

NORTHERN
IRELAND
HOTELS
FEDERATION

HOTELS 2025

Investment | Growth | Trends

Janice Gault - April 2025



NORTHERN
IRELAND
HOTELS
FEDERATION

HELLO!

HOTELS - THE 10,000 BEDROOM QUESTION

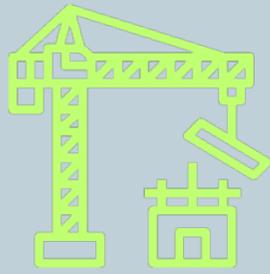


HOTELS BY GRADE

	2024			2025		
HOTELS BY GRADE	HOTELS	ROOMS	BY GRADE	HOTELS	ROOMS	BY GRADE
Five Star	4	365	4%	3	267	3%
Four Star	42	3,852	40%	39	3,606	38%
Three Star	50	2,274	24%	43	1,718	18%
Two Star	2	72	<1%	0	0	0%
Budget Brand	12	1,396	14%	12	1,301	14%
Awaiting Grading	7	465	5%	6	535	6%
Ungraded	26	1,222	13%	38	2,121	21%
TOTAL	143	9,646	100%	141	9,548	100%

2025 - SECTOR SNAPSHOT

A year of limited growth



**Investment
Continues**

£2BN
by 2027 with
around £100m in
2025



**Government
Contracts**

Circa 300
Bedrooms
returning to
tourism trading



**Limited
Expansion**

2.5% Growth
4 Hotels 240
Bedrooms
should open



**Aquisitions v
Development**

£100m
of transactios in
2024, more sales
imminent

ACCOMMODATION BY TYPE

	2019		2025	
TYPE	PREMISES	ROOMS	PREMISES	ROOMS
Hotels	142	9,302	141	9,548
Guesthouses	82	718	66	644
Guest Accommodation	162	985	555	2,443
Bed & Breakfast	614	2,008	435	1,480
Self-Catering	3,060	4,103	4,715	5,856
Bunk Houses	7	24	11	30
Hostels	38	586	40	486
Campus Accommodation	9	4,026	9	3,580
TOTAL	4,114	21,752	5,968	23,993

2025 ACCOMMODATION SHIFTS



**Considerable
Decline**

**B&B
Guesthouse
Sector**



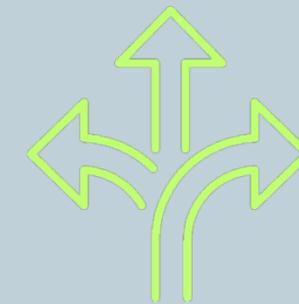
**Strong
Growth**

**Guest
Accommodation
Product**



**Massive
Expansion**

**Self-Catering
stand alone &
mixed use**

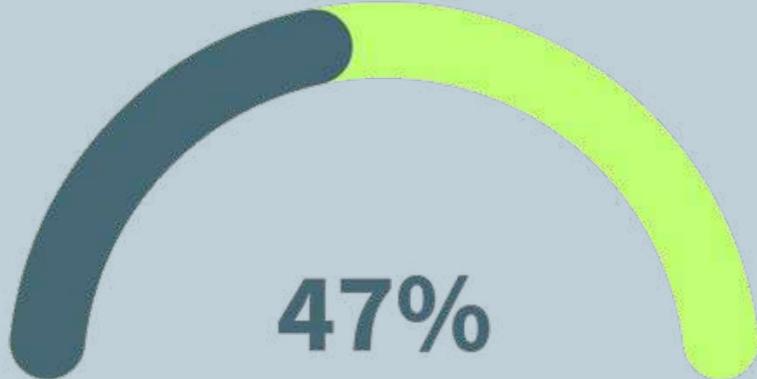


**Market
Polarisation**

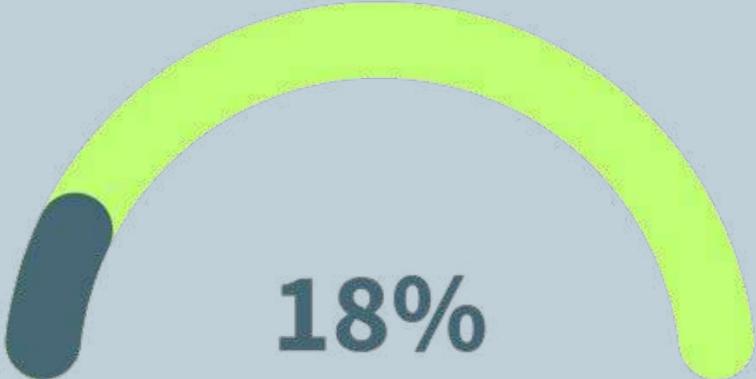
**Large Brands,
Small Luxury
both growing**

THE BIG BRAND THEORY

Branded hotels have grown in number
Most openings between 2025-27 will be branded
Several new brands will arrive in the market



International
Brands



Local Groups



Independent

Northern Ireland Hotel Bedrooms by category

TRENDS

Aparthotels & Suites

Small Luxury Hotel Products

Mixed use resort/hotel development

Star-graded hotels reducing considerably



HOTEL PERFORMANCE 2018-24

YEAR	2024	2023	2022	2021	2020	2019	2018
Occupancy (%)	74%	74.4%	71.5%	49.7%	33.2%	70.9%	73.3%
Average Daily Rate	£115.19	£108.08	£100.15	£93.66	£72.22	£78.26	£79.32
RevPAR	£85.21	£80.45	£71.63	£46.59	£24.00	£55.54	£58.16

2025 Challenges inflation & rising costs

Consumer confidence & global uncertainty

Price ceiling & possible fall in demand

HOTEL PERFORMANCE REGIONAL

	OCCUPANCY %		ADR £		REVPAR £		% DIFFERENCE		
REGION	2024	2023	2024	2023	2024	2023	OCC	ADR	REV
Northern Ireland	74	74.5	115.19	108.15	85.21	80.59	-0.7	6.5	5.7
Belfast	77.4	78.2	115.04	108.03	89.03	84.49	-1.0	6.5	5.4
Derry-Londonderry	68.7	69.1	96.78	91.68	66.46	63.34	-0.6	5.6	4.9
SW Ulster	58.3	60.6	111.64	105.68	65.13	64.00	-3.7	5.6	1.8
Regional NI	69.4	67.7	127.51	120.49	88.54	81.54	2.6	5.8	8.6

Strong ADR & RevPAR Growth

Occupancy under pressure x

CONCERNS

2025 inflation & rising costs

Consumer confidence & global uncertainty

Customer demands v Cost Control

Fall in inbound tourism, global uncertainty

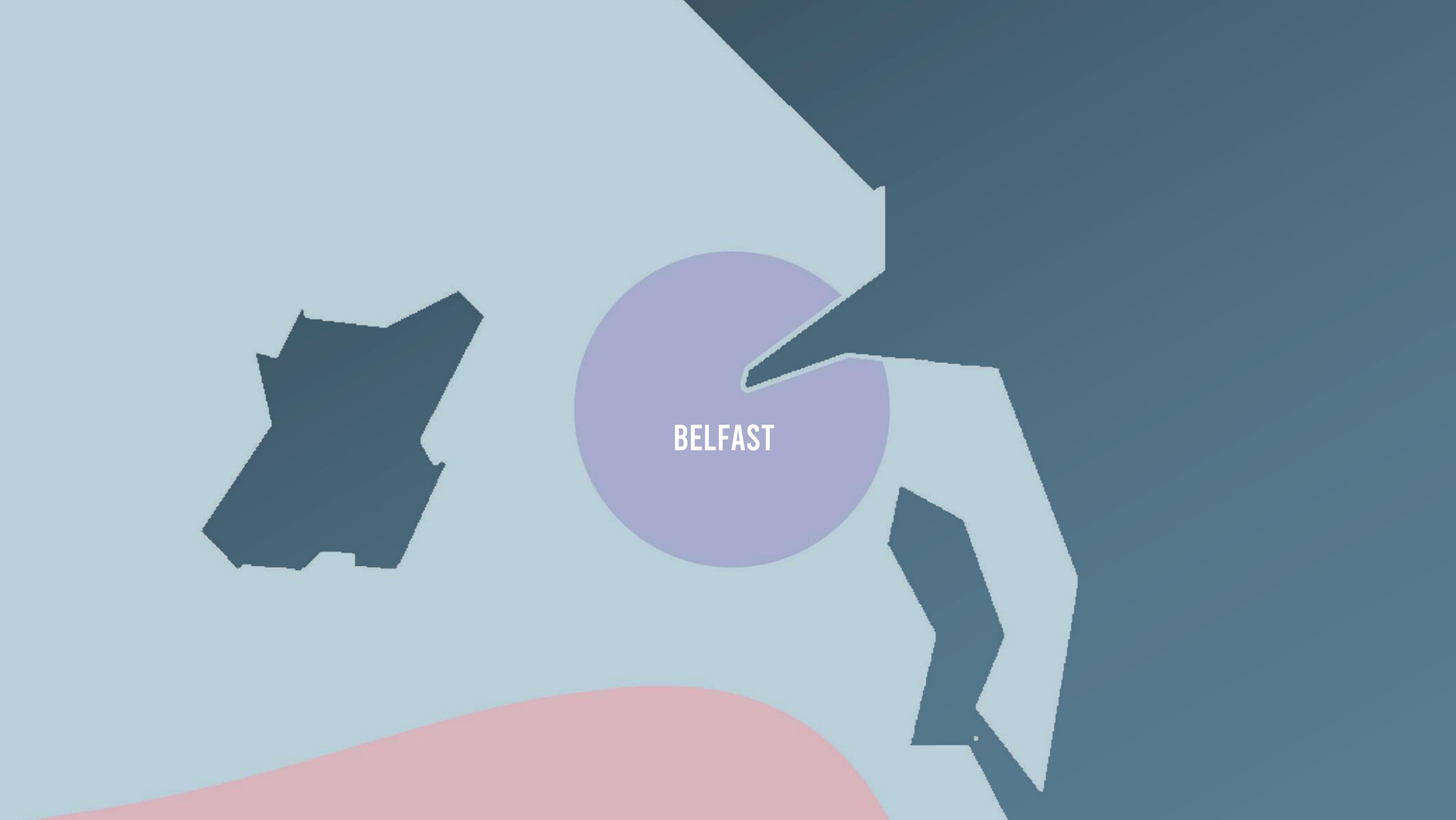
Investment - Ai, refurbishment & cost

Government contracts ending

Student & Unregulated Accommodation

PIPELINE



A stylized map of the United Kingdom is shown in dark blue. The island of Great Britain is on the left, and the island of Ireland is on the right. A purple circle is overlaid on the northeastern coast of Great Britain, specifically over the city of Belfast. The word "BELFAST" is written in white, uppercase letters inside this purple circle. The background is a gradient of light blue and teal, with a large, semi-transparent pink shape at the bottom left.

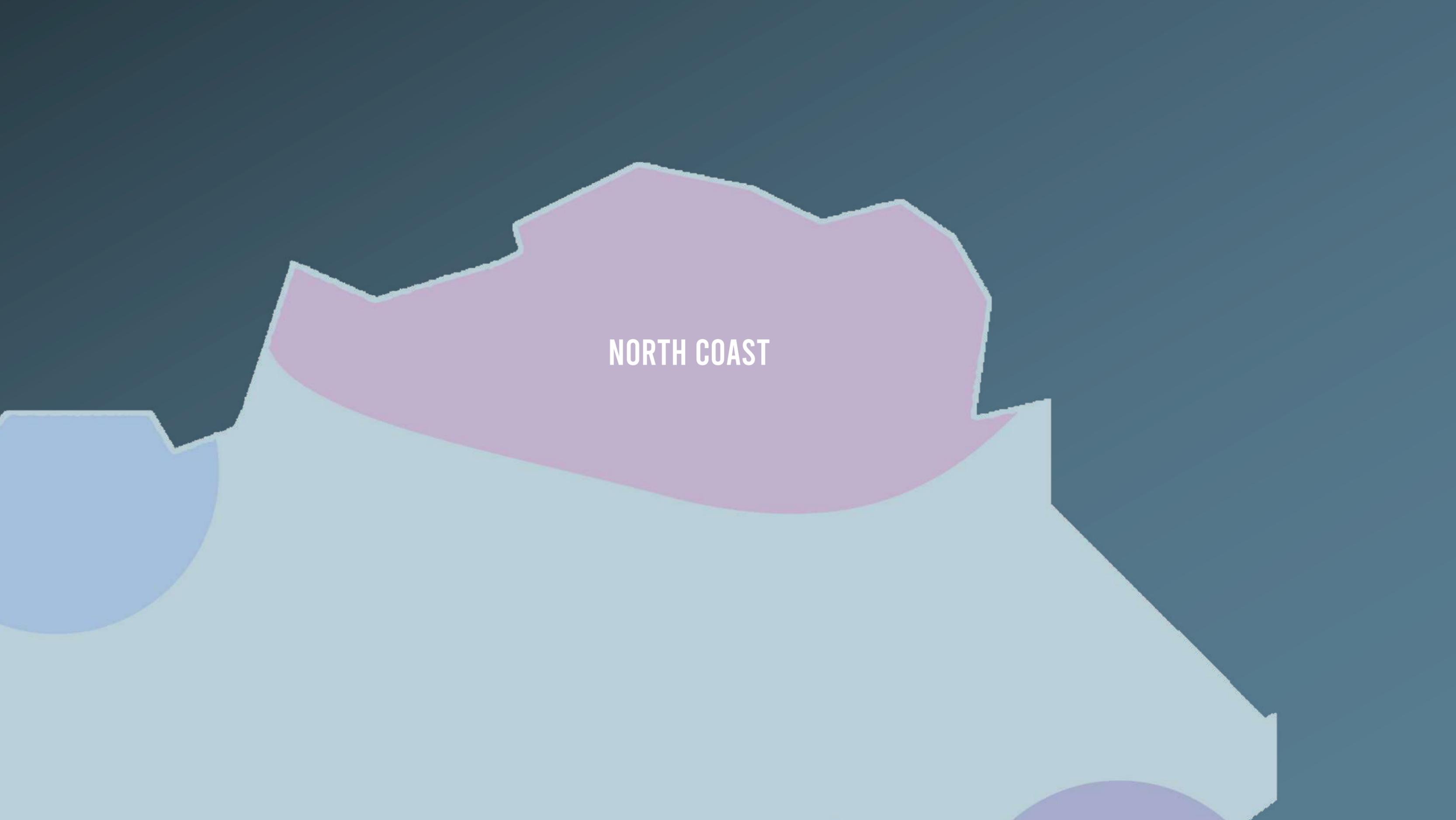
BELFAST

A stylized map of Northern Ireland is shown against a dark teal background. The map is composed of several colored regions: a large light blue area covering most of the island, a pink area in the northeast, and a small teal area in the southwest. The region of Derry-Londonderry is highlighted in a darker blue. The text "DERRY-LONDONDERRY" is written in white, uppercase letters within this highlighted region.

DERRY-LONDONDERRY

A stylized map of the Fermanagh & South West Ulster region. The region is highlighted in a light teal color against a dark blue background. The map shows the irregular coastline of the region, including a small inlet on the west coast. To the east, a portion of a neighboring region is visible, colored in a light pinkish-red. The text 'FERMANAGH & SOUTH WEST ULSTER' is centered within the teal area in a white, bold, sans-serif font.

FERMANAGH & SOUTH WEST ULSTER

A stylized map of the North Coast region. The map is divided into several colored areas: a large pink area at the top labeled 'NORTH COAST', a light blue area below it, and a darker blue area on the left. The text 'NORTH COAST' is written in white, bold, uppercase letters in the center of the pink area.

NORTH COAST

A stylized map of Northern Ireland is shown against a dark teal background. The map is composed of several colored regions: a teal region on the left, a light blue region at the top, a purple circle in the top right, and a large red region in the center and bottom. The text 'ARMAGH, NEWRY, MOURNE & DOWN' is centered within the red region.

ARMAGH, NEWRY, MOURNE & DOWN



REST OF NI

2025 – OPEN SEASON OPPORTUNITY

Limited growth with opportunity to yield

Global promotion with legacy benefits

The return of Rory





NORTHERN
IRELAND
HOTELS
FEDERATION

2026-27 A NEW ERA

Significant new stock up to 800 rooms

Arrival of aparthotels, major new brands

Belfast epicentre for development



NORTHERN
IRELAND
HOTELS
FEDERATION

HOTELS 2025

A report from the Northern Ireland Hotels Federation
on hotel investment, growth and trends.



NORTHERN
IRELAND
HOTELS
FEDERATION

THANK YOU