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The 2005 Greek Hotel Branding Report

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EXECUTIVE SUMMARY

Greece boasts one of the world's largest and most mature hotel sectors with nearly 9,000 businesses and a 342,000-room capacity, yet it is among the least developed in regard to branding. Only 3.4% of the country's hotels (controlling 16.8% of the total room capacity) have an affiliation either with a Greek or an international brand, a situation that reflects the orientation of most accommodation businesses towards the package tour market and their close co-operation with tour operators.

Greotel, **Best Western**, Cyprus-based **Louis**, **Mitsis** and **Iberostar** are the only companies active in Greece that have built significant portfolios of branded hotels with 31, 22, 16, 13 and 11 units, respectively. Greotel, the country's largest hotel operator, controls 6,626 rooms or 1.9% of the total room capacity available at Greek hotels.

Global brands, such as IHG's **InterContinental** and **Holiday Inn**, Accor's **Club Med**, **Sofitel** and **Novotel**, **Hilton**, Starwood's **Luxury Collection** as well as **Marriott** and **Hyatt**, have established a limited presence, with each one of these brands having up to four hotels in Greece. A comparatively large share has been secured by hotel brands directly managed or affiliated with the major European tour operators such as the predominantly all-inclusive resort hotels of **Robinson Club**, **Magic Life**, **Club alltoura**, **Calimera**, **LTI** and **Iberostar**, the latter operating 11 Greek hotels with 2,590 rooms.

Regarding Greek brands, second to Greotel is **Mitsis** with a capacity of 3,546 rooms in 13 hotels. Other national brands include the **Aldemar**, **Helios**, **Divanis**, **Capsis**, **Electra**, **Amalia**, **Chandris** and **AKS**. There are also several strong local brands in the country's main resort areas, such as **Maris** on Crete, **Esperia** on Rhodes and **Kipriotis** on Kos.

A growing number of Greek hotels are opting for consortium membership, with 84 hotels having joined international networks such as the Leading Hotels of the World, Great Hotels Organisation and Small Luxury Hotels.

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ABOUT THIS REPORT

This report presents the first attempt to determine the extent of branding among Greek hotels. There is no other source listing the required data in a similar way as set out in this report, therefore conducting extensive research was the prerequisite for establishing the current situation in regard to hotel branding in Greece.

Research was conducted over a period of several months. As there is no single source providing the entirety of information necessary to prepare the report, several printed and electronic hotel guides, databases, directories and other sources — including the author's own hotel database — were consulted. All original data found has been cross-checked for accuracy.

While preparing this report, several problems were encountered in regard to the accuracy of data, especially of the number of hotel rooms. For most hotels, different sources cited different room numbers. There have been cases where five different sources resulted in five different room numbers for the very same hotel! For instance, sources such as the printed directories and brochures of hotel companies, the companies' websites, third-party hotel guides, listings in the catalogues of tour operators and the official database of the Greek Chamber of Hotels rarely agree on room numbers.

Other inconsistencies encountered when preparing this report included hotel wings being listed as separate hotels (i.e. one source may present a hotel complex as a single unit, whereas another source may refer to it as two distinct hotels). Due to the discrepancy of sources, some data had to be confirmed by personal contact with the staff of the hotels in question.

When consulting other sources, readers of this report may come across different hotel names and different hotel configurations, as well as different hotel room numbers.

This study reflects the situation of hotel branding as it was at the time of the completion of this report. The hotel scene changes constantly with hotels joining and leaving brands and consortia and changing their configuration at any given moment.

In addition to the brands listed in the present report, there may be additional brands that this author is not aware of, especially at the local level. A future edition of this report will include any addition, correction or change that will come to the author's attention.

The author welcomes any addition or correction concerning the contents of this report. Readers are kindly invited to send their comments to the author's e-mail address: d.koutoulas@ba.aegean.gr.

INTRODUCTION

GLOBAL DOMINANCE OF HOTEL BRANDS

According to Roland Berger & Partner, a brand is a trustworthy, distinctive promise to the customer that

- differentiates similar products from competition
- adds value in the mind of the consumer to the objective product performance
- builds strong relationships with customers based on emotional values
- provides security and familiarity to facilitate the purchasing decision

Branding is the term used to describe the use of a name, term, symbol or design – or a combination of these – to identify a product and to differentiate it from the products of competitors. Branding includes the use of brand names, trademarks and practically all other means of product identification. Powerful brand names have *consumer franchise* translating into a high degree of product awareness, high perceived quality, strong consumer loyalty and the capacity to charge higher prices (Kotler and Armstrong 1991:257; Kotler 1991:441; Roland Berger & Partner 2000; Lehmann and Winer 1994:229).

The World Tourism Organisation estimates the worldwide hotel capacity at 17.4 million rooms. The world's 50 largest hotel companies alone control 5.1 million rooms in their branded hotels – or nearly 30% of the total capacity. This shows the extent to which the hospitality industry is controlled by major chains and the degree of globalisation in this sector. InterContinental Hotels Group, the world's largest hotel company, operates its brands in 100 countries, followed by Accor (with a presence in 90 countries), Starwood (82 countries), Best Western (80 countries) and Hilton Group (78 countries) (Strauss and Scoviak 2005).

In the USA, the share of branded hotels is 70% of the country's total capacity as compared to a share of approximately 30% for Europe. France is among the European hotel markets most penetrated by brands with 40% of the country's total room capacity (but only 16% of all hotels), being controlled by branded chains. In the rapidly growing Middle Eastern hotel market, the branded/non-branded ratio of hotels is 50:50 (source: MKG Consulting Database, March 2005; Middle East Strategy Advisors research, April 2005).

HOTEL BRANDS IN THE CONTEXT OF THE PRESENT REPORT

Branding is not just about a name. As each hotel bears a name, it is important to clarify what a brand is in the context of the present report.

This report deals with **hotel chains** (i.e. jointly managed groups of two or more hotels) **operating under the same brand**. The report will not deal with individual hotels, even if their reputation and renown have all the properties of a well-established brand (i.e. high degree of consumer awareness among target

markets, differentiation from competitors and the ability to achieve a price premium). Those hotel portfolios that are owned or operated by the same company but lack a common market identity are also excluded from the present analysis, as they do not constitute brands.

For the needs of this report, only the following cases will be considered as hotel brands:

- Two or more hotels bearing a common brand name
- Two or more hotels sharing a joint market approach and operating under the same umbrella brand

Examples of the first type are the Amalia, Divani and Electra chains with each hotel bearing the company brand together with an individual name or name of the location (e.g. Amalia Delphi, Divani Caravel and Electra Palace Thessaloniki). A typical example of the second type is the brand "Helios Hotels" that forms the umbrella for the chain's portfolio of luxury properties with individual names such as Elounda Beach Hotel and Grand Resort Lagonissi.

The country's largest hotel company, Grecotel, applies a mixed branding strategy. All of its resort hotels carry the prefix "Grecotel" in their name (e.g. Grecotel Rithymna Beach, Grecotel Creta Palace); whereas the company's urban hotels carry individual names (e.g. King George II, Athena Grand Hotel) and operate under the "Grecotel City Hotel" umbrella.

It is worth noting that only a few of the hotel companies listed in this report employ an integrated brand strategy as in the case of Grecotel and bluegr Mamidakis Hotels.

Unbranded hotel portfolios are not discussed in this report.

OVERVIEW OF THE GREEK HOTEL INDUSTRY

THE SIZE OF THE GREEK HOTEL INDUSTRY

According to the Greek Chamber of Hotels, there were a total of 8,697 hotels operating in Greece in 2004. Their cumulative capacity is 341,654 rooms and 648,812 beds or 39 rooms and 75 beds on average.

Upscale hotels with 4 and 5 stars represent 11.3% of all Greek hotels, but they command 32.5% of the total room capacity due to their significantly larger size when compared to the average hotel. More than half of Greek hotels belong to the 2-star category.

The typical Greek hotel is a small, family-owned business averaging 39 rooms. Only 585 of the country's total 8,697 hotels (or 6.7%) have more than 100 rooms with an average size of 204 rooms and a total capacity of almost 120,000 rooms.

Table 1: Statistics of the Greek Hotel Industry*

	Deluxe Class (5 stars)	A' Class (4 stars)	B' Class (3 stars)	C' Class (2 stars)	D' + E' Class (1 star)	All Hotels
No. of Hotels	108	876	1 617	4 405	1 691	8 697
Total No. of Rooms	21 975	89 027	81 033	119 827	29 792	341 654
Total No. of Beds	42 633	169 345	154 236	225 349	57 249	648 812
Average No. of Rooms	203	102	50	27	18	39
Average No. of Beds	395	193	95	51	34	75

*Based on data provided by the Greek Chamber of Hotels

Figure 1: Hotels per Category

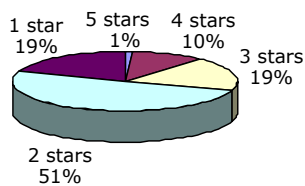
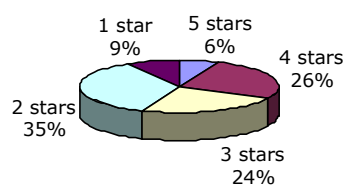


Figure 2: Hotel Rooms per Category



OVER-DEPENDENCE ON TOUR OPERATORS

Instead of developing their own marketing skills, most owners of resort hotels, as well as many city hotels, have relied for decades on tour operators to fill their room capacities. This has led to the Greek hotel industry's over-dependence on major European tour operators for most of its business.

Of the 14 million tourists who visited Greece in 2002, 57.8% arrived on charter flights operated by tour operators. The share of tour operator-controlled business is even higher among tourists from the European Union representing more than *three-quarters* of the country's tourist arrivals. More specifically, the share of European tourists arriving in Greece on charter flights is shown in the following breakdown (Source: GNTO/NSSG):

- 84% of British tourists
- 78% of German tourists
- 77% of Dutch tourists
- 77% of Austrian tourists
- 87% of Danish tourists
- 94% of Swedish tourists

The share of tour operator-related business is actually higher considering that package tours using scheduled flights have not been included in the above calculation.

A recent survey among Greek resort hotels revealed that they secure 60% of their customers through tour operators (Koutoulas 2006).

With package tour sales steadily declining for the fourth year in a row, Greek hotel owners are now looking for ways to diversify the sources of their business. Their interest in approaching high-spending FITs as well as securing meetings and incentive travel groups, has recently led, among others, to an accelerating enrolment rate in international hotel consortia such as the Leading Hotels of the World, Great Hotels Organisation and Small Luxury Hotels.

Until the early 1990s, there were only a couple of hotels participating in these networks. Nowadays, dozens of upscale Greek hotels are being represented by consortia.

Many hotel operators are also increasingly directing their efforts towards attracting more Greek customers, a market segment largely neglected a decade ago. Greeks have become more affluent and are paying significantly higher rates than West European tourists travelling on discounted packages.

ATHENS AND THE OLYMPIC LEGACY

The success of the 2004 Olympic Games held in Athens has created a great potential for boosting Greek tourism. Hotels not only in Athens but also in other parts of the country are considering ways to capitalise on the huge media exposure and the positive images associated with the Games as well as on the large-scale investments in Greece's infrastructure.

Most hotels of Athens and many upscale hotels throughout the country completed extensive renovation projects before the Games. According to the Athens Hotel Association, over one billion euros were spent by the city's hotels to modernise and upgrade their premises. High-quality rooms, expanded sports and spa facilities and state-of-the art meeting rooms are now the norm at Athenian hotels. Thus, the Greek capital boasts some of Europe's most modern hotel offerings. Many resorts also underwent an extensive refurbishment in time for the Olympics. What is still missing, however, is the marketing savvy to fill those highly upgraded rooms.

Hotel capacity expanded less than 10% in Athens, thus avoiding the explosive growth and the post-Games depression experienced by previous Olympic cities. Nevertheless, the slow business after the Games and the capital costs associated with renovations are putting pressure on the capital's hotels to open up to new markets such as city breaks travel from Europe and MICE-related business.

Several international brands have established a presence in the Greek capital. These include **Hilton, Holiday Inn, InterContinental, Marriott**, Starwood's **Luxury Collection, Best Western, Novotel, Sofitel** and **Golden Tulip**, with **Hyatt** preparing to enter the Athens market in connection with a casino operation.

Grecootel is the city's largest hotel operator comprising a total of eight hotels with 1,111 rooms in Greater Athens. **Divanis** controls a further 1,007 rooms in its three Athenian properties. Other national brands represented in Athens are **Electra** (with a Golden Tulip affiliation), **Helios, Chandris, Airotel, Amalia**, and **bluegr**. In addition, three local hotel companies operating under the **Astir Palace, Yes Hotels & Restaurant** and **Olympic Hotels** have a total of nine hotels.

OTHER URBAN HOTEL MARKETS

The most developed urban hotel market outside of Athens is Thessaloniki, the country's second largest city with a population of one million. Home of Greece's largest trade fair venue, Thessaloniki is a major business gateway to SE Europe and a popular conference destination.

Several national and international hotel brands have established a presence in the city. Major national players include **Grecootel, Capsis Hotel Chain** and **Electra Hotels** (with a **Golden Tulip** affiliation), with **Hyatt, Kempinski, Holiday Inn** and **Best Western** being the city's international brands. There are also two local brands, namely Aegeon Hotels and PAP Corp., operating in the city.

The other Greek cities present an untapped market for branded hotels. There is just a limited presence of **Best Western, Grecootel** and **Divanis** in secondary urban markets.

RESORT HOTELS

Most Greek hotels are located in the country's seaside resort areas catering to the sea and sun market. The largest concentration can be found on the Greek islands with 55% of the country's hotels and 62% of the total room capacity. Mainland resort areas such as the Peloponnese or the Chalkidiki peninsula in Northern Greece also feature a significant number of hotels.

66% of all Greek hotels are seasonal operations closing down during the winter months, usually between October and April. This is especially the case on the Greek islands with less than 20% of the accommodation remaining open for twelve months. Businesses operating throughout the year are either located in the centres of towns or are integrated resort complexes featuring conference, casino, spa and/or indoor sports facilities.

HOTEL BRANDS OPERATING IN GREECE

SHARE OF BRANDED HOTELS

The share of branded hotels in Greece is among the lowest in Europe. In total, only 296 out of 8,697 Greek hotels — or 3.4% — have a brand affiliation, controlling 16.8% of the country's room inventory.

More than 36,000 hotel rooms — or 10.6% of the total — correspond to Greek national and local brands, with a further 19,116 rooms (5.6%) belonging to hotels operating under an international brand. Interestingly, Cypriot hotel brands are also claiming 1.6% of the country's room capacity.

With the exception of local brands, branded hotels in Greece have an average size of more than 200 rooms. This compares to just 39 rooms of the country's average hotel.

Table 2: Branded Hotels in Greece

	No. of hotels	Share of the country's hotels	Total room capacity	Share of the country's total room capacity	Average no. of rooms per hotel
International Hotel Brands	95	1.1%	19 116	5.6%	201
National Hotel Brands	110	1.3%	23 201	6.8%	211
Local Hotel Brands	80	0.9%	12 946	3.8%	162
Cypriot Hotel Brands	24	0.3%	5 474	1.6%	228
<i>All Branded Hotels of Greece*</i>	<i>296</i>	<i>3.4%</i>	<i>57 321</i>	<i>16.8%</i>	<i>194</i>
All Greek Hotels	8 697	100%	341 654	100%	39

* without double-counting the hotels featuring two brands (13 hotels with 3,416 rooms)

Source: Koutoulas Hotel Database

Figure 3: Branded vs. Unbranded Hotels

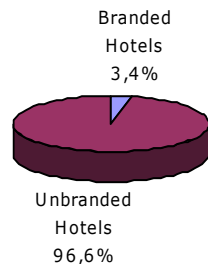
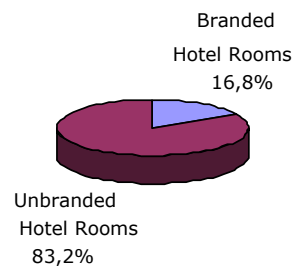


Figure 4: Branded vs. Unbranded Hotel Rooms



THE LARGEST HOTEL GROUPS OPERATING IN GREECE

Before the 71 brands operating in Greece are presented in more detail, the major hotel groups are briefly presented below. Table 3 comprises of the 20 largest hotel groups (according to total hotel rooms) operating single-brand or multi-brand hotel portfolios.

The group which is most prominent among these companies is TUI Hotels & Resorts, the subsidiary of TUI operating five of its twelve hotel brands in Greece. Other multi-brand portfolios include the French hotel giant Accor (represented by its Club Med, Novotel and Sofitel brands), the German tour operator Alltours (with the Club alltours and Holiday Club brands), the world's largest hotel company InterContinental Hotels Group (with InterContinental and Holiday Inn properties) and another German tour operator, Rewe (with its Calimera and LTI resorts).

These 20 hotel groups control 183 of the country's 296 branded hotels and 78% of the branded hotel room stock.

Table 3: The 20 Largest Hotel Groups (Based on Total Hotel Rooms) Operating in Greece

Company/Brand(s)	Hotels	Rooms	Average No. of Rooms
1 TUI Hotels & Resorts (Atlantica, Grecotel, Magic Life, Paladien, Robinson Club)	43	9 960	232
2 Mitsis Hotels	13	3 546	273
3 Louis Hotels	16	3 519	220
4 Accor (Club Méditerranée, Novotel, Sofitel)	8	3 022	378
5 Iberostar (Thomas Cook)	11	2 590	235
6 Aldemar	7	2 485	355
7 Alltours (Club alltours, Holiday Club)	10	2 259	226
8 Esperia Group of Hotels	7	2 008	287
9 Kipriotis Hotels	6	1 699	283
10 Helios Hotels	7	1 640	234
11 Best Western	22	1 537	70
12 Maris Hotels	5	1 420	284
13 Divanis Chain Hotels	6	1 411	235
14 Capsis Convention Centers & Resort Hotels	2	1 410	705
15 InterContinental Hotels Group (InterContinental, Holiday Inn)	4	1 119	280
16 Porto Carras Grand Resort	4	1 044	261
17 Chandris Hotels & Resorts	4	1 041	260
18 Cambourakis Group of Hotels	2	1 026	513
19 Rewe (Calimera Aktivhotels, LTI International Hotels)	4	1 023	256
20 Hilton (Hilton Group plc)	2	930	465
Total	183	44 689	303

Source: Koutoulas Hotel Database

INTERNATIONAL HOTEL BRANDS

There are 95 Greek hotels bearing an international brand. Their cumulative inventory is 19,116 rooms, or 5.6% of the country's total hotel capacity. Of the 26 international brands having a presence in Greece, 13 are owned or affiliated with tour operators, thus being oriented mainly towards the package tour traveller. Most of these hotels predominantly operate on an all-inclusive basis.

The international brands controlling more than 1,000 rooms in Greece are ***Iberostar, Club Med, Club alltoura, Holiday Club, Magic Life, Sofitel*** and ***Best Western***, the latter having 22 member hotels in Greece. A detailed listing of all hotels bearing an international brand is included in Appendix 1.

Several hotels presently in the development phase will carry an international flag. These projects include a Soneva resort operated by Six Senses on the island of Milos (Six Senses recently entered the Greek market by opening a Six Senses Spa on Crete), a Banyan Tree resort in Pylos and a Mandarin Oriental resort in Western Peloponnese. Hyatt is expected to manage the hotel of the Casino Mont Parnes complex near Athens, presently under renovation.

Hilton once ran a hotel on the island of Corfu, and Domina a hotel on the island of Paros, whereas Kempinski had a brief partnership with a hotel from Mykonos.

Table 4: International Hotel Brands with a Presence in Greece

International Hotel Brands (Parent Company)	Hotels	Rooms	Average No. of Rooms
Best Western	22	1 537	70
Blue & White Hotels (Groupe Heliades)	5	710	142
Calimera Aktivhotels (Rewe)	3	768	256
Club Méditerranée (Accor)	4	1 713	428
Club alltoura (Alltours)	5	1 060	212
Contiki Resorts (Contiki Holidays)	1	150	150
Domina Hotel Group (Gruppo Domina Vacanze)	1	160	160
Golden Tulip Hotels	2	288	144
Hapimag	3	299	100
Hilton (Hilton Group plc)	2	930	465
Holiday Club (Alltours)	5	1 199	240
Holiday Inn (InterContinental Hotels Group)	3	560	187
Hyatt International	1	152	152
Iberostar (Thomas Cook)	11	2 590	235
InterContinental (InterContinental Hotels Group)	1	559	559
Kempinski	1	99	99
LTI International Hotels (Rewe)	1	255	255
Magic Life (TUI)	4	1 352	338
Marriott International	1	259	259
Novotel (Accor)	1	195	195
Paladien Hotel Clubs (TUI)	2	299	150
Robinson Club (TUI)	3	927	309
Sofitel (Accor)	3	1 114	371
Sunwing Resorts (MyTravel)	2	452	226
The Luxury Collection (Starwood Hotels & Resorts Worldwide)	4	758	190
VentaClubs (Ventaglio)	4	731	183
Total	95	19 116	201

Source: Koutoulas Hotel Database

CYPRriot HOTEL BRANDS

Cypriot companies have built up a presence in the country since the late 1990s and are increasingly moving into the Greek hotel market. The largest among those companies, **Louis Hotels**, has evolved into one of Greece's leading hotel operators with a portfolio of 16 resort hotels and three of its properties also carry the **Iberostar** flag. Louis Hotels is part of a larger holding company with many interests including cruise ships, catering and tour operations.

Lanitis Group of Companies is another major Cypriot group of companies that has entered the Greek hotel market through its brand **Amathus** with the purchase of a resort hotel in Rhodes. Its portfolio includes construction companies, real estate, hotels and farms etc.

AquaSol and **Atlantica** (partly owned by tour operators MyTravel and TUI, respectively) as well as **Cyprotels** and **Leptos Calypso Hotels** also operate between one and three resort hotels in Greece. Atlantica has announced the addition of two hotels to its Greek portfolio (on Rhodes and Kefalonia) due to open in 2007.

Following their expansion into Greece, these six Cypriot brands presently control 24 hotels with 5,474 room – or 1.6% of the country's total room stock.

There are numerous other Cypriot entrepreneurs owning Greek hotels that are either unbranded or are operating under other brands. This is the case, for instance, with the **AKS** and **Yes** chains as well as the Ledra Marriott, Athenaeum InterContinental and Residence Georgio hotels in Athens.

A detailed listing of all hotels bearing a Cypriot brand is included in Appendix 2.

Table 5: Cypriot Hotel Brands with a Presence in Greece

Cypriot Hotel Brands (Parent Company)	Hotels	Rooms	Average No. of Rooms
Amathus (Lanitis Group of Companies)	1	334	334
AquaSol (affiliated with MyTravel)	2	435	218
Atlantica Hotels (TUI)	3	756	252
Cyprotels Hotels & Resorts (Libra Holidays Group)	1	230	230
Leptos Calypso Hotels	1	200	200
Louis Hotels	16	3 519	220
Total	24	5 474	228

Source: Koutoulas Hotel Database

NATIONAL GREEK HOTEL BRANDS

Several Greek hotel operators have introduced and established their own brands. The market leader is **Grecootel**, a hotel management company that is 50% owned by TUI and 50% by the Daskalantonakis family. It comprises 31 hotels located both in urban and resort locations with a total capacity of 6,626 rooms.

The second largest Greek hotel brand is **Mitsis Hotels** with a capacity of 3,546 rooms in 13 resort hotels. Other major brands include **Aldemar** (2,485 rooms in seven hotels), **Helios Hotels** (1,640 rooms in seven hotels), **Divanis** (1,411 rooms in six city and resort hotels) as well as the two large conference and resort hotels of **Capsis** affiliated with Sofitel and featuring a capacity of 1,410 rooms.

In addition to the larger brands, there are several specialist boutique hotel operators with a much smaller room count. These include, for instance, **bluegr Mamidakis Hotels** with four hotels, the three modern art-inspired properties of **Tsimaras Family Hotels & Resorts** as well as the **Country Club Hotels**, four stylishly appointed mountain retreats.

In total, there are 18 Greek brands operating in at least two regions of the country. These brands control 110 hotels with a total of 23,201 rooms or 6.8% of the country's room capacity.

A detailed listing of all hotels bearing a national brand is included in Appendix 3.

Table 6: National Greek Hotel Brands

National Hotel Brands	Hotels	Rooms	Average No. of Rooms
Aegean Star Hotels	3	601	200
Airotel Group	5	500	100
AKS Hotels	4	822	206
Aldemar	7	2 485	355
Amalia Hotels	6	909	152
bluegr Mamidakis Hotels	4	556	139
Capsis Convention Centers & Resort Hotels	2	1 410	705
Capsis Hotels	3	576	192
Chandris Hotels & Resorts	4	1 041	260
Country Club Hotels	4	67	17
Divanis Chain Hotels	6	1 411	235
Electra Hotels & Resorts	4	718	180
Grecotel (TUI)	31	6 626	214
Helios Hotels	7	1 640	234
Hydroussa	2	62	31
Mitsis Hotels	13	3 546	273
Santa Marina Hotels (1)	2	140	70
Tsimaras Family Hotels & Resorts	3	91	30
Total	110	23 201	211

Source: Koutoulas Hotel Database

LOCAL GREEK HOTEL BRANDS

Several Greek hotel brands have built a presence in just one region of the country. Among these purely local brands are some companies with a significant hotel portfolio such as the five **Maris** hotels of Crete with a total of 1,420 rooms (the same company also owns two unbranded rural retreats), the **Kipriotis** chain with five upscale hotels on Kos and one on nearby Rhodes featuring 1,699 rooms, as well as the **Esperia** group of seven hotels and 2,008 rooms on Rhodes.

Local brands also include the country's three integrated multi-hotel resorts, i.e. the ***Astir Palace*** in Athens, the ***Porto Carras Grand Resort*** and the ***Sani Resort*** in Chalkidiki. Sani also launched the new all-inclusive Oceania Club brand, with the opening of the first resort in Chalkidiki in 2005.

Local brands represent a total of 80 hotels with 12,946 rooms or 3.8% of the country's room capacity.

A detailed listing of all hotels bearing a local brand is included in Appendix 4.

Table 7: Local Greek Hotel Brands

Local Hotel Brands	Hotels	Rooms	Average No. of Rooms
Aegeon Hotels	3	153	51
AM Hoteliers	2	200	100
Astir Palace	3	526	175
Cambourakis Group of Hotels	2	1 026	513
Delphi Leading Hotels	4	152	38
Diana Hotels	3	291	97
Elounda S.A.	3	401	134
Esperia Group of Hotels	7	2 008	287
Fegoudakis Hotels	4	223	56
G. & E. Karamolegos Group of Hotels	4	226	57
Kipriotis Hotels	6	1 699	283
Mamidakis Hotel Experience	2	384	192
Maris Hotels	5	1 420	284
Olympic Hotels	2	390	195
PAP Corp.	4	410	103
Petasos Hotels	4	222	56
Porto Carras Grand Resort	4	1 044	261
Sani Resort	4	833	208
Santa Marina Hotels (2)	6	782	130
The Myconian Collection	4	449	112
Yes Hotels & Restaurants	4	107	27
Total	80	12 946	162

Source: Koutoulas Hotel Database

HOTEL BRANDS OPERATED BY TOUR OPERATORS

The four largest tour operators of Germany, namely TUI, Thomas Cook, Rewe and Alltours, as well as UK-based MyTravel have a presence in the Greek resort hotel market through several of their partly or fully owned hotel brands.

Among the brands represented in Greece is TUI's ***Robinson Club*** with three resorts, ***Magic Life*** with four resorts and ***Paladien*** with two resorts, Thomas Cook's ***Iberostar*** with eleven resorts, Rewe's ***Calimera*** with three resorts and ***LTI*** with one resort, Alltours' ***Club alltoura*** and ***Holiday Club*** with five resorts

each, as well as MyTravel's **Sunwing** with two resorts. Additionally, MyTravel has a minority stake in Cyprus-based **AquaSol** operating two resort hotels in Greece.

TUI also has a 50% stake in **Greotel**, the country's largest hotel management company and a further 50% stake in Cyprus-based **Atlantica Hotels**. Thanks to its five brands, TUI is Greece's largest hotel operator controlling a total of 43 hotels with 9,960 rooms (2.9% of all hotel rooms in Greece). A sixth TUI brand, Iberotel, recently ceased operating in Greece.

Several smaller tour operators have also introduced their own hotel brands in Greece. Among them are the Italian operators Ventaglio and Gruppo Domina Vacanze owning the **VentaClub** and **Domina** brands, the French company Groupe Heliades with the **Blue & White Hotels**, UK-based Contiki Holidays operating its very first **Contiki Resort** on Mykonos as well as the Cyprus-based Libra Holidays Group with its **Cyprotels** group.

Tour operator-controlled brands account for 84 hotels with 18,700 rooms (5.5% of total Greek hotel room capacity).

Table 8: Tour Operator-Controlled Hotel Brands with a Presence in Greece

Tour-Operator Controlled Hotel Brands	Hotels	Rooms	Average No. of Rooms
TUI : Atlantica, Greotel, Magic Life, Paladien, Robinson Club	43	9 960	232
Thomas Cook : Iberostar	11	2 590	235
Alltours : Club alltoura, Holiday Club	10	2 259	226
Rewe : Calimera Aktivhotels, LTI International Hotels	4	1 023	256
MyTravel : Aquasol, Sunwing Resorts	4	887	222
Ventaglio : VentaClubs	4	731	183
Groupe Heliades : Blue & White Hotels	5	710	142
Libra Holidays Group : Cyprotels Hotels & Resorts	1	230	230
Gruppo Domina Vacanze : Domina Hotel Group	1	160	160
Contiki Holidays : Contiki Resorts	1	150	150
Total	84	18 700	223

Source: Koutoulas Hotel Database

ALL-INCLUSIVE RESORTS

Most of the hotels managed by European tour operators, such as **Robinson Club**, **Magic Life**, **Iberostar**, **Club alltoura**, **Holiday Club**, **Calimera** and **LTI**, as well as the four **Club Med** properties operate on an all-inclusive basis.

Greek and Cypriot companies have also entered the market of all-inclusive holidays by converting some of their properties. **Greotel**, **Louis Hotels** and **Maris Hotels** are among these companies.

DUAL BRANDING

There are several Greek hotels bearing two brands. These cases of dual branding include Greek companies having an affiliation with an international brand but, at the same time, retaining their original brand. The Cypriot company Louis Hotels has also linked three of its properties with the Spanish Iberostar group.

Table 9: Greek Hotels Bearing Two Brands

Location	Name of Hotel	Rooms	Brand A	Brand B
Mykonos	Santa Marina Mykonos	97	Santa Marina	The Luxury Collection
Crete	Blue Palace Resort & Spa	204	Sbokos	The Luxury Collection
Crete	Capsis Beach Hotel & Sofitel Capsis Palace	719	Capsis	Sofitel
Rhodes	Sofitel Capsis Hotel Rhodes	691	Capsis	Sofitel
Athens	Golden Tulip Electra Palace	150	Electra	Golden Tulip
Thessaloniki	Golden Tulip Electra Palace	138	Electra	Golden Tulip
Kos	Iberostar Kipriotis Panorama	253	Kipriotis	Iberostar
Kos	Iberostar Kos Bay View Hotel	242	Kipriotis	Iberostar
Kos	Iberostar Kipriotis Maris Hotel	145	Kipriotis	Iberostar
Kos	Iberostar Hippocrates Hotel	163	Kipriotis	Iberostar
Corfu	Iberostar Kerkyra Golf	240	Louis	Iberostar
Corfu	Iberostar Regency Beach Hotel	213	Louis	Iberostar
Zante	Iberostar Plagos Beach	161	Louis	Iberostar
Total number of rooms		3 416		

Source: Koutoulas Hotel Database

DISMANTLED HOTEL BRANDS

The country's first hotel brand was founded by the Greek government in the 1950s. Dozens of properties under the name of **Xenia** were built throughout the country with the aim of educating the private sector on how to build and operate hotels. The Greek National Tourism Organisation disengaged from managing these properties during the 1980s and 1990s through privatisations, long-term leases or transfers of ownership to local authorities.

Another major chain of hotels was created by the state-owned National Bank of Greece, with a total of 13 hotels operating under the **Astir** brand. Most of the hotels were privatised during the 1990s, with the Bank retaining ownership and management of the Astir Palace complex in Vouliagmeni near Athens. Astir is presently searching for an international hotel operator to brand and manage this recently upgraded three-hotel asset.

The three former **Miramare** resorts of the Patronikolas family in Corfu, Rhodes and Olympia also changed hands, and nowadays bear other brands. More recently, the **Andromeda** group with two boutique hotels in Athens and in Thessaloniki, was dissolved after the sale of the Thessaloniki property as was the case with the hotel management company operating under the **Midas** brand, following the recent bankruptcy of the parent company Plotin, one of the country's largest incoming tour operators.

INTERNATIONAL HOTEL CONSORTIA WITH MEMBERS IN GREECE

For many years, it was just the Grande Bretagne in Athens and the Elounda Mare on Crete that were members of international consortia (the Leading Hotels of the World and Relais & Châteaux, respectively). They were later joined by the Elounda Beach on Crete and a few other properties. It has only been since the late 1990s that several Greek hotel owners started to realise the benefits of participating in these marketing, sales and reservations networks.

Three of the consortia, namely the Leading Hotels of the World, the Small Luxury Hotels and the Great Hotels Organisation, actively pursued the growth of their membership base during the last four to five years. They now have 12, 16 and 24 hotel members in Greece, respectively.

In total, 14 international consortia have 84 member hotels in Greece (hotel consortia that are predominantly reservations-oriented, such as Utell and Vantis, are not considered in this report). There are also several Greek hotel consortia based in Greece including Medotels Hotels & Resorts, Yades Heritage & Hospitality, Mediterranean Traditional Mansions and yourGreece.

A detailed listing of all hotels that are members of international hotel consortia is included in Appendix 5.

Table 10: International Hotel Consortia with Member Hotels in Greece

Consortium	No. of Member Hotels
Boutique Hotels & Resorts International	2
Charming Hotels	4
Concorde Hotels	2
Design Hotels	4
Distinguished Hotels International	1
Great Hotels Organisation	24
ILA Châteaux & Hotels de Charme	1
Leading Hotels of the World	12
Luxe Worldwide Hotels	9
Preferred Hotels	3
Relais & Châteaux	2
Small Luxury Hotels of the World	16
Summit Hotels & Resorts	2
WORLDHOTELS (SRS)	2
Total No. of Member Hotels	84

Source: Koutoulas Hotel Database

CONCLUSIONS

Compared to other countries, Greece has seen a low penetration of its hotel industry by brands. Only 3.4% of the country's hotels (controlling 16.8% of the total room capacity) have an affiliation either with a Greek or an international brand.

Branded hotels in Greece have an average size of 194 rooms. This compares to just 39 rooms of the country's average hotel.

More than 36,000 hotel rooms — or 10.6% of the total — correspond to Greek national and local brands, with a further 19,116 rooms (5.6%) belonging to hotels operating under an international brand. An additional 1.6% of the country's room capacity is claimed by Cypriot hotel brands.

There are just five Greek hotel portfolios with more than 10 hotels, i.e. **Grecotel**, **Best Western**, **Louis**, **Mitsis** and **Iberostar** having 31, 22, 16, 13 and 11 units, respectively. Grecotel, the country's largest hotel operator, controls 6,626 rooms or 1.9% of the total room capacity available at Greek hotels.

Tour operator-controlled brands claim one third of all branded hotels in Greece accounting for 84 hotels with 18,700 rooms (5.5% of total Greek hotel room capacity). A good part of these accommodations operate on an all-inclusive basis. The German travel conglomerate TUI is dominating this hotel segment by having five of its twelve hotel brands operating in the country. TUI has evolved to become Greece's largest hotel operator controlling a total of 43 hotels with 9,960 rooms (2.9% of all hotel rooms in Greece) carrying the **Grecotel**, **Atlantica**, **Magic Life**, **Paladien** and **Robinson Club** brands.

Global brands, such as IHG's **InterContinental** and **Holiday Inn**, Accor's **Club Med**, **Sofitel** and **Novotel**, **Hilton**, Starwood's **Luxury Collection** as well as **Marriott** and **Hyatt**, have established a rather weak presence of up to four hotels in Greece, quite limited when compared to other European countries. However, interest of Greek hotel owners in international hotel consortia has grown significantly over the last years.

The absence of major global hotel brands from the Greek market, such as Sheraton, Westin, Four Seasons, Ritz-Carlton, Le Méridien and Radisson, creates significant opportunities for both brand operators and hotel owners. International brand operators can find several Greek properties matching their criteria, whereas Greek hotel owners may consider affiliating their properties with some of the world's largest hotel networks.

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APPENDIX 1: HOTELS BEARING AN INTERNATIONAL HOTEL BRAND

<i>Brand</i>	<i>Location</i>	<i>Name of Hotel</i>	<i>Rooms</i>	<i>Total Rooms</i>
Best Western				1.537
1	Ancient Olympia	Best Western Hotel Europa	78	
2	Athens	Best Western Premier Coral Hotel	88	
3	Athens	Best Western Elysium Design Hotel	16	
4	Athens	Best Western Dore Hotel	22	
5	Athens	Best Western Esperia Palace Hotel	175	
6	Athens	Best Western Hotel Fenix	129	
7	Athens	Best Western Hotel Zinon	55	
8	Athens	Best Western Ilisia Hotel	90	
9	Athens	Best Western Museum Hotel	90	
10	Athens	Best Western Pythagorion Hotel	56	
11	Athens	Best Western The Park Hotel Piraeus	40	
12	Athens	Best Western Hotel Caterina	47	
13	Crete	Best Western Porto Veneziano	57	
14	Evia	Best Western Lucy Hotel	90	
15	Lefkada	Best Western Odeon Hotel	17	
16	Mykonos	Best Western Hotel Dionysos	25	
17	Porto Heli	Best Western Hotel Rozos	21	
18	Rhodes	Best Western Hotel Plaza	136	
19	Santorini	Best Western Kallisti Thera Hotel	42	
20	Thessaloniki	Best Western Hotel Saint George Asprovalta	35	
21	Thessaloniki	Best Western Hotel Vergina	133	
22	Zakynthos	Best Western Zante Park	95	
Blue & White Hotels (Groupe Heliades)				710
1	Crete	Yassou Kriti Hotel-Club	192	
2	Crete	Hotel-Club Kalypso	125	
3	Evia	Grand Bleu Hotel-Club	172	
4	Peloponnese	Achaia Med Village-Club	200	
5	Santorini	Kokkinos Villas	21	
Calimera Aktivhotels (Rewe)				768
1	Corfu	Calimera Ermones Beach	272	
2	Rhodes	Calimera Porto Angeli	171	
3	Chalkidiki	Calimera Simantro Beach	325	
Club Méditerranée (Accor)				1.713
1	Attica	Club Med Athenia	543	
2	Attica	Club Med Mare Nostrum	352	
3	Evia	Club Med Gregolimano	490	
4	Kos	Club Med Kos	328	
Club alltoura (Alltours)				1.060
1	Crete	Club alltoura Mare Monte Beach	198	

Brand	Location	Name of Hotel	Rooms	Total Rooms
2	Rhodes	Club alltoura Alfa Beach	146	
3	Kos	Club alltoura Marmari Beach	320	
4	Chalkidiki	Club alltoura Poseidon Palace	196	
5	Chalkidiki	Club alltoura Aristoteles Beach	200	
Contiki Holidays				150
1	Mykonos	Contiki Resort	150	
Domina Hotel Group (Gruppo Domina Vacanze)				160
1	Crete	Domina Inn Elyros	160	
Golden Tulip Hotels				288
1	Athens	Golden Tulip Electra Palace	150	
2	Thessaloniki	Golden Tulip Electra Palace	138	
Hapimag				299
1	Athens	Hapimag Athen	16	
2	Crete	Hapimag Damnoni Kreta	199	
3	Peloponnese	Hapimag Porto Heli	84	
Hilton (Hilton Group plc)				930
1	Athens	Hilton Athens	528	
2	Rhodes	Hilton Rhodes Resort	402	
Holiday Club (Alltours)				1.199
1	Crete	Holiday Club Imperial Belvedere	340	
2	Crete	Holiday Club Themis Beach	157	
3	Rhodes	Holiday Club Miraluna Kiotary Village	307	
4	Kos	Holiday Club Princess of Kos	261	
5	Chalkidiki	Holiday Club Poseidon Village	134	
Holiday Inn (InterContinental Hotels Group)				560
1	Athens	Holiday Inn Athens	188	
2	Athens	Holiday Inn Attica Avenue	194	
3	Thessaloniki	Holiday Inn Thessaloniki	178	
Hyatt International				152
1	Thessaloniki	Hyatt Regency	152	
Iberostar (Thomas Cook)				2.590
1	Crete	Iberostar Creta Mare	172	
2	Crete	Iberostar Creta Marine	359	
3	Crete	Iberostar Creta Panorama	282	
4	Crete	Iberostar Mirabello Beach & Village	305	
5	Corfu	Iberostar Kerkyra Golf	240	
6	Corfu	Iberostar Regency Beach	221	

<i>Brand</i>	<i>Location</i>	<i>Name of Hotel</i>	<i>Rooms</i>	<i>Total Rooms</i>
7	Kos	Iberostar Hippocrates Palace	200	
8	Kos	Iberostar Kipriotis Maris	153	
9	Kos	Iberostar Kipriotis Panorama	253	
10	Kos	Iberostar Kos Bay View	244	
11	Zante	Iberostar Plagos Beach	161	
InterContinental (InterContinental Hotels Group)				559
1	Athens	Athenaeum InterContinental	559	
Kempinski				99
1	Thessaloniki	Kempinski Nikopolis	99	
LTI International Hotels (Rewe)				255
1	Corfu	LTI Gelina Village	255	
Magic Life (TUI)				1.352
1	Rhodes	Magic Life Rhodos Classic	375	
2	Crete	Magic Life Lyktos Classic	335	
3	Kos	Magic Life Kos Classic	320	
4	Corfu	Magic Life Korfu Classic	322	
Marriott International				259
1	Athens	Ledra Marriott	259	
Novotel (Accor)				195
1	Athens	Novotel Mirayia	195	
Paladien Hotel Clubs (TUI)				299
1	Peloponnese	Paladien Lena Mary	161	
2	Crete	Paladien Moklos	138	
Robinson Club (TUI)				927
1	Peloponnese	Robinson Club Kyllini Beach	312	
2	Crete	Robinson Club Lyttos Beach	347	
3	Kos	Robinson Club Daidalos	268	
Sofitel (Accor)				1.114
1	Athens	Sofitel Athens Airport	345	
2	Crete	Sofitel Capsis	691	
3	Rhodes	Sofitel Capsis Palace	78	
Sunwing Resorts (MyTravel)				452
1	Crete	Sunwing Resort Makrygialos	128	
2	Rhodes	Sunwing Resort	324	

<i>Brand</i>	<i>Location</i>	<i>Name of Hotel</i>	<i>Rooms</i>	<i>Total Rooms</i>
The Luxury Collection (Starwood Hotels & Resorts Worldwide)				758
1	Athens	Grande Bretagne	403	
2	Crete	Blue Palace Resort & Spa	204	
3	Mykonos	Santa Marina Mykonos	97	
4	Santorini	Villa Vedema	54	
VantaClubs (Ventaglio)				731
1	Limnos	VantaClub Akti Myrina	194	
2	Crete	VantaClub Annabelle Village	264	
3	Peloponnese	VantaClub Apollo Beach Porto Heli	165	
4	Alonissos	VantaClub Marpunta Village	108	
			Total Number of Rooms	19.116

APPENDIX 2: HOTELS BEARING A CYPRIOT HOTEL BRAND

<i>Brand</i>	<i>Location</i>	<i>Name of Hotel</i>	<i>Rooms</i>	<i>Total Rooms</i>
Amathus (Lanitis Group of Companies)				334
1	Rhodes	Rodian Amathus	334	
AquaSol (affiliated with MyTravel)				435
1	Crete	Elounda Aqua Sol Resort	182	
2	Rhodes	Sun Palace Hotel	253	
Atlantica Hotels (TUI)				756
1	Rhodes	Atlantica Imperial Resort	262	
2	Rhodes	Atlantica Princess	216	
3	Rhodes	Club Atlantica Aegean Blue	278	
Cyprotels Hotels & Resorts (Libra Holidays Group)				230
1	Rhodes	Luca Faliraki	230	
Leptos Calypso Hotels				200
1	Crete	Panorama	200	
Louis Hotels				3.519
1	Crete	Louis Creta Princess Hotel	420	
2	Crete	Louis Creta Paradise	230	
3	Corfu	Louis Grand	247	
4	Corfu	Louis Corcyra Beach Hotel	260	
5	Corfu	Iberostar Kerkyra Golf	240	
6	Corfu	Iberostar Regency Beach Hotel	213	
7	Corfu	Villa Regency	6	
8	Zante	Iberostar Plagos Beach	161	
9	Zante	Louis Palazzo Di Zante	181	
10	Zante	Louis Royal Palace Hotel	170	
11	Zante	Louis Imperial Zante	143	
12	Zante	Louis Zante Beach	268	
13	Kos	Louis Helios Beach Hotel	108	
14	Kefalonia	Louis Apostolata Hotel	73	
15	Mykonos	Mykonos Theoxenia	57	
16	Rhodes	Louis Colossos Beach	742	
Total Number of Rooms				5.474

APPENDIX 3: HOTELS BEARING A NATIONAL HOTEL BRAND

<i>Brand</i>	<i>Location</i>	<i>Name of Hotel</i>	<i>Rooms</i>	<i>Total Rooms</i>
Aegean Star Hotels				<i>601</i>
1	Chalkidiki	Aegean Melathron	157	
2	Crete	Creta Star	324	
3	Crete	Creta Royal	120	
Airotel Group				<i>500</i>
1	Athens	Airotel Stratos Vassilikos	88	
2	Athens	Airotel Alexandros	93	
3	Athens	Airotel Parthenon	79	
4	Peloponnese	Airotel Achaia Beach	85	
5	Evia	Airotel Malaconda Beach	155	
Aldemar				<i>2.485</i>
1	Crete	Aldemar Knossos Royal Villas	40	
2	Crete	Aldemar Knossos Royal Village	364	
3	Crete	Aldemar Royal Mare Village	390	
4	Crete	Aldemar Cretan Village	342	
5	Rhodes	Aldemar Paradise Royal Mare	587	
6	Rhodes	Aldemar Paradise Village	200	
7	Peloponnese	Aldemar Olympian Village	562	
AKS Hotels				<i>822</i>
1	Peloponnese	AKS Porto Heli Hotel	215	
2	Peloponnese	AKS Hinitsa Bay Hotel	216	
3	Crete	AKS Annabelle Village	264	
4	Crete	AKS Minoa Palace	127	
Amalia Hotels				<i>909</i>
1	Athens	Amalia Athens	98	
2	Peloponnese	Amalia Nauplia	175	
3	Peloponnese	Amalia Olympia	160	
4	Central Greece	Amalia Delphi	184	
5	Thessaly	Amalia Kalambaka	175	
6	Epirus	Margarona	117	
bluegr Mamidakis Hotels				<i>556</i>
1	Crete	Minos Beach art'otel	129	
2	Crete	Candia Park Village	222	
3	Athens	Life Gallery	30	
4	Rhodes	Miramare Wonderland	175	
Capsis Convention Centers & Resort Hotels				<i>1.410</i>
1	Crete	Capsis Beach Hotel & Sofitel Capsis Palace	719	

Brand	Location	Name of Hotel	Rooms	Total Rooms
2	Rhodes	Sofitel Capsis Hotel Rhodes	691	
Capsis Hotels				576
1	Thessaloniki	Capsis Hotel Thessaloniki	425	
2	Thessaloniki	Capsis Bristol	20	
3	Crete	Astoria Capsis	131	
Chandris Hotels & Resorts				1.041
1	Athens	Metropolitan Hotel	374	
2	Corfu	Corfu Chandris	277	
3	Corfu	Dassia Chandris	251	
4	Chios	Chios Chandris	139	
Country Club Hotels				67
1	Epirus	Country Club Archontikon	10	
2	Central Greece	Country Club Hellas	29	
3	Peloponnese	Country Club Hellenikon	10	
4	Peloponnese	Country Club Trikolonion	18	
Divanis Chain Hotels				1.411
1	Athens	Divani Apollon Palace & Spa	286	
2	Athens	Divani Caravel	471	
3	Athens	Divani Palace Acropolis	250	
4	Corfu	Divani Corfu Palace	162	
5	Thessaly	Divani Palace Larissa	77	
6	Thessaly	Divani Meteora	165	
Electra Hotels & Resorts				718
1	Athens	Athens Electra	109	
2	Athens	Golden Tulip Electra Palace	150	
3	Thessaloniki	Golden Tulip Electra Palace	138	
4	Rhodes	Rhodes Electra Palace	321	
Greotel (TUI)				6.626
1	Corfu	Greotel Corfu Imperial	300	
2	Corfu	Greotel Daphnila Bay Thalasso	260	
3	Corfu	Greotel Eva Palace	225	
4	Crete	Greotel Club Creta Sun	338	
5	Crete	Greotel Club Marine Palace	278	
6	Crete	Greotel Creta Palace	355	
7	Crete	Greotel El Greco	333	
8	Crete	Greotel Elounda Village	165	
9	Crete	Greotel Rithymna Beach	520	
10	Halkidiki	Greotel Pella Beach	205	
11	Peloponnese	Filoxenia	193	
12	Kos	Greotel Kos Imperial	287	
13	Kos	Greotel Royal Park	236	
14	Mykonos	Greotel Mykonos Blu	102	
15	Peloponnese	Greotel Lakopetra Beach	193	

<i>Brand</i>	<i>Location</i>	<i>Name of Hotel</i>	<i>Rooms</i>	<i>Total Rooms</i>
16	Peloponnese	Grecotel Mandola Rosa	42	
17	Peloponnese	Grecotel Olympia Oasis	313	
18	Peloponnese	Grecotel Olympia Riviera Thalasso	208	
19	Peloponnese	Grecotel Ilia Palms	80	
20	Rhodes	Grecotel Rhodos Royal	353	
21	Thrace	Grand Hotel Egnatia	95	
22	Larissa	Larissa Imperial	150	
23	Thessaloniki	Makedonia Palace	284	
24	Athens	NJV Athens Plaza	182	
25	Athens	Vouliagmeni Suites	36	
26	Athens	Athena Grand	79	
27	Athens	King George II	102	
28	Athens	Athens Acropol	167	
29	Athens	Athens Imperial	276	
30	Athens	Omonia Grand Hotel	115	
31	Attica	Grecotel Cape Sounio	154	
Helios Hotels				1.640
1	Crete	Elounda Beach	243	
2	Crete	Elounda Bay Palace	281	
3	Crete	Kalimera Kriti	415	
4	Crete	Kernos Beach	271	
5	Attica	Grand Resort Lagonissis	281	
6	Peloponnese	Nafplia Palace	104	
7	Peloponnese	Amphitryon	45	
Hydroussa				62
1	Hydra	Hydroussa	40	
2	Skyros	Hydroussa	22	
Mitsis Hotels				3.546
1	Kos	Mitsis Summer Palace	235	
2	Kos	Mitsis Norida Beach	351	
3	Kos	Mitsis Ramira Beach	283	
4	Kos	Mitsis Family Village	120	
5	Rhodes	Mitsis Grand Hotel	378	
6	Rhodes	Mitsis Lindos Memories	70	
7	Rhodes	Mitsis Rodos Maris	428	
8	Rhodes	Mitsis Rodos Village	407	
9	Rhodes	Mitsis Petit Palais	215	
10	Rhodes	Mitsis La Vita Hotel	115	
11	Crete	Mitsis Serita	282	
12	Crete	Mitsis Ranela	438	
13	Central Greece	Mitsis Galini	224	
Santa Marina Hotels (1)				140
1	Mykonos	Santa Marina Mykonos	97	
2	Central Greece	Santa Marina Arachova	43	
Tsimaras Family Hotels & Resorts				91

<i>Brand</i>	<i>Location</i>	<i>Name of Hotel</i>	<i>Rooms</i>	<i>Total Rooms</i>
1	Peloponnese	Primarolia Art Hotel	14	
2	Kefalonia	Emelisse Art Hotel	65	
3	Ithaca	Perantzada 1811 Art Hotel	12	
			<i>Total Number of Rooms</i>	23.201

APPENDIX 4: HOTELS BEARING A LOCAL HOTEL BRAND

<i>Brand</i>	<i>Location</i>	<i>Name of Hotel</i>	<i>Rooms</i>	<i>Total Rooms</i>
Ageon Hotels				<i>153</i>
1	Thessaloniki	Egnatia Hotel	49	
2	Thessaloniki	Egnatia Palace	54	
3	Thessaloniki	Aegeon	50	
AM Hoteliers				<i>200</i>
1	Thessaly	Park Hotel Volos	119	
2	Thessaly	Xenia Portaria	81	
Astir Palace				<i>526</i>
1	Athens	Astir Palace Arion	181	
2	Athens	Astir Palace Nafsika	176	
3	Athens	Astir Palace Aphrodite	169	
Cambourakis Group of Hotels				<i>1.026</i>
1	Rhodes	Rodos Palace	785	
2	Rhodes	Mediterranean	241	
Delphi Leading Hotels				<i>152</i>
1	Central Greece	Delphi Palace Hotel	44	
2	Central Greece	Iniohos Hotel	21	
3	Central Greece	King Iniohos Hotel	60	
4	Central Greece	Pythia Art Hotel	27	
Diana Hotels				<i>291</i>
1	Zante	Diana Hotel	51	
2	Zante	Diana Palace	140	
3	Zante	Filoxenia	100	
Elounda S.A.				<i>401</i>
1	Crete	Elounda Mare	85	
2	Crete	Elounda Peninsula Suites Hotel	38	
3	Crete	Porto Elounda De Luxe Resort	278	
Esperia Group of Hotels				<i>2.008</i>
1	Rhodes	Esperos Village	195	
2	Rhodes	Esperos Palace	416	
3	Rhodes	Esperides Beach	580	
4	Rhodes	Esperia Hotel	171	
5	Rhodes	Epsilon Apartments	112	
6	Rhodes	Faliraki Beach	330	
7	Rhodes	Olympos Beach	204	

<i>Brand</i>	<i>Location</i>	<i>Name of Hotel</i>	<i>Rooms</i>	<i>Total Rooms</i>
Fegoudakis Hotels				<i>223</i>
1	Chios	Golden Sand Hotel	108	
2	Chios	Grecian Castle Hotel	55	
3	Chios	Kyveli Apartments	32	
4	Chios	Sunset Hotel	28	
G. & E. Karamolegos Group of Hotels				<i>226</i>
1	Santorini	Xenones Filotera	18	
2	Santorini	Rose Bay Hotel	41	
3	Santorini	Kamari Beach Hotel	107	
4	Santorini	Majestic Hotel	60	
Kipriotis Hotels				<i>1.699</i>
1	Kos	Kipriotis Village Resort	651	
2	Kos	Iberostar Kipriotis Panorama	253	
3	Kos	Iberostar Kos Bay View Hotel	242	
4	Kos	Iberostar Kipriotis Maris Hotel	145	
5	Kos	Iberostar Hippocrates Hotel	163	
6	Rhodes	Kipriotis Hotel	245	
Mamidakis Hotel Experience				<i>384</i>
1	Crete	Minos Palace	148	
2	Crete	Arina Sand	236	
Maris Hotels				<i>1.420</i>
1	Crete	Creta Maris	547	
2	Crete	Silva Maris	312	
3	Crete	Bella Marius	159	
4	Crete	Candia Maris	256	
5	Crete	Terra Maris	146	
Olympic Hotels				<i>390</i>
1	Athens	Royal Olympic Hotel	300	
2	Athens	Olympic Palace Hotel	90	
PAP Corp.				<i>410</i>
1	Thessaloniki	Astoria	90	
2	Chalkidiki	Agionissi Resort	70	
3	Chalkidiki	Alexander the Great	210	
4	Chalkidiki	Xenia Ouranoupolis	40	
Petasos Hotels				<i>222</i>
1	Mykonos	Mykonos Grand Hotel & Resort	100	
2	Mykonos	Petasos Bay	22	
3	Mykonos	Petasos Beach Hotel	82	
4	Mykonos	Petasos Town Hotel	18	

<i>Brand</i>	<i>Location</i>	<i>Name of Hotel</i>	<i>Rooms</i>	<i>Total Rooms</i>
Porto Carras Grand Resort				<i>1.044</i>
1	Chalkidiki	Meliton	480	
2	Chalkidiki	Sithonia	458	
3	Chalkidiki	Village Inn	89	
4	Chalkidiki	Villa Galini	17	
Sani Resort				<i>833</i>
1	Chalkidiki	Sani Beach Hotel	475	
2	Chalkidiki	Sani Beach Club	205	
3	Chalkidiki	Porto Sani Village	103	
4	Chalkidiki	Sani Asterias Suites	50	
Santa Marina Hotels (2)				<i>782</i>
1	Crete	Santa Marina Beach Hotel Chania	188	
2	Crete	Santa Marina Beach Hotel Heraklion	210	
3	Crete	Santa Marina Beach Hotel Agios Nikolaos	131	
4	Crete	Kriti Chania	98	
5	Crete	Santa Marina Plaza	51	
6	Crete	Grand Bay Beach Resort	104	
The Myconian Collection				<i>449</i>
1	Mykonos	Royal Myconian Resort	112	
2	Mykonos	Myckonian Imperial Resort	111	
3	Mykonos	Myconian Ambassador Hotel	70	
4	Mykonos	Myconian K Hotels (Kohili, Korali, Kyma, Kalypso)	156	
Yes Hotels & Restaurants				<i>107</i>
1	Athens	Periscope	22	
2	Athens	Semiramis	52	
3	Athens	Kefalari Suites	12	
4	Athens	Twentyone	21	
			Total Number of Rooms	12.946

APPENDIX 5: MEMBERS OF INTERNATIONAL HOTEL CONSORTIA

Consortium	Member Hotels in Greece
Boutique Hotels & Resorts International	<ul style="list-style-type: none"> ▪ Lato Boutique Hotel, Crete ▪ The Tsitouras Collection, Santorini
Charming Hotels	<ul style="list-style-type: none"> ▪ Paradise Hotel, Andros ▪ St. Nicolas Bay, Crete ▪ Poseidon Resort, Loutraki ▪ Tharroe of Mykonos, Mykonos
Concorde Hotels	<ul style="list-style-type: none"> ▪ Elounda Beach, Crete ▪ Elounda Bay, Crete
Design Hotels	<ul style="list-style-type: none"> ▪ Life Gallery, Athens ▪ Semiramis, Athens ▪ Fresh Hotel, Athens ▪ Mykonos Theoxenia, Mykonos
Distinguished Hotels International	<ul style="list-style-type: none"> ▪ Santikos Mansion, Pelion
Great Hotels Organisation	<ul style="list-style-type: none"> ▪ Astir Palace, Athens ▪ King George II Palace, Athens ▪ St. George Lycabettus, Athens ▪ Grecotel Cape Sounion, Attica ▪ Poseidon Resort, Loutraki ▪ Grecotel Mandola Rosa, Kyllini ▪ Grecotel Olympia Riviera Resort, Kyllini ▪ Aldemar Olympian Village, Olympia ▪ Ilion, Nauplia ▪ Aldemar Knossos Royal Village, Crete ▪ Aldemar Royal Mare, Crete ▪ Blue Palace Resort & Spa, Crete ▪ Capsis Beach Hotel & Sofitel Capsis Palace, Crete ▪ St. Nicolas Bay, Crete ▪ Elounda Gulf Villas & Suites, Crete ▪ Lato Boutique Hotel, Crete ▪ Neptune Hotels, Kos ▪ Grecotel Kos Imperial, Kos ▪ Grecotel Mykonos Blu, Mykonos ▪ Aldemar Paradise Royal Mare, Rhodes ▪ Sofitel Capsis Hotel Rhodes & Convention Centre, Rhodes ▪ Honeymoon Petra Villas, Santorini ▪ Volcano View Villas, Santorini ▪ Grecotel Corfu Imperial, Corfu
ILA Châteaux & Hotels de Charme	<ul style="list-style-type: none"> ▪ Astir of Paros, Paros
Leading Hotels of the World	<ul style="list-style-type: none"> ▪ Divani Apollon Palace & Spa, Athens ▪ Divani Caravel, Athens ▪ Grand Resort Lagonissi, Athens ▪ King George II, Athens ▪ Life Gallery, Athens ▪ Danai Beach Resort & Villas, Chalkidiki ▪ Elounda Beach, Crete ▪ Elounda Bay, Crete ▪ Kivotos Clubhotel, Mykonos ▪ Myconian Imperial Thalasso Spa, Mykonos ▪ Royal Myconian Thalasso Spa, Mykonos ▪ Amphitryon, Nauplia
Luxe Worldwide Hotels	<ul style="list-style-type: none"> ▪ Astir Palace, Athens ▪ Candia Park Village, Crete ▪ St. Nicolas Bay, Crete ▪ Andronikos Village Hotel, Mykonos ▪ Princess of Mykonos, Mykonos ▪ Semeli, Mykonos ▪ Astir of Paros, Paros ▪ Poseidon, Paros ▪ Skiathos Palace Hotel, Skiathos
Preferred Hotels	<ul style="list-style-type: none"> ▪ Grecotel Cape Sounion, Athens ▪ Porto Elounda De Luxe Resort, Crete ▪ Grecotel Mykonos Blu, Mykonos
Relais & Châteaux	<ul style="list-style-type: none"> ▪ Elounda Mare, Crete ▪ Zannos Melathron, Santorini

Consortium	Member Hotels in Greece
Small Luxury Hotels of the World	<ul style="list-style-type: none"> ▪ Danai Château Repos, Chalkidiki ▪ Eagles Palace, Chalkidiki ▪ Elounda Gulf Villas & Suites, Crete ▪ Minos Beach art'otel, Crete ▪ Belvedere, Mykonos ▪ Mykonos Grand Hotel & Resort, Mykonos ▪ Nafplia Palace, Nauplia ▪ Yria Resort, Paros ▪ Miramare Wonderland, Rhodes ▪ Rodos Park Suites, Rhodes ▪ Chromata, Santorini ▪ Cosmopolitan Suites, Santorini ▪ Katikies, Santorini ▪ Notos Therme & Spa, Santorini, ▪ Santorini Kastelli Resort, Santorini ▪ Aegean Suites, Skiathos
Summit Hotels & Resorts	<ul style="list-style-type: none"> ▪ Greotel Athens Imperial, Athens ▪ Greotel Makedonia Palace, Thessaloniki
WORLDHOTELS (SRS)	<ul style="list-style-type: none"> ▪ Holiday Suites, Athens ▪ Royal Olympic, Athens

APPENDIX 6: WEBSITES OF HOTEL BRANDS

Hotel Brand/Company	Website
Aegean Star Hotels	http://www.aegeanstar.com/
Aegeon Hotels	http://www.egnatia-hotel.gr/
Airotel Group	http://www.airotel.gr/
AKS Hotels	http://www.akshotels.com
Aldemar	http://www.aldemarhotels.com/
AM Hoteliers	http://www.amhotels.gr/
Amalia Hotels	http://www.amalia.gr/
Amathus (Lanitis Group of Companies)	http://www.amathus.com/hotels_final.htm
AquaSol (affiliated with MyTravel)	http://www.aquasolhotels.com/
Astir Palace	http://www.astir-palace.com/en/
Atlantica Hotels (TUI)	http://www.atlantica-hotels.com
Best Western	http://www.bestwestern.com/gr
Blue & White Hotels (Groupe Heliades)	http://www.bluewhite-hotels.gr/index_en.htm
bluegr Mamidakis Hotels	http://www.bluegr.com/
Calimera Aktivhotels (Rewe)	http://www.calimera.de
Cambourakis Group of Hotels	http://www.rodos-palace.gr/
Capsis Convention Centers & Resort Hotels	http://www.capsis.gr
Capsis Hotels	http://www.capsishotel.gr/
Chandris Hotels & Resorts	http://www.chandris.gr/
Club alltours (Alltours)	http://www.alltours.com
Club Méditerranée (Accor)	http://www.clubmed.com
Contiki Holidays	http://www.contiki.com
Country Club Hotels	http://www.countryclub.gr/
Cyprotels Hotels & Resorts (Libra Holidays Group)	http://www.dhcyprotels.com/main.htm
Delphi Leading Hotels	http://www.delphi-hotels.gr/
Diana Hotels	http://www.dianahotels.gr
Divanis Chain Hotels	http://www.divanis.gr
Domina Hotel Group (Gruppo Domina Vacanze)	http://www.domina.it
Electra Hotels & Resorts	http://www.electrahotels.gr/
Elounda S.A.	http://www.elounda-sa.com/
Esperia Group of Hotels	http://www.esperia-hotels.gr/home.html
Fegoudakis Hotels	http://www.fegoudakis.com/
G. & E. Karamolegos Group of Hotels	http://www.karamolegos.gr
Golden Tulip Hotels	http://www.goldentuliptop.com
Grecotel (TUI)	http://www.grecotel.gr
Hapimag	http://www.hapimag.com
Helios Hotels	http://www.helioshotels.gr
Hilton (Hilton Group plc)	http://www.hilton.com
Holiday Club (Alltours)	http://www.alltours.com

Hotel Brand/Company	Website
Holiday Inn (InterContinental Hotels Group)	http://www.holiday-inn.com
Hyatt International	http://www.hyatt.com
Hydroussa	http://www.hydroussahotel.gr/
Iberostar (Thomas Cook)	http://www.iberostar.com
InterContinental (InterContinental Hotels Group)	http://www.interconti.com
Kempinski	http://www.kempinski.com
Kipriotis Hotels	http://www.kipriotis.gr/
Leptos Calypso Hotels	http://www.leptos-hotels.com/
Louis Hotels	http://www.louishotels.com
LTI International Hotels (Rewe)	http://www.lti.de
Magic Life (TUI)	http://www.magiclife.com
Mamidakis Hotel Experience	http://www.mamidakishotels.gr/
Maris Hotels	http://www.maris.gr/
Marriott International	http://www.marriott.com
Mitsis Hotels	http://www.mitsishotels.com
Novotel (Accor)	http://www.novotel.com
Olympic Hotels	http://www.olympichotelsathens.com
Paladien Hotel Clubs (TUI)	http://www.paladien.com
PAP Corp.	http://www.papcorp.gr/
Petasos Hotels	http://www.petasos.gr/
Porto Carras Grand Resort	http://www.portocarras.gr/home.htm
Robinson Club (TUI)	http://www.robinson-club.com
Sani Resort	http://www.saniresort.gr/page/
Santa Marina Hotels (1)	http://www.santa-marina.gr
Santa Marina Hotels (2)	http://www.santamarina-hotels.gr/
Sofitel (Accor)	http://www.sofitel.com
Sunwing Resorts (MyTravel)	http://www.sunwing.net
The Luxury Collection (Starwood Hotels & Resorts Worldwide)	http://www.starwood.com
The Myconian Collection	http://www.myconiancollection.gr/
Tsimaras Family Hotels & Resorts	http://www.arthotel.gr/
VentaClubs (Ventaglio)	http://www.ventaglio.com
Yes Hotels & Restaurants	http://www.semiramisathens.com