

Fair Work and Employment Conditions in the Greek Tourism and Hospitality Sector

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EXECUTIVE SUMMARY

This report examines the working conditions and Fair Work in the Greek hospitality sector, drawing on quantitative and qualitative evidence from a national worker survey. While the sector is a cornerstone of the Greek economy, contributing over 20% of GDP and employment, it continues to rely on an employment model characterised by flexibility, seasonality, and uneven job quality. The report employs Fredman et al's (2020; 2025) Fair Work framework to discuss the research findings reflecting on five Fair Work principles: *Fair Pay*, *Fair Contracts*, *Fair Conditions*, *Fair Management* and *Fair Representation*.

Interestingly, the findings reveal a segmented labour market in which fair and unfair work coexist. Quantitative data reveal this duality. On the one hand, many workers, mainly from larger organisations, report having formal contracts, positive workplace environments, and respectful treatment by managers. On the other hand, a significant percentage of participants from smaller and independent organisations are experiencing underpayment, unpaid overtime, high work intensity, workplace violence, and limited access to rest time. Additionally, pay is often legally compliant but widely perceived as inadequate; working conditions combine positive social environments with high physical and emotional strain; contracts are common but do not always guarantee stability or predictability; and management is generally described as fair but offers limited worker participation and employee voice with evident low union membership and limited collective voice. Finally, the quantitative analysis reveals a dominance of neutral responses to the survey questions which, alarmingly, suggests that unfair working conditions might have become normalised, or consented by workers within the sector.

Qualitative evidence, however, fruitfully, provides a more in-depth picture of workplace challenges. Workers consistently describe wages as insufficient relative to workload and cost of living, with long-term stagnation undermining perceptions of fairness. Seasonal employment is associated with excessive working hours, abusive behaviours, limited rest days, and dependence on employer-provided accommodation, which is often described as inadequate. The employment relationship is frequently characterised by a gap between formal contracts and actual practices, reflecting patterns of informality and "semi-compliance".

A key insight of this survey is the evident divergence between quantitative and qualitative findings. This reflects three underlying dynamics: the normalisation of poor conditions, structural segmentation between more and less regulated workplaces, and constrained worker voice due to weak collective representation. Together, these factors sustain a system in which flexibility is prioritised over security and stability in the employment relationship. At the same time, the presence of more positive experiences, particularly in larger and more formalised organisations, demonstrates that better practices are achievable. Improving working conditions is therefore not a question of feasibility but of consistent implementation and stronger institutional support. With continued sectoral growth and projected labour shortages, improving job quality is both a social and economic priority for the industry. Addressing pay, work intensity, contractual reliability, and worker representation in an integrated manner will be essential to enhancing workforce sustainability, supporting service quality, and ensuring the long-term resilience of the Greek tourism and hospitality sector.

ΣΥΝΟΨΗ

Η παρούσα έκθεση εξετάζει τις συνθήκες εργασίας και τη Δίκαιη Εργασία στον τομέα του Τουρισμού και Φιλοξενίας στην Ελλάδα, βασιζόμενη σε ποσοτικά και ποιοτικά δεδομένα από μια πανελλήνια έρευνα. Παρότι ο κλάδος αποτελεί ακρογωνιαίο λίθο της ελληνικής οικονομίας, συμβάλλοντας σε ποσοστό άνω του 20% στο ΑΕΠ και στην απασχόληση, εξακολουθεί να στηρίζεται σε ένα μοντέλο απασχόλησης που χαρακτηρίζεται από επιβαλλόμενη αποδοχή εκ μέρους του εργαζομένου για ευελιξία, εποχικότητα και ανομοιογενή ποιότητα εργασίας. Η έκθεση υιοθετεί το πλαίσιο Δίκαιης Εργασίας των Fredman et al. (2020; 2025) για την παρουσίαση των ερευνητικών ευρημάτων, εξετάζοντάς τα υπό το πρίσμα των πέντε αρχών της Δίκαιης Εργασίας: *Δίκαιη Αμοιβή, Δίκαιες Συμβάσεις, Δίκαιες Συνθήκες Εργασίας, Δίκαιο Μάνατζμεντ και Δίκαιη Εκπροσώπηση*.

Ενδιαφέρον παρουσιάζει το γεγονός ότι τα ευρήματα αποκαλύπτουν μια ανομοιογενή αγορά εργασίας, στην οποία συνυπάρχουν δίκαιες και μη δίκαιες συνθήκες εργασίας. Τα ποσοτικά δεδομένα δείχνουν αυτή τη δυαδικότητα. Από τη μία πλευρά, πολλοί εργαζόμενοι, κυρίως σε μεγαλύτερες και πιο οργανωμένες επιχειρήσεις, αναφέρουν την ύπαρξη τυπικών συμβάσεων εργασίας, θετικό εργασιακό περιβάλλον και διαχείριση προσωπικού που χαρακτηρίζεται από σεβασμό. Από την άλλη πλευρά, ένα σημαντικό ποσοστό συμμετεχόντων, κυρίως σε μικρότερες και ανεξάρτητες επιχειρήσεις, βιώνει υποαμοιβή, απλήρωτες υπερωρίες, υψηλή ένταση εργασίας, φαινόμενα βίας στον χώρο εργασίας και περιορισμένη πρόσβαση σε επαρκή χρόνο ανάπαυσης. Επιπλέον, ενώ τα δεδομένα δείχνουν ότι οι αμοιβές είναι συχνά νομικά συμβατές, ευρέως χαρακτηρίζονται ως ανεπαρκείς. Επίσης, αν και το εργασιακό περιβάλλον χαρακτηρίζεται θετικό, οι συμμετέχοντες δηλώνουν υψηλή σωματική και συναισθηματική κούραση. Οι συμβάσεις εργασίας δεν διασφαλίζουν πάντοτε σταθερότητα, και η διοίκηση αν και περιγράφεται γενικά ως δίκαιη προσφέρει περιορισμένη συμμετοχή των εργαζομένων στη λήψη αποφάσεων και ασθενή εργατική φωνή, όπως αποτυπώνεται στη χαμηλή συνδικαλιστική παρουσία και στη μειωμένη συλλογική εκπροσώπηση. Τέλος, η ποσοτική ανάλυση ανέδειξε την παρουσία πολλών ουδέτερων απαντήσεων στα ερωτήματα της έρευνας, στοιχείο που υποδηλώνει ότι μη δίκαιες συνθήκες εργασίας ενδέχεται να έχουν σε μεγάλο βαθμό κανονικοποιηθεί ή αναγκαστικά γίνονται αποδεκτές από τους εργαζομένους στον κλάδο.

Ωστόσο, τα ποιοτικά δεδομένα προσφέρουν μια πιο αναλυτική και εις βάθος εικόνα των προκλήσεων στον χώρο εργασίας. Οι εργαζόμενοι περιγράφουν συστηματικά τις αμοιβές ως ανεπαρκείς σε σχέση με τον φόρτο εργασίας και το κόστος ζωής, με τη μακροχρόνια μισθολογική στασιμότητα να υπονομεύει τις αντιλήψεις περί δίκαιης εργασίας. Η εποχική απασχόληση συνδέεται με εξαντλητικά ωράρια, καταχρηστικές συμπεριφορές, περιορισμένες ημέρες ανάπαυσης και εξάρτηση από τη στέγαση που παρέχεται από τον εργοδότη, η οποία συχνά περιγράφεται ως ανεπαρκής. Οι εργασιακές σχέσεις χαρακτηρίζονται συχνά από ένα χάσμα μεταξύ των όρων των συμβάσεων εργασίας και της πραγματικότητας, αντανακλώντας μοτίβα άτυπης εργασίας και ημι-συμμόρφωσης από εργοδότες με εργασιακά θεσμικά πλαίσια.

Ένα βασικό εύρημα της παρούσας έρευνας είναι η σαφής απόκλιση μεταξύ των ποσοτικών και των ποιοτικών δεδομένων. Η απόκλιση αυτή αντανακλά τρεις υποκείμενες εξηγήσεις: την κανονικοποίηση μη δίκαιων συνθηκών εργασίας, τον διαχωρισμό μεταξύ περισσότερο και λιγότερο οργανωμένων χώρων εργασίας και τον περιορισμό της εργατικής φωνής λόγω της αδύναμης συλλογικής εκπροσώπησης. Συνολικά, οι παράγοντες αυτοί συντηρούν ένα σύστημα στο οποίο δίνεται προτεραιότητα στην ευελιξία εις βάρος της ασφάλειας και της σταθερότητας της εργασιακής σχέσης. Ταυτόχρονα, η παρουσία πιο

θετικών εμπειριών στο δείγμα, ιδίως σε μεγαλύτερες επιχειρήσεις, δείχνει ότι βέλτιστες πρακτικές δίκαιης εργασίας είναι εφικτές. Η βελτίωση των συνθηκών εργασίας δεν αποτελεί, επομένως ζήτημα δυνατότητας εφαρμογής, αλλά ζήτημα συνεπούς εφαρμογής και ισχυρότερης θεσμικής υποστήριξης. Με τη συνεχιζόμενη ανάπτυξη του κλάδου και τις προβλεπόμενες ελλείψεις εργατικού δυναμικού, η αναβάθμιση της ποιότητας της εργασίας και η προσφορά Δίκαιης Εργασίας συνιστά τόσο κοινωνική όσο και οικονομική προτεραιότητα για τον κλάδο. Η αντιμετώπιση των ζητημάτων που αφορούν τις αμοιβές, την εντατικοποίηση του εργασιακού φόρτου, την αξιοπιστία των συμβάσεων και την συλλογική εκπροσώπηση των εργαζομένων θα είναι καθοριστική για την ενίσχυση της μακροπρόθεσμης βιωσιμότητας και ανθεκτικότητας του κλάδου και την αναβάθμιση της ποιότητας των παρεχόμενων υπηρεσιών.



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1. INTRODUCTION

This report examines working conditions in the Greek tourism and hospitality sector through the lens of the Fair Work framework (Fredman et al., 2020; 2025), with a particular focus on how workers experience pay, conditions, contracts, management, and representation in practice. The study is motivated by the growing importance of tourism and hospitality to the Greek economy and the parallel intensification of concerns regarding labour shortages, job quality, and the long-term sustainability of the sector's employment model.

The research forms part of a wider international project investigating working conditions in hospitality and tourism across multiple countries, coordinated by the Global Hospitality Research Alliance (GHRA). By situating the Greek case within this comparative framework, the study contributes to a broader effort to understand how different institutional, economic, and organisational contexts shape the quality of work in a globally significant, yet consistently precarious sector (Curran and Hadjisolomou, 2025). The Greek component of the project is a collaborative initiative involving five UK universities (University of Strathclyde, Bournemouth University, Manchester Metropolitan University, and Nottingham Trent University) in partnership with the University of Piraeus in Greece.

The focus on the Greek context is particularly significant. The country represents one of the most tourism-dependent economies globally, where the sector's economic success coexists with persistent labour market challenges. Previous research has highlighted structural features such as seasonality, informality, and wage pressure, raising questions about whether current employment practices can sustain both workforce supply and service quality over the long term (Papadopoulos, 2021). At the same time, emerging evidence suggests that improving working conditions is not only a matter of social justice but also a key factor in addressing recruitment and retention difficulties within the industry.

Methodologically, the study combines quantitative survey data with qualitative responses from workers across the Greek tourism and hospitality industry. This mixed-methods design enables both a broad mapping of working conditions and a deeper exploration of how these conditions and Fair Work are interpreted and experienced by workers. In doing so, the report seeks to move beyond aggregate indicators and capture the lived realities of hospitality work.

Overall, the report aims to provide evidence-based insights into the structure and dynamics of working conditions in Greek tourism and hospitality, identify key areas of concern, and contribute to ongoing academic and policy debates on Fair Work, labour market regulation, and sustainable tourism development.

2. BACKGROUND

Economic Importance of the Sector

The hospitality and wider tourism sector remain a cornerstone of the Greek economy, with the latest World Travel & Tourism Council (WTTC) 2025 Economic Impact Research confirming both strong recovery and continued expansion. The sector’s total contribution to GDP reached approximately \$53 billion in 2025, representing 20.6% of the national economy, up from around \$48.8 billion in 2024 (WTTC, 2025). This positions Greece among the most tourism-dependent economies globally. In employment terms, tourism supported approximately 900,000 jobs in 2025, accounting for 21.1% of total national employment, compared to around 850,000 jobs in 2024 (WTTC, 2025). This highlights the sector’s critical role as a major employer and its importance for labour market stability. International visitor spending continues to be a key driver of growth. WTTC projections indicate that inbound tourism expenditure reached approximately \$28-28.4 billion in 2025, reflecting an increase of around 10–11% compared to pre-pandemic (2019) levels (WTTC, 2025). This sustained rise demonstrates the resilience and competitiveness of the Greek tourism product, despite increasing debates around overtourism and sustainability (Leka et al., 2025).

From a comparative perspective, Greece significantly outperforms the European Union average in terms of tourism’s economic contribution. While tourism accounts for approximately 20.6% of GDP in Greece, the EU average stands at around 10–10.5%, underlining the country’s structural reliance on the sector (Arapoglou, 2024). This dependency represents both a competitive advantage and a potential vulnerability to external shocks.

Looking ahead, WTTC forecasts continued long-term expansion. By 2035, the sector is projected to contribute approximately \$63.3 billion to GDP (around 21.7%) and support over 1.1 million jobs (Figure 1), reinforcing its dominant role in the Greek economy (WTTC, 2025). However, this growth trajectory is expected to intensify existing labour market pressures, including projected labour shortages and the need for improved job quality to sustain workforce supply (Kafetzopoulos et al., 2025). Overall, the existing projections confirm that Greek tourism is entering a new phase of record economic performance. At the same time, the sector’s scale and dependence raise critical questions about sustainability, not only in environmental terms but also in relation to employment conditions, workforce resilience, and the long-term viability of the hospitality labour model.

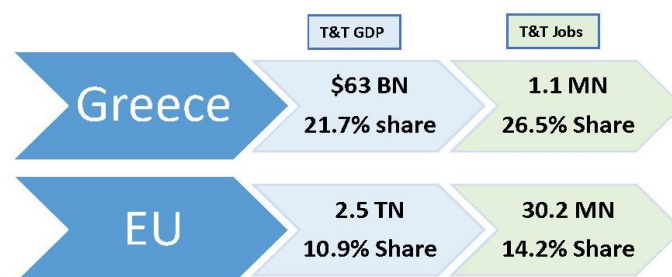


Figure 1: Travel & Tourism Contribution Forecast (GR/EU) 2025-2035 (WTTC, 2025)

Precarity as an Embedded Feature of Work in the Greek Tourism and Hospitality Sector

The Greek hospitality sector is highly labour-intensive and structurally characterised by seasonality, regional concentration, and a strong reliance on flexible work arrangements (Ioannou, 2021). Evidence from national and European datasets shows that accommodation and food services account for a disproportionately large share of employment compared to other EU countries (Eurofound, 2024; INSETE, n.d.). Part-time and temporary employment are central to this model, with part-time work accounting for 18.6% of jobs in the sector and representing a larger share relative to full-time employment nationally (INSETE, n.d.). While this flexibility allows employers to respond to fluctuating demand, it also embeds instability within employment relations.

Low pay is a defining dimension of this precarity. Prior to the 2008 financial crisis, wages in tourism and hospitality were often above the statutory minimum due to sectoral collective agreements. However, austerity-era reforms - including the reduction of the minimum wage and the deregulation of collective bargaining - placed sustained downward pressure on earnings (Papadopoulos & Ioannou, 2023). Between 2011 and 2018, average wages declined significantly, while the expansion of flexible contracts enabled cost minimisation (Papadopoulos, 2021). Consequently, the minimum wage now operates as the de facto standard, reinforcing income insecurity.

Working conditions further reflect this embedded nature of precarity, extending beyond the workplace to include living arrangements, particularly for seasonal workers. Employer-provided accommodation is often reported as overcrowded, inadequate, or unsafe (Ioannou, 2021; Papadopoulos, 2021). Combined with long working hours and physically demanding roles, these conditions negatively affect workers' health, wellbeing, and dignity, highlighting the need to consider the broader lived experience of hospitality workforce. The wider, wicked, employment practices found in the sector globally (Baum et al., 2024) also contribute to insecurity through the persistence of informality. In Greece, despite improvements in labour inspections, "semi-compliance" remains widespread, with workers frequently declared for fewer hours than they actually work and additional hours remaining unpaid or informally compensated (Ioannou, 2021). Such practices are particularly prevalent in small and medium-sized enterprises, where enforcement is weaker. Delayed payments and informal agreements tied to the completion of seasonal work further intensify financial uncertainty. Indeed, the seasonal nature of the sector (Baum et al., 2024) exacerbates these challenges. During peak periods, seasonal workers often face excessive working hours, sometimes up to 70 hours per week, limited rest, and high work intensity, frequently without adequate compensation or legal protection. At the same time, seasonal workers are required to relocate to tourist destinations, increasing their dependence on employers for both income and accommodation and limiting their capacity to contest poor conditions (Ioannou, 2021).

The seasonal nature of work and the expansion of flexible employment arrangements in the sector have produced a segmented workforce. Specifically, a relatively small core of secure workers exists alongside a growing group of precarious workers employed through temporary contracts, agency work, internships, or informal arrangements (Avagianou et al., 2024). These workers, often young individuals, migrants, and seasonal employees, face long and unpredictable working hours, limited access to social protection, and reduced bargaining power (Mexi & Kokkinou, 2023), contributing to high turnover and limited career progression, whilst the evidently gap of representation further intensifies these conditions. Although collective bargaining persists in parts of the sector, particularly in hotels, union coverage has declined significantly since the crisis (Papadopoulos & Ioannou, 2023). In many workplaces, especially smaller or seasonal establishments, workers lack effective representation and are often reluctant to report violations due to fear of dismissal or non-renewal of contracts (Ioannou, 2021).

Finally, precarious employment conditions intersect with issues of workplace harassment and abuse. Research shows that verbal abuse, intimidation, and sexual harassment are embedded issues of the daily reality of hospitality workers (Mitsakis et al., 2025). Power asymmetries and workers' dependence on employers create conditions in which such practices can persist, further undermining workers dignity at work.

The urgency for Fair Work in the Greek Tourism and Hospitality Sector

The Greek hospitality sector faces a critical paradox: it is economically vital yet socially fragile in terms of employment conditions. Persistent wicked issues such as low wages, informality and embedded precarity, contribute to labour shortages and high turnover (Baum et al., 2024). Improving working conditions and providing *Fair and Decent Work* could enhance productivity, service quality, and employee retention (Finlay, 2020). With forecasts indicating a potential labour shortage of up to 290,000 workers by 2035 (WTTC, 2025), addressing these structural issues and advocating for *Fair Work* in the sector is an urgent matter and a national strategic economic priority.

In response to this challenge, this report discusses Fair Work in the Greek Tourism and Hospitality industry drawing on the Fair Work Framework developed by Fredman et al. (2020; 2025) as part of the broader FairWork Project; an initiative that seeks to define and measure standards of decent work within the platform economy. The FairWork Project (<https://fair.work/en/fw/homepage/>) centres on five core principles that establish universal benchmarks for fair work practices across diverse economic and regulatory contexts. By systematically applying these principles, the framework enables the generation of comparable data across countries, drawing on a combination of national surveys, fieldwork, and in-depth research into platform-based employment.

Although originally designed to assess digital labour platforms, the Fair Work Framework has broader analytical value. Its principles are highly adaptable and can be applied to other sectors, such as hospitality, that exhibit similar characteristics, including precarious employment arrangements, fragmented work schedules, and asymmetrical power relations between workers and employers. As such, the framework provides a useful tool for evaluating labour standards beyond the platform economy, offering a structured and transferable approach to assessing fair work in contemporary service economy and labour markets. It does so through five interrelated principles:

- **Fair Pay** requires that workers receive remuneration sufficient to meet basic living standards within their local context, taking into account work-related expenses and the total number of hours worked. It also emphasises the importance of timely and complete payment for all labour performed.
- **Fair Contracts** calls for employment terms that are transparent, clearly written, and easily accessible, ensuring that workers understand their rights and obligations. It also requires that contracts fairly identify the responsible legal frame, provide reasonable notice for any changes.
- **Fair Conditions** focuses on the responsibility of employers to mitigate risks inherent in labour processes and to actively safeguard workers' physical and mental well-being through preventative and protective measures.
- **Fair Management** emphasises equitable and transparent management practices, including clear communication and non-discriminatory decision-making. Workers should have access to mechanisms for appeal and redress in cases of disciplinary action or disputes.
- **Fair Representation** upholds workers' rights to express their voice, including the ability to collectively organise and engage in meaningful dialogue with employers, irrespective of their employment classification.

 Fair Pay	The ability of workers to earn a decent income
 Fair Contracts	Transparent employment terms & conditions
 Fair Conditions	Health and safety of workers protected
 Fair Management	Communication and decision-making
 Fair Representation	Employee voice

Figure 2: Fair work principles (Source: Hadjisolomou et al., 2026, adapted from Fredman et al., 2020; 2025)

3. METHODOLOGY

The *Working Conditions in Hospitality* study forms part of a global research initiative led by the Auckland University of Technology (AUT) and coordinated by the Global Hospitality Research Alliance, involving participation from multiple countries (<https://hospitalityresearchalliance.com>). The original survey instrument, developed by AUT, was reviewed and adapted to the Greek context. While minor contextual modifications were made to ensure relevance, the overall structure and content of the questionnaire were retained to support cross-national comparability.

Following the finalisation of the online survey, ethical approval was obtained from Bournemouth University. Data collection took place between February and October 2025. A multi-channel distribution strategy was employed to maximise reach and ensure a diverse sample. The survey link was disseminated through social media platforms, as well as through direct engagement with industry stakeholders. In particular, hotel and restaurant managers were approached to circulate the survey among their staff, while higher education institutions across Greece, especially those offering undergraduate and postgraduate programmes in hospitality and tourism, were also engaged to support distribution.

The final sample comprises 451 respondents and forms the basis for the core analysis of employment conditions. This figure was derived from an initial pool of 583 completed questionnaires, following the exclusion of 132 responses where participants either did not confirm employment in the hospitality or tourism sector or did not provide a valid sector identifier. The resulting dataset contains no item-level missing data for key demographic variables or primary outcome measures used in the analysis.

The quantitative analysis is based on descriptive statistics, providing an overview of employment patterns, perceptions, and experiences across the sample. These findings are complemented by qualitative analysis of 247 open-ended responses, which were examined using deductive content analysis. The five dimensions of the Fair Work framework (fair pay, fair conditions, fair contracts, fair management, and fair representation) served as the a priori coding structure (Hadjisolomou et al., 2022). The analysis involved iterative reading of responses, systematic coding of excerpts into one or more dimensions, and comparison of patterns both within and across categories.

This mixed-methods approach enables a more comprehensive understanding of working conditions by combining the breadth of quantitative data with the depth of qualitative insights. The integrated findings are presented in the following section.

Sample Characteristics

A total of 451 respondents completed the questionnaire. As shown in Figure 3, the sample was predominantly young, with nearly half of respondents aged 16–25 years (49.9%). Participants aged 26–35 years represented 16.3% of the sample, followed by those aged 36–45 years (14.8%) and 46–55 years (13.1%). Smaller proportions were aged 56–65 years (5.1%) and 66 years and above (0.7%).

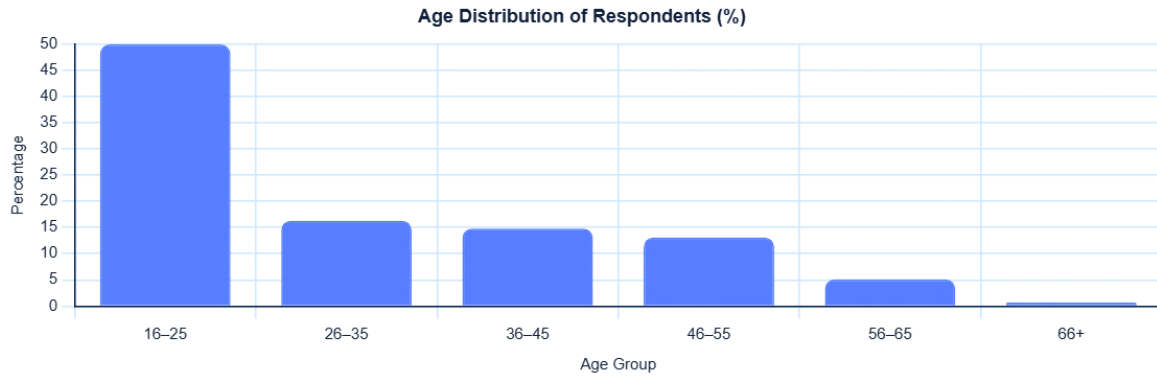


Figure 3: Age distribution of respondents

Regarding gender identity (Figure 4), 55.2% of respondents identified as female and 42.2% as male. A small proportion selected prefer not to say (2.4%), while 0.2% identified as all genders.

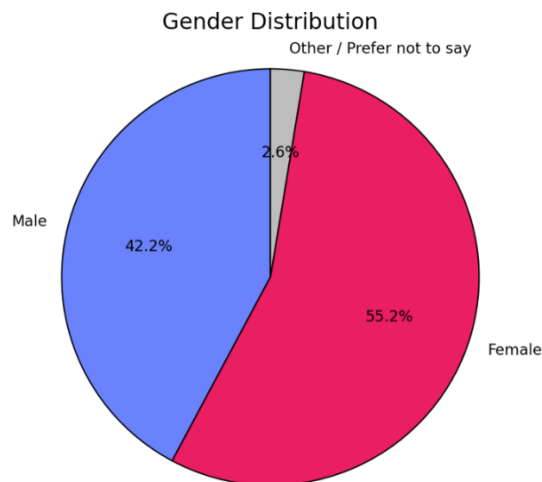


Figure 4: Gender of Respondents

In terms of sexual orientation, the majority of respondents identified as heterosexual (87.2%), whilst the sample was overwhelmingly composed of Greek citizens (98.5%).

Importantly, slightly over half of the respondents reported being current students (51.2%), whilst substantial proportions held a bachelor’s degree (23.4%) or a postgraduate degree (19.6%). Among respondents who were students, the vast majority were studying hospitality or tourism-related subjects (90.9%).

Workplace and Employment Characteristics

Nearly half of respondents reported that they are currently employed on a seasonal basis or have worked seasonally within the past two years (45.9%), while 50.1% reported no seasonal employment experience (Figure 5).



Figure 5: Seasonal work experience

Almost half of respondents were employed in independent or family-owned establishments (47.0%), 32.9% worked in Greek chain organisations, while 20.1% were employed by multinational chains.

Respondents’ places of work were geographically concentrated in Attica (42.98%), followed by the South Aegean (19.0%) and the Peloponnese (15.2%). Smaller proportions were employed in Crete (7.3%), Central Macedonia (4.6%), and the Ionian Islands (3.8%), with very limited representation from other regions of Greece.

In terms of organisational size (Figure 6), the largest proportion of respondents worked in establishments employing 200 or more people (34.9%), followed by those employing 6–19 employees (22.3%). Smaller proportions were employed in organisations with 1–5 employees (11.9%), 20–49 employees (10.6%), 50–99 employees (7.9%), 100–199 employees (12.4%), or 50–99 employees (7.9%).

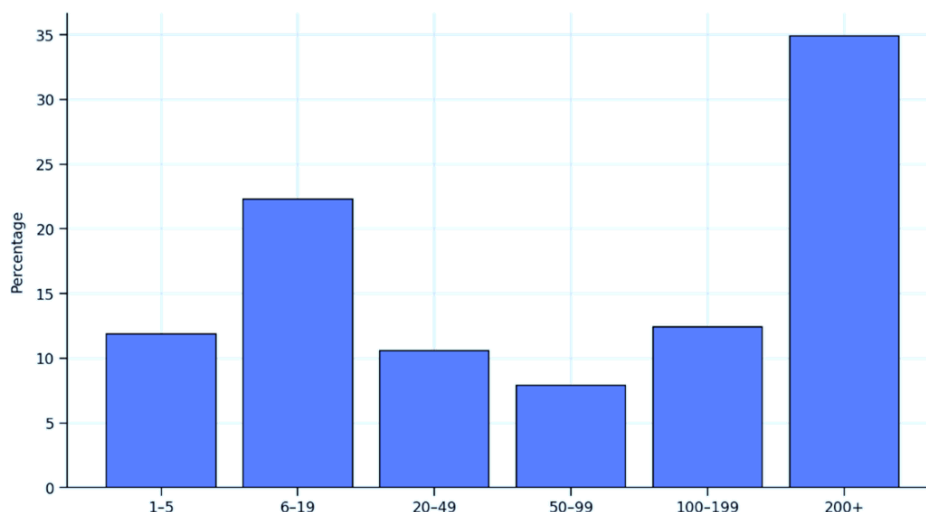


Figure 6: Size of Organisation

Approximately 24.7% of respondents reported 1–3 years of experience in the hospitality or tourism sector, while 19.9% had less than one year of experience. A substantial proportion reported long-term sector involvement, with 17.9% having over 20 years of experience and 14.8% reporting 10–20 years of experience.

Finally, over one-third of respondents had been in their current job for less than one year (37.5%). Approximately equal proportions reported having worked in their current position for 1–3 years (31.3%) or more than three years (31.1%).

Report Data presentation and structure

Next the report presents an integrated analysis of the research findings structured around the five core dimensions of the Fair Work framework: *fair pay, fair contracts, fair working conditions, fair management, and fair representation*. This framework provides a systematic approach through which working conditions in the Greek tourism and hospitality sector are examined, allowing the analysis to move beyond isolated indicators and instead assess how different aspects of work quality intersect and reinforce one another. Each dimension is explored in turn, highlighting both areas of relative relevance with Fair Work principles and domains where significant issues persist.

Within each dimension, the analysis deliberately combines quantitative and qualitative evidence to offer a more comprehensive account of how Fair Work is experienced and lived in workplace reality. Survey data are used to identify patterns and prevalence across the workforce, while qualitative testimonies provide insight into workers' lived experiences and perceptions. This mixed-methods approach enables a deeper understanding of the interplay between formal employment structures, such as contracts, pay arrangements, and management practice, and everyday workplace realities. In doing so, the report captures not only the existence of Fair Work standards on paper, but also evaluates how these are implemented, negotiated, or undermined in practice across the sector.



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4. DATA ANALYSIS

Fair Pay

Fair pay emerges as a contested and relational concept in the Greek tourism and hospitality industry, shaped by the tension between formal compliance and lived experience. The integration of quantitative and qualitative findings reveals not a uniformly low-pay sector, but a segmented wage reality, where legal adequacy often coexists with perceived unfairness.

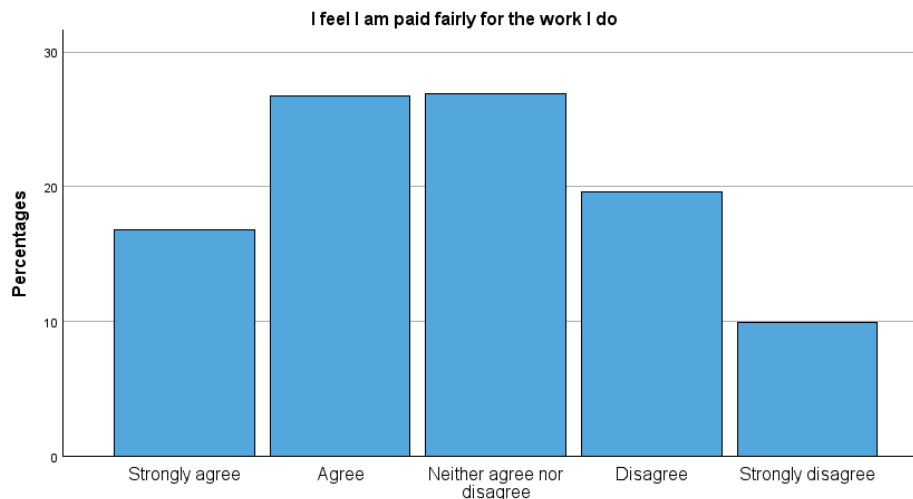


Figure 7: Overall perception of fair pay

The quantitative data presents a divided distribution of perceptions. A considerable part of respondents report earning above the statutory minimum wage, being paid for the hours they work. However, a sizeable minority (27%) indicate underpayment, including not being compensated for all hours worked. Importantly, perceptions of fairness are split almost evenly between positive and negative evaluations, accompanied by a substantial neutral category (Figure 7). This neutrality is analytically significant, suggesting that low pay may be normalised within the sector, rather than explicitly recognised as unfair. This pattern points to a critical distinction between formal compliance and distributive justice. While wages may meet legal thresholds, workers do not necessarily perceive them as fair when evaluated against workload, effort, experience, or the cost of living. In this sense, fair pay is not evaluated in absolute terms, but relationally.

The qualitative findings deepen and sharpen this interpretation. Workers consistently describe pay as structurally inadequate and disconnected from the intensity and demands of hospitality work. The issue is not only low wages, but the perception that labour is systematically undervalued. This is particularly evident in accounts of long-term wage stagnation. As one participant notes:

“After 25 years in the hospitality industry, I am looking for alternatives because the money I earn from my job is no longer enough for a decent living. The first salary I received when I started in 2000 was €1,000, and right now I earn the same amount. The seasonality of the profession, together with the negligible support from the state, has led me to financial deadlock” (P53).

Such accounts introduce a temporal dimension largely absent from the quantitative survey data, showing that dissatisfaction is not episodic but cumulative. Pay is experienced as failing to reward experience, undermining both motivation and long-term commitment to the sector. Moreover, qualitative responses highlight that workers interpret pay through a moral economy of recognition. Low wages are not seen merely as insufficient, but as indicative of disrespect and exploitation. As one respondent states, pay ***“does not even cover the basics of survival,” while simultaneously reflecting “a culture of exploitation” (P139).*** Here, remuneration becomes a proxy for value: *inadequate pay signals that effort and contribution are not acknowledged.*

A further theme concerns the disconnection between sectoral growth and wage stagnation. Workers explicitly note that increasing tourism revenues and business expansion have not translated into improved compensation. This perceived imbalance reinforces the view that economic gains are unevenly distributed, with workers absorbing the costs of competitiveness and seasonality.

At the same time, it is important to note that perceptions of fairness are not uniform. A minority of respondents describe pay as acceptable, particularly in more formalised organisational contexts or where wages are supplemented by tips, bonuses, or non-monetary benefits. This aligns with the quantitative evidence of variation and supports the interpretation of a segmented labour market, where better practices coexist with more exploitative arrangements.

Crucially, both datasets converge on the idea that pay cannot be understood in isolation from broader socio-economic conditions. Workers repeatedly link wages to inflation, housing costs, and the geography of tourism, particularly in high-demand destinations where living costs are elevated. As a result, even legally compliant wages may fail to ensure basic economic security. This helps explain why fair pay is also framed as a labour supply and retention issue, with inadequate compensation discouraging both entry into and continuation within the sector. Taken together, the integrated findings suggest that fair pay in Greek hospitality is characterised by *“compliant insufficiency”*, showing that wages often meet formal legal standards, but fall short of workers’ expectations of fairness, dignity, and sustainability. This gap is sustained by three interrelated dynamics: the normalisation of low pay, structural segmentation across workplaces, and the absence of strong collective mechanisms to negotiate improvements.

Fair Contracts

Fair contracts in the Greek tourism and hospitality sector are best understood not in terms of their mere presence, but in terms of their reliability, transparency, and enforceability in practice. The findings reveal a system characterised by widespread formalisation alongside persistent gaps between contractual terms and lived employment realities. This points to a model of “*formalised but flexible employment*”, where formal contracts exist, but do not always function as effective guarantees of fair work.

The quantitative findings suggest relatively high levels of contractual compliance. A large majority of respondents (85.9%) report having signed a written employment agreement, and a substantial proportion are employed on permanent full-time contracts (Figure 8). At face value, this indicates a sector that is largely formalised and aligned with regulatory standards.

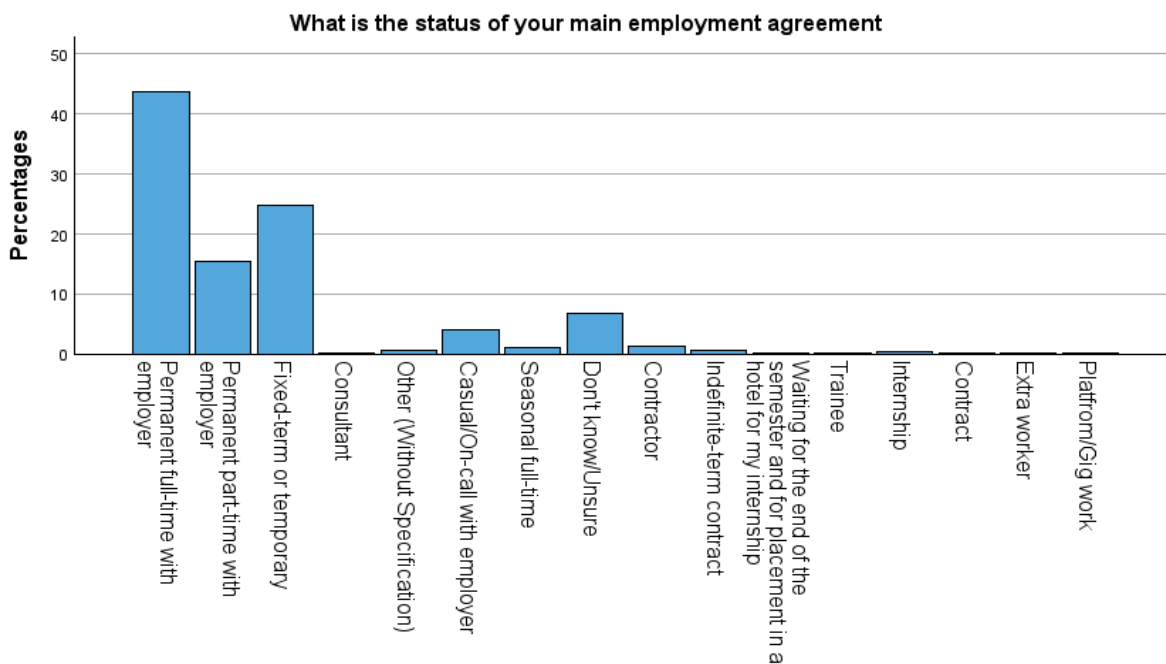


Figure 8: Types of Contracts

However, this formalisation coexists with significant indicators of contractual instability and inconsistency. Nearly half of the respondents report having engaged in seasonal work (45.9%), while fixed term and other flexible arrangements remain prevalent. More importantly, there is a clear mismatch between contracted and actual working hours, with a higher proportion of workers reporting working over 35 hours in practice than those whose contracts specify such hours. This discrepancy suggests that contracts often fail to capture the real labour input, thereby undermining their function as protective instruments.

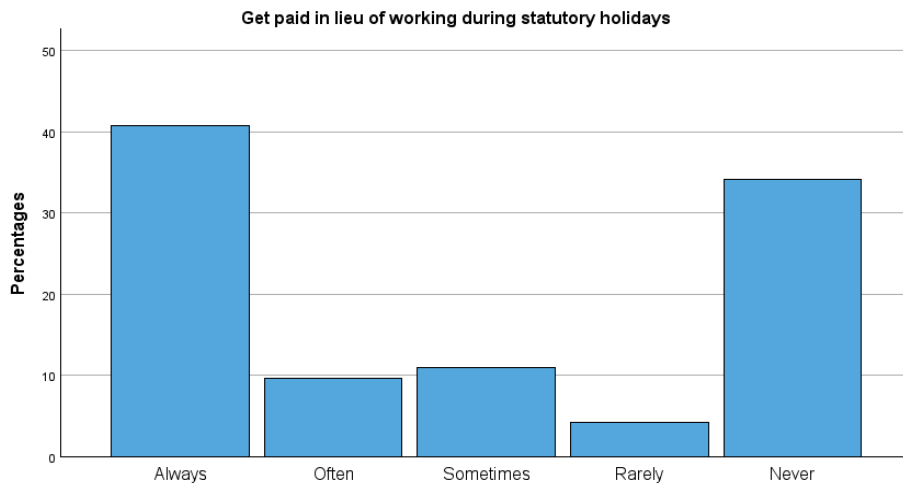


Figure 9: Being paid for working during holidays

Further quantitative evidence reinforces this interpretation: entitlements such as compensation for statutory holidays or time off in lieu are unevenly implemented (Figure 9). Taken together, these patterns point to a system in which legal rights exist on paper but are inconsistently realised in practice.

The qualitative findings provide further critical insight into how these discrepancies are experienced by workers. A recurring theme is that contracts often function as formal shells, while the actual employment relationship is governed by informal arrangements, managerial discretion, and personalised agreements. As one participant explains:

“A large part of my salary is ‘black’ (undeclared). There is neither a collective nor an individual contract in practice, but rather a personal agreement with each worker” (P68)

This statement highlights two key dynamics: first, the coexistence of formal and informal pay structures; and second, the shift from institutionalised regulation to individualised negotiation, which places workers in structurally weaker positions. Other responses reinforce the prevalence of partial declaration and hidden labour practices:

“A considerable amount of my compensation, including tips, was given in cash and could not be declared for tax purposes... working extra hours without being officially recorded was not uncommon” (P69)

Here, the contract does not disappear, but is effectively decoupled from actual working conditions, allowing employers to maintain formal compliance while informally adjusting labour costs. In more critical accounts, workers describe active manipulation of contractual and payroll systems:

“We work without days off, they manipulate our payroll, and they clock our work cards whenever they want” (P177)

Such practices indicate that even where digital or formal monitoring systems exist, they may be subject to employer control, limiting their effectiveness as enforcement mechanisms.

A further dimension of contractual unfairness concerns misrepresentation and lack of transparency at the recruitment stage. Workers emphasise that contracts are not only about written terms, but also about whether expectations regarding roles, hours, and living conditions are communicated genuinely:

“During the season they should at least tell you the truth about the accommodation conditions. And they should tell you the truth about the position you will take on” (P77)

This expands the meaning of fair contracts beyond legal documentation to include informational fairness and good faith in employment relationships.

Taken together, the qualitative data strongly support the interpretation of a system characterised by “*semi-compliance*”, where employers formally adhere to regulatory requirements while informally circumventing them. Contracts are present, but their content is often selectively applied, adjusted, or overridden in response to operational pressures such as seasonality and cost control. A key observation here is that this system produces structured ambiguity. Ambiguity benefits employers by preserving flexibility, enabling rapid adjustment to fluctuating demand, and externalising risk onto workers. At the same time, it undermines workers’ ability to plan their lives, enforce their rights, or challenge unfair practices. As a result, contracts cease to function as instruments of security and instead become mechanisms of contingent control.

Importantly, this condition is not uniformly experienced across the sector. The coexistence of more formalised and reliable contractual arrangements alongside highly informal and flexible practices points once again to labour market segmentation. Workers in larger or more structured organisations are more likely to experience contracts as meaningful guarantees, while those in smaller, seasonal, or family-run businesses are more exposed to variability and informality.

Overall, the integrated findings suggest that fair contracts in Greek tourism and hospitality are characterised by “*formalisation without full protection*”. While the widespread presence of written agreements indicates progress in regulatory compliance, the persistence of undeclared work, discrepancies in hours and pay, and limited enforceability highlight the fragility of contractual rights in practice.

Fair Conditions

Working conditions are characterised by a fundamental tension between positive subjective evaluations and structurally demanding, and at times harmful, working practices. The findings reveal that working conditions cannot be understood as uniformly poor or uniformly fair, but rather as simultaneously enabling and extractive, depending on which dimension of the work experience is foregrounded.

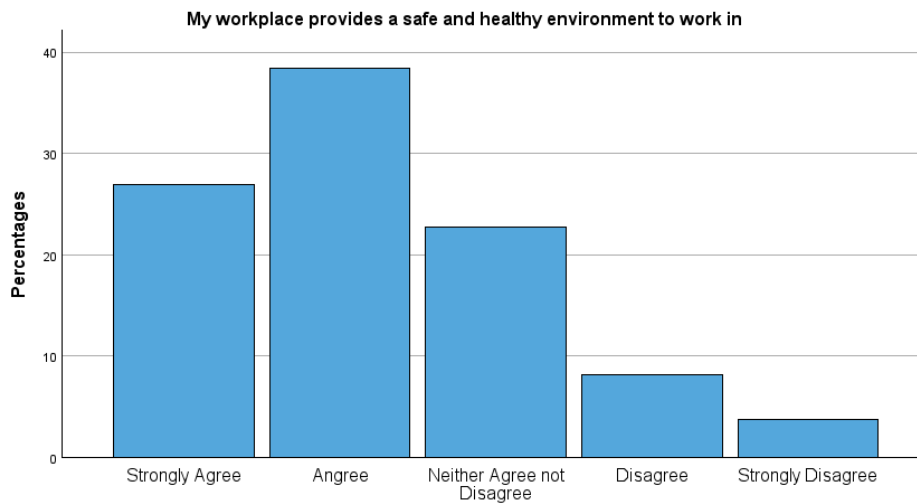


Figure 10: Perception of working environment

The majority of survey respondents report positive perceptions of their working environment, including relatively high levels of enjoyment, interpersonal respect, and perceived safety (Figure 10). At the same time, these positive evaluations coexist with clear indicators of strain and overwork (Figure 11). A significant proportion of workers report understaffing during busy periods and high work intensity. This is further reinforced by the fact that a notable share of respondents indicate that they do not always receive rest breaks (Figure 12) or compensation for additional effort, pointing to a gap between formal entitlements and everyday experience.

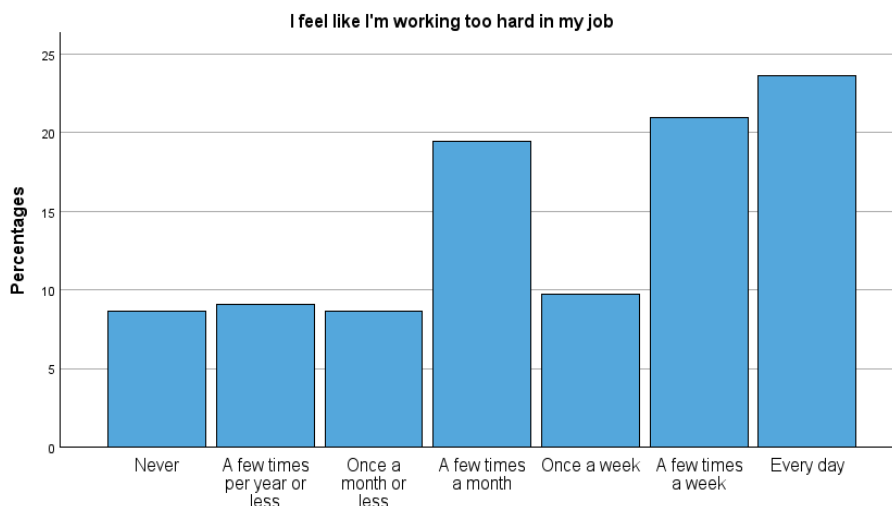


Figure 11: Feeling overworked

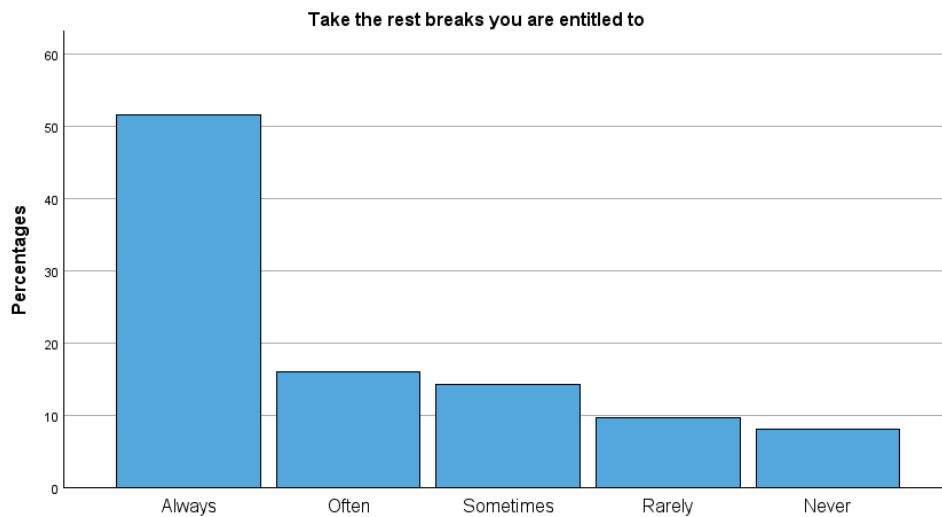


Figure 12: Taking breaks during work

Importantly, the data on turnover intentions (Figure 13) reinforce the centrality of working conditions as a structural issue. Factors such as poor work-life balance, toxic work environments, and workplace abuse/harassment emerge as key drivers of exit from jobs. While harassment is not the most frequently cited reason, its presence is analytically significant, as it signals that for a segment of workers, the workplace is not merely demanding but actively harmful.

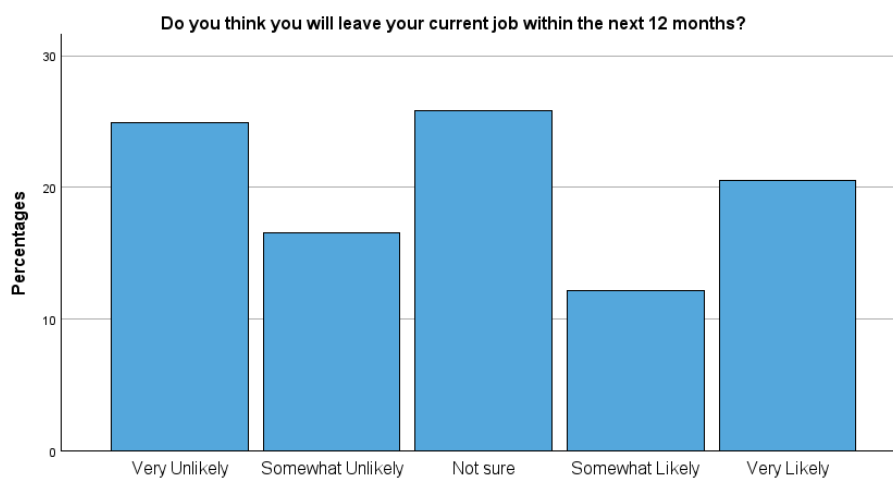


Figure 13: Turnover intentions

The qualitative findings deepen this analysis by revealing how workers experience and interpret these conditions in embodied and emotional terms. A dominant theme across responses is the normalisation of exhaustion, especially among seasonal workers. Long hours, lack of rest days, and continuous work during the summer season are described not as exceptions but as expected conditions of employment:

“My work during the season is seven days a week, with no day off, and it exceeds 9-10 hours every day.” (P68)

These accounts point to a working regime in which time, rest, and recovery are subordinated to peak demand, with workers expected to absorb the pressures of seasonality. At the same time, workers emphasise the physical and emotional toll of such conditions. References to exhaustion and pressure are frequent among the respondents (e.g. P67, P68, P49, P136). These statements reinforce the idea that work intensity is not only high but unsustainable over time, particularly when combined with inadequate staffing and long working hours.

Crucially, the qualitative data reveal that working conditions also encompass dignity, respect, and protection from harm, bringing issues of bullying and harassment into sharper focus (see quantitative responses in the next section). While not always explicitly labelled as such, many responses describe environments that can be interpreted as intimidating, abusive, or psychologically unsafe. For example, one respondent highlights customer-driven intimidation and incivility:

“Customers need to be properly informed about what they pay for... and they should stop intimidating staff with phrases like ‘I know someone and you will lose your job.’”
(P23)

This illustrates how harassment may originate not only from management but also from customers reflecting the asymmetrical power dynamics, inherent in service work. Other responses point more directly to internal workplace dynamics, including toxic organisational cultures and cycles of mistreatment:

“Seasonal work in Greece is often very exhausting and frustrating... it is a slum and a toxic environment.” (P78)

“The chain of violence/exploitation must stop at some point.” (P163)

The latter is particularly significant, as it conceptualises mistreatment not as isolated incidents but as a systemic and self-reinforcing pattern, where abusive practices become embedded within the organisational culture. In more extreme cases, respondents refer to gendered and sexualised inequalities, suggesting the presence of harassment linked to power and hierarchy:

“You see the mistreatment... especially of women waitresses... and they hold their position because of their relationships with managers.” (P168)

While such accounts are not representative of all workplaces, they highlight that harassment and discrimination form part of the lived experience for some workers, reinforcing the importance of examining working conditions beyond physical demands.

At the same time, it is important to recognise that positive experiences do exist, particularly where supportive management and strong team dynamics are present. Several respondents describe

environments characterised by cooperation, respect, and effective problem-solving, suggesting that demanding work can be experienced as manageable and even rewarding under the right organisational conditions. This reinforces the interpretation of a segmented labour market, where working conditions vary significantly across employers.

A key insight emerging from the integration of findings is that workers differentiate between social and structural dimensions of working conditions. Positive relationships with colleagues and managers may coexist with high workloads, long hours, and limited rest. This helps explain why quantitative data show relatively high levels of satisfaction alongside clear indicators of strain. Workers may value the social environment while simultaneously enduring structurally intensive and, at times, exploitative conditions. Overall, the findings suggest that fair working conditions in Greek hospitality are characterised by *“normalised intensity with uneven protection”*. High work demands, long hours, and limited recovery are widely accepted as part of the job, while protection from harm, including bullying and harassment, is inconsistent and dependent on organisational context.

Experiences of Abuse, Bullying and Harassment in the Workplace

A key question of the survey was the types and frequency of bullying, abuse and harassment experienced and witnessed by respondents, as summarised in Figures 14 and 15 below. Participants were able to select multiple types of mistreatment and report how often each was experienced, ranging from *never* to *always*. The results highlight varying levels of exposure across different forms of bullying and harassment, with notable differences in both prevalence and severity.

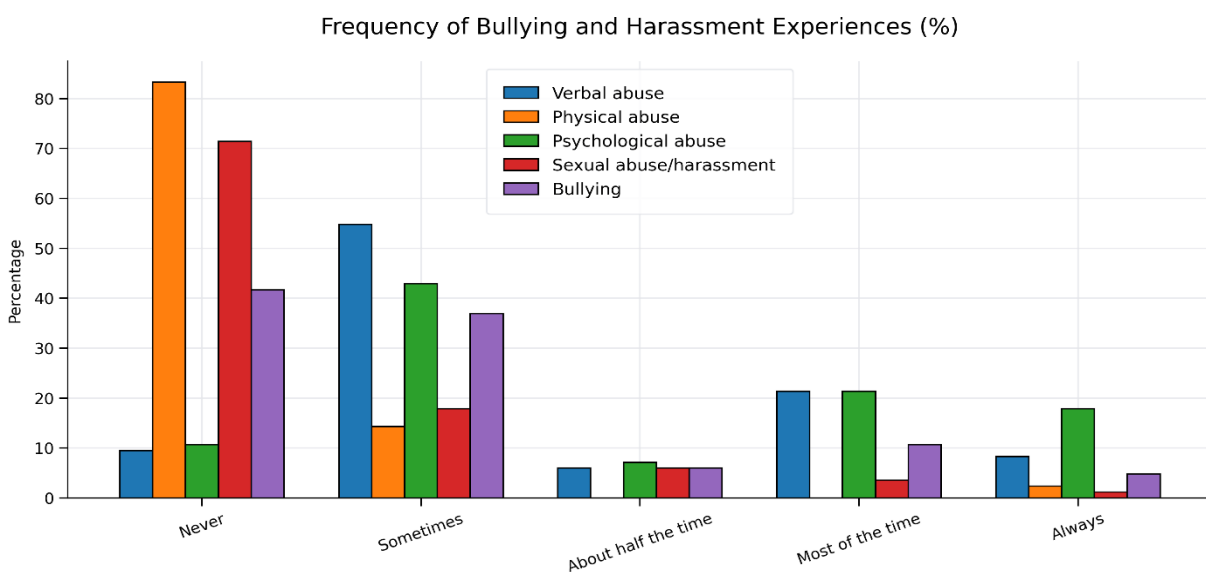


Figure 14: Frequency of experienced abuse, bullying and harassment behaviours

Verbal abuse was the most frequently reported form of mistreatment. Only 9.5% of respondents indicated that they had never experienced verbal abuse. In contrast, the majority reported some level of exposure, with 54.8% experiencing verbal abuse *sometimes*. More frequent exposure was also common, as 21.4% reported experiencing verbal abuse *most of the time* and 8.3% reported experiencing it *always*. The findings suggest that verbal abuse is not only widespread but also recurrent for a substantial proportion of respondents.

Psychological abuse demonstrated similarly high levels of prevalence and persistence. Only 10.7% of respondents reported never experiencing psychological abuse. The largest proportion (42.9%) experienced psychological abuse *sometimes*. However, a significant share reported frequent exposure, with 21.4% experiencing psychological abuse *most of the time* and 17.9% *always*. Overall, nearly two-fifths of respondents reported experiencing psychological abuse on a regular basis, indicating a potentially serious and sustained impact on employee wellbeing.

Bullying was also commonly reported, though less frequently than verbal and psychological abuse. While 41.7% of respondents indicated that they had never experienced bullying, 36.9% reported experiencing it *sometimes*. More persistent exposure was reported by 10.7%, who experienced bullying *most of the time*, and 4.8%, who experienced it *always*, suggesting that bullying affects a substantial minority of respondents, with ongoing exposure reported by some.

Sexual abuse and harassment were reported less frequently overall compared to other forms of mistreatment. A majority of respondents (71.4%) indicated that they had never experienced sexual abuse or harassment. Nevertheless, 17.9% reported experiencing it *sometimes*, while 6% experienced it *about half the time*. Smaller proportions reported more frequent exposure, with 3.6% experiencing it *most of the time* and 1.2% experiencing it *always*. Although less prevalent, the presence of repeated exposure remains a serious concern.

Physical abuse was the least commonly reported form of mistreatment. Most respondents (83.3%) reported never experiencing physical abuse. However, 14.3% experienced physical abuse *sometimes*, and 2.4% *always*, indicating that physical abuse, while relatively rare, is not entirely absent from the workplace experiences of respondents.

Abuse, Bullying and Harassment *Witnessed* in the Workplace

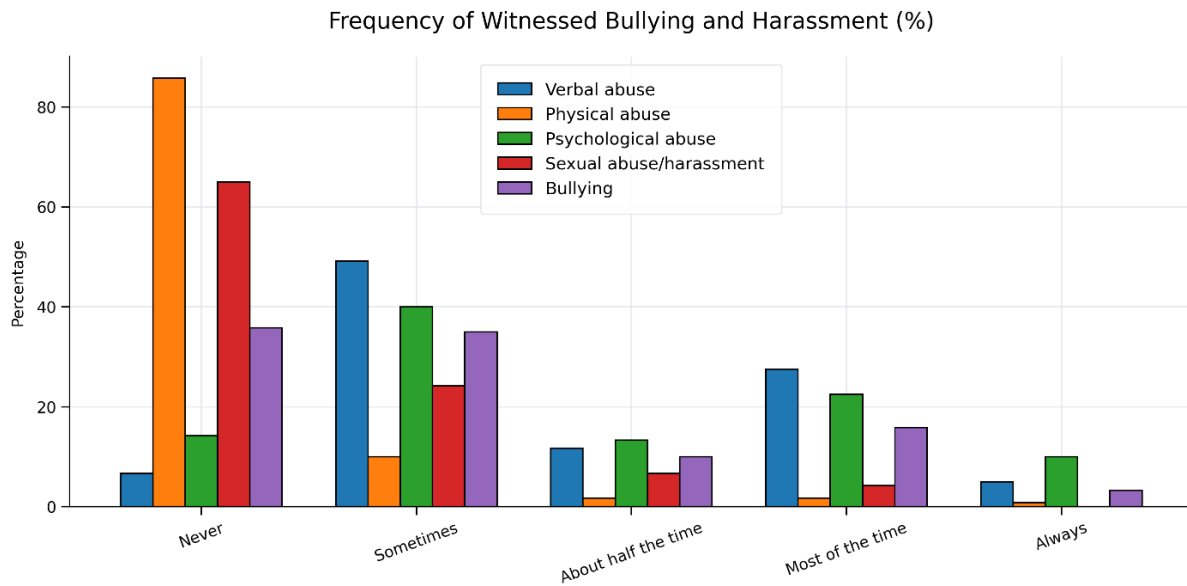


Figure 15: Frequency of witnessed abuse, bullying and harassment behaviours

Verbal abuse was the most commonly witnessed form of mistreatment. Only 6.7% of respondents reported never witnessing verbal abuse, while nearly half (49.2%) witnessed it *sometimes*. More frequent witnessing was also common, with 27.5% reporting witnessing verbal abuse *most of the time* and 5% *always*. These figures suggest that verbal mistreatment is highly visible and recurrent within workplace settings.

Psychological abuse was also frequently witnessed. While 14.2% of respondents reported never witnessing psychological abuse, 40% witnessed it *sometimes*. A substantial proportion reported higher frequencies, with 22.5% witnessing psychological abuse *most of the time* and 10% *always*.

Bullying behaviours were similarly widespread. Approximately 35.8% of respondents reported never witnessing bullying, while a similar proportion (35%) witnessed it *sometimes*. Additionally, 15.8% reported witnessing bullying *most of the time* and 3.3% *always*, demonstrating that bullying is a persistent and visible workplace issue for many respondents.

Sexual abuse and harassment were less frequently witnessed overall. Although most respondents (65.0%) reported never witnessing sexual harassment, 24.2% witnessed it *sometimes*, and 4.2% witnessed it *most of the time*. Despite lower overall prevalence, these findings remain concerning given the seriousness of this form of mistreatment.

Physical abuse was the least frequently witnessed behaviour. The majority of respondents (85.8%) reported never witnessing physical abuse, with 10.0% witnessing it *sometimes* and only small proportions witnessing it more frequently.

Accommodation conditions for seasonal workers as Fair conditions

The issue of accommodation for seasonal workers in the Greek islands is a long-standing and recurring concern in the sector, re-emerging every year during the peak tourism season. The sharp imbalance between tourist accommodation demand and available housing, combined with the seasonal and often precarious nature of employment, places workers in a particularly vulnerable position. Employer-provided accommodation is frequently presented as a solution; however, evidence below suggests that the quality, adequacy, and transparency of such arrangements remain highly uneven and, in many cases, problematic. The findings of the survey provide critical insights into the extent to which accommodation is provided, the types and quality of housing offered, and workers' lived experiences, revealing structural shortcomings that raise serious concerns regarding dignity, well-being, and employment rights.

Provision of Accommodation: Uneven Responsibility: 57.3% of respondents reported that their employer provided accommodation during the peak season, while a substantial 42.7% did not receive any accommodation support. This division highlights a fragmented landscape in which responsibility for housing is inconsistently assumed. While employer-provided accommodation can mitigate the severe housing shortages in island settings, the absence of such provision for over two-fifths of workers suggests that many seasonal employees must compete directly with tourists in inflated rental markets, often at wages that do not reflect these costs. This situation sustains economic insecurity and increases workers' dependence on informal or substandard housing arrangements. As one participant reported:

Life on the islands is becoming, financially, increasingly difficult due to rising costs and limited transportation, while accommodation for employees in lower-level positions often involves shared housing under poor conditions. (P453)

Types of Accommodation: Dominance of Shared and High-Density Housing: Responses indicate significant variability in the types of accommodation provided. The most common arrangements were shared bedrooms (37.7%), followed by individual apartments or houses (30.8%). Notably, only 14.6% reported having a shared apartment or house with their own bedroom, while smaller proportions were housed in hotel rooms, guesthouses, or atypical arrangements such as infirmary rooms or overcrowded employer residential complexes.

The high prevalence of shared bedrooms points to a normalization of high-density living conditions, often justified by the temporary nature of employment. However, such arrangements can undermine privacy, rest, and recovery from physically demanding work, particularly when combined with long working hours.

Amenities and Infrastructure: Basic Provisions partly guaranteed: The survey reveals that basic amenities are not universally available. While electricity and proper lighting were the most reported amenity provided (91% of total selections), access to clean drinking water accounted for 50% of selections. Similarly, kitchen and laundry facilities were reported in just 62% of selections.

Living Conditions and Reported Issues: A Pattern of Discomfort and Insecurity: Responses point to a wide range of recurring issues. The most frequently cited problems were noise disturbance (22.5%), poor hygiene and cleanliness (15.5%), and overcrowding (15%). Other concerns included pest infestations, poor ventilation, inadequate furniture, and dampness. Importantly, only 7% of selections indicated that respondents experienced no issues or were satisfied. Qualitative responses highlighted serious concerns on accommodation with participants stating:

“Accommodation in many areas is simply awful. Changing jobs—or even leaving the country—feels like the only real option. Greece is failing to provide opportunities for its young people.” (P168)

Satisfaction Levels: Neutrality and Ambivalence as Indicators of Normalized Risk: The data reveals a pattern of ambivalence. While 52.3% of respondents reported being somewhat or very satisfied with the overall condition of their accommodation, a notably high 30.8% expressed neutral responses, and 16.9% reported dissatisfaction. Similar trends were observed regarding cleanliness. The importance of neutral responses may reflect a normalization of inadequate conditions rather than genuine satisfaction. Workers may adjust expectations downward due to limited alternatives, short-term contracts, or fear of negative repercussions if they express dissatisfaction.

Transparency on accommodation provision: Gaps Prior to Employment: The data show a critical issue of lack of transparency regarding accommodation. While 59.2% were informed in advance about accommodation conditions, 31.5% reported insufficient information, and 9.2% stated that they were misled regarding the provided accommodation. These findings raise significant ethical concerns. Accepting employment under false or incomplete information undermines informed consent and places workers at heightened risk, particularly when relocation to island regions involves limited exit options and high living costs.

Overall: The data suggests that accommodation for seasonal workers, particularly on the Greek islands, remains a structurally weak component of the Greek tourism employment model. While employer-provided housing is relatively widespread, its quality, adequacy, and regulation vary significantly. The prevalence of shared and overcrowded spaces, limited access to basic amenities, recurring hygiene and safety issues, and lack of full transparency indicate systemic shortcomings rather than isolated failures.

Below are illustrated two **AI-generated images** created to visualise accommodation conditions as described to members of the research team and/or published in social media. **The images are illustrative and do not show an actual room or location.**



Image A¹: Illustrates a shared room in an old house on a Greek island, located away from the area of work, shared by two female hospitality workers employed by the same organisation. The room contains a bunk bed and provides only minimal basics, with limited storage space for clothing. According to participants' descriptions, the accommodation did not include air conditioning, adequate ventilation, or access to a washing machine.



Image B¹: illustrates an old, small house on a Greek island that was shared by two male workers. Inside the house, there were two single beds and a small bathroom that included a washing machine. The house didn't have air-conditioning, and the metal roof caused the indoor temperature to rise significantly. All other furniture and daily-use items and seating were located outside the house.

¹https://www.in.gr/2025/07/16/greece/zise-ton-mytho-sou-stin-paragka-oi-athlies-synthikes-diamonis-ton-ergazomenon-stin-touristiki-sezon/#google_vignette

Fair Management

Fair management emerges as the most positively evaluated dimension in the analysis, yet also one marked by important internal tensions between interpersonal treatment and structural empowerment. The findings suggest that while many workers experience respectful and supportive managerial relationships, this does not necessarily translate into meaningful participation, recognition, or equitable organisational practices.

The survey results indicate relatively high levels of perceived dignity and respect in managerial interactions (Figure 16). Most respondents report being treated fairly by managers and receiving supportive feedback, while many also feel able to express their views without fear of retaliation.

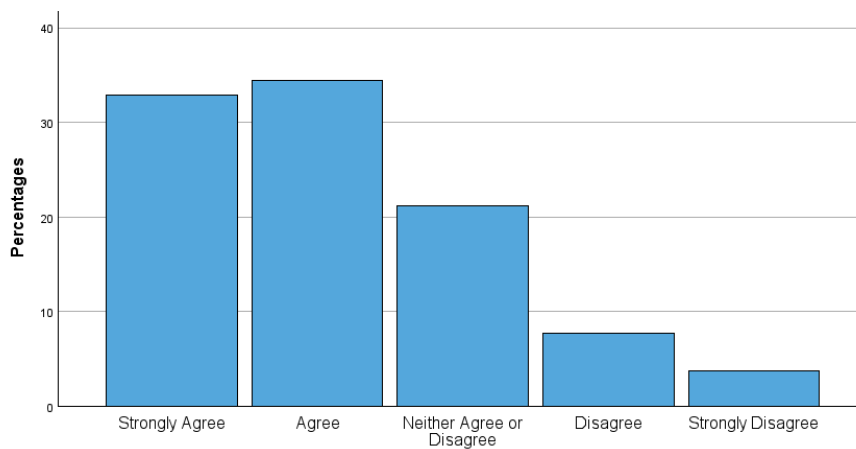


Figure 16: Managerial behaviour towards employees

However, positive feedback is not consistently experienced, with 39.7% of respondents indicating limitations or dissatisfaction in this area (Figure 17). These findings point to a broadly positive evaluation of day-to-day managerial behaviour and suggest that, in many workplaces, relational aspects of fairness are present.

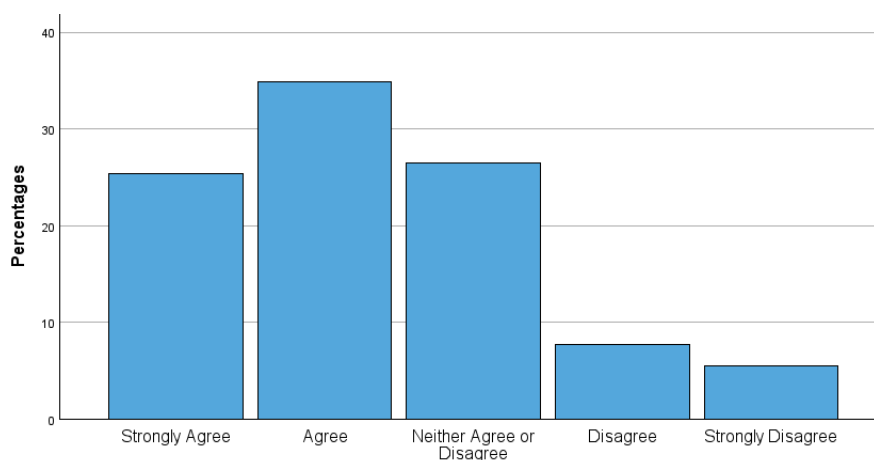


Figure 17: Providing supportive employee feedback

In contrast, and of particular concern, respondents identify management and employers as perpetrators of bullying and harassment within the sector (Figure 18). This raises serious questions regarding the reported norms of respect and dignity at work and suggests a potential normalisation of mistreatment embedded within managerial and supervisory practices and relationships.

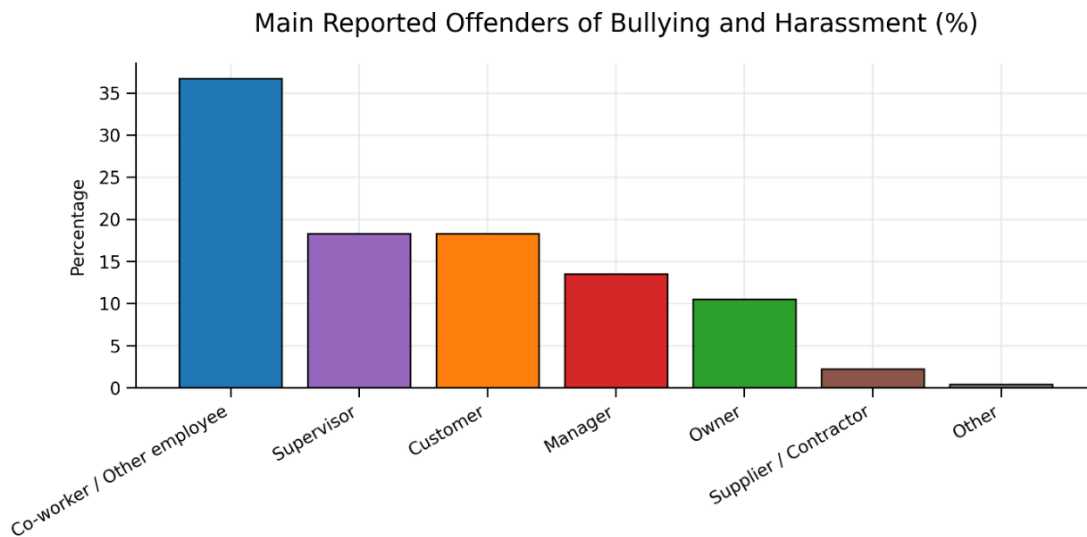


Figure 18: Preparators of bullying and harassment

The qualitative findings deepen this distinction by revealing how workers differentiate between being treated well and being valued or empowered. Positive accounts of management emphasise accessibility, responsiveness, and human-centred leadership. For example:

“In the small hotel I worked in, the manager was very helpful and kind... issues were addressed and resolved.” (P34)

“In the current hotel I work at, I felt like a human.” (P159)

The phrasing of the latter quote is particularly revealing. Being treated “*like a human*” is presented not as a given, but as an exceptional experience, implying that such treatment is not consistently guaranteed across the sector. At the same time, a substantial body of qualitative evidence points to systematic shortcomings in managerial practices, particularly in relation to recognition, communication, and fairness in decision-making. Workers frequently describe environments characterised by lack of appreciation and weak organisational communication:

“It is very hard to get acknowledgement of the efforts, knowledge and innovative ideas... not good communication” (P105)

Such accounts suggest that while overt mistreatment may not be universal, many workers experience a lack of recognition, which undermines engagement and reinforces perceptions of unfairness.

More critically, several responses highlight the persistence of informal, personalised, and non-meritocratic management structures:

“There is no meritocracy; supervisors are acquaintances, relatives... whether you do your job or not, you are paid the same.” (P54)

This reflects a system in which organisational decisions, including promotion and evaluation, are shaped not by transparent criteria but by social proximity and informal networks. Such practices weaken trust in management and contribute to perceptions of unfairness and inequality. Other responses point to issues of communication style and hierarchical behaviour, where managerial authority is exercised in coercive and abuse ways that can undermine dignity:

“Supervisors need to be careful how they speak to their subordinates.” (P112)

“I think this is now the worst job in Greece in every possible sense. Mistreatment of workers is evident, and management does nothing about it” (P168)

Importantly, the qualitative data also reveal that management often acts as the transmission force of structural pressures within the sector. Issues such as understaffing, cost control, and seasonality are central focus for management approach and are translated into intensified workloads, reduced breaks, and increased expectations at the managerial level. One respondent explicitly links managerial behaviour to cost-driven incentives:

“Managers operate based on food cost and labour cost in order to receive bonuses.” (P73)

This indicates that managerial practices cannot be fully understood in isolation from broader organisational and economic logics. If performance is measured primarily in terms of cost reduction, then practices that intensify work or limit staffing may be institutionally encouraged, even when they negatively affect working conditions.

A key finding emerging in this study is the coexistence of positive and negative experiences reinforces the broader pattern of labour market segmentation. In more formalised organisations, particularly larger or chain-based operations, management practices appear more consistent, structured, and supportive. In contrast, smaller or family-run businesses often exhibit more personalised and variable approaches, leading to greater unpredictability in worker experience.

Overall, the findings suggest that fair management in the Greek tourism and hospitality sector is unevenly experienced. While many workers report respectful interpersonal treatment, the persistence of informal management practices and experiences of mistreatment limit the extent to which management can be considered fully fair.

Fair Representation and Employee Voice

Fair representation emerges as the weakest and most structurally constrained dimension within the Greek hospitality sector. The findings reveal a system in which worker voice is present but limited, it is individualised rather than collective and often lacks effectiveness. This results in a form of “*constrained voice*”, where employees may have opportunities to express their voice, but lack the institutional mechanisms required to translate this into effective voice.

Quantitative findings present a mixed picture. Most respondents report that they feel able to express their views and concerns without fear of retaliation, suggesting a degree of openness at the workplace level. However, this perception of voice coexists with extremely low levels of formal representation, particularly in terms of union membership and collective engagement, as well as evidence that workers often choose not to raise or formally report workplace issues. This apparent openness is further “blurred” by more ambivalent responses regarding employee voice and participation, with a substantial proportion of respondents remaining neutral or less positive about their ability to influence workplace decisions or have their ideas meaningfully considered by management. This indicates that while workers may feel heard at an interpersonal level, their capacity to shape organisational practices remains limited.

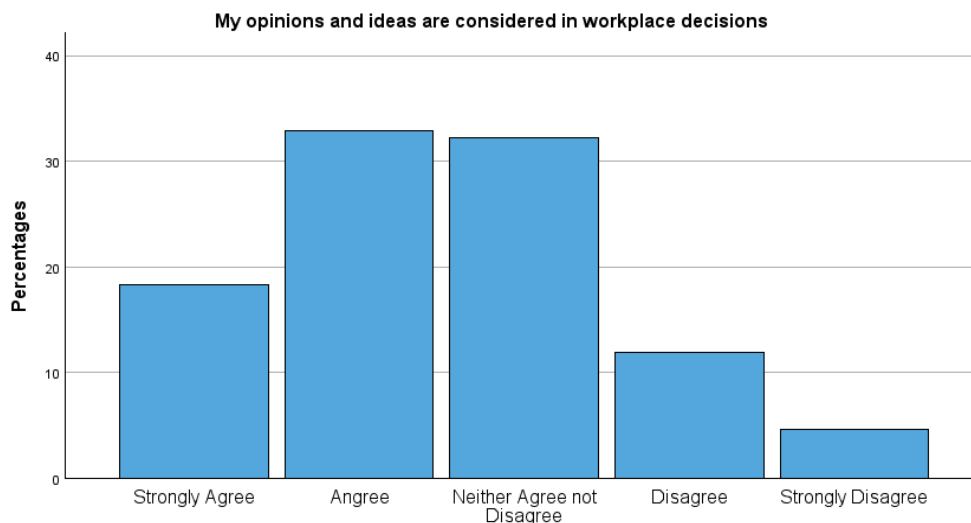


Figure 19: Employee participation in workplace decisions

A clear example of limited and ineffective employee voice is the limited capacity of workers to report, challenge, or effectively resolve issues of bullying, mistreatment, and harassment in the workplace. The data suggest that while workers experience problematic or harmful workplace (mis)behaviours, these are not consistently translated into formal complaints or collective action. Although the majority of respondents (64.2%) indicated that incidents were reported, a substantial minority (approximately 33%) reported that such incidents remained unreported. This reluctance of reporting is driven by factors such as fear of repercussions, lack of trust in management, and perceptions of ineffectiveness of reporting

mechanisms (Figure 20). This illustrates the limited worker voice on issues related with mistreatment in the workplace and reinforce the finding of effective voice gap.

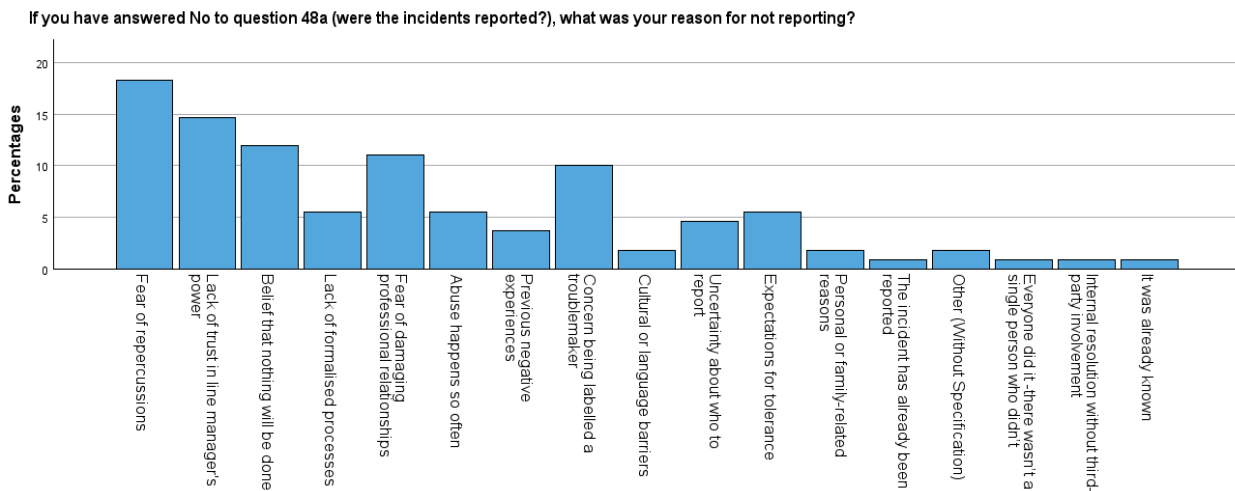


Figure 20: Reasons for not reporting incidents such as bullying and harassment

The qualitative findings provide critical insight into this gap. Workers rarely refer directly to unions or formal representative structures. Instead, they describe a working environment characterised by fragmentation, lack of solidarity, and limited collective agency. As one participant notes:

“Workers are not united for the common good, and that is why pay and working conditions do not improve.” (P61)

This statement suggests that workers perceive poor working conditions not only as the outcome of employer practices, but also the lack of collective solidarity, reflecting the belief that collective action is essential for change, and that the absence of unity weakens workers’ bargaining power.

Other responses point to the absence and/or perceived ineffectiveness of institutional protections and employment law enforcement mechanisms, suggesting that low representation is experienced not only as weak worker collectivism, but also as weak institutional protection, where neither unions nor regulatory bodies are perceived as effective safeguards:

“There is no state control, and so employers exploit workers.” (P63)

“There is no enforcement of legislation and no serious work culture... they operate like small corner shops from the 1980s but make millions in profits.” (P134)

In this context, workers often respond to unfair conditions not through voice, but through exit or withdrawal. This is evident in responses that express resignation, or a preference to leave employment rather than endure poor conditions:

“I prefer not to work rather than work for insufficient pay and poor conditions...I prefer to be unemployed rather than working under such conditions.” (P63)

Such statements indicate that when voice is perceived as ineffective, workers shift towards individual coping strategies, including job mobility or sectoral exit.

At the same time, the qualitative data suggest that even where workers feel able to speak informally, this does not necessarily translate into collective influence or structural change. Voice remains individualised and situational, dependent on managerial receptiveness rather than supported by formal mechanisms or collective bargaining structures. This reinforces the interpretation that representation in the sector is de-institutionalised, relying on interpersonal dynamics rather than enforceable rights.

A key finding here is that the weakness of fair representation is not an isolated issue, but a mediating condition for all other dimensions of fairness. The persistence of low pay, excessive working hours, contractual inconsistencies, and uneven management practices can be partly explained by the absence of strong collective voice. Without effective representation and effective voice, workers lack the means to challenge unfair practices, negotiate improvements, or ensure the enforcement of employment rights. More critically, the findings suggest that this absence of representation may be structurally embedded within the sector’s labour model. The prevalence of seasonal work, fragmented employment relationships, and high labour turnover makes collective organisation more difficult. At the same time, fear of job loss, non-renewal of contracts, or reputational consequences discourages workers from raising concerns, particularly in smaller or less formalised workplaces.

This creates a self-reinforcing cycle: weak representation enables poor conditions, while poor conditions further weaken representation. In this sense, fair representation is not simply one dimension among others, but a foundational condition for the realisation of fair work more broadly. At the same time, it is important to recognise that the absence of strong collective structures does not imply a lack of awareness among workers. On the contrary, many respondents demonstrate a clear understanding of the structural nature of their situation, linking poor conditions to broader issues of regulation, enforcement, and sectoral norms. What is missing is not awareness, but effective mechanisms for collective action and institutional support.

Overall, the integrated findings suggest that fair representation in Greek hospitality is characterised by *“voice without power.”* While workers may have opportunities to express concerns at an individual level, the lack of collective structures and institutional support limits the effectiveness of that voice.

5. DISCUSSION AND RECOMMENDATIONS

This report set out to understand how Fair Work “looks like” in the Greek tourism and hospitality sector. The answer, however, is not straightforward. As the data show, the sector is not defined by uniformly poor working conditions, nor by consistently fair ones. Instead, it operates in a space in between, where fair work practices often coexist with everyday practices that fall short of workers’ expectations. The findings reveal a pattern of partial and uneven fairness across all five Fair Work principles, reflecting the coexistence of relatively fair employment practices alongside persistent structural shortcomings. Quantitative data often point to the presence of formal protections, such as written contracts, regular pay, and generally respectful managerial behaviour. However, qualitative evidence consistently highlights the limits of these formal arrangements, revealing gaps between what is provided on paper and what is experienced in everyday working life.

A central insight emerging from the report’s integrated analysis is that Fair Work in the sector is shaped by three interrelated dynamics: normalisation, segmentation, and constrained voice. First, suboptimal conditions such as long working hours, high work intensity, and low relative pay appear to be normalised within the sector, reflected in the substantial proportion of neutral responses in the survey. Second, the data point to a segmented labour market, where experiences vary significantly across organisational types, employment arrangements, and individual circumstances. Third, and most critically, the limited opportunity of collective representation constrains workers’ ability to challenge unfair management practices, reinforcing the persistence of inequalities across the other dimensions.

Figure 21 summarises the key findings of this study. What stands out most clearly is the unevenness of experience. Better working conditions are present in parts of the sector, particularly in larger and more structured organisations such as hotel and restaurant chains. Yet these practices are not consistently applied. As a result, Fair Work is a condition that workers may encounter in one workplace but not in another or they even may experience it differently within the same organisation over time. This suggests that the challenge ahead is not about merely identifying what “*fair*” looks like but making it more widespread, consistent and reliable.



Figure 21: Survey Key Findings

KEY POINTS AND RECOMMENDATIONS

Fair Pay

Pay remains one of the strongest pressure points. While many workers earn at or above the statutory minimum wage, this does not necessarily translate into a sense of fair pay. Workers consistently assess their earnings in relation to the effort they invest, the intensity of their work and the cost of living, particularly in high-demand tourist destinations where accommodation and daily expenses are significantly higher. This helps explain why dissatisfaction persists even where employers meet legal requirements. In practice, fair pay is not assessed against minimum thresholds, but against whether it enables a decent and sustainable standard of living. Where this balance is missing, workers begin to disengage, not only from their current roles but from the sector more broadly.

For employers, this points to a growing need to view pay as part of a broader workforce strategy rather than a fixed cost. Even modest adjustments—such as clearer pay progression, recognition of experience, or more transparent reward structures—can influence how fair pay is perceived. At the same time, the persistence of unpaid overtime and undeclared work highlights the continued importance of enforcement. Here, policymakers have a critical role in ensuring that compliance is not only formal but substantive, particularly in segments of the sector where monitoring remains weak.

Fair Contracts

At first glance, the widespread use of written contracts might suggest a relatively well-regulated labour market. However, the findings tell a more complex story. For many workers, contracts do not fully reflect the reality of their working lives. As the survey reveals, hours are frequently extended beyond what is agreed, and informal arrangements often shape how work is organised in practice. This disconnect undermines the core purpose of a contract which is to provide clarity and security. When workers cannot rely on what is formally written and agreed, the employment relationship becomes less predictable and, ultimately, less trustworthy.

Addressing this issue requires a shift in emphasis from formality to reliability. For employers, this means ensuring that contracts accurately capture actual working patterns, particularly during peak seasons when pressures intensify. Greater transparency at the recruitment stage (e.g. about roles, hours, and even accommodation conditions) can also help prevent mismatched expectations that later lead to dissatisfaction.

From a policy perspective, the challenge lies in bridging the gap between declared and actual work. Strengthening inspection mechanisms to focus on this gap, rather than on documentation alone, would go some way towards addressing the “*semi-compliance*” practices identified in the report. More broadly, improving the credibility of contracts is essential if they are to function as meaningful safeguards rather than symbolic documents.

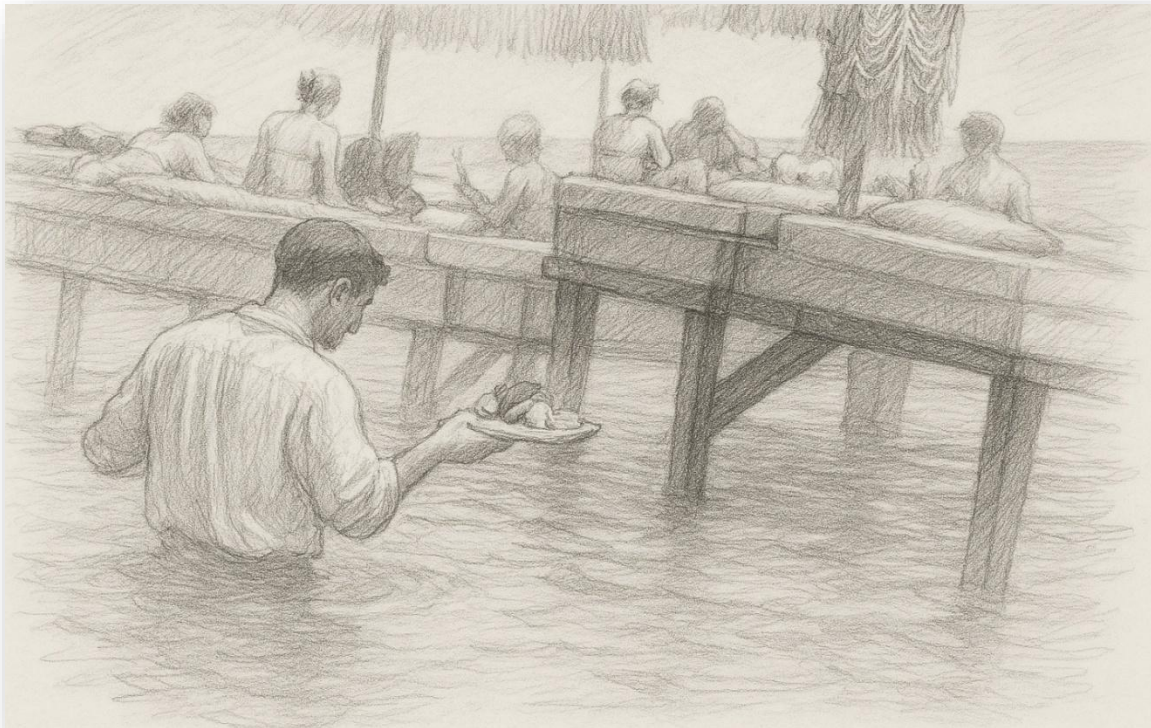
Fair Conditions

Working conditions in Greek hospitality are often described in two contrasting ways. On the one hand, many workers value the social environment of their jobs, highlighting teamwork, camaraderie, and positive interpersonal relationships. On the other hand, these experiences sit alongside long hours, high work intensity, and limited opportunities for rest, particularly during the peak tourist season and abusive working environments. This duality is important. It suggests that a positive workplace atmosphere can coexist with demanding, and at times unsustainable working conditions. In other words, enjoying the job does not necessarily mean that the job is manageable in the long term.

For employers, this raises a critical question about how work is organised. Ensuring adequate staffing during busy periods, protecting access to breaks, and managing shift lengths more effectively are not simply operational issues; they are central to how fair work is experienced. In a sector where service quality depends heavily on human interaction, sustained overwork carries clear risks, not only for employee wellbeing but also for customer experience.

There is also a need to look more closely at issues of dignity and protection. While not universal, accounts of bullying, harassment, and customer-related pressure highlight that psychological safety cannot be taken for granted. This is an area where both organisational culture and regulatory oversight matter. Employers play a key role in setting expectations and responding to incidents, but policymakers also have a responsibility to ensure that existing protections are enforced consistently across the sector.

Finally, the data evidence reinforces the need for clearer regulatory standards, stronger enforcement mechanisms, and greater accountability regarding worker accommodation. Without meaningful intervention, housing conditions will continue to function as an invisible yet central dimension of weak employment conditions, disproportionately affecting seasonal workers who sustain the critical tourism economy.



This AI-generated image illustrates the case of seasonal workers on Greek islands serving customers seated on a platform above the sea, while the workers move through chest-deep water to serve them. This striking scene, highlighting the intense physical demands placed on workers, has raised serious concerns and debates about the working conditions and practices within parts of the Greek tourism sector.

<https://greekreporter.com/2023/07/03/video-waiter-wading-water-serve-viral-greece/>

Fair Management

One of the more encouraging findings of the report is that many workers describe their immediate managers in positive terms. Respectful treatment, approachability, and day-to-day support are frequently mentioned, suggesting that interpersonal aspects of management are often working well. However, this positive picture is not without its limitations. Workers also point to inconsistencies in how decisions are made, a lack of recognition for effort, abuse and bullying from management, and the persistence of informal practices such as favouritism or reliance on personal networks. These issues highlight a gap between relational fairness (how people are treated) and procedural fairness (how decisions are made).

Closing this gap requires a greater emphasis on consistency and transparency. For employers, this means moving beyond informal management styles towards clearer structures around feedback, performance, and progression, as well as addressing abusive behaviours and mistreatment via transparent decision-making processes. When employees understand how decisions are made, and witness the fair application of these decisions, trust in management will be strengthened.

At the same time, it is important to recognise that managers themselves often operate under significant pressure, particularly in environments shaped by cost constraints and seasonal demand. This points to a wider organisational challenge: if performance is measured primarily in terms of cost control, managerial practices are likely to reflect this. Addressing fairness at the management level therefore also involves rethinking the incentives and expectations placed on managers within the system.

Fair representation

Perhaps the most striking finding across the report is the limited development of fair representation and employee voice. While many workers feel able to express their views informally, this does not necessarily translate into meaningful or effective voice. Collective mechanisms remain weak, and a significant number of workers remain reluctant to raise concerns due to fear of repercussions or a lack of confidence that action will follow. This creates a situation in which voice exists but has limited impact, resulting to the persistence of underlying issues and unfair practices.

For employers, this highlights the importance of building effective channels for employee voice, beyond just feedback processes. What is crucial here is whether employee voice leads to evident change and improvement of workers experience.

For policymakers, the findings raise broader questions about the state of collective representation in the sector. Strengthening institutional support whether through unions, labour inspections, or alternative forms of worker representation, remains critical. Without this, improvements in other areas are likely to be partial and uneven.

6. CONCLUSION

The Greek hospitality sector is entering a decisive phase. Its economic contribution continues to grow, but the employment model that has supported this success based on flexibility, seasonality, and high work intensity, is under increasing pressure. This report highlights a clear tension. The sector continues to attract a workforce that is skilled, engaged, and often genuinely passionate about hospitality. At the same time, this commitment is being tested by working conditions that many experience as difficult to sustain. Long hours, inconsistent application of contracts, and pay that does not always reflect effort or living costs are not isolated concerns, they are recurring features of everyday work.

The risk is not simply dissatisfaction, but gradual disengagement. When workers begin to feel that effort is not matched by fair pay and reasonable conditions, they start to reconsider their future in the sector. In a context of growing labour shortages, this is no longer a marginal issue, it is a structural one. At the same time, the findings point to an important and practical insight: better practices already exist. There are clear examples of workplaces where employees are paid fairly, treated with respect, and work under conditions that, while demanding, remain manageable. These are not exceptions because conditions are easier, but because they are managed differently. *This matters*: it shows that improving working conditions is not about whether the sector can change, but about how consistently it applies what already works.

The challenge, however, is unevenness. Working conditions still vary significantly across the sector, particularly between larger, more structured organisations and smaller, more informal businesses. In too many cases, outcomes depend on the individual employer rather than on consistent standards. At the same time, a continued reliance on flexibility, often translated into long hours and intensified workloads, shifts pressure onto workers in ways that are becoming harder to sustain. A further constraint is the limited development of employee voice. While employees could speak up informally, this rarely translates into meaningful voice and impact. Without stronger and more trusted mechanisms for representation and voice, many issues remain unresolved, and responsibility for change is left largely to individual employers.

Overall, these dynamics point to a sector at a crossroads. Maintaining the status quo may support short-term performance, but it risks reinforcing labour shortages, increasing turnover, and putting pressure on service quality. A more sustainable path depends on greater consistency in how people are employed and managed. For employers, the message is clear. Working conditions are not separate from business performance, they are central to it. Pay, contracts, workload, and management practices directly shape retention, employee engagement, and the quality-of-service delivery. In a people-driven industry, how employees are treated is inseparable from the customer experience. For policymakers and industry

stakeholders, the priority is to close the gap between regulation and practice. This means strengthening regulatory enforcement where needed but also supporting approaches that improve job quality and ensure Fair Work across the sector.

Ultimately, the future of Greek hospitality will depend not only on attracting visitors, but on retaining its workforce. A sector that offers fair, decent and secure work will be better placed to compete, grow, and sustain its success. The foundations already exist. The challenge now is to apply them more consistently.



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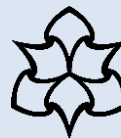
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