



Hotel Expansion

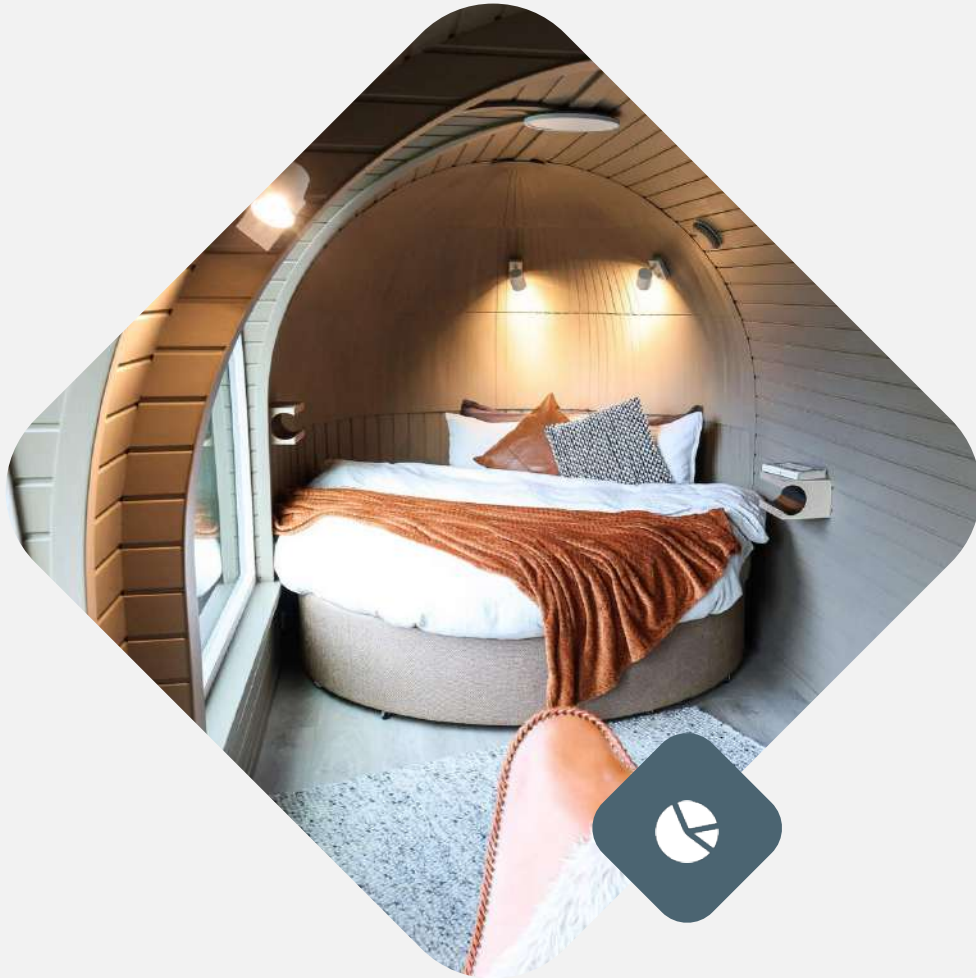
Hotel Expansion

Trends, Investment & Challenges

Janice Gault
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The best hotels are not just places to sleep
— they're experiences to remember.



Overview

The accommodation market is maturing with very modest growth over the last couple of years.

6,474

Total
Premises

24,421

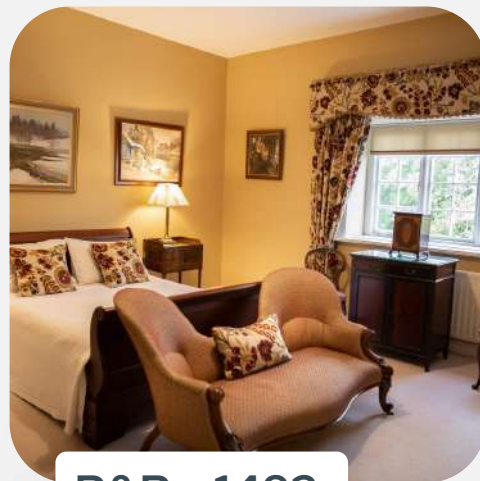
Total
Rooms

9,678

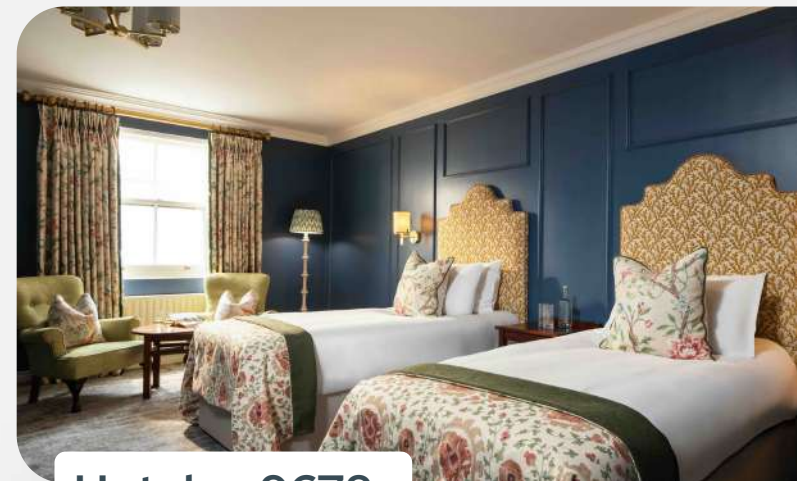
Hotel
Rooms

Accommodation

Hotels remain the largest and most dominant sector but there is diversification across the industry, adding lodges, pods, glamping, etc.



B&B - 1482



Hotels - 9678



Campus - 3580



GH - 633



Self-Catering - 6408



GA - 2640

Market Trends

The three-star market is declining with more hotels choosing to be ungraded.

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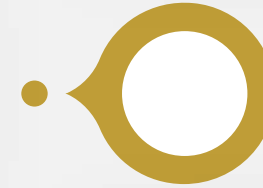


Self-Catering

Record growth with strong occupancy

B&Bs

Decline in B&Bs and Guesthouses across the country

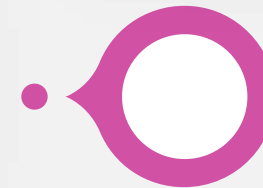


Guest Accommodation

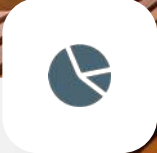
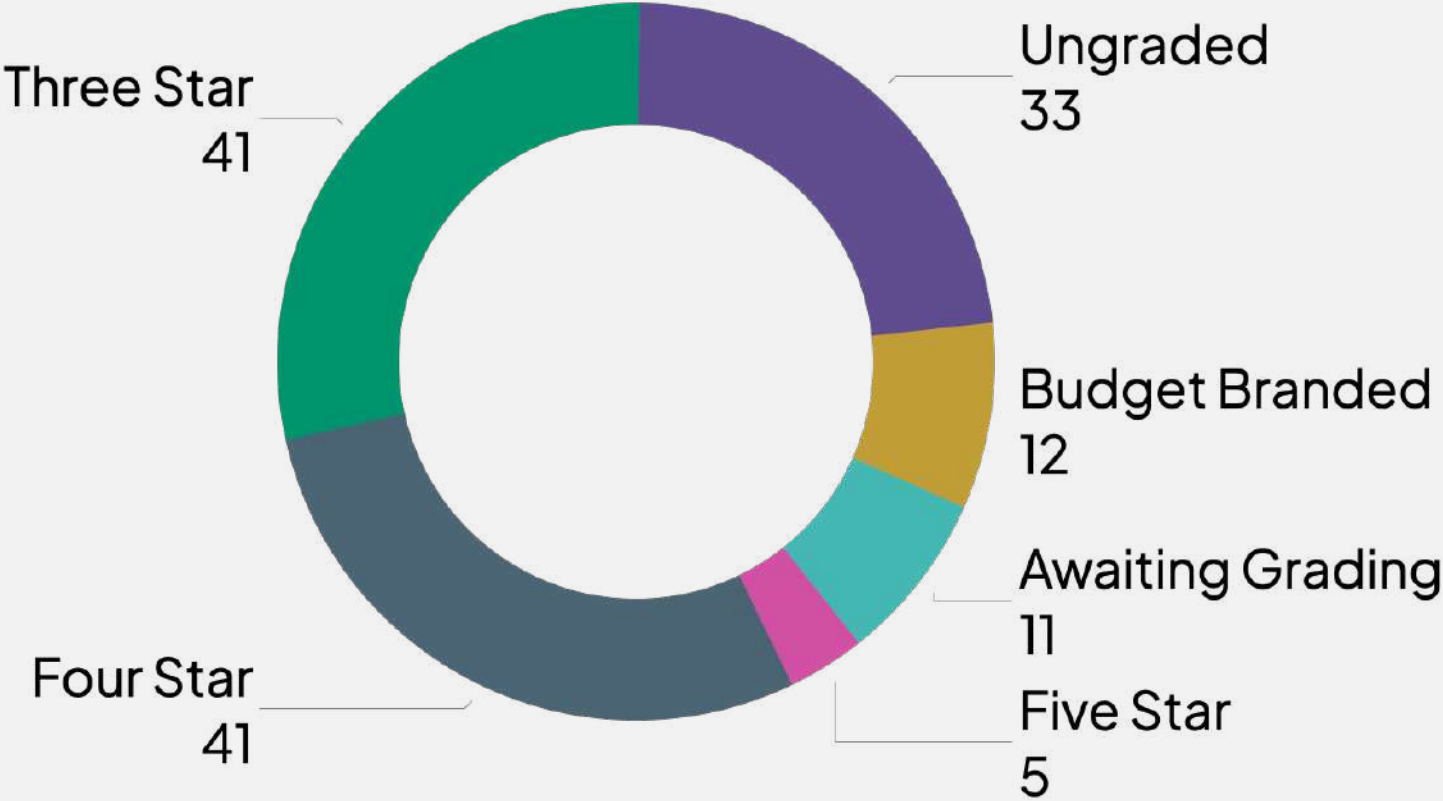
Significant growth in this sector with many unusual accommodations

Hotels

Expanding into alternative options. Brands dominate new hotels



Hotels by Grade



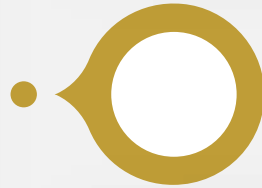


Consolidation

Larger operators,
management contracts
& economies of scale

Brand

Brand affiliations offer
loyalty reach & cost
efficiencies



Technology

Driving efficiency and
guest engagement

Polarisation

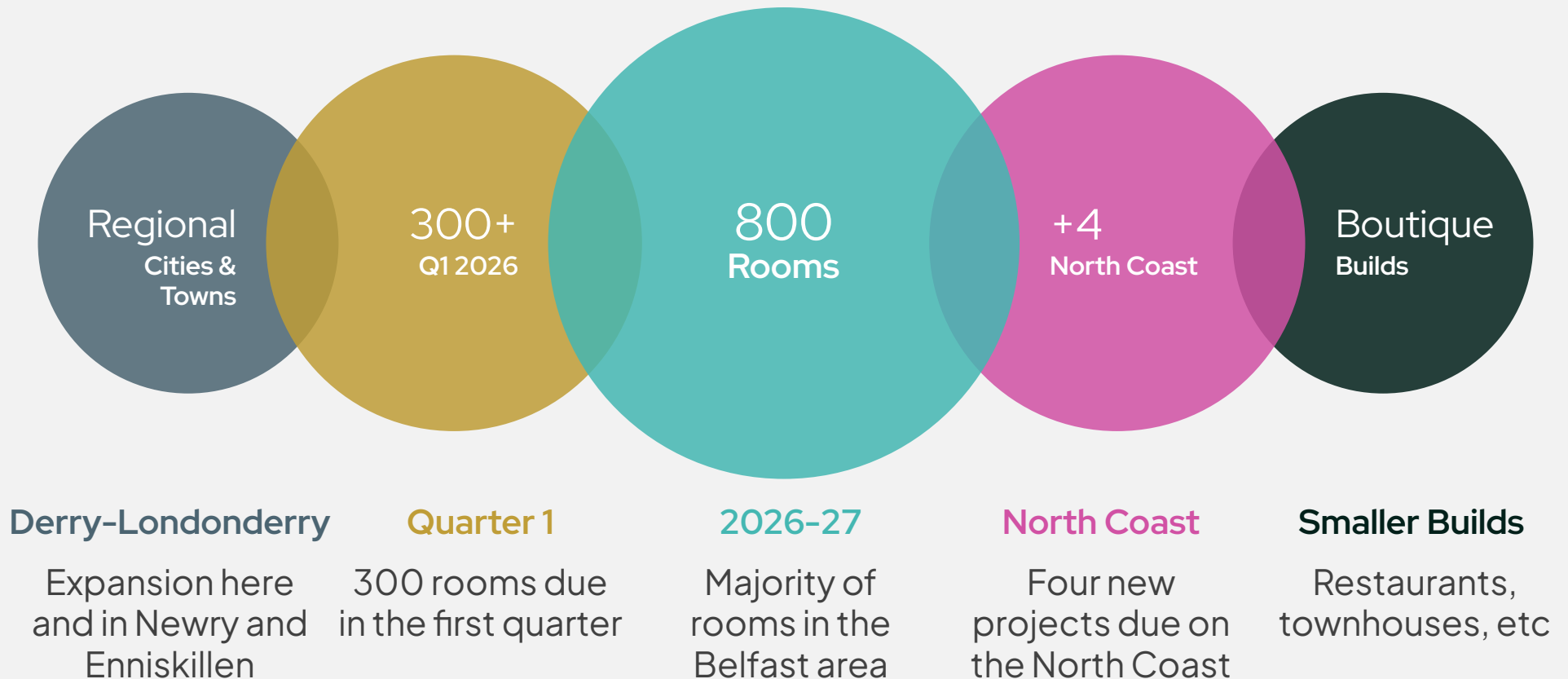
Boutique and bespoke
versus branded and big



Hotel Trends

Significant cost increases means
hotels must adapt to survive and
grow.

Pipeline 2026-27





Openings

The market will grow by circa 8% by the end of 2027.

Hotel Expansion



136

Adagio Aparthotel



144

Tempo by Hilton
Belfast



228

Aloft & Residence Inn



102

The Bedford Hotel



164

Yotel



44

Holiday Inn Express
Derry-Londonderry



73

Walled City Hotel



81

Premier Inn Belfast
International Airport





Investment

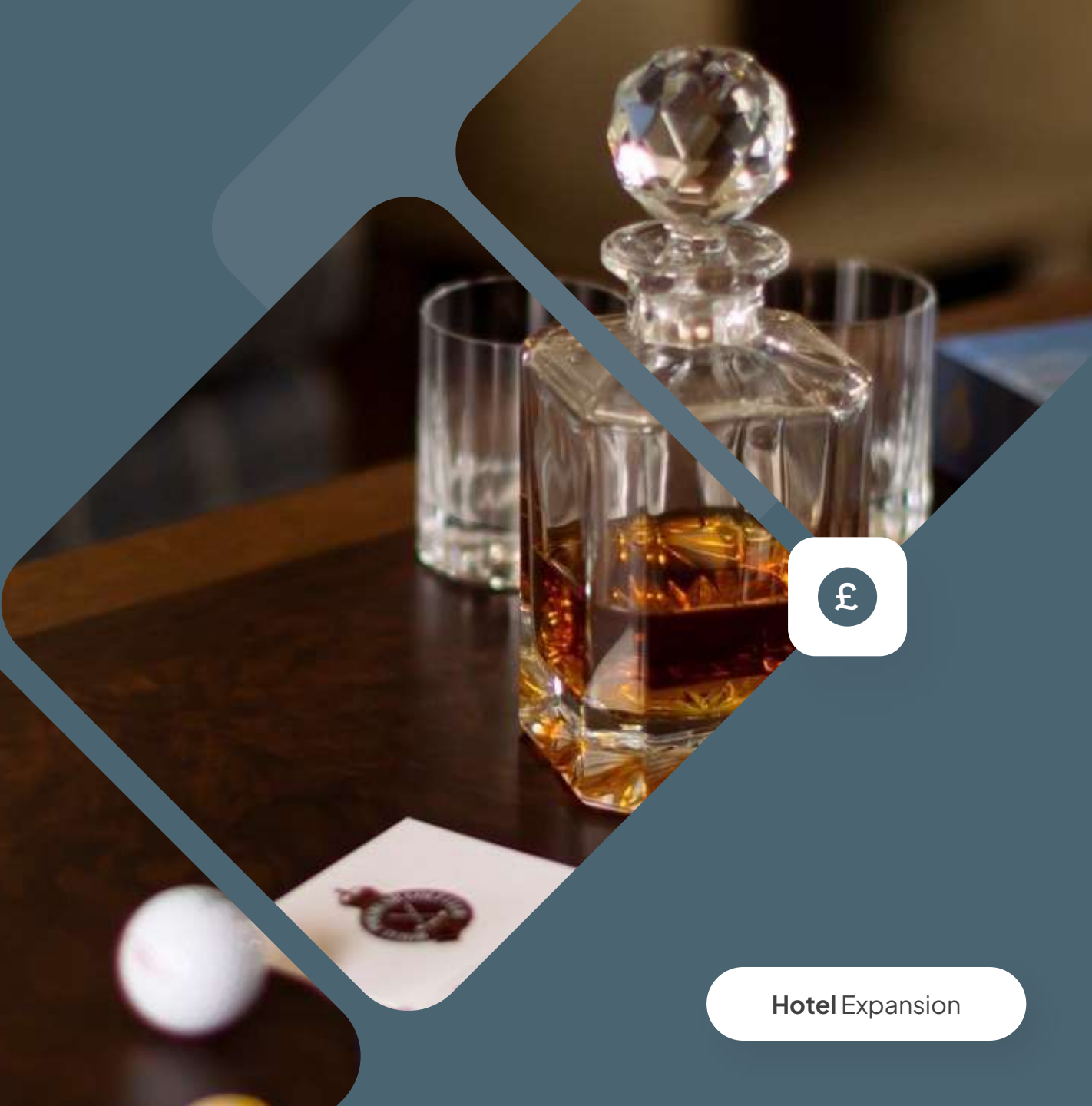
Acquisition remains the fastest route to market.
Growth continues with over 75 projects possible.

£100m

2025

£150m

2026-27

A background image of a bar setting. In the foreground, a square glass decanter filled with amber liquid (whiskey) sits on a dark wooden bar. Behind it are two glasses, one partially filled. A white napkin with a small red circular logo is on the bar. A white golf ball is visible in the lower left. The image is partially obscured by dark blue geometric shapes.

£

Hotel Expansion

Key Challenges

01

Unregulated
short-term lets

02

Student accommodation
& housing pressures

03

Rising operational costs –
energy, supplies, staffing

04

Staff shortages impacting
service & growth

05

Global uncertainty dampening
consumer confidence



On the Horizon



**TNI Certification
Review**



**Taxation &
Rates Pressure**



**Competition in
Major Hubs**



**Evolution of
Accommodation**

Conclusions

-  Sector is expanding and showing resilience.
-  Profits under pressure.
-  Strategic investment and innovation driving growth.
-  Collaboration needed to tackle regulation, staffing and costs.
-  Global uncertainty impacting on consumer confidence.





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Thank You



Hotels are like people
— each has its own personality.