



NORTHERN  
IRELAND  
HOTELS  
FEDERATION

# HOTELS



Hotel

# LANDSCAPE

141

## Hotels

75% refurbished or built since 2003

9,432

## Bedrooms

A 2% increase with two hotels, a total of 266 rooms

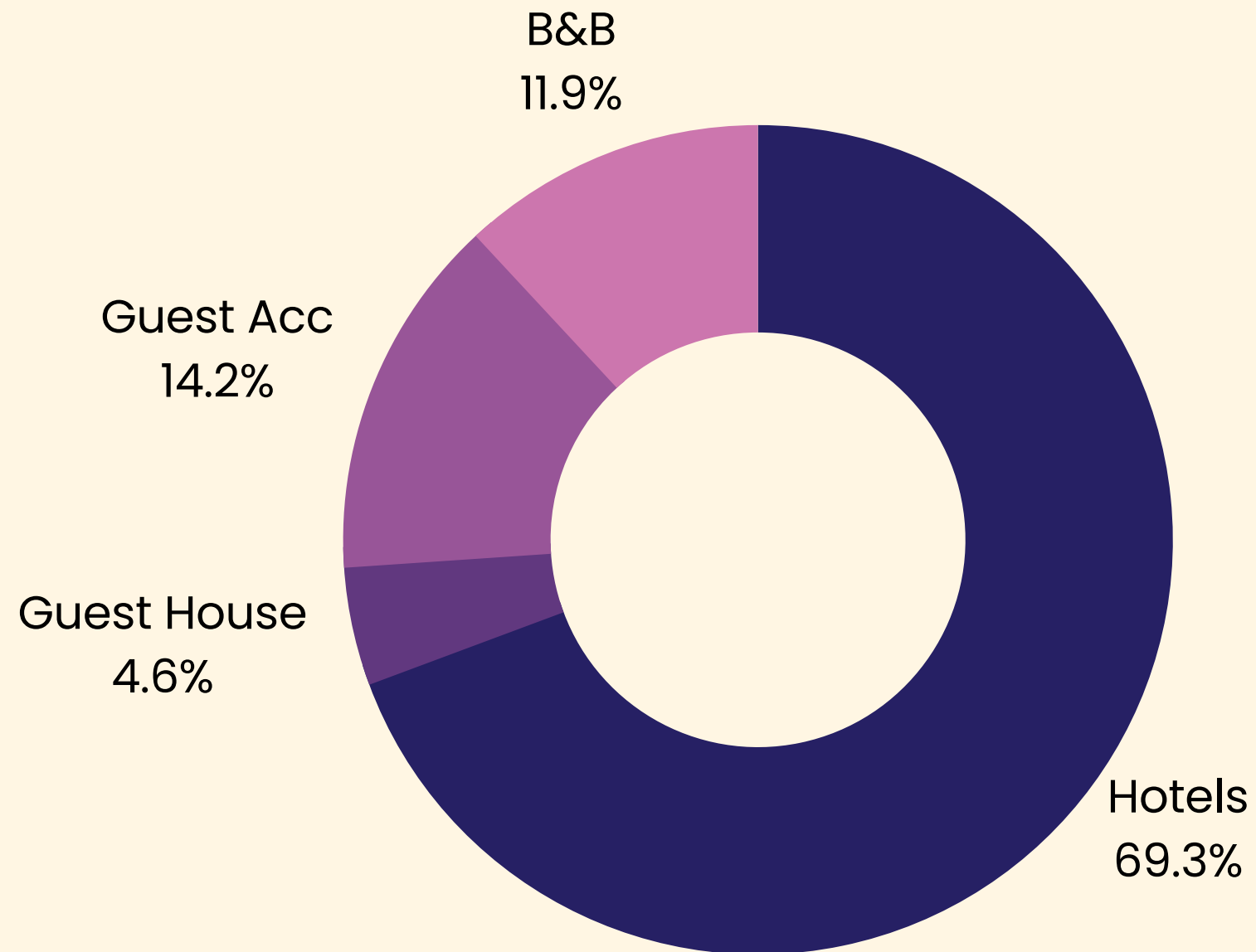
£1bn

## Investment

£50m per annum with a possible £300m by 2025

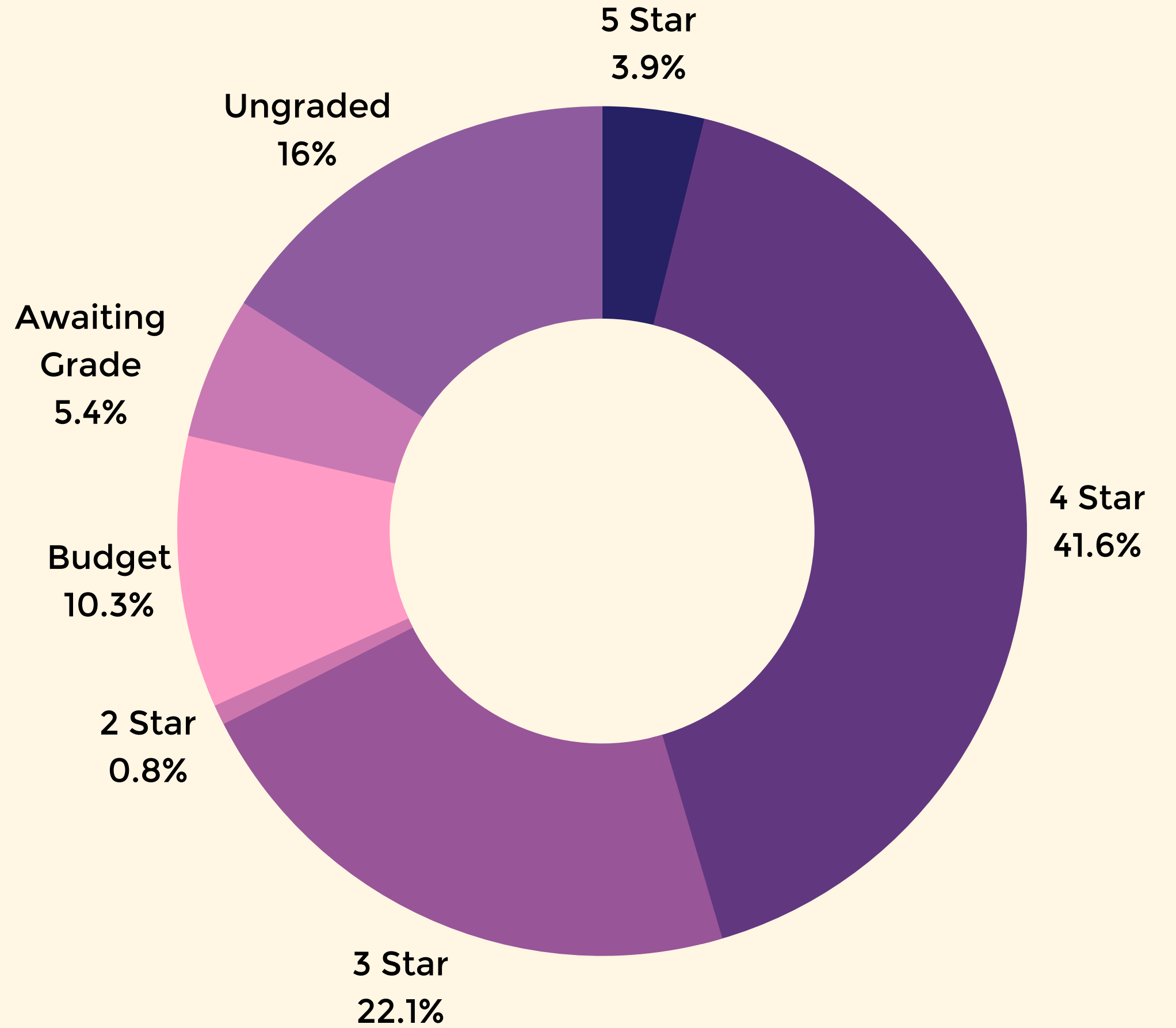
# Accommodation

## ANALYSIS



| Type                 | No           | Rooms         |
|----------------------|--------------|---------------|
| Hotels               | 141          | 9,432         |
| Guest Accommodation  | 69           | 627           |
| Guest House          | 385          | 1,927         |
| B&B                  | 469          | 1,621         |
| Self Catering        | 3,746        | 4,783         |
| Bunk Houses          | 13           | 34            |
| Hostels              | 40           | 481           |
| Campus Accommodation | 9            | 4,145         |
| <b>Total</b>         | <b>4,872</b> | <b>23,050</b> |

*Current*  
**HOTEL MIX**



# *Seismic* **CHANGE**

The local hotel landscape is unrecognisable from the sector of two decades ago.  
Market mix, size and massive investment have seen the industry double in size.

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**SIZE**

**LOCATION**

**GRADING**

**RESORTS**

**MIXED PRODUCT**

**BRAND**



# Performance 2022

**71.5%**

## Occupancy

Almost back to 2019 levels  
and nearing that of 2018

**£100.15**

## ADR

Increased by 28% since  
prepandemic trading

**£71.63**

## RevPAR

A record high and 29%  
ahead of 2019 levels

# Industry CONCERNS

Business since the sector returned to trading without restrictions in March 2022  
has been tempered by considerable constraints

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**SKILLS & PEOPLE**

**COSTS & ENERGY**

**INFLATION**

**VAT IMBALANCE**

**SUPPLY CHAIN**

**UNCERTAINTY**

Project

# PIPELINE

**45** **Projects**  
in the public domain with  
over 4,500 bedrooms

**266** **Bedrooms**  
Due to open in 2023 adding  
2% to bedstock

**14** **Schemes**  
Under consideration or  
at a conceptual stage



# Stalled GROWTH

The predicted increase in hotel numbers has been thwarted by the pandemic. Projects are being re-evaluated with some unlikely to proceed or others altering

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**BUILDING COSTS**

**INTEREST RATES**

**AVAILABILITY**

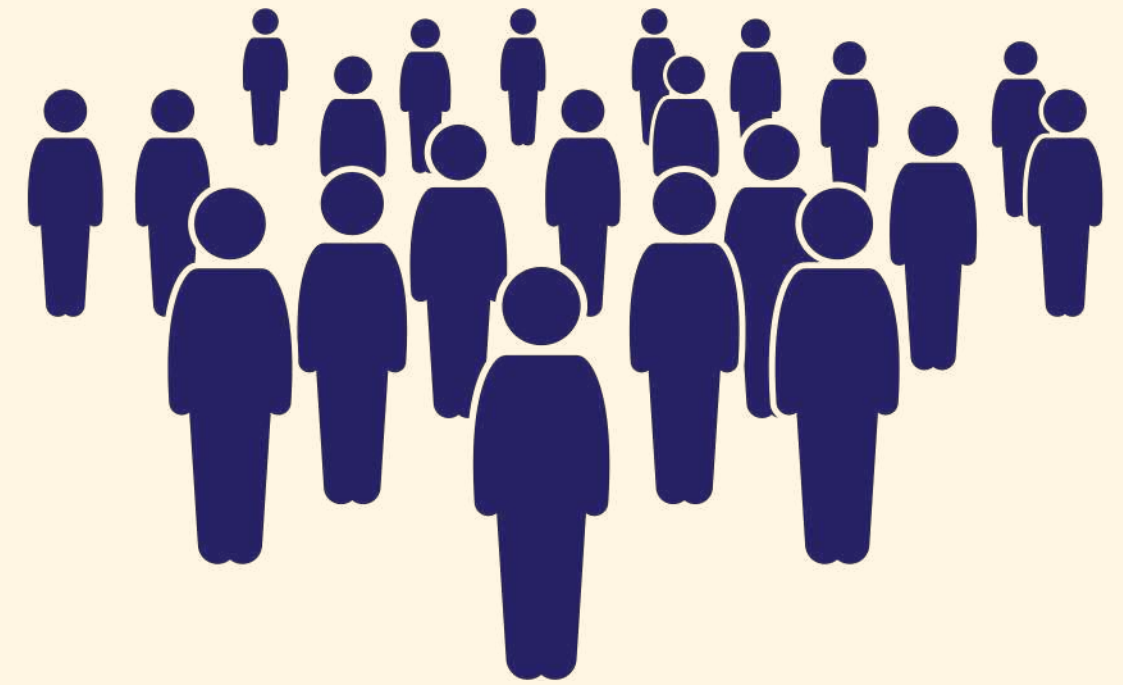
**NEW PRODUCTS**

**CONFIDENCE**

**UNCERTAINTY**



# Balancing 2023



# Government SUPPORT

In 2019, Tourism spend broke the £1bn Barrier; coincidentally this is the sum invested by the industry over the last two decades. Growth and the realisation of the sector's potential could still be achieved but would need more Government support.

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**TAXATION**

**IMMIGRATION**

**VAT**

**SKILLS**

**PROMOTION**

**PLANNING**



*The Report*



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*Thank you*

