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The
2009 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 10,000 businesses and a 403,000-room capacity, yet it is among the least developed in regard to branding. Only 4% of the country's hotels (controlling 19% of the total room capacity) have an affiliation with one of the 113 recorded Greek, Cypriot or international brands, a situation that reflects the orientation of most accommodation businesses towards the package tour market and their close co-operation with tour operators. Nevertheless, there has been a steady growth in branded hotels, with their capacity growing by over 20,000 rooms since 2005 to a total of 77,464 rooms in 431 hotels.

Mitsis, Grecotel, Best Western, Classical, Iberostar, Club alltura as well as Cyprus-based **Atlantica** and **Louis** are the only brands active in Greece with ten or more hotels. Mitsis, the country's largest hotel brand, controls 4,787 rooms or 1.2% of the total room capacity available at Greek hotels.

Global brands, such as IHG's **InterContinental, Crowne Plaza** and **Holiday Inn**, Accor's **Club Med, Sofitel** and **Novotel, Hilton**, Starwood's **Luxury Collection** and **Westin** as well as **Marriott** and **Hyatt**, have established a limited presence of one or two hotels in Greece (except for The Luxury Collection featuring six hotels). A comparatively large share – nearly 5% – of the country's total room capacity has been secured by hotel brands directly managed by or affiliated with the major European tour operators such as the predominantly all-inclusive resort hotels of **Robinson Club, Magic Life, Club alltura, Calimera** and **LTI**.

Regarding Greek brands, second to Mitsis is **Grecotel** – part of both TUI Hotels & Resorts and N. Daskalantonakis Group – with a capacity of 4,473 rooms in 19 hotels. Other major national brands include **Aldemar, Aquis, Classical, Helios, Divani, Mareblue, Chandris** and **Aegean Star**. There are also several large local brands in the country's main resort areas, such as **Esperia** on Rhodes, **Kipriotis** on Kos and **G-Hotels** in Chalkidiki.

The country's 20 largest hotel brands comprise 169 hotels with a capacity of 40,002 rooms. This amounts to 10% of the country's total hotel room inventory and more than half of all branded hotel rooms.

A growing number of Greek hotels are opting for consortium membership, with 97 hotels having joined international networks such as the Leading Hotels of the World, Great Hotels Organisation and Small Luxury Hotels of the World in 2009.

Table 1 The 20 largest hotel brands of Greece (based on total hotel rooms) in 2009

| Rank 2009 (Rank 2005) | Brand | No. of Hotels | No. of Rooms | Type of Brand |
|----------------------------------|---|--------------------------|-------------------------|--------------------------|
| 1 (2) | Mitsis Hotels | 16 | 4,787 | National |
| 2 (1) | Grecootel (TUI, N. Daskalantonakis Group) | 19 | 4,473 | National |
| 3 (4) | Iberostar | 12 | 3,377 | International |
| 4 (17) | Club alltoura (Alltours) | 10 | 3,206 | International |
| 5 (3) | Louis Hotels | 10 | 2,831 | Cypriot |
| 6 (29) | Atlantica Hotels (TUI) | 11 | 2,634 | Cypriot |
| 7 (5) | Aldemar Hotels & Spa | 8 | 2,450 | National |
| 8 (-) | Aquis Hotels & Resorts | 8 | 2,235 | National |
| 9 (8) | Kipriotis Hotels | 5 | 1,706 | Local |
| 10 (-) | Classical Hotels (N. Daskalantonakis Group) | 11 | 1,569 | National |
| 11 (9) | Helios Hotels & Resorts | 7 | 1,566 | National |
| 12 (6) | Esperia Hotel Group | 6 | 1,563 | Local |
| 13 (-) | G-Hotels | 5 | 1,521 | Local |
| 14 (12) | Divani Collection | 7 | 1,464 | National |
| 15 (10) | Best Western | 22 | 1,367 | International |
| 16 (-) | Mareblue Hotels & Resorts | 5 | 1,300 | National |
| 17 (19) | Chandris Hotels & Resorts | 5 | 1,253 | National |
| 18 (33) | Aegean Star Hotels | 5 | 1,237 | National |
| 19 (13) | Capsis Hotels & Resorts | 2 | 1,156 | National |
| 20 (-) | Star Hotels | 5 | 1,122 | National |
| Total* | | 169 | 40,002 | |

* without double-counting the hotels featuring two brands (10 hotels with 2,815 rooms)

Source: Koutoulas Hotel Database

ABOUT THIS REPORT

In its second edition now, the **Greek Hotel Branding Report** measures the extent of branding among Greek hotels by listing all hotel brands and all their member hotels in detail as well as by supplying comprehensive statistics on hotel brands and the hotel industry in Greece.

Due to the lack of readily available data, it was necessary to conduct extensive research over a period of several months for precisely establishing the situation of hotel branding in Greece. 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 from all companies mentioned in this report as well as from third parties – including the author’s own extensive hotel database – were consulted. All original data found referring to:

- hotel brands operating in Greece,
- individual hotels belonging to each brand,
- the location of each hotel and
- the number of rooms at each hotel,

has been cross-checked for accuracy.

All hotel brands listed in this report have been assigned to one of four categories:

- **International brands** are headquartered abroad and operate hotels in at least one country besides Greece.
- Greek **national brands** are headquartered in Greece and operate hotels in at least two different Greek regions.
- Greek **local brands** are headquartered in Greece and all their hotels are concentrated in one part of the country.
- **Cypriot brands** are headquartered and operate hotels in Cyprus and have expanded into Greece by assigning their brands to Greek hotels, as well.

The total number of hotel brands that were recorded in 2009 was 113, significantly more than the 71 brands listed in the 2005 report. This increase is attributable to international brands that have entered the Greek market over the last four years, to the creation of new national or local Greek brands as well as to the inclusion of brands already existing in 2005 that the author was unaware of when he wrote the first edition of this report.

In addition to hotel brands, this report also covers the presence of **international hotel consortia** – such as the *Leading Hotels of the World* and the *Small Luxury Hotels of the World* – in Greece. All consortia and their Greek member hotels have been listed in a dedicated chapter.

No distinction is made in the present report in regard to room types. Each suite, studio, apartment, bungalow, villa etc. is included in the total room count.

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 with different names). 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 all the time, with hotels joining and leaving brands or 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 feedback concerning the contents of this report. Readers are kindly invited to send their comments to the author's e-mail address: d.koutoulas@gmail.com.

ABOUT THE AUTHOR



Dr. Dimitris Koutoulas, with a degree in Business Administration and a Ph.D. in Tourism Marketing, has been working as a marketing consultant in the tourism, hotel, event and publishing industries since 1990. He also lectures at Greek universities.

Dr. Koutoulas has successfully implemented assignments in 24 countries on behalf of private and public-sector clients and partners from Greece, Germany, the Netherlands, Cyprus, the UK, the USA, Spain, Belgium, the United Arab Emirates, Austria, Switzerland, Australia, Oman, Hungary, Turkey etc. His consultation appointments include business and marketing planning, research and other assignments on behalf of Ministries, National and Regional Tourism Organisations, Convention Bureaux, the European Union, the Athens Olympic Games Organising Committee, Chambers of Commerce, Industry Associations as well as multinational companies and other businesses.

Dr. Koutoulas also has a long hands-on experience in marketing tourist destinations and individual businesses through designing and implementing integrated marketing campaigns, publicity campaigns and public relations activities and producing travel and hotel guides, websites and audio books.

Dr. Koutoulas has participated in several hotel rating projects both in Greece and abroad. These projects include the design and review of star classification systems, hotel quality assessments through mystery guest inspections and other techniques, design of hotel award schemes etc. He has inspected and assessed hundreds of hotels in eight countries.

Dr. Koutoulas is an experienced researcher who regularly conducts surveys among hotels, tourism authorities, Convention Bureaux and other entities. He has published several research reports and analyses of the Greek and international tourism, hospitality and meetings industries and he is also the author of numerous academic papers. He has been invited as a speaker to numerous conferences in Greece and abroad.

INTRODUCTION

GLOBAL DOMINANCE OF HOTEL BRANDS

According to Roland Berger & Partner (2000), 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 5.5 million rooms in their branded hotels – about 32% 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 Starwood (95 countries), Accor (with a presence in 90 countries), Best Western (80 countries) and Hilton Group (78 countries) (Gale, 2008).

In the USA, the share of branded hotels is 67% of the country's total room capacity as compared to a share of approximately 25% for Europe. France is among the European hotel markets most penetrated by brands with 40% of the country's total room capacity being controlled by branded chains. In the rapidly growing Middle Eastern hotel market, the branded/non-branded ratio of hotels is 50:50 (source: research conducted and published by the firms PricewaterhouseCoopers LLP, Smith Travel Research, MKG Consulting and Middle East Strategy Advisors).

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 or hotel portfolios** (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 joint market identity are also excluded from the present analysis, as they do not constitute brands.

In 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 having a joint market presence 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.

It is worth noting that only a few of the hotel companies listed in this report employ an integrated brand strategy and a powerful brand identity as in the case of Grecotel, bluegr Mamidakis Hotels and Grace Hotels. Many Greek brands – especially at the local level – are quite unsophisticated in their approach to jointly marketing their hotels.

Unbranded hotel portfolios are not discussed in this report.

OVERVIEW OF THE GREEK HOTEL INDUSTRY

SOME KEY DATA ON THE GREEK HOTEL INDUSTRY

According to the Greek Chamber of Hotels, there were 9,705 hotels operating in Greece by the end of 2008. Their cumulative capacity is 402,967 rooms and 758,363 beds or 42 rooms and 78 beds on average.

Upscale hotels with four and five stars represent 14% of all Greek hotels, but they command 35% of the total room capacity due to their significantly larger size when compared to the average hotel. Nearly half of all Greek hotels belong to the two-star category.

Comparing the present data with the data of four years ago, there is a noticeable increase in five-star hotels with their room capacity nearly doubling since 2004. Total room capacity grew by 18% across all categories, with two-star and five-star hotels leading the way.

The overall average size of Greek hotels grew by three rooms to 42 rooms between 2004 and 2008 mainly driven by the lower categories. Interestingly, upscale hotels shrank in size, with the average room count of five-star hotels dropping from 203 to 172 over the last four years.

Table 2 Greek Hotel Industry Statistics
(as of December 31, 2008; Source: Greek Chamber of Hotels)

| | 5 Stars | 4 Stars | 3 Stars | 2 Stars | 1 Star | All Hotels |
|----------------------|---------|---------|---------|---------|--------|------------|
| No. of Hotels | 230 | 1,132 | 2,097 | 4,629 | 1,617 | 9,705 |
| Total No. of Rooms | 39,614 | 101,101 | 93,400 | 138,103 | 30,749 | 402,967 |
| Total No. of Beds | 78,464 | 191,966 | 176,395 | 253,386 | 58,152 | 758,363 |
| Average No. of Rooms | 172 | 89 | 45 | 30 | 19 | 42 |
| Average No. of Beds | 341 | 170 | 84 | 55 | 36 | 78 |

Figure 1 Hotels per Category in 2008

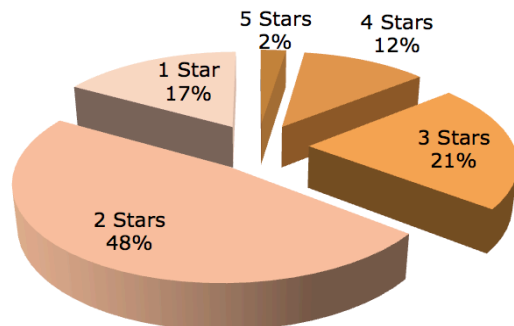


Figure 2 Hotel Rooms per Category in 2008

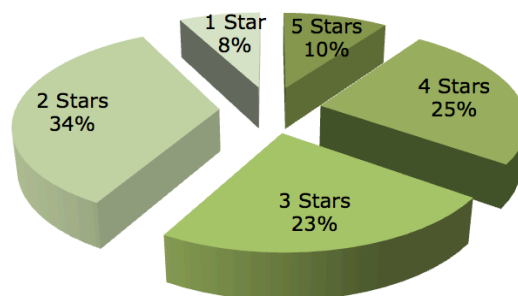


Figure 3 Number of hotels operating in Greece in 2004 and 2008 per category
(Source: Greek Chamber of Hotels)

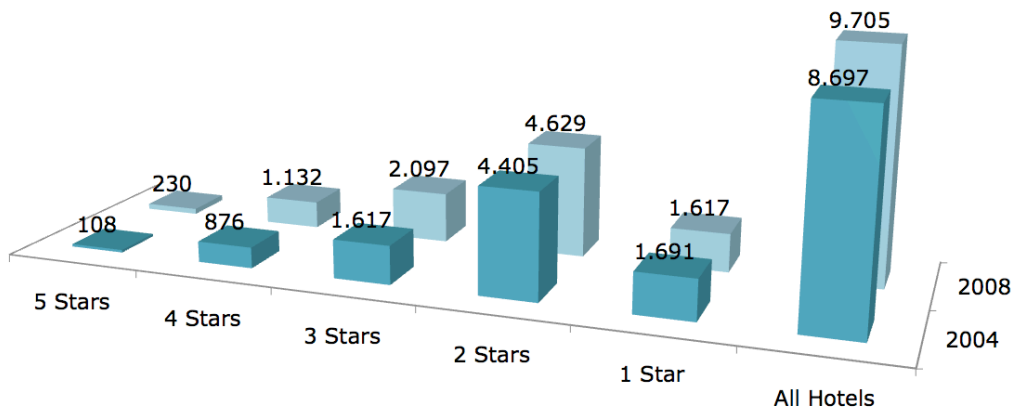


Figure 4 Room capacity of hotels operating in Greece in 2004 and 2008 per category
(Source: Greek Chamber of Hotels)

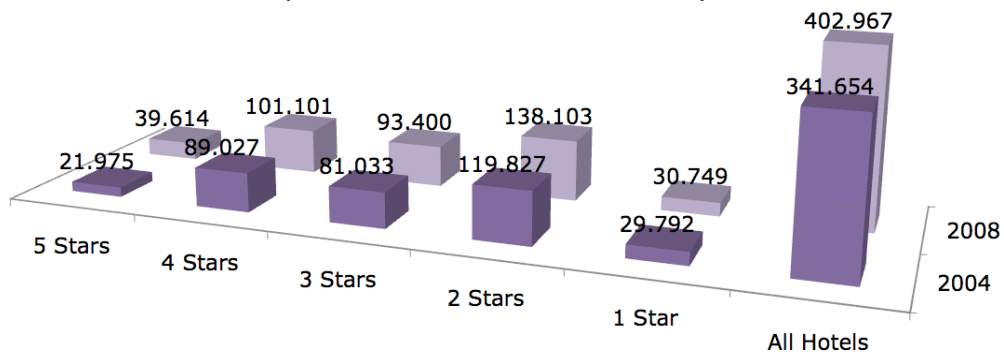
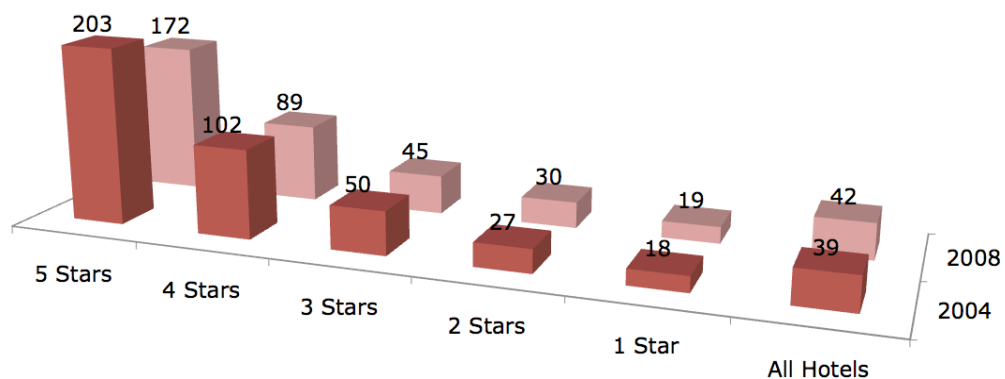


Figure 5 Average number of rooms at Greek hotel in 2004 and 2008 per category
(Calculation based on data of the Greek Chamber of Hotels)



OVER-DEPENDENCE ON TOUR OPERATORS

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 sector's over-dependence on major European tour operators for most of its business and a widespread lack of basic marketing skills in the industry.

Nearly half of the 17.5 million tourists (excluding cruise passengers) who visited Greece in 2007, 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 (excluding cruise passengers). More specifically, the share of tourists from selected European countries arriving in Greece on charter flights is shown in the following breakdown (Source: National Statistical Service of Greece):

- 80% of British tourists
- 61% of German tourists
- 70% of Dutch tourists
- 69% of Austrian tourists
- 80% of Danish tourists
- 76% of Swedish tourists
- 90% of Norwegian tourists
- 81% of Finnish tourists
- 62% of Belgian tourists
- 57% of Polish 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. Only one single operator, namely TUI, contributed 30% of all tourist arrivals from the twelve traditional source market of Greek tourism in West and North Europe. Greece depends on TUI for 57% of all tourist arrivals from Ireland, 40% of all tourist arrivals from Austria and Belgium as well as for 37% of all tourist arrivals from Germany (Koutoulas, 2007). The influence of the large tour operators has grown even more following the mega mergers of TUI with First Choice and of Thomas Cook with MyTravel in 2007 that further consolidated the purchasing power of Europe's two largest tour operators.

Nevertheless, Greece has been witnessing a drop in market share among the clients of TUI and Thomas Cook. Greece's share among TUI clients slid from 14% to 12% and among Thomas Cook clients from 11% to 8.4% (Koutoulas, 2007). Spain has been leading the loss of market share, while Turkey has gained parts of these losses.

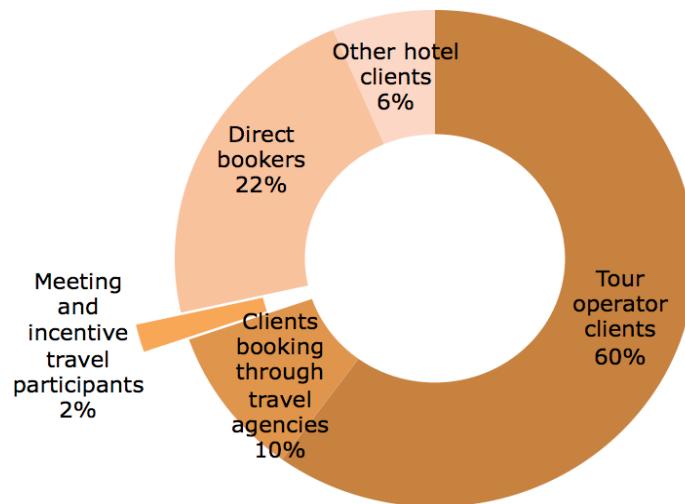
A survey conducted among Greek resort hotels revealed that they secure 60% of their customers through tour operators (Koutoulas, 2006). Bookings coming directly from end consumers are limited on average to 22%, however hotels on the islands of Santorini and Mykonos have been demonstrating most successfully how to avoid over-dependence on tour operators by attracting independent travellers over the internet.

With package tour sales steadily declining during most of the present decade, 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 of the World*.

Until the early 1990s, there were only a couple of hotels participating in these networks. Nowadays, nearly one hundred 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.

Figure 6 Business Mix of Greek Resort Hotels (Source: Koutoulas, 2006)



ATHENS AND THE OLYMPIC LEGACY

The success of the Olympic Games held in Athens in 2004 considerably boosted the city's tourist traffic. The loss in overnight stays at the city's hotels that occurred during the pre-Olympic years was recovered over the course of the three years following the Games, with overnight stays of 2007 rising to the levels of 2000. A total of 3.5 million tourists now stay at the hotels of the Greater Athens and Attica Area annually, of which more than two million choose a hotel in the city centre. Average stay in Athens is 2.2 nights (Koutoulas and Nikolaou, 2008). Annual occupancy surpassed the 60% mark in 2007.

Figure 7 Annual overnight stays at the hotels of Central Athens and the Greater Athens and Attica Area Area between 1998 and 2007 (including Central Athens but excluding the Islands of the Attica Region; Source: National Statistical Service of Greece)

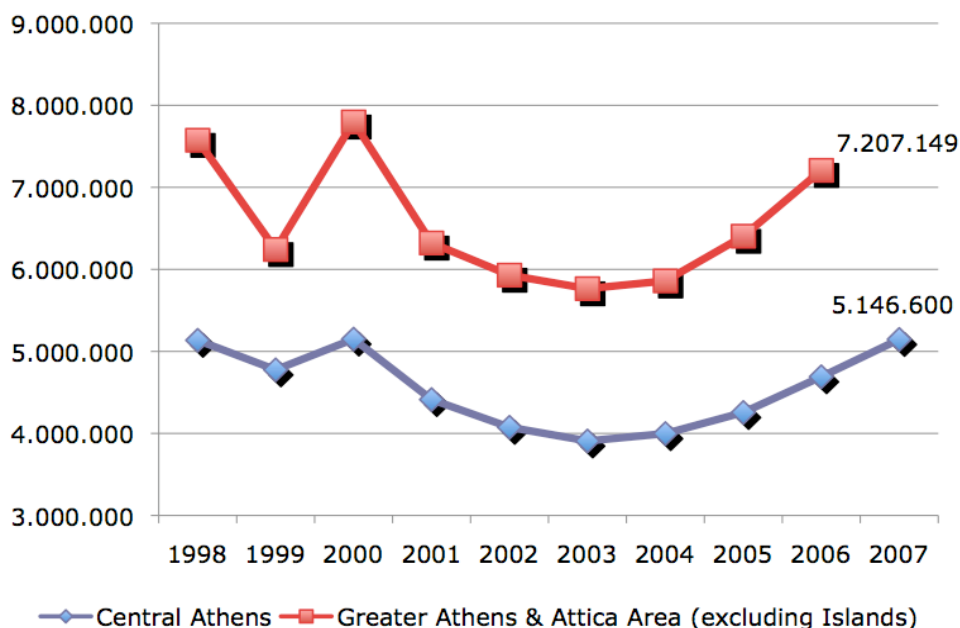
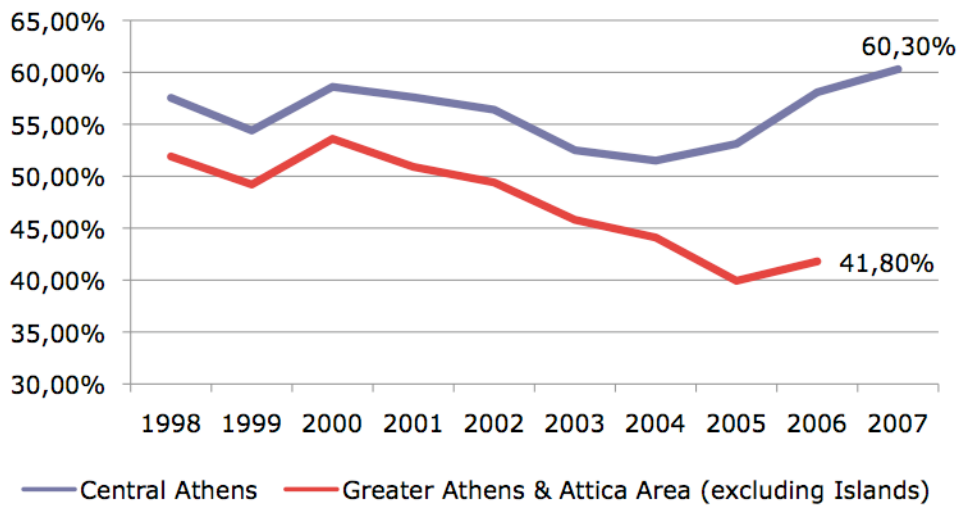


Figure 8 Annual bed occupancy at the hotels of Central Athens and the Greater Athens and Attica Area between 1998 and 2007 (excluding the Islands of the Attica Region;
Source: National Statistical Service of Greece)



The city's tourist industry profited from the extensive global media exposure of the Olympic Games and the greatly improved infrastructure in and around Athens. A new metro and airport, improved road connections, regeneration of the area surrounding the Acropolis and its archaeological park, new visitor attractions and entertainment options have put Athens again on the map of the European city breaks market.

Most hotels of Athens and many upscale hotels throughout the country completed extensive renovation projects before the 2004 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. What is still missing, however, is the marketing savvy to fill those upgraded rooms.

Hotel capacity expanded by only 6%, Athens thus avoided the explosive growth and the post-Games depression experienced by previous Olympic cities. In comparison, Barcelona's and Sydney's hotel capacity grew by 32% for the 1992 Olympics and by 30% for the 2000 Olympics, respectively.

Downtown Athens now boasts 249 hotels with 16,400 rooms and an average size of 66 rooms. The Greater Athens and Attica Area (excluding nearby islands) has a total of 505 hotels with 30,049 rooms and an average size of 60 rooms.

Several international brands have established a presence in the Greek capital. These include Accor's **Novotel** and **Sofitel**, **Best Western**, **Golden Tulip**, **Hilton**, IHG's **Crowne Plaza**, **Holiday Inn** and **InterContinental**, **Marriott**, **Melia** as well as Starwood's **Luxury Collection** and **Westin**.

Following the restructuring of the Grecootel group, **Divani** now occupies the top spot as the largest hotel operator in the Greek capital with a total of 1,063 rooms at its four Athens-area hotels. **InterContinental Hotels Group** controls further 929 rooms through its three brands (InterContinental, Crowne Plaza and Holiday Inn). **Classical Hotels**, a spin-off from Grecootel, operates a total of six hotels with 757 rooms in Greater Athens and **Starwood** another 682 rooms at its three hotels under the Luxury Collection and Westin brands.

Other national brands represented in Athens are **Electra**, **Chandris**, **Airotel**, **Amalia**, **Star Hotels** and **bluegr**. In addition, four local hotel companies carrying the **Douros**, **Oscar**, **Theoxenia** and **Yes Hotels** brands operate a total of 14 hotels.

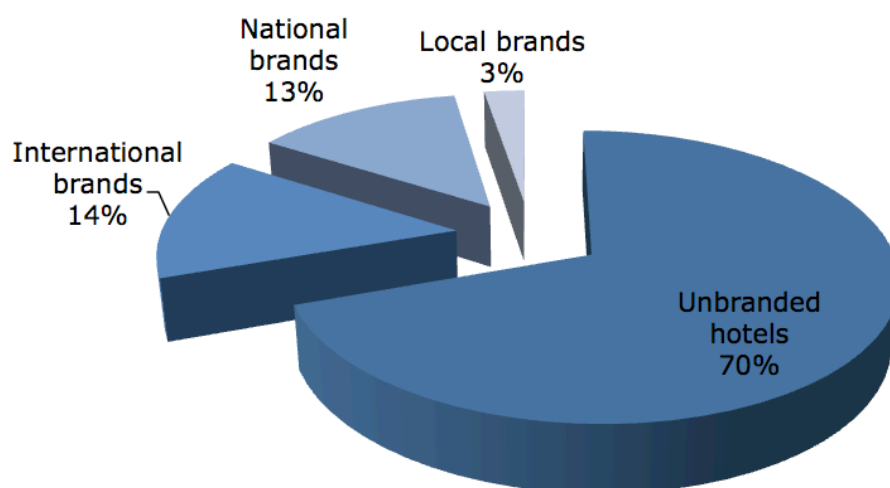
30% of all hotel rooms in the Greater Athens and Attica Area operate under a local, a national or an international brand. Branded hotels (except the ones carrying a local brand) are significantly larger than the average hotel in the Greek capital.

Table 3 Branded and unbranded hotels in the Greater Athens and Attica Area in 2009 (excluding the Islands of the Attica Region; without double-counting the hotels featuring two brands)

| | No. of Hotels | Total No. of Rooms | Average No. of Rooms |
|--|---------------|--------------------|----------------------|
| All hotels of Greater Athens & Attica* of which: | 505 | 30,049 | 60 |
| Unbranded hotels | 445 | 20,907 | 47 |
| International brands | 23 | 4,345 | 189 |
| National brands | 23 | 4,015 | 175 |
| Local brands | 14 | 782 | 56 |

* Source: Greek Chamber of Hotels

Figure 9 Branded vs. unbranded hotel room capacity in the Greater Athens and Attica Area in 2009 (excluding the Islands of the Attica Region)



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. National players include **Classical Hotels**, **Capsis Hotels**, **Electra Hotels**

(with a **Golden Tulip** affiliation), **Anatolia**, **Domotel** and **Philian Art & Design Hotels**, with **Hyatt** and **Holiday Inn** being the city's international brands. **Chandris** entered the Thessaloniki market in 2009 with the opening of the MET. **Kempinski** and **Best Western** no longer have affiliated hotels in the city. There are also two local brands, namely **Aegeon Hotels** and **P.A.P Corp.**, operating in Thessaloniki.

The 1,855 rooms of the city's 17 branded hotels amount to 21% of the total hotel room capacity in the Thessaloniki Prefecture.

The other Greek cities present an untapped market for branded hotels. There is just a limited presence of **Best Western**, **Classical** and **Divani** in secondary urban markets besides the local brands.

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 58% of the country's hotels and 63% 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 (Source: Greek Chamber of Hotels). 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 have a significant presence in the country's large resort areas with dozens of hotels and thousands of hotel rooms operating under international, national, local or Cypriot brands on the larger islands. For instance, 111 out of 1,538 hotels (7%) and 22,615 out of 81,458 hotel rooms (28%) on Crete carry a brand. Branded hotels are of a much larger size than the average hotel and, therefore, control a much higher share of total room capacity.

The share of branded hotel rooms is even higher in the case of Kos (37%) and Rhodes (38%).

Figure 10 Branded vs. unbranded hotel room capacity in the large seaside resort areas of Greece in 2009

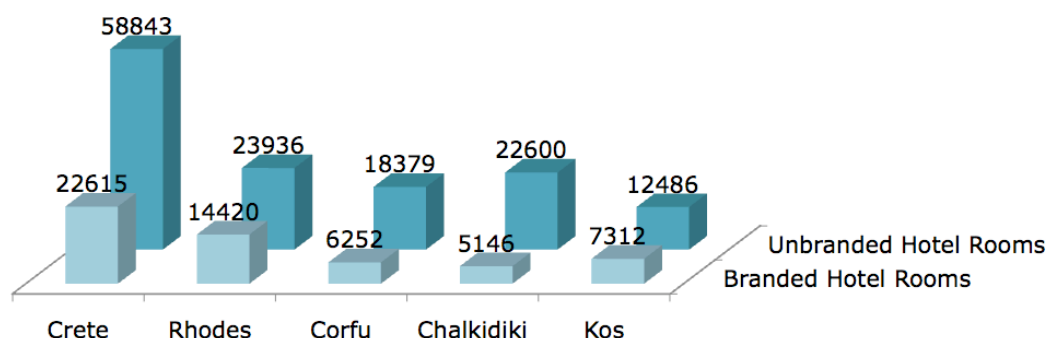
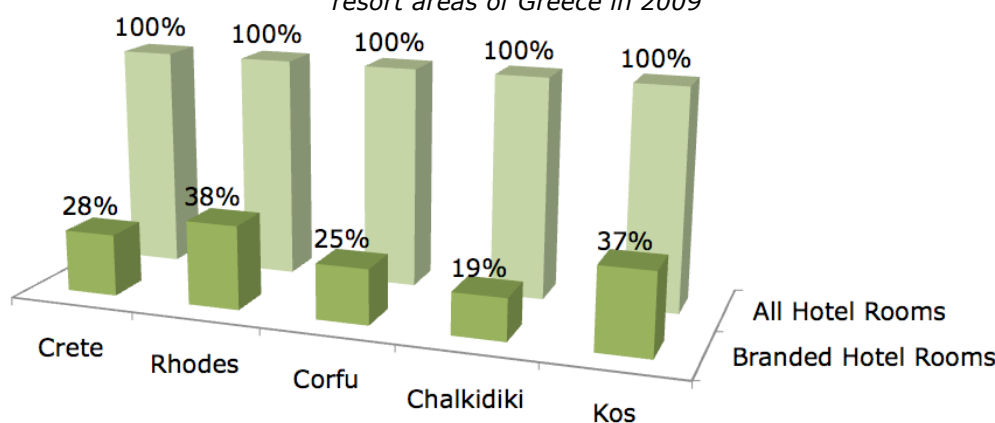


Figure 11 Share of hotel brands among the total hotel room capacity in the large seaside resort areas of Greece in 2009



The regional presence of brands in the largest hotel markets of Greece is presented in the following table.

Table 4 Share and average size of branded hotels in major urban centres and seaside resort areas of Greece in 2009 (without double-counting the hotels featuring two brands)

| | Greater Athens | Thessaloniki | Crete | Rhodes | Chalkidiki | Corfu | Kos |
|---|----------------|--------------|--------|--------|------------|--------|--------|
| All hotels* | 505 | 142 | 1,538 | 467 | 566 | 420 | 254 |
| All hotel rooms* | 30,049 | 8,967 | 81,458 | 38,356 | 27,746 | 24,631 | 19,798 |
| Branded hotels | 60 | 17 | 111 | 46 | 24 | 22 | 25 |
| Branded hotel rooms | 9,142 | 1,855 | 22,615 | 14,420 | 5,146 | 6,252 | 7312 |
| % Branded hotel rooms | 30% | 21% | 28% | 38% | 19% | 25% | 37% |
| of which: | | | | | | | |
| % International brands | 14% | 4% | 6% | 7% | 1% | 9% | 19% |
| % National brands | 13% | 14% | 10% | 14% | 3% | 14% | 11% |
| % Local brands | 3% | 3% | 10% | 10% | 15% | 0% | 4% |
| % Cypriot brands | 0% | 0% | 2% | 7% | 0% | 2% | 3% |
| Average no. of rooms at all hotels | 60 | 63 | 53 | 82 | 49 | 59 | 78 |
| Average no. of rooms at branded hotels | 152 | 109 | 204 | 313 | 214 | 284 | 292 |

* Source: Greek Chamber of Hotels

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 431 out of 9,705 Greek hotels — or 4% — have a brand affiliation, controlling 19% of the country's room inventory. However, since the last edition of the Greek Hotel Branding Report in 2005, the number of branded hotels grew substantially with an increase in branded hotel room capacity of over 20,000 rooms or 35%.

Nearly 55,000 hotel rooms — or 13.7% of the total — correspond to Greek national and local brands, with a further 21,667 rooms (5.4%) belonging to hotels operating under an international brand. Interestingly, Cypriot hotel brands are also claiming 1.7% 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 42 rooms of the country's average hotel.

The growing penetration of brands in the Greek hotel sector is attributable mainly to local and national brands, with local brands nearly doubling their room capacity between 2005 and 2009. In comparison, growth of international and Cypriot brands has been quite limited.

There were 113 hotel brands operating in Greece in 2009, 42 more than in 2005. The largest increase came from new local brands that more than doubled between 2005 and 2009. There were also a few Greek brands that were dissolved and foreign brands that left Greece since 2005.

Table 5 *Branded Hotels in Greece in 2009*

| | 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 | 104 | 1.1% | 21,667 | 5.4% | 208 |
| National Hotel Brands | 155 | 1.6% | 31,639 | 7.9% | 204 |
| Local Hotel Brands | 167 | 1.7% | 23,267 | 5.8% | 139 |
| Cypriot Hotel Brands | 26 | 0.3% | 6,723 | 1.7% | 259 |
| <i>All Branded Hotels of Greece*</i> | 431 | 4% | 77,464 | 19% | 180 |
| All Greek Hotels | 9,705 | 100% | 402,967 | 100% | 42 |

* without double-counting the hotels featuring two brands (21 hotels with 5,832 rooms)

Source: Koutoulas Hotel Database

Figure 12 Share of branded hotels among the hotel sector of Greece in 2009

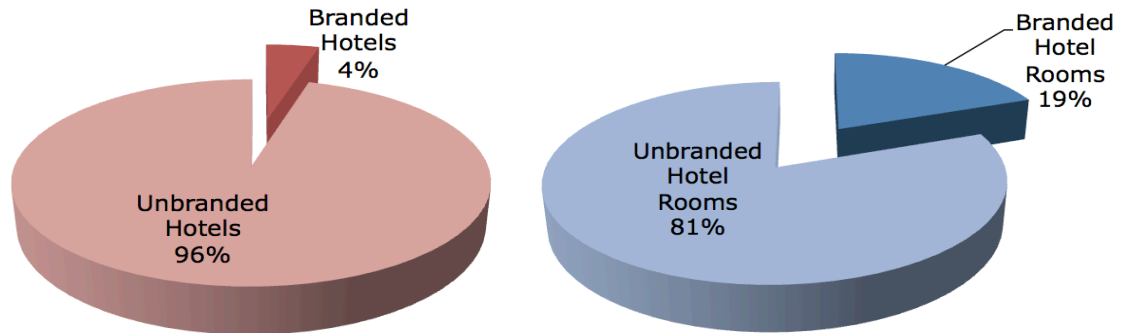


Figure 13 Number of branded hotels in Greece in 2005 and in 2009

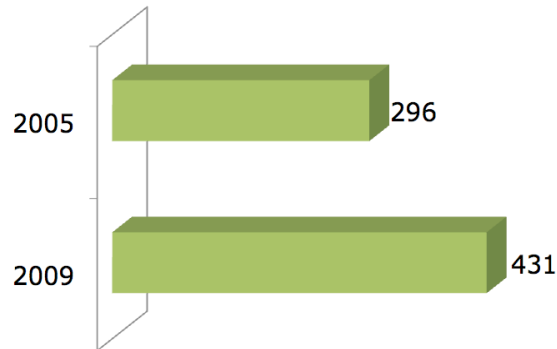


Figure 14 Share of branded hotels among the Greek hotel sector between 2005 and 2009

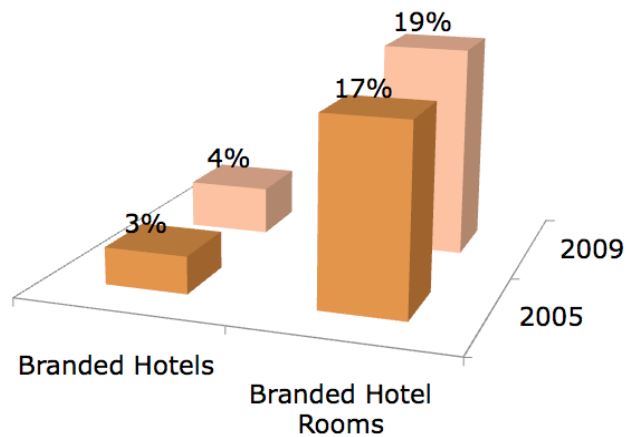
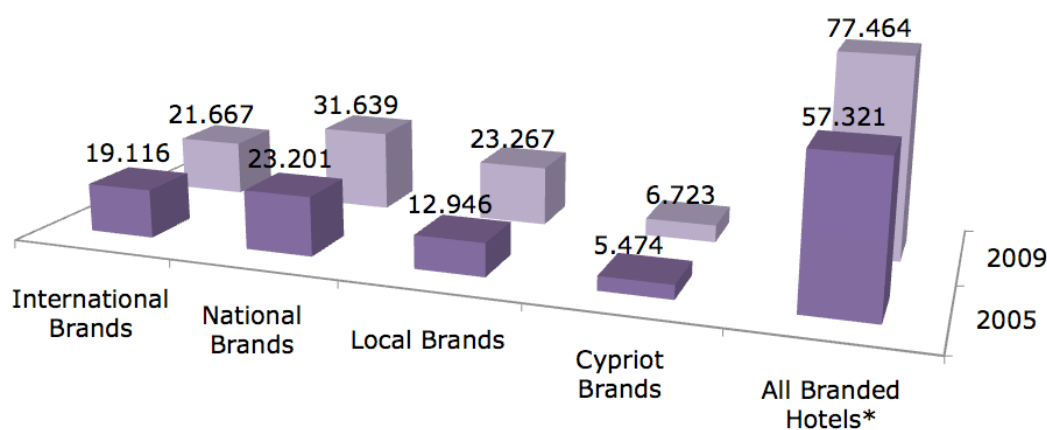


Figure 15 Growth of branded hotel room capacity in Greece between 2005 and 2009 per type of brand



* without double-counting the hotels featuring two brands

Table 6 Hotel Brands operating in Greece in 2005 and in 2009

| Type of Brand | No. of Brands in 2005 | minus Brands that left Greece or were dissolved | plus new Brands | = | No. of Brands in 2009 |
|----------------------------|-----------------------|---|-----------------|----------|-----------------------|
| International Hotel Brands | 26 | -4 | +11 | = | 33 |
| National Hotel Brands | 18 | -1 | +12 | = | 29 |
| Local Hotel Brands | 21 | -4 | +28 | = | 45 |
| Cypriot Hotel Brands | 6 | -0 | +0 | = | 6 |
| All Brands | 71 | -9 | +51 | = | 113 |

Source: Koutoulas Hotel Database

THE LARGEST HOTEL GROUPS OPERATING IN GREECE

Before the 113 brands operating in Greece are presented in more detail, the country's major hotel groups are briefly discussed below. Table 7 includes the 20 largest hotel groups (according to total hotel rooms) operating single-brand or multi-brand hotel portfolios.

The hotel portfolio of **TUI Hotels & Resorts**, a subsidiary of TUI, has considerably shrunk from 9,960 to 8,869 rooms since 2005, however it still remains the largest hotel group in Greece with its 36 hotels (down from 43 hotels) operating under six distinct brands.

Other multi-brand portfolios include the tour operators **Alltours** (now with twice as many hotel rooms operating under the ActiSun, Club alltours and Holiday Club brands), **Thomas Cook** (with the brands Aqua Sol, Neilson, SENTIDO and Sunwing Resorts) and **Rewe** (with the brands Calimera Aktivhotels and LTI International Hotels). The French hotel giant **Accor** (represented by its Club Med, Novotel and Sofitel brands) lost more than half of its room capacity in Greece since 2005.

The restructuring of the hotel portfolio of the Daskalantonakis family led to the creation of three different brands out of the original Grecotel group. Four Cretan hotels now operate under the **Aquila** brand, whereas the other two brands are part of the **N. Daskalantonakis Group**:

- **Grecootel:** This hotel management company still remains a 50-50 venture between Daskalantonakis and TUI and is also part of TUI Hotels & Resorts. It consists only of resort hotels.
- **Classical Hotels:** Grecootel's former city hotel division is now a separate brand. It is the first Greek hotel group to expand internationally with hotels in Bulgaria, Serbia and Turkey. The Classical portfolio also includes a few hotels in resort areas.

Mitsis has added more than 1,200 new hotel rooms to its inventory since 2005 and is now the largest hotel brand in Greece in front of **Grecootel**, **Iberostar**, **Louis** and **Aldemar**. Newly founded **Aquis** secured a top-10 position, as its rapidly growing portfolio surpassed the 2,000-room mark in 2009. Other notable new entries into the top-20 list include **G-Hotels**, **Mareblue** and **Aegean Star**.

The 192 hotels belonging to the top-20 hotel groups represent 44,913 hotel rooms, i.e. 58% of all branded hotel rooms in Greece or 11% of the total Greek hotel room capacity.

International hotel groups operating two or more brands in Greece that did not make it into the top-20 list are the **InterContinental Hotels Group** (with the brands Crowne Plaza, InterContinental and Holiday Inn), **Starwood Hotels & Resorts Worldwide** (with The Luxury Collection and Westin) as well as **Sol Melia** (with Melia and Sol).

Table 7 The 20 Largest Hotel Groups (based on total hotel rooms) operating in Greece in 2009

| | Company (Brands) | No. of Hotels | No. of Rooms | Average No. of Rooms |
|----|---|----------------------|---------------------|-----------------------------|
| 1 | TUI Hotels & Resorts (Atlantica, Grecootel, Magic Life, Robinson Club, Sensatori, Sensimar) | 36 | 8,869 | 246 |
| 2 | N. Daskalantonakis Group (Classical Hotels, Grecootel) | 30 | 6,042 | 201 |
| 3 | Mitsis Hotels | 16 | 4,787 | 299 |
| 4 | Alltours (ActiSun, Club alltoura, Holiday Club) | 14 | 4,416 | 315 |
| 5 | Iberostar | 12 | 3,377 | 281 |
| 6 | Louis Hotels | 10 | 2,831 | 283 |
| 7 | Aldemar | 8 | 2,450 | 306 |
| 8 | Thomas Cook (Aqua Sol, Neilson, SENTIDO, Sunwing Resorts) | 13 | 2,269 | 175 |
| 9 | Aquis Hotels & Resorts | 8 | 2,235 | 279 |
| 10 | Kipriotis Hotels | 5 | 1,706 | 341 |
| 11 | Helios Hotels | 7 | 1,566 | 224 |
| 12 | Esperia Group of Hotels | 6 | 1,563 | 261 |
| 13 | G-Hotels | 5 | 1,521 | 304 |
| 14 | Rewe (Calimera Aktivhotels, LTI International Hotels) | 5 | 1,493 | 299 |
| 15 | Divani Collection | 7 | 1,464 | 209 |
| 16 | Best Western | 22 | 1,367 | 62 |
| 17 | Accor (Club Méditerranée, Novotel, Sofitel) | 4 | 1,342 | 336 |
| 18 | Mareblue Hotels & Resorts | 5 | 1,300 | 260 |
| 19 | Chandris Hotels & Resorts | 5 | 1,253 | 251 |
| 20 | Aegean Star Hotels | 5 | 1,237 | 247 |
| | Total* | 192 | 44,913 | 234 |

* without double-counting the Grecootel chain as well as the hotels featuring two brands (31 hotels with 8,175 rooms)

Source: Koutoulas Hotel Database

INTERNATIONAL HOTEL BRANDS

There are 104 Greek hotels bearing an international brand. Their cumulative inventory is 21,667 rooms, or 5.4% of the country's total hotel capacity. Of the 33 international brands having a presence in Greece, 15 are owned or affiliated with tour operators, thus being oriented mainly towards the package tour traveller. Many of these hotels operate on an all-inclusive basis. A detailed listing of all hotels featuring an international brand is included in Appendix 1.

The international brands controlling more than 1,000 rooms are **Iberostar**, **Club alltoura** and **Best Western**, the latter having 22 member hotels in Greece. Brands that gained the most since 2005 include **Club alltoura** and **Iberostar**. Among the brands that lost a considerable part of their room capacity since 2005 is **Club Med**, **Magic Life** and **Sofitel**. International brands that departed Greece since the 2005 edition of the Greek Hotel Branding Report include **Contiki**, **Domina**, **Kempinski** and TUI's **Paladien** brand.

Starwood Hotels & Resorts Worldwide has been among the fastest growing international hotel groups in Greece. Starwood added the Mystique on Santorini and took over the management of the three-hotel Astir Palace resort complex in Vouliagmeni, a seaside suburb of Athens. Of those three hotels, Arion joined **The Luxury Collection** brand, Nafsika became a **Westin**, while Aphrodite is scheduled to reopen in 2011 as the first **W Hotel** in Greece. Starwood also agreed with Costa Navarino to operate two resorts on the Peloponnese under the Luxury Collection and the Westin brands when they open in 2010. Starwood's total room count is, thus, expected to exceed the 2,000 mark by 2011.

A new generation of integrated resorts is currently under development in various parts of the country. These resorts are mixed-use investments including smaller or larger residential components and, in some cases, golf courses. Developers have been signing contracts with international hotel groups to operate the hotel elements of these resorts under their brands such as **Kempinski**, **Chedi** by GHM, **Aman**, **Banyan Tree**, **Soneva** by Six Senses, **Oberoi**, **Fairmont** and **Raffles**.

Other notable changes after the 2005 edition of the Greek Hotel Branding Report include the following:

- The former **Hilton Rhodes** has been renamed the Imperial Rhodes by its new owners.
- The two Copsis resort hotels on Crete and Rhodes left **Sofitel**.
- The Holiday Inn Athens became the **Crowne Plaza**.
- A new generation of resort brands – i.e. **Sensatori**, **Sensimar** and **SENTIDO** – has been introduced by the two mega tour operators TUI and Thomas Cook.
- New arrivals to Greece include global hotel brands such as **Sol Melia**, **Westin** and **Mövenpick**.

Table 8 International Hotel Brands with a Presence in Greece in 2009

| International Hotel Brands | No. of Hotels | No. of Rooms | Average No. of Rooms | Hotels in 2005 | Rooms in 2005 |
|---|---------------|---------------|----------------------|----------------|---------------|
| ActiSun Hotels (Alltours) | 1 | 342 | 342 | | |
| Best Western | 22 | 1,367 | 62 | 22 | 1,537 |
| Blue & White Hotels (Groupe Heliades) | 3 | 260 | 87 | 5 | 710 |
| Calimera Aktivhotels (Rewe) | 3 | 765 | 255 | 3 | 768 |
| Club Méditerranée (Accor) | 2 | 801 | 401 | 4 | 1,713 |
| Club alltoura (Alltours) | 10 | 3,206 | 321 | 5 | 1,060 |
| Crowne Plaza (InterContinental Hotels Group) | 1 | 192 | 192 | - | - |
| Golden Tulip Hotels | 2 | 293 | 147 | 2 | 288 |
| Hapimag | 3 | 298 | 99 | 3 | 299 |
| Hilton (Hilton Group plc) | 1 | 542 | 542 | 2 | 930 |
| Holiday Club (Alltours) | 3 | 868 | 289 | 5 | 1,199 |
| Holiday Inn (InterContinental Hotels Group) | 2 | 371 | 186 | 3 | 560 |
| Hyatt International | 1 | 152 | 152 | 1 | 152 |
| Iberostar | 12 | 3,377 | 281 | 11 | 2,590 |
| InterContinental (InterContinental Hotels Group) | 1 | 543 | 543 | 1 | 559 |
| LTI International Hotels (Rewe) | 2 | 728 | 364 | 1 | 255 |
| Magic Life (TUI) | 1 | 320 | 320 | 4 | 1,352 |
| Mark Warner | 2 | 439 | 220 | | |
| Marriott International | 1 | 314 | 314 | 1 | 259 |
| Melia (Sol Melia) | 1 | 136 | 136 | - | - |
| Mövenpick Hotels & Resorts | 1 | 285 | 285 | - | - |
| Neilson (Thomas Cook) | 6 | 574 | 96 | - | - |
| Novotel (Accor) | 1 | 196 | 196 | 1 | 195 |
| Robinson Club (TUI) | 2 | 614 | 307 | 3 | 927 |
| Sensatori (TUI/Thomson) | 1 | 410 | 410 | - | - |
| Sensimar (TUI) | 2 | 418 | 209 | - | - |
| SENTIDO Hotels & Resorts (Thomas Cook) | 3 | 775 | 258 | - | - |
| Sofitel (Accor) | 1 | 345 | 345 | 3 | 1,114 |
| Sol (Sol Melia) | 1 | 651 | 651 | | |
| Sunwing Resorts (Thomas Cook) | 2 | 452 | 226 | 2 | 452 |
| The Luxury Collection (Starwood Hotels & Resorts Worldwide) | 6 | 930 | 155 | 4 | 758 |
| Ventaglio | 3 | 541 | 180 | 4 | 731 |
| Westin Hotels & Resorts (Starwood Hotels & Resorts Worldwide) | 1 | 162 | 162 | - | - |
| Total | 104 | 21,667 | 208 | 95 | 19,116 |

Source: Koutoulas Hotel Database

CYPRriot HOTEL BRANDS

Cypriot hospitality 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 10 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, and also owns the Mykonos Theoxenia, a design hotel. Six of the hotels that were part of the Louis portfolio in 2005 have left the group.

One of the fastest growing players in the Greek hotel industry is **Atlantica**, a Cyprus-based company that is partly owned by TUI. It has added eight hotels since 2005 and more than trebled its room inventory.

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 (partly owned by tour operator Thomas Cook) as well as **Cyprotels** and **Leptos Calypso Hotels** also operate between one and two resort hotels in Greece.

Following their expansion into Greece, these six Cypriot brands presently control 26 hotels with 6,723 rooms – or 1.7% 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 Melia hotels in Athens.

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

Table 9 Cypriot Hotel Brands with a Presence in Greece in 2009

| Cypriot Hotel Brands | No. of Hotels | No. of Rooms | Average No. of Rooms | Hotels in 2005 | Rooms in 2005 |
|---|---------------|--------------|----------------------|----------------|---------------|
| Amathus (Lanitis Group of Companies) | 1 | 355 | 355 | 1 | 334 |
| Aqua Sol (Thomas Cook) | 2 | 468 | 234 | 2 | 435 |
| Atlantica Hotels (TUI) | 11 | 2,634 | 239 | 3 | 756 |
| Cyprotels Hotels & Resorts (Libra Holidays Group) | 1 | 235 | 235 | 1 | 230 |
| Leptos Calypso Hotels | 1 | 200 | 200 | 1 | 200 |
| Louis Hotels | 10 | 2,831 | 283 | 16 | 3,519 |
| Total | 26 | 6,723 | 259 | 24 | 5,474 |

Source: Koutoulas Hotel Database

NATIONAL GREEK HOTEL BRANDS

Several Greek hotel operators have introduced and established their own brands. Until recently, the market leader has been **Grecotel**, a hotel management company that is 50% owned by TUI and 50% by the Daskalantonakis family. The recent restructuring of the hotel portfolio of the Daskalantonakis family led to the creation of three different brands: **Aquila** (a local Cretan brand), **Grecotel** (resort hotel division) and **Classical Hotels** (city hotel division with 1,569 rooms

in eleven hotels), with the two latter brands being part of the **N. Daskalantonakis Group**. This company is the only Greek hotel chain with a presence outside the country's borders; its Classical division operates three hotels – the Sheraton Sofia Balkan Hotel in Bulgaria, the Classical Metropol Palace in Serbia and the Bodrum Blue South Beach in Turkey – which have not been included in the room count of the present report.

Mitsis Hotels overtook Greotel following the addition of three hotels since 2005 and is now the country's largest hotel brand with a 4,787-room inventory (as compared to the 4,473 hotel rooms of Greotel). Mitsis also owns the Sofitel Athens Airport Hotel. Other major national brands include **Aldemar** (2,450 rooms in eight hotels), **Helios Hotels** (1,566 rooms in seven hotels), **Divani** (1,464 rooms in seven city and resort hotels) as well as the five-hotel portfolio of **Mareblue** with a total of 1,300 rooms.

One notable newcomer is **Aquis**, a resort hotel operator that has been growing aggressively since its recent inception. Totalling 2,235 rooms in eight hotels, it has already established itself as the eighth largest hotel group in Greece.

Another newly formed hotel company is **Sunshine Vacation Clubs**. Its portfolio comprises three of the hotels previously run under the Magic Life brand.

In addition to the larger brands, there are several specialist boutique hotel operators with a much smaller room count. They include, for instance, **bluegr Mamidakis Hotels** with four hotels, the four-unit **Grace Hotels** (which includes two of the former **Tsimaras Family Hotels & Resorts's** art-inspired properties) as well as the **Country Club Hotels**, two stylishly appointed mountain retreats.

In total, there are 29 Greek brands operating in at least two regions of the country. These brands control 155 hotels with a total of 31,639 rooms or 7.9% of the country's room capacity. A detailed listing of all hotels featuring a national brand is included in Appendix 3.

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 **G-Hotels** units in Chalkidiki with a total of 1,521 rooms, the **Kipriotis** chain with four upscale hotels on Kos (partly co-branded by Iberostar) and one on nearby Rhodes featuring 1,706 rooms, as well as the **Esperia** group of seven hotels and 1,563 rooms on Rhodes.

Local brands also include some of the country's few integrated multi-hotel resorts, i.e. the **Porto Carras Grand Resort** and the **Sani Resort** in Chalkidiki. Sani also operates the unbranded all-inclusive Oceania Club.

Of the original five-unit portfolio of **Maris**, only two hotels remain with the owner's brand. Two hotels are now run by Aquis and a third one has joined Mövenpick.

Table 10 National Greek Hotel Brands in 2009

| National Hotel Brands | No. of Hotels | No. of Rooms | Average No. of Rooms | Hotels in 2005 | Rooms in 2005 |
|---|---------------|---------------|----------------------|----------------|---------------|
| Aegean Star Hotels | 5 | 1,237 | 247 | 3 | 601 |
| Airotel Group | 5 | 500 | 100 | 5 | 500 |
| AKS Hotels | 4 | 823 | 206 | 4 | 822 |
| Aldemar Hotels & Spa | 8 | 2,450 | 306 | 7 | 2,485 |
| Amalia Hotels | 5 | 772 | 154 | 6 | 909 |
| Anatolia Hotels | 2 | 125 | 63 | - | - |
| Aquis Hotels & Resorts | 8 | 2,235 | 279 | - | - |
| bluegr Mamidakis Hotels | 4 | 556 | 139 | 4 | 556 |
| Capsis Hotels | 3 | 558 | 186 | 3 | 576 |
| Capsis Hotels & Resorts | 2 | 1,156 | 578 | 2 | 1,410 |
| Chandris Hotels & Resorts | 5 | 1,253 | 251 | 4 | 1,041 |
| Classical Hotels (N. Daskalantonakis Group) | 11 | 1,569 | 143 | - | - |
| Country Club Hotels | 2 | 47 | 24 | 4 | 67 |
| Divani Collection | 7 | 1,464 | 209 | 6 | 1,411 |
| Domotel | 3 | 184 | 61 | - | - |
| Eden Hotels & Resorts | 2 | 383 | 192 | - | - |
| Electra Hotels & Resorts | 4 | 710 | 178 | 4 | 718 |
| Grace Hotels | 4 | 122 | 31 | - | - |
| Grecotel (TUI, N. Daskalantonakis Group) | 19 | 4,473 | 235 | 31 | 6,626 |
| Helios Hotels & Resorts | 7 | 1,566 | 224 | 7 | 1,640 |
| Hydroussa | 2 | 62 | 31 | 2 | 62 |
| Mareblue Hotels & Resorts | 5 | 1,300 | 260 | - | - |
| Mitsis Hotels | 16 | 4,787 | 299 | 13 | 3,546 |
| Philian Art & Design Hotels | 4 | 113 | 28 | - | - |
| Santa Marina Hotels | 3 | 160 | 53 | 2 | 140 |
| Santikos Hotels & Resorts | 4 | 266 | 67 | - | - |
| Star Hotels | 5 | 1,122 | 224 | - | - |
| Sunshine Vacation Clubs | 3 | 1,022 | 341 | - | - |
| Xenotel Grouphotel | 3 | 624 | 208 | - | - |
| Total | 155 | 31,639 | 204 | 110 | 23,201 |

Source: Koutoulas Hotel Database

Some of the table's new entries have been introduced as umbrella brands for existing hotel portfolios owned by the same person or family as in the case of Rhodes-based **Harmony Resorts**. Among the local brands are also small portfolios of boutique hotels such as **Petasos Hotels** or the design-oriented **Yes! Hotels**.

The 45 local brands represent a total of 167 hotels with 23,267 rooms or 5.8% of the country's room capacity. A detailed listing of all hotels featuring a local brand is included in Appendix 4.

Table 11 Local Greek Hotel Brands in 2009

| Local Hotel Brands | No. of Hotels | No. of Rooms | Average No. of Rooms | Hotels in 2005 | Rooms in 2005 |
|-------------------------------------|---------------|---------------|----------------------|----------------|---------------|
| Acrotel | 4 | 347 | 87 | - | - |
| Aegeon Hotels | 4 | 162 | 41 | 3 | 153 |
| Aquila Hotels & Resorts | 4 | 1,089 | 272 | - | - |
| Cambourakis Group of Hotels | 2 | 1,026 | 513 | 2 | 1,026 |
| Castello Hotels | 2 | 163 | 82 | - | - |
| Cyan Group of Hotels | 3 | 703 | 234 | - | - |
| Delphi Leading Hotels | 3 | 132 | 44 | 4 | 152 |
| Diana Hotels | 4 | 331 | 83 | 3 | 291 |
| Douros Group of Hotels | 4 | 275 | 69 | - | - |
| Elounda S.A. | 3 | 277 | 92 | 3 | 401 |
| Esperia Hotel Group | 6 | 1,563 | 261 | 7 | 2,008 |
| Fegoudakis Hotels | 5 | 256 | 51 | 4 | 223 |
| G. & E. Karamolegos Group of Hotels | 4 | 240 | 60 | 4 | 226 |
| G-Hotels | 5 | 1,521 | 304 | - | - |
| Galaxy Economou Hotels | 2 | 180 | 90 | - | - |
| Giannoulis Hotels & Resorts | 5 | 621 | 124 | - | - |
| Golden Hotels | 2 | 331 | 166 | - | - |
| Harmony Resorts | 3 | 1,012 | 337 | - | - |
| Hersonissos Group Hotels | 5 | 720 | 144 | - | - |
| Kanapitsa Hotels | 2 | 95 | 48 | - | - |
| Kipriotis Hotels | 5 | 1,706 | 341 | 6 | 1,699 |
| Lakitira Hotels | 3 | 585 | 195 | - | - |
| Ledra Hotels & Villas | 3 | 232 | 77 | - | - |
| M Hotels | 3 | 693 | 231 | - | - |
| Mamidakis Hotel Experience | 2 | 384 | 192 | 2 | 384 |
| Maris Hotels | 2 | 693 | 347 | 5 | 1,420 |
| Minoan Hotels Group | 7 | 203 | 29 | - | - |
| Oceanos Hotels Group | 4 | 48 | 12 | - | - |
| Oscar Hotels | 3 | 241 | 80 | - | - |
| P.A.P Corp. | 4 | 463 | 116 | 4 | 410 |
| Petasos Hotels | 3 | 258 | 86 | 4 | 222 |
| Porto Carras Grand Resort | 4 | 1,039 | 260 | 4 | 1,044 |
| Resorts of Mykonos | 6 | 321 | 54 | - | - |
| Rethymnotels | 8 | 1,088 | 136 | - | - |
| Rocabella Hotels & Spas | 2 | 57 | 29 | - | - |
| Sani Resort | 4 | 843 | 211 | 4 | 833 |
| Sbokos Hotel Group | 3 | 775 | 258 | - | - |
| Sergis Hotels & Studios | 5 | 269 | 54 | - | - |
| Smile Hotels | 2 | 239 | 120 | - | - |
| The Myconian Collection | 4 | 451 | 113 | 4 | 449 |
| Theoxenia Palace Hotels | 3 | 159 | 53 | - | - |
| Vantaris Hotels | 2 | 270 | 135 | - | - |
| Xenos Group Hotels | 7 | 896 | 128 | - | - |
| Yes! Hotels | 4 | 107 | 27 | 4 | 107 |
| Zantotel Astir Hotels | 2 | 203 | 102 | - | - |
| Total | 167 | 23,267 | 139 | 80 | 12,946 |

Source: Koutoulas Hotel Database

HOTEL BRANDS OPERATED BY TOUR OPERATORS

Europe's two largest tour operators TUI and Thomas Cook as well as the two leading German operators Rewe and Alltours have a major 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 two resorts, **Magic Life** with one resort as well as its new brands **Sensatori** and **Sensimar** with one and two resorts, respectively. 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 six brands, TUI is Greece's largest hotel operator controlling a total of 36 hotels with 8,869 rooms (2.2% of all hotel rooms in Greece). Other TUI brands that until recently had a presence in Greece include Iberotel and Paladien.

Thomas Cook operates a total of 2,269 hotel rooms in Greece through four of its affiliated brands: **Neilson** (six resorts), **SENTIDO** (three resorts), **Sunwing Resorts** (two resorts) and Cyprus-based **Aqua Sol** (two resorts). Significantly larger is the Greek hotel portfolio of Alltours comprising the brands **ActiSun** (one resort), **Club alltoura** (ten resorts) and **Holiday Club** (three resorts) that add up to 4,416 rooms. Rewe's hotel operations in Greece include three **Calimera Aktivhotels** and two **LTI International Hotels** totalling 1,493 rooms.

Several smaller tour operators have also introduced their own hotel brands in Greece. Among them is the Italian operator Ventaglio owning the **VentaClub** brand, the French company Groupe Heliades with the **Blue & White Hotels**, UK-based **Mark Warner** operating two resorts on Kos and the Peloponnese as well as the Cyprus-based Libra Holidays Group with its **Cyprotels** group.

The 19 tour operator-controlled brands account for 77 hotels with 18,522 rooms (4.6% of total Greek hotel room capacity).

Tour operators that withdrew their hotel brands from Greece since the 2005 edition of the Greek Hotel Branding Report include the British company Contiki Holidays and Italy-based Gruppo Domina Vacanze.

Table 12 Tour Operator-Controlled Hotel Brands with a Presence in Greece in 2009

| Tour-Operator Controlled Hotel Brands | No. of Hotels | No. of Rooms | Average No. of Rooms |
|--|---------------|---------------|----------------------|
| TUI: Atlantica, Greotel, Magic Life, Robinson Club, Sensatori, Sensimar | 36 | 8,869 | 246 |
| Alltours: ActiSun, Club alltoura, Holiday Club | 14 | 4,416 | 315 |
| Thomas Cook: Aqua Sol, Neilson, SENTIDO, Sunwing Resorts | 13 | 2,269 | 175 |
| Rewe: Calimera Aktivhotels, LTI International Hotels | 5 | 1,493 | 299 |
| Ventaglio: VentaClubs | 3 | 541 | 180 |
| Mark Warner | 2 | 439 | 220 |
| Groupe Heliades: Blue & White Hotels | 3 | 260 | 87 |
| Libra Holidays Group: Cyprotels Hotels & Resorts | 1 | 235 | 235 |
| Total | 77 | 18,522 | 241 |

Source: Koutoulas Hotel Database

DUAL BRANDING

There are several Greek hotels that are affiliated with two brands. These cases of dual branding include Greek companies cooperating with an international brand but, at the same time, retaining their original brand. The Cypriot companies Atlantica and Louis Hotels have also affiliated some of their properties with the international hotel groups Iberostar and Sensatori.

Table 13 Greek Hotels Featuring Two Brands in 2009

| Location | Name of Hotel | Rooms | Brand I | Brand II |
|------------------------------|---------------------------------------|--------------|-----------------------|--------------|
| Alonissos | VentaClub Marpunta Village | 107 | Ventaglio | Santikos |
| Athens | Best Western Esperia Palace Hotel | 175 | Best Western | Star Hotels |
| Athens | Electra Palace | 155 | Golden Tulip | Electra |
| Corfu | Iberostar Kerkyra Golf | 240 | Iberostar | Louis Hotels |
| Corfu | Iberostar Regency Beach Hotel | 222 | Iberostar | Louis Hotels |
| Corfu | SENTIDO Aeolos Beach Resort | 310 | SENTIDO | Mareblue |
| Crete | ActiSun Aldemar Cretan Village | 342 | ActiSun Hotels | Aldemar |
| Crete | Atlantica Sensatori Resort | 410 | Sensatori | Atlantica |
| Crete | Blue Palace Resort & Spa | 251 | The Luxury Collection | Sbokos |
| Crete | Iberostar Creta Marine | 359 | Iberostar | Aegean Star |
| Crete | Iberostar Creta Panorama | 282 | Iberostar | Aegean Star |
| Crete | Iberostar Mirabello Beach & Village | 311 | Iberostar | M Hotels |
| Kos | Iberostar Kipriotis Panorama & Suites | 436 | Iberostar | Kipriotis |
| Kos | Iberostar Panorama Family | 203 | Iberostar | Kipriotis |
| Kos | Lakitira Resort Hotel & Village | 246 | Mark Warner | Lakitira |
| Kos | Sol Kipriotis Village | 651 | Sol | Kipriotis |
| Mykonos | Santa Marina Resort & Villas | 96 | The Luxury Collection | Santa Marina |
| Rhodes | Club alltoura Mitsis Faliraki Beach | 330 | Club alltoura | Mitsis |
| Rhodes | Club alltoura Mitsis Rhodos Village | 407 | Club alltoura | Mitsis |
| Thessaloniki | Electra Palace | 138 | Golden Tulip | Electra |
| Zante | Iberostar Plagos Beach | 161 | Iberostar | Louis Hotels |
| Total number of rooms | | 5,832 | | |

Source: Koutoulas Hotel Database

DISMANTLED GREEK 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. Starwood took over the management of

Astir's last asset, the Astir Palace complex in Vouliagmeni, in 2006 and rebranded the latter's three units as Westin, Luxury Collection and W hotels. The first two hotels are currently operating, the third one is due to open as a W in 2011 following renovation.

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 as was the case with the hotel management company operating under the **Midas** brand, following the bankruptcy of the parent company Plotin, one of the country's largest incoming tour operators.

Several hotel brands listed in the 2005 of the Greek Hotel Branding Report have been retired since then. These national and local brands included the following:

- **Tsimaras Family Hotels & Resorts** (three hotels with 91 rooms in Patras, Kefalonia and Ithaca): Two hotels are now part of Grace Hotels.
- **AM Hoteliers** (two hotels with 200 rooms in Thessaly): The Xenia Portaria is now part of Star Hotels.
- **Astir Palace** (three hotels with 526 rooms near Athens): Two hotels now feature Starwood's brands Westin and The Luxury Collection.
- **Olympic Hotels** (two hotels with 390 rooms in Athens): The Olympic Palace has been acquired by Yes! Hotels and is expected to reopen in late 2009 as a design hotel under a different name.
- **Santa Marina Hotels II** (six hotels with 782 rooms on Crete): Most units of this brand are now part of Giannoulis Hotels & Resorts and Cyan Group of Hotels.

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 of the World and the Great Hotels Organisation, actively pursued the growth of their membership base over recent years. They now have 15, 28 and 27 hotel members in Greece, respectively. The notable growth of Small Luxury Hotels's presence in Greece is in part attributable to its close relationship with the hotel operator P. Paleologos & Partners Co. managing a large portfolio of independent boutique hotels on Santorini, Mykonos and Paros.

In total, 11 international consortia have 97 member hotels in Greece (hotel consortia that are predominantly reservations-oriented, such as Utell and Supranational, are not considered in this report). There are also several Greek hotel consortia including Yades Heritage & Hospitality, Mediterranean Traditional Mansions and yourGreece.

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

Table 14 International Hotel Consortia with Member Hotels in Greece in 2005 and in 2009

| Consortium | Member Hotels in: | 2009 | 2005 |
|---|--------------------------|-------------|-------------|
| Boutique Hotels & Resorts International | | 6 | 2 |
| Charming Hotels | | - | 4 |
| Concorde Hotels | | - | 2 |
| Design Hotels | | 4 | 4 |
| Distinguished Hotels International | | - | 1 |
| Great Hotels Organisation | | 27 | 24 |
| ILA Châteaux & Hotels de Charme | | 1 | 1 |
| Leading Hotels of the World | | 15 | 12 |
| Luxe Worldwide Hotels | | 5 | 9 |
| Preferred Hotels | | 3 | 3 |
| Relais & Châteaux | | 6 | 2 |
| Small Luxury Hotels of the World | | 28 | 16 |
| Sterling Hotels | | 1 | - |
| Summit Hotels & Resorts | | - | 2 |
| WORLDHOTELS (formerly SRS) | | 1 | 2 |
| Total No. of Member Hotels | | 97 | 84 |

Source: Koutoulas Hotel Database

CONCLUSIONS

The capacity of branded hotels has grown significantly since 2005, with the total number of branded hotel rooms increasing by 35% over the last four years. However, Greece still has a low penetration of its hotel industry by brands when compared to other countries. Only 4% of the country's hotels (controlling 19% 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 180 rooms. This compares to just 42 rooms of the country's average hotel.

Nearly 55,000 hotel rooms – or 13.7% of the total – correspond to Greek national and local brands, with a further 21,667 rooms (5.4%) belonging to hotels operating under an international brand. An additional 1.7% of the country's room capacity is claimed by Cypriot hotel brands.

There are eight hotel brands in Greece with more than 10 hotels, i.e. **Best Western** (22 hotels), **Grecootel** (19 hotels), **Mitsis** (16 hotels), **Iberostar** (12 hotels), **Atlantica** (11 hotels), **Classical** (11 hotels), **Club alltoura** (10 hotels) and **Louis** (10 hotels). Mitsis and Grecootel, the country's largest hotel brands, control 4,787 and 4,473 rooms – or 1.2% and 1.1% – of the total room capacity available at Greek hotels, respectively.

Tour operator-controlled brands claim one fourth of all branded hotels in Greece accounting for 77 hotels with 18,522 rooms (4.6% of total Greek hotel room capacity). A good part of these accommodations operates on an all-inclusive basis. The German travel conglomerate TUI is dominating this hotel segment by having six of its hotel brands operating in the country. TUI has evolved to become Greece's largest hotel operator controlling a total of 36 hotels with 8,869 rooms (2.2% of all hotel rooms in Greece) carrying the **Grecootel**, **Atlantica**, **Magic Life**, **Robinson Club**, **Sensatori** and **Sensimar** brands.

Global brands, such as IHG's **InterContinental**, **Crowne Plaza** and **Holiday Inn**, Accor's **Club Med**, **Sofitel** and **Novotel**, **Hilton**, Starwood's **Luxury Collection** and **Westin** as well as **Marriott** and **Hyatt**, have established a rather weak presence of one or two hotels in Greece (except for The Luxury Collection featuring six hotels), 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, 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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APPENDICES

APPENDIX 1: HOTELS FEATURING AN INTERNATIONAL HOTEL BRAND

| <i>Brand</i> | <i>Location</i> | <i>Name of Hotel</i> | <i>Rooms</i> | <i>Total Rooms</i> |
|---------------------------------------|-----------------|--|--------------|--------------------|
| ActiSun Hotels (Alltours) | | | | 342 |
| 1 | Crete | ActiSun Aldemar Cretan Village | 342 | |
| Best Western | | | | 1,367 |
| 1 | Athens | Best Western Caterina | 47 | |
| 2 | Athens | Best Western Dore Hotel | 23 | |
| 3 | Athens | Best Western Elysium Design Hotel | 16 | |
| 4 | Athens | Best Western Esperia Palace Hotel | 175 | |
| 5 | Athens | Best Western Hotel Fenix | 134 | |
| 6 | Athens | Best Western Hotel Zinon | 55 | |
| 7 | Athens | Best Western Ilisia Hotel | 90 | |
| 8 | Athens | Best Western Museum Hotel | 90 | |
| 9 | Athens | Best Western Pythagorion Hotel | 56 | |
| 10 | Athens | Best Western The Park Hotel Piraeus | 80 | |
| 11 | Crete | Best Western Your Memories Hotel | 24 | |
| 12 | Evia | Best Western Lucy Hotel | 92 | |
| 13 | Macedonia | Best Western Lingos | 40 | |
| 14 | Macedonia | Best Western Saint George | 35 | |
| 15 | Mykonos | Best Western Hotel Psarou Garden | 26 | |
| 16 | Peloponnese | Best Western Hotel Europa | 80 | |
| 17 | Peloponnese | Best Western Hotel Rozos | 22 | |
| 18 | Peloponnese | Best Western Irida Resort | 9 | |
| 19 | Rhodes | Best Western Hotel Plaza | 136 | |
| 20 | Santorini | Best Western Paradise Hotel | 35 | |
| 21 | Santorini | Best Western The Museum Spa Wellness Hotel | 7 | |
| 22 | Zante | Best Western Zante Park | 95 | |
| Blue & White Hotels (Groupe Heliades) | | | | 260 |
| 1 | Evia | Grand Bleu Hotel-Club | 175 | |
| 2 | Paros | Paros Bay | 64 | |
| 3 | Santorini | Kokkinos Villas | 21 | |
| Calimera Aktivhotels (Rewe) | | | | 765 |
| 1 | Corfu | Calimera Miramare Beach | 243 | |
| 2 | Crete | Calimera Sirens Beach | 320 | |
| 3 | Rhodes | Calimera Porto Angeli | 202 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|---|-----------------|-------------------------------------|--------------|--------------------|
| Club Méditerranée (Accor) | | | | 801 |
| 1 | Attica | Club Med Athenia | 419 | |
| 2 | Evia | Club Med Gregolimano | 382 | |
| Club alltoura (Alltours) | | | | 3,206 |
| 1 | Corfu | Club alltoura Blue Bay Resort | 300 | |
| 2 | Corfu | Club alltoura Corfu Beach | 565 | |
| 3 | Crete | Club alltoura Fodele Beach | 412 | |
| 4 | Crete | Club alltoura Sunshine Lyktos Beach | 228 | |
| 5 | Kos | Club alltoura Marine Resort | 298 | |
| 6 | Kos | Club alltoura Marmari Beach | 320 | |
| 7 | Macedonia | Club alltoura Poseidon Palace | 196 | |
| 8 | Rhodes | Club alltoura Alfa Beach | 150 | |
| 9 | Rhodes | Club alltoura Mitsis Faliraki Beach | 330 | |
| 10 | Rhodes | Club alltoura Mitsis Rhodos Village | 407 | |
| Crowne Plaza (InterContinental Hotels Group) | | | | 192 |
| 1 | Athens | Crowne Plaza Athens City Center | 192 | |
| Golden Tulip Hotels | | | | 293 |
| 1 | Athens | Electra Palace Hotel | 155 | |
| 2 | Thessaloniki | Electra Palace Hotel | 138 | |
| Hapimag | | | | 298 |
| 1 | Athens | Hapimag Athen | 16 | |
| 2 | Crete | Hapimag Damnoni Kreta | 199 | |
| 3 | Peloponnese | Hapimag Porto Heli | 83 | |
| Hilton (Hilton Group plc) | | | | 542 |
| 1 | Athens | Hilton Athens | 542 | |
| Holiday Club (Alltours) | | | | 868 |
| 1 | Crete | Holiday Club Imperial Belvedere | 340 | |
| 2 | Kos | Holiday Club Achilleas Village | 346 | |
| 3 | Kos | Holiday Club Corali & Village | 182 | |
| Holiday Inn (InterContinental Hotels Group) | | | | 371 |
| 1 | Athens | Holiday Inn Attica Avenue | 194 | |
| 2 | Thessaloniki | Holiday Inn Thessaloniki | 177 | |
| Hyatt International | | | | 152 |
| 1 | Thessaloniki | Hyatt Regency | 152 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|---|-----------------|---------------------------------------|--------------|--------------------|
| Iberostar | | | | 3,377 |
| 1 | Corfu | Iberostar Kerkyra Golf | 240 | |
| 2 | Corfu | Iberostar Regency Beach | 222 | |
| 3 | Crete | Iberostar Creta Mare | 172 | |
| 4 | Crete | Iberostar Creta Marine | 359 | |
| 5 | Crete | Iberostar Creta Panorama | 282 | |
| 6 | Crete | Iberostar Mirabello Beach & Village | 311 | |
| 7 | Kos | Iberostar Panorama Family | 203 | |
| 8 | Kos | Iberostar Odysseus Astir | 266 | |
| 9 | Kos | Iberostar Kipriotis Panorama & Suites | 436 | |
| 10 | Rhodes | Iberostar Lindos Imperial | 451 | |
| 11 | Rhodes | Iberostar Lindos Royal Village | 274 | |
| 12 | Zante | Iberostar Plagos Beach | 161 | |
| InterContinental (InterContinental Hotels Group) | | | | 543 |
| 1 | Athens | Athenaeum InterContinental | 543 | |
| LTI International Hotels (Rewe) | | | | 728 |
| 1 | Corfu | LTI Gelina Village | 328 | |
| 2 | Rhodes | LTI Miraluna Village & Spa | 400 | |
| Magic Life (TUI) | | | | 320 |
| 1 | Kos | Club Magic Life Kos | 320 | |
| Mark Warner | | | | 439 |
| 1 | Kos | Lakitira Resort Hotel & Village | 246 | |
| 2 | Peloponnese | San Agostino Beach Resort | 193 | |
| Marriott International | | | | 314 |
| 1 | Athens | Ledra Marriott | 314 | |
| Melia (Sol Melia) | | | | 136 |
| 1 | Athens | Melia Athens | 136 | |
| Mövenpick Hotels & Resorts | | | | 285 |
| 1 | Crete | Mövenpick Resort & Thalasso Crete | 285 | |
| Neilson (Thomas Cook) | | | | 574 |
| 1 | Chalkidiki | Neilson Anastasia | 91 | |
| 2 | Limnos | Neilson Portomyrina Palace | 132 | |
| 3 | Lesbos | Neilson Aeolian Village | 115 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|--|-----------------|----------------------------------|--------------|--------------------|
| 4 | Peloponnese | Neilson Nautica Bay Beach Club | 112 | |
| 5 | Epirus | Neilson The Retreat | 101 | |
| 6 | Lefkada | Neilson Cosmos Beachclub | 23 | |
| Novotel (Accor) | | | | 196 |
| 1 | Athens | Novotel Athenes | 196 | |
| Robinson Club (TUI) | | | | 614 |
| 1 | Crete | Robinson Club Lyttos Beach | 347 | |
| 2 | Kos | Robinson Club Daidalos | 267 | |
| Sensatori (TUI/Thomson) | | | | 410 |
| 1 | Crete | Atlantica Sensatori Resort | 410 | |
| Sensimar (TUI) | | | | 418 |
| 1 | Crete | Sensimar Sea Side Resort & Spa | 233 | |
| 2 | Rhodes | Sensimar Port Royal Villas & Spa | 185 | |
| SENTIDO Hotels & Resorts (Thomas Cook) | | | | 775 |
| 1 | Corfu | SENTIDO Aeolos Beach Resort | 310 | |
| 2 | Crete | SENTIDO Anthoussa Resort & Spa | 210 | |
| 3 | Kos | SENTIDO Michelangelo | 255 | |
| Sofitel (Accor) | | | | 345 |
| 1 | Athens | Sofitel Athens Airport | 345 | |
| Sol (Sol Melia) | | | | 651 |
| 1 | Kos | Sol Kipriotis Village | 651 | |
| Sunwing Resorts (Thomas Cook) | | | | 452 |
| 1 | Crete | Sunwing Resort Makrygialos | 128 | |
| 2 | Rhodes | Sunwing Resort Kallithea | 324 | |
| The Luxury Collection (Starwood Hotels & Resorts Worldwide) | | | | 930 |
| 1 | Athens | Arion Resort & Spa, Astir Palace | 199 | |
| 2 | Athens | Grande Bretagne | 321 | |
| 3 | Crete | Blue Palace Resort & Spa | 251 | |
| 4 | Mykonos | Santa Marina Resort & Villas | 96 | |
| 5 | Santorini | Mystique | 18 | |
| 6 | Santorini | Villa Vedema | 45 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|---|-----------------|--|------------------------------|--------------------|
| Ventaglio | | | | 541 |
| 1 | Alonissos | VentaClub Marpunta Village | 107 | |
| 2 | Kos | VentaClub Caravia Beach | 294 | |
| 3 | Paros | VentaClub Porto Paros | 140 | |
| Westin Hotels & Resorts (Starwood Hotels & Resorts Worldwide) | | | | 162 |
| 1 | Athens | The Westin Athens Astir Palace Bach Resort | 162 | |
| | | | Total Number of Rooms | 21,667 |

APPENDIX 2: HOTELS FEATURING 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) | | | | 355 |
| 1 | Rhodes | Amathus Beach Hotel Rhodes | 355 | |
| Aqua Sol (affiliated with Thomas Cook) | | | | 468 |
| 1 | Crete | Elounda Aqua Sol Resort | 215 | |
| 2 | Rhodes | Sun Palace Hotel | 253 | |
| Atlantica Hotels (TUI) | | | | 2,634 |
| 1 | Crete | Atlantica Caldera Bay | 147 | |
| 2 | Crete | Atlantica Caldera Beach | 226 | |
| 3 | Crete | Atlantica Caldera Creta Paradise | 236 | |
| 4 | Crete | Atlantica Caldera Village | 119 | |
| 5 | Crete | Atlantica Sensatori Resort | 410 | |
| 6 | Kos | Atlantica Club Porto Bello Beach | 292 | |
| 7 | Kos | Atlantica Porto Bello Royal | 310 | |
| 8 | Rhodes | Atlantica Aegean Park | 124 | |
| 9 | Rhodes | Atlantica Club Aegean Blue | 278 | |
| 10 | Rhodes | Atlantica Imperial Resort | 262 | |
| 11 | Rhodes | Atlantica Princess | 230 | |
| Cyprotels Hotels & Resorts (Libra Holidays Group) | | | | 235 |
| 1 | Rhodes | Luca Cypria Faliraki | 235 | |
| Leptos Calypso Hotels | | | | 200 |
| 1 | Crete | Panorama | 200 | |
| Louis Hotels | | | | 2,831 |
| 1 | Corfu | Iberostar Kerkyra Golf | 240 | |
| 2 | Corfu | Iberostar Regency Beach Hotel | 222 | |
| 3 | Corfu | Louis Corcyra Beach Hotel | 370 | |
| 4 | Corfu | Louis Grand Hotel | 247 | |
| 5 | Corfu | Regency Esperides | 6 | |
| 6 | Crete | Louis Creta Princess Hotel | 420 | |
| 7 | Kefalonia | Apostolata Elios Island Resort & Spa | 155 | |
| 8 | Rhodes | Louis Colossos Beach | 742 | |
| 9 | Zante | Iberostar Plagos Beach | 161 | |
| 10 | Zante | Louis Zante Beach | 268 | |
| Total Number of Rooms | | | | 6,723 |

APPENDIX 3: HOTELS FEATURING 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 | | | | 1,237 |
| 1 | Chalkidiki | Aegean Melathron | 150 | |
| 2 | Crete | Creta Star | 324 | |
| 3 | Crete | Creta Royal | 122 | |
| 4 | Crete | Iberostar Creta Marine | 359 | |
| 5 | Crete | Iberostar Creta Panorama | 282 | |
| Airotel Group | | | | 500 |
| 1 | Athens | Airotel Alexandros | 93 | |
| 2 | Athens | Airotel Parthenon | 79 | |
| 3 | Athens | Airotel Stratos Vassilikos | 88 | |
| 4 | Evia | Airotel Malaconda Beach | 155 | |
| 5 | Peloponnese | Airotel Achaia Beach | 85 | |
| AKS Hotels | | | | 823 |
| 1 | Crete | AKS Annabelle Village | 264 | |
| 2 | Crete | AKS Minoa Palace | 129 | |
| 3 | Peloponnese | AKS Hinitsa Bay Hotel | 216 | |
| 4 | Peloponnese | AKS Porto Heli Hotel | 214 | |
| Aldemar Hotels & Spa | | | | 2,450 |
| 1 | Crete | ActiSun Aldemar Cretan Village | 342 | |
| 2 | Crete | Aldemar Knossos Royal Village | 346 | |
| 3 | Crete | Aldemar Knossos Royal Villas | 40 | |
| 4 | Crete | Aldemar Royal Mare Village | 385 | |
| 5 | Peloponnese | Aldemar Olympian Village | 444 | |
| 6 | Peloponnese | Aldemar Royal Olympian | 118 | |
| 7 | Rhodes | Aldemar Paradise Royal Mare | 575 | |
| 8 | Rhodes | Aldemar Paradise Village | 200 | |
| Amalia Hotels | | | | 772 |
| 1 | Athens | Amalia Athens | 98 | |
| 2 | Central Greece | Amalia Delphi | 184 | |
| 3 | Peloponnese | Amalia Nauplia | 172 | |
| 4 | Peloponnese | Amalia Olympia | 147 | |
| 5 | Thessaly | Amalia Kalambaka | 171 | |
| Anatolia Hotels | | | | 125 |
| 1 | Thessaloniki | Anatolia Thessaloniki | 69 | |
| 2 | Thrace | Anatolia Komotini | 56 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|--|-----------------|-------------------------------------|--------------|--------------------|
| Aquis Hotels & Resorts | | | | 2,235 |
| 1 | Corfu | Aquis Pelekas Beach Hotel | 181 | |
| 2 | Corfu | Aquis Sandy Beach Resort | 562 | |
| 3 | Corfu | Aquis Agios Gordios Beach Hotel | 246 | |
| 4 | Corfu | Aquis Corfu Holiday Palace Hotel | 256 | |
| 5 | Crete | Aquis Zorbas Village | 221 | |
| 6 | Crete | Aquis Bella Beach Hotel | 159 | |
| 7 | Crete | Aquis Silva Beach Hotel | 312 | |
| 8 | Kos | Aquis Marine Resort & Waterpark | 298 | |
| bluegr Mamidakis Hotels | | | | 556 |
| 1 | Athens | Life Gallery | 30 | |
| 2 | Crete | Minos Beach art'otel | 129 | |
| 3 | Crete | Candia Park Village | 222 | |
| 4 | Rhodes | Miramare Wonderland | 175 | |
| Capsis Hotels | | | | 558 |
| 1 | Crete | Capsis Astoria | 131 | |
| 2 | Thessaloniki | Capsis Bristol | 20 | |
| 3 | Thessaloniki | Capsis Thessaloniki | 407 | |
| Capsis Hotels & Resorts | | | | 1,156 |
| 1 | Crete | OUT OF THE BLUE Capsis Elite Resort | 465 | |
| 2 | Rhodes | Capsis Hotel Rhodes | 691 | |
| Chandris Hotels & Resorts | | | | 1,253 |
| 1 | Athens | Metropolitan Hotel | 374 | |
| 2 | Chios | Chios Chandris | 139 | |
| 3 | Corfu | Corfu Chandris | 277 | |
| 4 | Corfu | Dassia Chandris | 251 | |
| 5 | Thessaloniki | The MET | 212 | |
| Classical Hotels (N. Daskalantonakis Group) | | | | 1,569 |
| 1 | Athens | Classical 2, Fashion House Hotel | 115 | |
| 2 | Athens | Classical Athens Acropol | 167 | |
| 3 | Athens | Classical Athens Imperial | 262 | |
| 4 | Athens | Classical BabyGrand Hotel | 76 | |
| 5 | Athens | Classical King George Palace | 102 | |
| 6 | Athens | Classical Vouliagmeni Suites | 35 | |
| 7 | Crete | Classical Plaza Spa Suites | 86 | |
| 8 | Peloponnese | Classical e-Filoxenia | 188 | |
| 9 | Thessaloniki | Classical Makedonia Palace | 283 | |
| 10 | Thessaly | Classical Larissa Imperial | 150 | |
| 11 | Thrace | Classical Egnatia Grand | 105 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|---|-----------------|--------------------------------|--------------|--------------------|
| Country Club Hotels | | | | 47 |
| 1 | Central Greece | Country Club Hellas | 29 | |
| 2 | Peloponnese | Country Club Trikolonion | 18 | |
| Divani Collection | | | | 1,464 |
| 1 | Athens | Divani Apollon Palace & Spa | 286 | |
| 2 | Athens | Divani Apollon Suites | 56 | |
| 3 | Athens | Divani Caravel | 471 | |
| 4 | Athens | Divani Palace Acropolis | 250 | |
| 5 | Corfu | Divani Corfu Palace | 162 | |
| 6 | Thessaly | Divani Meteora | 165 | |
| 7 | Thessaly | Divani Palace Larissa | 74 | |
| Domotel | | | | 184 |
| 1 | Thessaloniki | Les Lazaristes | 74 | |
| 2 | Thessaly | Arni | 31 | |
| 3 | Thessaly | Xenia Volou | 79 | |
| Eden Hotels & Resorts | | | | 383 |
| 1 | Attica | Eden Beach Resort Hotel | 240 | |
| 2 | Peloponnese | Eden Beach Plaka Hotel | 143 | |
| Electra Hotels & Resorts | | | | 710 |
| 1 | Athens | Electra Hotel | 109 | |
| 2 | Athens | Electra Palace Hotel | 155 | |
| 3 | Rhodes | Electra Palace Hotel | 308 | |
| 4 | Thessaloniki | Electra Palace Hotel | 138 | |
| Grace Hotels | | | | 122 |
| 1 | Ithaca | Ithaki Grace Perantzada | 19 | |
| 2 | Kefalonia | Kefalonia Grace Emelisse | 63 | |
| 3 | Mykonos | Mykonos Grace | 31 | |
| 4 | Santorini | Santorini Grace | 9 | |
| Grecotel (TUI, N. Daskalantonakis Group) | | | | 4,473 |
| 1 | Attica | Grecotel Cape Sounio | 153 | |
| 2 | Chalkidiki | Grecotel Pella Beach | 205 | |
| 3 | Corfu | Grecotel Corfu Imperial | 301 | |
| 4 | Corfu | Grecotel Daphnila Bay Thalasso | 260 | |
| 5 | Corfu | Grecotel Eva Palace | 225 | |
| 6 | Crete | Grecotel Amirandes | 212 | |
| 7 | Crete | Grecotel Club Marine Palace | 316 | |
| 8 | Crete | Grecotel Creta Palace | 350 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|--------------------------------------|-----------------|---------------------------------------|--------------|--------------------|
| 9 | Crete | Grecotel El Greco | 333 | |
| 10 | Crete | Grecotel Kalliston | 211 | |
| 11 | Crete | Grecotel Marine Palace Suites | 59 | |
| 12 | Kos | Grecotel Kos Imperial Thalasso | 287 | |
| 13 | Kos | Grecotel Royal Park | 268 | |
| 14 | Mykonos | Grecotel Mykonos Blu | 111 | |
| 15 | Peloponnese | Grecotel Lakopetra Beach | 276 | |
| 16 | Peloponnese | Grecotel Mandola Rosa | 42 | |
| 17 | Peloponnese | Grecotel Olympia Oasis | 313 | |
| 18 | Peloponnese | Grecotel Olympia Riviera Thalasso | 198 | |
| 19 | Rhodes | Grecotel Rhodes Royal | 353 | |
| Helios Hotels & Resorts | | | | 1,566 |
| 1 | Attica | Grand Resort Lagonissi | 290 | |
| 2 | Crete | Elounda Bay Palace | 242 | |
| 3 | Crete | Elounda Beach | 249 | |
| 4 | Crete | Kalimera Kriti | 415 | |
| 5 | Crete | Kernos Beach | 241 | |
| 6 | Peloponnese | Amphitryon | 45 | |
| 7 | Peloponnese | Nafplia Palace | 84 | |
| Hydroussa | | | | 62 |
| 1 | Hydra | Hydroussa | 40 | |
| 2 | Skyros | Hydroussa | 22 | |
| Mareblue Hotels & Resorts | | | | 1,300 |
| 1 | Corfu | SENTIDO Aeolos Beach Resort | 310 | |
| 2 | Crete | Mareblue Neptuno Beach Resort | 140 | |
| 3 | Crete | Mareblue Village Hersonissos | 275 | |
| 4 | Rhodes | Mareblue Cosmopolitan Beach Resort | 377 | |
| 5 | Rhodes | Mareblue Lindos Bay Resort & Spa | 198 | |
| Mitsis Hotels | | | | 4,787 |
| 1 | Central Greece | Mitsis Galini Wellness Spa and Resort | 224 | |
| 2 | Corfu | Mitsis Roda Beach Resort and Spa | 388 | |
| 3 | Crete | Mitsis Rinela | 440 | |
| 4 | Crete | Mitsis Serita | 272 | |
| 5 | Epirus | Mitsis Grand Serai Congress and Spa | 216 | |
| 6 | Kos | Mitsis Family Village | 219 | |
| 7 | Kos | Mitsis Norida Beach | 455 | |
| 8 | Kos | Mitsis Ramira Beach | 338 | |
| 9 | Kos | Mitsis Summer Palace | 254 | |
| 10 | Rhodes | Club alltoura Mitsis Faliraki Beach | 330 | |
| 11 | Rhodes | Mitsis Grand Hotel | 405 | |
| 12 | Rhodes | Mitsis La Vita Beach Hotel | 126 | |
| 13 | Rhodes | Mitsis Lindos Memories | 70 | |
| 14 | Rhodes | Mitsis Petit Palais | 215 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|--|-----------------|---|--------------|--------------------|
| 15 | Rhodes | Club alltoura Mitsis Rhodos Village | 407 | |
| 16 | Rhodes | Mitsis Rodos Maris | 428 | |
| Philian Art & Design Hotels | | | | 113 |
| 1 | Skiathos | La Piscine Art Hotel | 42 | |
| 2 | Thessaloniki | Art Apartments | 5 | |
| 3 | Thessaloniki | Galaxy Art Hotel | 31 | |
| 4 | Thessaloniki | Plaza Art Hotel | 35 | |
| Santa Marina Hotels | | | | 160 |
| 1 | Central Greece | Santa Marina Arachova | 43 | |
| 2 | Central Greece | Santa Marina Arachova Resort & Spa | 21 | |
| 3 | Mykonos | Santa Marina Resort & Villas | 96 | |
| Santikos Hotels & Resorts | | | | 266 |
| 1 | Alonissos | VentaClub Marpunta Village | 107 | |
| 2 | Skiathos | Aegean Suites | 20 | |
| 3 | Skiathos | Skiathos Princess | 131 | |
| 4 | Thessaly | Santikos Mansion | 8 | |
| Star Hotels | | | | 1,122 |
| 1 | Athens | Best Western Esperia Palace Hotel | 175 | |
| 2 | Chalkidiki | Gerakina Beach - Sithonia Village Hotel | 577 | |
| 3 | Peloponnese | Porto Rio Hotel | 223 | |
| 4 | Thessaly | Volos Palace | 72 | |
| 5 | Thessaly | Xenia Palace Portaria | 75 | |
| Sunshine Vacation Clubs | | | | 1,022 |
| 1 | Corfu | Sunshine Corfu | 312 | |
| 2 | Crete | Sunshine Crete | 335 | |
| 3 | Rhodes | Sunshine Rhodes | 375 | |
| Xenotel Grouphotel | | | | 624 |
| 1 | Attica | Aquamarina | 130 | |
| 2 | Attica | Mare Nostrum Hotel Club | 356 | |
| 3 | Crete | King Minos Palace | 138 | |
| Total Number of Rooms | | | | 31,639 |

APPENDIX 4: HOTELS FEATURING A LOCAL HOTEL BRAND

| <i>Brand</i> | <i>Location</i> | <i>Name of Hotel</i> | <i>Rooms</i> | <i>Total Rooms</i> |
|-----------------------------|-----------------|-------------------------------|--------------|--------------------|
| Acrotel | | | | 347 |
| 1 | Chalkidiki | Athena Pallas | 173 | |
| 2 | Chalkidiki | Athena Villas | 4 | |
| 3 | Chalkidiki | Elea Village | 80 | |
| 4 | Chalkidiki | Lily Ann Beach & Village | 90 | |
| Aegeon Hotels | | | | 162 |
| 1 | Thessaloniki | Aegeon Hotel | 59 | |
| 2 | Thessaloniki | Egnatia Hotel | 49 | |
| 3 | Thessaloniki | Egnatia Palace | 43 | |
| 4 | Thessaloniki | Perea Hotel | 11 | |
| Aquila Hotels & Resorts | | | | 1,089 |
| 1 | Crete | Aquila Atlantis Hotel | 160 | |
| 2 | Crete | Aquila Elounda Village | 208 | |
| 3 | Crete | Aquila Porto Rethymno | 202 | |
| 4 | Crete | Aquila Rithymna Beach | 519 | |
| Cambourakis Group of Hotels | | | | 1,026 |
| 1 | Rhodes | Rodos Palace | 785 | |
| 2 | Rhodes | Mediterranean | 241 | |
| Castello Hotels | | | | 163 |
| 1 | Crete | Castello City Hotel | 68 | |
| 2 | Crete | Castello Village Resort | 95 | |
| Cyan Group of Hotels | | | | 703 |
| 1 | Crete | Apollonia Resort & Spa | 334 | |
| 2 | Crete | Santa Marina Resort | 208 | |
| 3 | Crete | Sitia Beach City Resort & Spa | 161 | |
| Delphi Leading Hotels | | | | 132 |
| 1 | Central Greece | Delphi Palace Hotel | 44 | |
| 2 | Central Greece | King Iniohos Hotel | 60 | |
| 3 | Central Greece | Pythia Art Hotel | 28 | |
| Diana Hotels | | | | 331 |
| 1 | Zante | Diana Hotel | 51 | |
| 2 | Zante | Diana Palace | 140 | |
| 3 | Zante | Filoxenia | 100 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|--|-----------------|---------------------------|--------------|--------------------|
| 4 | Zante | Meandros | 40 | |
| Douros Group of Hotels | | | | 275 |
| 1 | Athens | Adrian | 22 | |
| 2 | Athens | Jason Inn | 57 | |
| 3 | Athens | Jason Prime | 82 | |
| 4 | Athens | King Jason | 114 | |
| Elounda S.A. | | | | 277 |
| 1 | Crete | Elounda Mare | 81 | |
| 2 | Crete | Elounda Peninsula | 54 | |
| 3 | Crete | Porto Elounda | 142 | |
| Esperia Hotel Group | | | | 1,563 |
| 1 | Rhodes | Epsilon Apartments | 112 | |
| 2 | Rhodes | Esperia Hotel | 171 | |
| 3 | Rhodes | Esperides Beach | 530 | |
| 4 | Rhodes | Esperos Palace | 393 | |
| 5 | Rhodes | Esperos Village | 195 | |
| 6 | Rhodes | Olympos Beach | 162 | |
| Fegoudakis Hotels | | | | 256 |
| 1 | Chios | Golden Sand Hotel | 108 | |
| 2 | Chios | Grecian Castle Hotel | 55 | |
| 3 | Chios | Kyveli Apartments | 32 | |
| 4 | Chios | Sea View Resorts | 33 | |
| 5 | Chios | Sunset Hotel | 28 | |
| G. & E. Karamolegos Group of Hotels | | | | 240 |
| 1 | Santorini | Kamari Beach Hotel | 106 | |
| 2 | Santorini | Majestic Hotel | 61 | |
| 3 | Santorini | Rose Bay Hotel | 55 | |
| 4 | Santorini | Xenones Filotera | 18 | |
| G-Hotels | | | | 1,521 |
| 1 | Chalkidiki | Athos Palace | 407 | |
| 2 | Chalkidiki | Macedonia Sun | 147 | |
| 3 | Chalkidiki | Pallini Beach | 484 | |
| 4 | Chalkidiki | Simantro | 325 | |
| 5 | Chalkidiki | Theophano Imperial Palace | 158 | |
| Galaxy Economou Hotels | | | | 180 |
| 1 | Crete | Galaxy Hotel | 127 | |
| 2 | Crete | Galaxy Villas | 53 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|--|-----------------|---------------------------------------|--------------|--------------------|
| Giannoulis Hotels & Resorts | | | | 621 |
| 1 | Crete | Almyra Hotel & Village | 162 | |
| 2 | Crete | Cavo Spada Luxury Resort & Spa | 150 | |
| 3 | Crete | Grand Bay Beach Resort | 70 | |
| 4 | Crete | Santa Marina Beach Hotel Chania | 188 | |
| 5 | Crete | Santa Marina Plaza Hotel | 51 | |
| Golden Hotels | | | | 331 |
| 1 | Crete | Golden Star | 180 | |
| 2 | Crete | Golden Beach | 151 | |
| Harmony Resorts | | | | 1,012 |
| 1 | Rhodes | Elysium | 330 | |
| 2 | Rhodes | Rodos Palladium | 377 | |
| 3 | Rhodes | Sun Beach Resort Complex | 305 | |
| Hersonissos Group Hotels | | | | 720 |
| 1 | Crete | Hersonissos Hotel | 129 | |
| 2 | Crete | Hersonissos Maris | 204 | |
| 3 | Crete | Hersonissos Palace | 154 | |
| 4 | Crete | Hersonissos Park | 70 | |
| 5 | Crete | Hersonissos Village | 163 | |
| Kanapitsa Hotels | | | | 95 |
| 1 | Skiathos | Cape Kanapitsa Hotel Suites | 40 | |
| 2 | Skiathos | Kanapitsa Mare Hotel & Spa | 55 | |
| Kipriotis Hotels | | | | 1,706 |
| 1 | Kos | Sol Kipriotis Village | 651 | |
| 2 | Kos | Iberostar Panorama Family | 203 | |
| 3 | Kos | Iberostar Kipriotis Panorama & Suites | 436 | |
| 4 | Kos | Kipriotis Hippocrates Hotel | 168 | |
| 5 | Rhodes | Kipriotis Hotel Rhodes | 248 | |
| Lakitira Hotels | | | | 585 |
| 1 | Kos | Helona Resort | 256 | |
| 2 | Kos | Lakitira Resort Hotel & Village | 246 | |
| 3 | Kos | Lakitira Suites | 83 | |
| Ledra Hotels & Villas | | | | 232 |
| 1 | Crete | Domes of Elounda | 92 | |
| 2 | Crete | Elounda Blue Bay | 131 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|-----------------------------------|-----------------|-------------------------------------|--------------|--------------------|
| 3 | Crete | Pleiades Luxurious Villas | 9 | |
| M Hotels | | | | 693 |
| 1 | Crete | Coral Hotel | 165 | |
| 2 | Crete | Hermes Hotel | 217 | |
| 3 | Crete | Iberostar Mirabello Beach & Village | 311 | |
| Mamidakis Hotel Experience | | | | 384 |
| 1 | Crete | Arina Sand | 236 | |
| 2 | Crete | Minos Palace | 148 | |
| Maris Hotels | | | | 693 |
| 1 | Crete | Creta Maris | 547 | |
| 2 | Crete | Terra Maris | 146 | |
| Minoan Hotels Group | | | | 203 |
| 1 | Peloponnese | Apollon | 47 | |
| 2 | Peloponnese | Bungalows Phaistos | 6 | |
| 3 | Peloponnese | King Minos Luxury | 60 | |
| 4 | Peloponnese | Knossos | 18 | |
| 5 | Peloponnese | Minoa | 44 | |
| 6 | Peloponnese | Phaistos | 20 | |
| 7 | Peloponnese | Villa Lilly | 8 | |
| Oceanos Hotels Group | | | | 48 |
| 1 | Crete | Oceanos Belmondo | 8 | |
| 2 | Crete | Oceanos Palazzo Greco | 28 | |
| 3 | Crete | Oceanos Palazzo Residence | 2 | |
| 4 | Crete | Oceanos Porto del Colombo | 10 | |
| Oscar Hotels | | | | 241 |
| 1 | Athens | Oscar Hotel | 124 | |
| 2 | Athens | Oscar Hotel II | 40 | |
| 3 | Athens | Oscar Inn | 77 | |
| P.A.P Corp. | | | | 463 |
| 1 | Chalkidiki | Agionissi Resort | 69 | |
| 2 | Chalkidiki | Alexander the Great | 216 | |
| 3 | Chalkidiki | Xenia Ouranoupolis | 88 | |
| 4 | Thessaloniki | Astoria | 90 | |
| Petasos Hotels | | | | 258 |
| 1 | Mykonos | Mykonos Grand Hotel & Resort | 107 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|------------------------------------|-----------------|-----------------------------|--------------|--------------------|
| 2 | Mykonos | Petasos Beach Hotel | 133 | |
| 3 | Mykonos | Petasos Town Hotel | 18 | |
| Porto Carras Grand Resort | | | | 1,039 |
| 1 | Chalkidiki | Meliton Deluxe | 480 | |
| 2 | Chalkidiki | Sithonia | 453 | |
| 3 | Chalkidiki | Villa Galini | 17 | |
| 4 | Chalkidiki | Village Inn | 89 | |
| Resorts of Mykonos | | | | 321 |
| 1 | Mykonos | Nissaki | 25 | |
| 2 | Mykonos | Palladium | 40 | |
| 3 | Mykonos | Petinos | 74 | |
| 4 | Mykonos | Petinos Beach | 24 | |
| 5 | Mykonos | Saint John | 148 | |
| 6 | Mykonos | Spirit of Mykonos Residence | 10 | |
| Rethymnotels | | | | 1,088 |
| 1 | Crete | Aegean Pearl | 90 | |
| 2 | Crete | Atrium | 130 | |
| 3 | Crete | Ideon | 90 | |
| 4 | Crete | Minos | 180 | |
| 5 | Crete | Minos Mare | 127 | |
| 6 | Crete | Minos Mare Royal Hotel | 71 | |
| 7 | Crete | Pearl Beach | 160 | |
| 8 | Crete | Theartemis Palace | 240 | |
| Rocabella Hotels & Spas | | | | 57 |
| 1 | Mykonos | Rocabella Mykonos | 19 | |
| 2 | Santorini | Rocabella Santorini | 38 | |
| Sani Resort | | | | 843 |
| 1 | Chalkidiki | Porto Sani Village | 103 | |
| 2 | Chalkidiki | Sani Asterias Suites | 50 | |
| 3 | Chalkidiki | Sani Beach Club | 215 | |
| 4 | Chalkidiki | Sani Beach Hotel | 475 | |
| Sbokos Hotel Group | | | | 775 |
| 1 | Crete | Agapi Beach | 320 | |
| 2 | Crete | Blue Palace Resort & Spa | 251 | |
| 3 | Crete | Cretan Malia Park | 204 | |
| Sergis Hotels & Studios | | | | 269 |
| 1 | Naxos | Hotel Sergis | 48 | |

| Brand | Location | Name of Hotel | Rooms | Total Rooms |
|--------------------------------|-----------------|---------------------------|--------------|--------------------|
| 2 | Naxos | Naxos Holidays | 74 | |
| 3 | Naxos | Naxos Palace | 77 | |
| 4 | Naxos | Naxos Sun Studios | 40 | |
| 5 | Naxos | Naxos Sunny Beach | 30 | |
| Smile Hotels | | | | 239 |
| 1 | Crete | Iolida Beach | 139 | |
| 2 | Crete | Iolida Village | 100 | |
| The Myconian Collection | | | | 451 |
| 1 | Mykonos | Myconian Ambassador Hotel | 72 | |
| 2 | Mykonos | Myconian Imperial Resort | 111 | |
| 3 | Mykonos | Myconian K Hotels | 156 | |
| 4 | Mykonos | Royal Myconian Resort | 112 | |
| Theoxenia Palace Hotels | | | | 159 |
| 1 | Athens | Piraeus Theoxenia | 76 | |
| 2 | Athens | Theoxenia House | 12 | |
| 3 | Athens | Theoxenia Palace | 71 | |
| Vantaris Hotels | | | | 270 |
| 1 | Crete | Vantaris Beach | 150 | |
| 2 | Crete | Vantaris Palace | 120 | |
| Xenos Group Hotels | | | | 896 |
| 1 | Zante | Admiral Argassi | 96 | |
| 2 | Zante | Admiral Tsilivi | 170 | |
| 3 | Zante | Captain's Hotel | 77 | |
| 4 | Zante | Commodore | 161 | |
| 5 | Zante | Planos Aparthotel | 90 | |
| 6 | Zante | Planos Bay Hotel | 110 | |
| 7 | Zante | Zante Maris Hotel & Spa | 192 | |
| Yes! Hotels | | | | 107 |
| 1 | Athens | Kefalari Suites | 13 | |
| 2 | Athens | Periscope | 22 | |
| 3 | Athens | Semiramis | 51 | |
| 4 | Athens | Twentyone | 21 | |
| Zantotel Astir Hotels | | | | 203 |
| 1 | Zante | Zantotel Astir Beach | 83 | |
| 2 | Zante | Zantotel Astir Palace | 120 | |
| Total Number of Rooms | | | | 23,267 |

APPENDIX 5: MEMBERS OF INTERNATIONAL HOTEL CONSORTIA IN GREECE

| Consortium | Member Hotels in Greece |
|---|---|
| Boutique Hotels & Resorts International | <ul style="list-style-type: none"> ▪ Aquila Elounda Village, Crete ▪ Lato Boutique Hotel, Crete ▪ Aegea Hotel, Evia ▪ Imaret, Macedonia ▪ Astarte Suites, Santorini ▪ The Tsitouras Collection, Santorini |
| Design Hotels | <ul style="list-style-type: none"> ▪ Fresh Hotel, Athens ▪ Life Gallery, Athens ▪ Semiramis, Athens ▪ Mykonos Theoxenia, Mykonos |
| Great Hotels Organisation | <ul style="list-style-type: none"> ▪ King George Palace, Athens ▪ St. George Lycabettus, Athens ▪ Piraeus Theoxenia, Athens ▪ Plaza Resort, Attica ▪ Porto Sani Village, Chalkidiki ▪ Sani Asterias Suite, Chalkidiki ▪ Sani Beach Club, Chalkidiki ▪ Sani Beach Hotel, Chalkidiki ▪ Aldemar Knossos Royal Village, Crete ▪ Aldemar Royal Mare, Crete ▪ Blue Palace Resort & Spa, Crete ▪ Domes of Elounda, Crete ▪ Minoa Palace Resort & Spa, Crete ▪ OUT OF THE BLUE Capsis Elite Resort, Crete ▪ St. Nicolas Bay, Crete ▪ Elounda Gulf Villas & Suites, Crete ▪ Cavo Tagoo, Mykonos ▪ Ostraco Suites, Mykonos ▪ Tharroe of Mykonos, Mykonos ▪ Aldemar Royal Olympian, Peloponnese ▪ Aldemar Paradise Royal Mare, Rhodes ▪ Atrium Palace Thalasso Spa Resort, Rhodes ▪ Atrium Prestige Thalasso Spa Resort, Rhodes ▪ Capsis Hotel Rhodes, Rhodes ▪ Ixian Grand, Rhodes ▪ Honeymoon Petra Villas, Santorini ▪ Majestic Hotel, Santorini |
| 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, Attica ▪ King George Palace, Athens ▪ Life Gallery, Athens ▪ Danai Beach Resort & Villas, Chalkidiki ▪ Elounda Beach, Crete ▪ Elounda Bay, Crete ▪ Kivotos, Mykonos ▪ Myconian Imperial Thalasso Spa, Mykonos ▪ Royal Myconian Thalasso Spa, Mykonos ▪ Amphitryon, Peloponnese ▪ Mandola Rosa, Peloponnese ▪ Lindian Village, Rhodes ▪ Katikies, Santorini |
| Luxe Worldwide Hotels | <ul style="list-style-type: none"> ▪ Amalia Hotel, Athens ▪ Andronikos Village Hotel, Mykonos ▪ Mykonos View by Semeli, Mykonos ▪ Semeli, Mykonos ▪ Astir of Paros, Paros |
| Preferred Hotels | <ul style="list-style-type: none"> ▪ Greotel Cape Sounion, Athens ▪ Porto Elounda, Crete ▪ Greotel Mykonos Blu, Mykonos |

| Consortium | Member Hotels in Greece |
|----------------------------------|---|
| Relais & Châteaux | <ul style="list-style-type: none"> ▪ Elounda Mare, Crete ▪ Imaret, Macedonia ▪ Myconian Ambassador Thalasso Spa, Mykonos ▪ Kirini, Santorini ▪ La Maltese, Santorini ▪ Zannos Melathron, Santorini |
| Small Luxury Hotels of the World | <ul style="list-style-type: none"> ▪ Baby Grand, Athens ▪ Theoxenia Palace, Athens ▪ Eagles Palace, Chalkidiki ▪ Elounda Gulf Villas & Suites, Crete ▪ Minos Beach art'otel, Crete ▪ St. Nicolas Bay Resort, Crete ▪ Belvedere, Mykonos ▪ Bill and Co Suites and Lounge, Mykonos ▪ Mykonos Grand Hotel & Resort, Mykonos ▪ Petasos Beach Resort & Spa, Mykonos ▪ Porto Mykonos, Mykonos ▪ Yria Resort, Paros ▪ Nafplia Palace, Peloponnese ▪ Lindos Blu, Rhodes ▪ Melenos Lindos, Rhodes ▪ Rodos Park Suites, Rhodes ▪ Canaves Oia, Santorini ▪ Carpe Diem, Santorini ▪ Chromata, Santorini ▪ Cosmopolitan Suites, Santorini ▪ Katikies, Santorini ▪ Notos Therme & Spa, Santorini, ▪ On The Rocks, Santorini ▪ San Antonio, Santorini ▪ Santorini Kastelli Resort, Santorini ▪ Aegean Suites, Skiathos ▪ Skiathos Princess, Skiathos ▪ Nikopolis, Thessaloniki |
| Sterling Hotels | <ul style="list-style-type: none"> ▪ Aquila Porto Rethymno, Crete |
| WORLDHOTELS | <ul style="list-style-type: none"> ▪ Royal Olympic, Athens |

**APPENDIX 6: ALPHABETICAL INDEX AND WEBSITES
OF ALL LISTED HOTEL BRANDS**

| | Brand (Company/Group) | Type of Brand | Website |
|----|---|----------------------|--|
| 1 | Acrotel | Local | www.acrotel.gr |
| 2 | ActiSun Hotels (Alltours) | International | www.alltours.de |
| 3 | Aegean Star Hotels | National | www.aegeanstar.com |
| 4 | Aegeon Hotels | Local | www.egnatia-hotel.gr |
| 5 | Airotel Group | National | www.airotel.gr |
| 6 | AKS Hotels | National | www.akshotels.com |
| 7 | Aldemar Hotels & Spa | National | www.aldemarhotels.com |
| 8 | Amalia Hotels | National | www.amalia.gr |
| 9 | Amathus (Lanitis Group of Companies) | Cypriot | www.amathus.com |
| 10 | Anatolia Hotels | National | www.anatoliahotel.gr |
| 11 | Aqua Sol (Thomas Cook) | Cypriot | www.aquasolhotels.com |
| 12 | Aquila Hotels & Resorts | Local | www.aquilahotels.com |
| 13 | Aquis Hotels & Resorts | National | www.aquisresorts.com |
| 14 | Atlantica Hotels (TUI) | Cypriot | www.atlanticahotels.com |
| 15 | Best Western | International | www.bestwestern.com/gr |
| 16 | Blue & White Hotels (Groupe Heliades) | International | www.bluewhite-hotels.gr |
| 17 | bluegr Mamidakis Hotels | National | www.bluegr.com |
| 18 | Calimera Aktivhotels (Rewe) | International | www.calimera.com |
| 19 | Cambourakis Group of Hotels | Local | www.rodos-palace.gr |
| 20 | Capsis Hotels | National | www.capsishotels.gr |
| 21 | Capsis Hotels & Resorts | National | www.capsis.com |
| 22 | Castello Hotels | Local | www.castellohotels.com |
| 23 | Chandris Hotels & Resorts | National | www.chandris.gr |
| 24 | Classical Hotels (N. Daskalantonakis Group) | National | www.classicalhotels.com |
| 25 | Club alltoura (Alltours) | International | www.alltours.de |
| 26 | Club Méditerranée (Accor) | International | www.accorhotels.com |
| 27 | Country Club Hotels | National | www.countryclub.gr |
| 28 | Crowne Plaza (InterContinental Hotels Group) | International | www.ichotelsgroup.com |
| 29 | Cyan Group of Hotels | Local | www.cyanhotels.com |
| 30 | Cyprotels Hotels & Resorts (Libra Holidays Group) | Cypriot | www.cyprotelshotels.com |
| 31 | Delphi Leading Hotels | Local | www.delphi-hotels.gr |
| 32 | Diana Hotels | Local | www.dianahotels.gr |
| 33 | Divani Collection | National | www.divanis.com |
| 34 | Domotel | National | www.domotel.gr |
| 35 | Douros Group of Hotels | Local | www.douros-hotels.com |
| 36 | Eden Hotels & Resorts | National | www.eden.gr |
| 37 | Electra Hotels & Resorts | National | www.electrahotels.gr |
| 38 | Elounda S.A. | Local | www.elounda-sa.com |
| 39 | Esperia Hotel Group | Local | www.esperia-hotels.gr |
| 40 | Fegoudakis Hotels | Local | www.fegoudakis.com |
| 41 | G-Hotels | Local | www.g-hotels.gr |
| 42 | G. & E. Karamolegos Group of Hotels | Local | www.karamolegos.gr |
| 43 | Galaxy Economou Hotels | Local | www.economouhotels.gr |
| 44 | Giannoulis Hotels & Resorts | Local | www.boutiquehotelchain.com |

| | Brand (Company/Group) | Type of Brand | Website |
|----|--|----------------------|--|
| 45 | Golden Hotels | Local | www.goldenhoteles.gr |
| 46 | Golden Tulip Hotels | International | www.goldentulip.com |
| 47 | Grace Hotels | National | www.gracehotelsgroup.com |
| 48 | Greotel (TUI, N. Daskalantonakis Group) | National | www.greotel.com |
| 49 | Hapimag | International | www.hapimag.com |
| 50 | Harmony Resorts | Local | www.harmonyresorts.gr |
| 51 | Helios Hotels & Resorts | National | www.helioshotels.gr |
| 52 | Hersonissos Group Hotels | Local | www.hersotels.gr |
| 53 | Hilton (Hilton Group plc) | International | www.hilton.com |
| 54 | Holiday Club (Alltours) | International | www.alltours.de |
| 55 | Holiday Inn (InterContinental Hotels Group) | International | www.ichotelsgroup.com |
| 56 | Hyatt International | International | www.hyatt.com |
| 57 | Hydroussa | National | www.hydroussahotel.gr |
| 58 | Iberostar | International | www.iberostar.com |
| 59 | InterContinental (InterContinental Hotels Group) | International | www.ichotelsgroup.com |
| 60 | Kanapitsa Hotels | Local | www.kanapitsa.com |
| 61 | Kipriotis Hotels | Local | www.kipriotis.gr |
| 62 | Lakitira Hotels | Local | www.lakitira.com |
| 63 | Ledra Hotels & Villas | Local | www.ledracrete.gr |
| 64 | Leptos Calypso Hotels | Cypriot | www.leptoscalypso.com.cy |
| 65 | Louis Hotels | Cypriot | www.louishotels.com |
| 66 | LTI International Hotels (Rewe) | International | www.lti.de |
| 67 | M Hotels | Local | www.mhotels.gr |
| 68 | Magic Life (TUI) | International | www.magiclife.com |
| 69 | Mamidakis Hotel Experience | Local | www.mamidakishotels.gr |
| 70 | Mareblue Hotels & Resorts | National | www.marebluehotels.gr |
| 71 | Maris Hotels | Local | www.maris.gr |
| 72 | Mark Warner | International | www.markwarner.co.uk |
| 73 | Marriott International | International | www.marriott.com |
| 74 | Melia (Sol Melia) | International | www.solmelia.com |
| 75 | Minoan Hotels Group | Local | www.minoanhotels.gr |
| 76 | Mitsis Hotels | National | www.mitsishotels.com |
| 77 | Mövenpick Hotels & Resorts | International | www.moevenpick-hotels.com |
| 78 | Neilson (Thomas Cook) | International | www.neilson.co.uk |
| 79 | Novotel (Accor) | International | www.accorhotels.com |
| 80 | Oceanos Hotels Group | Local | www.oceanoshotels.gr |
| 81 | Oscar Hotels | Local | www.oscar.gr |
| 82 | P.A.P Corp. | Local | www.papcorp.com |
| 83 | Petasos Hotels | Local | www.petasos.gr |
| 84 | Philian Art & Design Hotels | National | www.philianhotels.gr |
| 85 | Porto Carras Grand Resort | Local | www.portocarras.gr |
| 86 | Resorts of Mykonos | Local | www.resortsofmykonos.gr |
| 87 | Rethymnotels | Local | www.rethymnotels.gr |
| 88 | Robinson Club (TUI) | International | www.robinson.com |
| 89 | Rocabella Hotels & Spas | Local | www.rocabella.gr |
| 90 | Sani Resort | Local | www.saniresort.gr |
| 91 | Santa Marina Hotels | National | www.santa-marina.gr |
| 92 | Santikos Hotels & Resorts | National | www.santikoshotels.com |
| 93 | Sbokos Hotel Group | Local | www.sbokoshotels.gr |
| 94 | Sensatori (TUI/Thomson) | International | www.thomson.co.uk |
| 95 | Sensimar (TUI) | International | www.sensimar.com |

| | Brand (Company/Group) | Type of Brand | Website |
|-----|---|----------------------|--|
| 96 | SENTIDO Hotels & Resorts (Thomas Cook) | International | www.sentidohotels.com |
| 97 | Sergis Hotels & Studios | Local | www.sergishotels.com |
| 98 | Smile Hotels | Local | www.smilehotels.gr |
| 99 | Sofitel (Accor) | International | www.accorhotels.com |
| 100 | Sol (Sol Melia) | International | www.solmelia.com |
| 101 | Star Hotels | National | www.star-hotels.gr |
| 102 | Sunshine Vacation Clubs | National | www.sunshinevacationclubs.com |
| 103 | Sunwing Resorts (Thomas Cook) | International | www.ving.se/sunwing |
| 104 | The Luxury Collection (Starwood Hotels & Resorts Worldwide) | International | www.starwoodhotels.com |
| 105 | The Myconian Collection | Local | www.myconiancollection.gr |
| 106 | Theoxenia Palace Hotels | Local | www.theoxeniapalace.gr |
| 107 | Vantaris Hotels | Local | www.vantarishotels.gr |
| 108 | Ventaglio | International | www.ventaglio.com |
| 109 | Westin Hotels & Resorts (Starwood Hotels & Resorts Worldwide) | International | www.starwoodhotels.com |
| 110 | Xenos Group Hotels | Local | www.xenos-hotels.gr |
| 111 | Xenotel Grouphotel | National | www.xenotel.gr |
| 112 | Yes! Hotels | Local | www.yeshotels.gr |
| 113 | Zantotel Astir Hotels | Local | www.astirhotels.gr |