in Other Sectors, compared to 29.5% and 18.2% respectively in the EU-27.

Undeclared Employment

- General downward trend: from 2.5% (2019) to 2.3% (2025) overall.
- Accommodation: 1.1% (particularly low). Catering Services: 3.8% (above the national average but improving).

Accommodation and Catering Services – Age, Gender, and Regional Distribution

- Dominant age groups in Q3 2025: 45–64 years old (37.4%) and 30–44 years old (33.9%).
- Increased shares were recorded among young people aged 15–24 (+19.7%), individuals aged 45–64 (+32.5%), and those aged 65+ (+36.0%).

Gender

- For the first time, in Q2 and Q3 2025, women slightly outnumbered men in the sector (50.1%).
- Women: +11.3% during the 2019–2025 period; Men: -0.8%.
- The male-to-female ratio in Accommodation and Catering Services is trending toward 50/50.

Regional Distribution

- Among total employment in Accommodation and Catering Services, the highest shares are concentrated in the regions of Attica (28.5%) and Central Macedonia (13.5%), followed by Crete (10.1%) and the South Aegean (9.8%). More specifically, Accommodation activities are dominated by the South Aegean (23.4%) and Crete (20.1%), while Catering Services are concentrated in Attica (33.3%) and Central Macedonia (15.1%).
- The regions with the highest dependence on the sector, measured as the share of sectoral employment relative to total regional employment, are: South Aegean (29.5%), Ionian Islands (24.5%), Crete (14.9%), and North Aegean (14.9%).

Key Conclusion

The Accommodation and Catering Services demonstrates resilience and growth following the pandemic, with improvements in employment quality (more full-time positions), broader social inclusion, and declining undeclared employment. However, the sector remains highly seasonal and geographically concentrated, while Other Sectors recorded a higher employment growth rate during the 2019–2025 period.

3. Annex

Table 3: Distribution of employees per Region, 2019-2025

Region	2019	2020	2021	2022	2023	2024	2025
Attica	1.442.366	1.471.711	1.506.223	1.575.373	1.563.782	1.588.024	1.635.159
Central Macedonia	642.691	638.820	643.027	682.713	703.299	727.216	727.680
Western Greece	214.683	216.616	230.668	241.144	254.077	260.059	250.856
Thessaly	253.248	252.071	257.653	269.582	260.123	258.624	273.224
Crete	252.984	231.493	230.649	250.519	253.501	258.463	270.670
Peloponnese	211.431	213.930	212.001	216.391	221.607	229.646	227.538
Eastern Macedonia & Thrace	214.647	203.593	200.305	213.617	222.467	225.729	223.966
Central Greece	194.168	188.853	192.212	209.080	214.962	212.468	216.509
South Aegean	132.973	117.636	117.433	126.107	132.029	136.282	133.471
Epirus	112.748	108.753	103.875	117.833	122.039	124.534	126.636
Western Macedonia	87.085	87.116	89.665	89.020	94.028	98.533	93.349
North Aegean	74.817	72.813	71.920	74.565	75.798	78.224	78.483
Ionian Islands	77.188	72.074	72.349	74.689	75.748	78.151	82.177
Total	**3.911.030**	**3.875.479**	**3.927.980**	**4.140.633**	**4.193.460**	**4.275.953**	**4.339.717**

Source: Labour Force Survey ELSTAT - Processing INSETE Intelligence

Table 4: Distribution of employees per Region in the Accommodation and Catering Services sector, 2019-2025

Region	2019	2020	2021	2022	2023	2024	2025
Attica	114.249	112.969	106.621	103.344	96.666	104.163	113.967
Central Macedonia	48.442	45.564	44.408	58.051	59.177	54.286	54.046
Crete	39.913	30.447	26.819	35.555	42.465	46.221	40.354
South Aegean	36.836	27.136	26.802	30.288	34.497	40.871	39.377
Peloponnese	20.796	20.903	14.362	22.231	23.494	23.849	23.921
Thessaly	20.408	19.323	20.408	25.155	22.118	19.136	23.385
Ionian Islands	19.378	14.633	19.177	21.546	21.294	23.983	20.122
Central Greece	17.066	16.532	12.881	17.199	17.967	19.122	18.622
Eastern Macedonia & Thrace	18.323	14.138	11.898	17.868	15.103	16.783	18.224
Western Greece	18.330	15.414	19.712	18.233	21.244	25.271	17.278
Epirus	13.216	10.951	9.003	11.926	13.712	12.555	15.415
North Aegean	9.144	8.717	6.643	9.995	7.257	7.549	11.666
Western Macedonia	5.753	6.907	5.735	5.293	7.603	7.190	3.872
Total	**381.856**	**343.635**	**324.468**	**376.684**	**382.597**	**400.983**	**400.250**

Source: Labour Force Survey ELSTAT - Processing INSETE Intelligence

Table 5: Distribution of employees in Accommodation per Region, 2019-2025

Region	2019	2020	2021	2022	2023	2024	2025
South Aegean	21.647	15.610	18.969	18.092	18.941	21.415	26.207
Crete	19.251	12.203	13.473	16.879	19.515	22.605	22.454
Attica	14.061	12.067	16.490	16.771	14.852	19.820	17.830
Central Macedonia	8.187	5.672	10.232	11.396	12.275	12.138	10.550
Ionian Islands	9.624	6.690	9.387	11.951	12.863	10.346	8.569
Peloponnese	5.224	6.808	5.236	5.192	5.396	7.965	6.190
Thessaly	3.568	1.929	2.633	3.676	3.212	3.820	4.678
Eastern Macedonia & Thrace	2.479	2.615	1.839	2.096	2.407	3.780	3.977
Epirus	1.943	1.357	2.022	3.182	2.590	2.349	3.484
North Aegean	1.764	1.566	1.723	2.711	2.197	1.838	2.882
Central Greece	3.289	2.294	878	1.769	2.967	2.372	2.231
Western Greece	2.504	948	1.943	2.278	2.920	3.367	2.181
Western Macedonia	918	435	611	580	179	879	565
Total	**94.459**	**70.193**	**85.437**	**96.571**	**100.314**	**112.693**	**111.798**

Source: Labour Force Survey ELSTAT - Processing INSETE Intelligence

Table 6: Distribution of employees in Catering Services per Region, 2019-2025

Region	2019	2020	2021	2022	2023	2024	2025
Attica	100.188	100.902	90.130	86.573	81.814	84.344	96.137
Central Macedonia	40.255	39.892	34.175	46.655	46.901	42.149	43.496
Thessaly	16.840	17.394	17.774	21.478	18.906	15.316	18.707
Crete	20.662	18.245	13.346	18.676	22.950	23.616	17.900
Peloponnese	15.572	14.095	9.126	17.039	18.098	15.884	17.731
Central Greece	13.777	14.238	12.003	15.430	15.000	16.750	16.391
Western Greece	15.826	14.466	17.769	15.955	18.324	21.904	15.097
Eastern Macedonia & Thrace	15.845	11.523	10.059	15.772	12.696	13.003	14.248
South Aegean	15.189	11.526	7.833	12.196	15.556	19.456	13.170
Epirus	11.273	9.594	6.981	8.744	11.122	10.206	11.931
Ionian Islands	9.754	7.943	9.790	9.596	8.431	13.637	11.554
North Aegean	7.380	7.152	4.920	7.284	5.060	5.711	8.784
Western Macedonia	4.836	6.472	5.123	4.713	7.424	6.312	3.307
Total	**287.398**	**273.443**	**239.031**	**280.113**	**282.283**	**288.289**	**288.452**

Source: Labour Force Survey ELSTAT - Processing INSETE Intelligence

Table 7: Distrbution of employees in Other Sectors per Region, 2019-2025

Region	2019	2020	2021	2022	2023	2024	2025
Attica	1.328.117	1.358.742	1.399.602	1.472.029	1.467.116	1.483.861	1.521.193
Central Macedonia	594.249	593.256	598.619	624.662	644.122	672.930	673.635
Thessaly	232.840	232.748	237.245	244.427	238.005	239.487	249.839
Western Greece	196.353	201.202	210.956	222.911	232.832	234.788	233.578
Crete	213.071	201.046	203.830	214.964	211.036	212.241	230.316
Eastern Macedonia & Thrace	196.324	189.455	188.408	195.750	207.364	208.946	205.741
Peloponnese	190.635	193.027	197.639	194.160	198.113	205.797	203.617
Central Greece	177.102	172.321	179.331	191.881	196.994	193.346	197.887
Epirus	99.532	97.802	94.872	105.907	108.327	111.979	111.221
South Aegean	96.137	90.500	90.631	95.818	97.532	95.411	94.094
Western Macedonia	81.331	80.209	83.930	83.727	86.425	91.342	89.478
North Aegean	65.673	64.096	65.277	64.570	68.542	70.675	66.817
Ionian Islands	57.810	57.441	53.172	53.143	54.454	54.167	62.054
Total	**3.529.174**	**3.531.844**	**3.603.513**	**3.763.949**	**3.810.863**	**3.874.970**	**3.939.467**

Source: Labour Force Survey ELSTAT - Processing INSETE Intelligence

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