



City of Edinburgh Hotel Development Schedule 2017

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Explanatory notes

Cover photograph : Premier Inn, Market Street

Whilst reasonable efforts have been made to verify the information in this report, the City of Edinburgh Council are unable to provide an assurance as to the accuracy, currency or comprehensiveness of tables and commentary. Users should undertake their own checks before using the data in this report as an input to policy or investment decisions.

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Commentary

Development summary

This is the eleventh hotel schedule to be produced by the City of Edinburgh Council. It has been developed in response to the growing demand for hotel space in the city and the consequent increase in hotel planning applications and developments. The schedule details completions, properties under construction, planning consents, applications awaiting determination and closures.

Graph 1 shows that 706 rooms were completed in 2017, 661 are currently under construction and consent has been granted for another 3,132. Of these, 1,917 were new build, 1,074 were change of use and 141 were extensions.

A total of 8,717 rooms have been developed or granted consent since 2007. A total of 6,116 of these have actually been completed. There are also 3,132 rooms still awaiting determination.

Edinburgh's total stock of serviced accommodation at the end of 2017 was approximately 14,300 rooms.

All completions and developments under construction in 2017 were on brownfield sites, as are all but one existing consents.

Graph 2 shows that the 706 room completions in 2017 was a slight decrease on the previous year. The 3,132 room consents in place at the end of 2017 is a 10% increase on the 2016 figure of 2,858. The majority of completions and developments under construction in 2017 were in the City Centre.

Market analysis

The hotel sector in Edinburgh continues to display strong signs of growth. There was planning consent for 3,132 rooms at the end of 2017. Occupancy levels for the year increased slightly to 83%.

Previous hotel schedules have highlighted the central role of the major hotel chains in Edinburgh's hotel development activity. This continued in 2017 with a Hub by Premier Inn and a Marriott Courtyard opening, totalling 317 rooms.

The major hotel chains comprise a significant proportion of the total Edinburgh hotel stock as at the end of 2017.

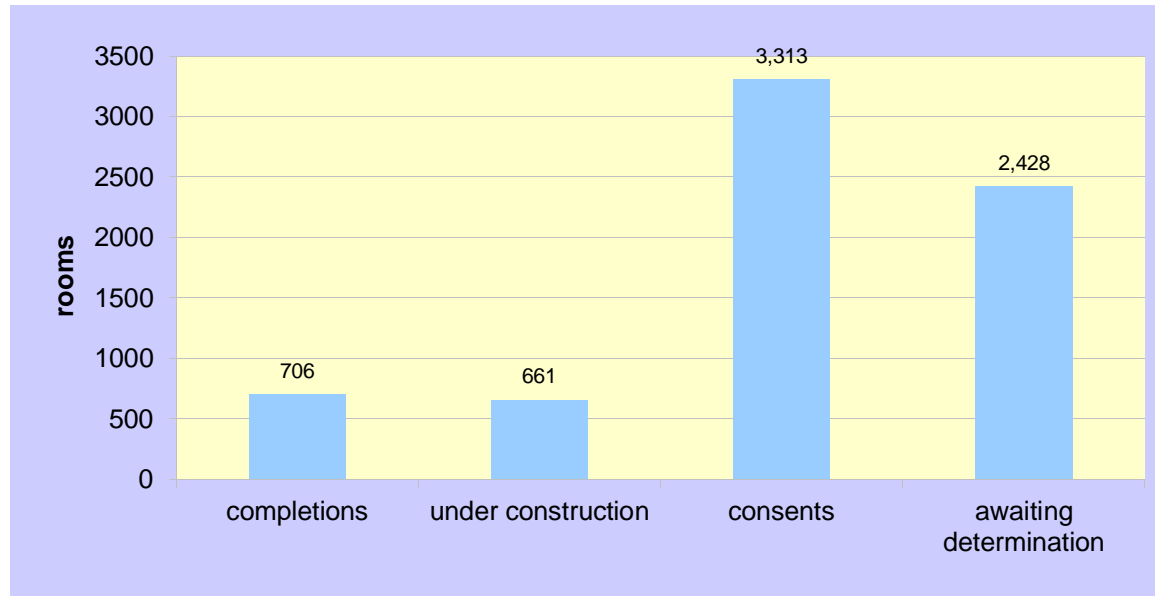
Operator	Total rooms
Premier Inn	1,505
Travelodge	1,188
Holiday Inn/Holiday Inn Express	802
Ibis/Ibis Styles	619
Apex Hotels	538

These five chains operate 4,652 rooms in Edinburgh out of approximately 9,300 comparable hotel rooms.

Significant activity in 2017

- An 80 room extension to the Premier Inn Edinburgh Park is under construction.
- Consent has been granted for a 235 room Leonardo Hotel in Victoria Street/Cowgate.
- A 160 room Marriott Courtyard hotel opened by Heriot Watt University.
- A 157 room Hub by Premier Inn opened on Rose Street.
- A 181 room Hampton by Hilton opened at Fountainbridge.

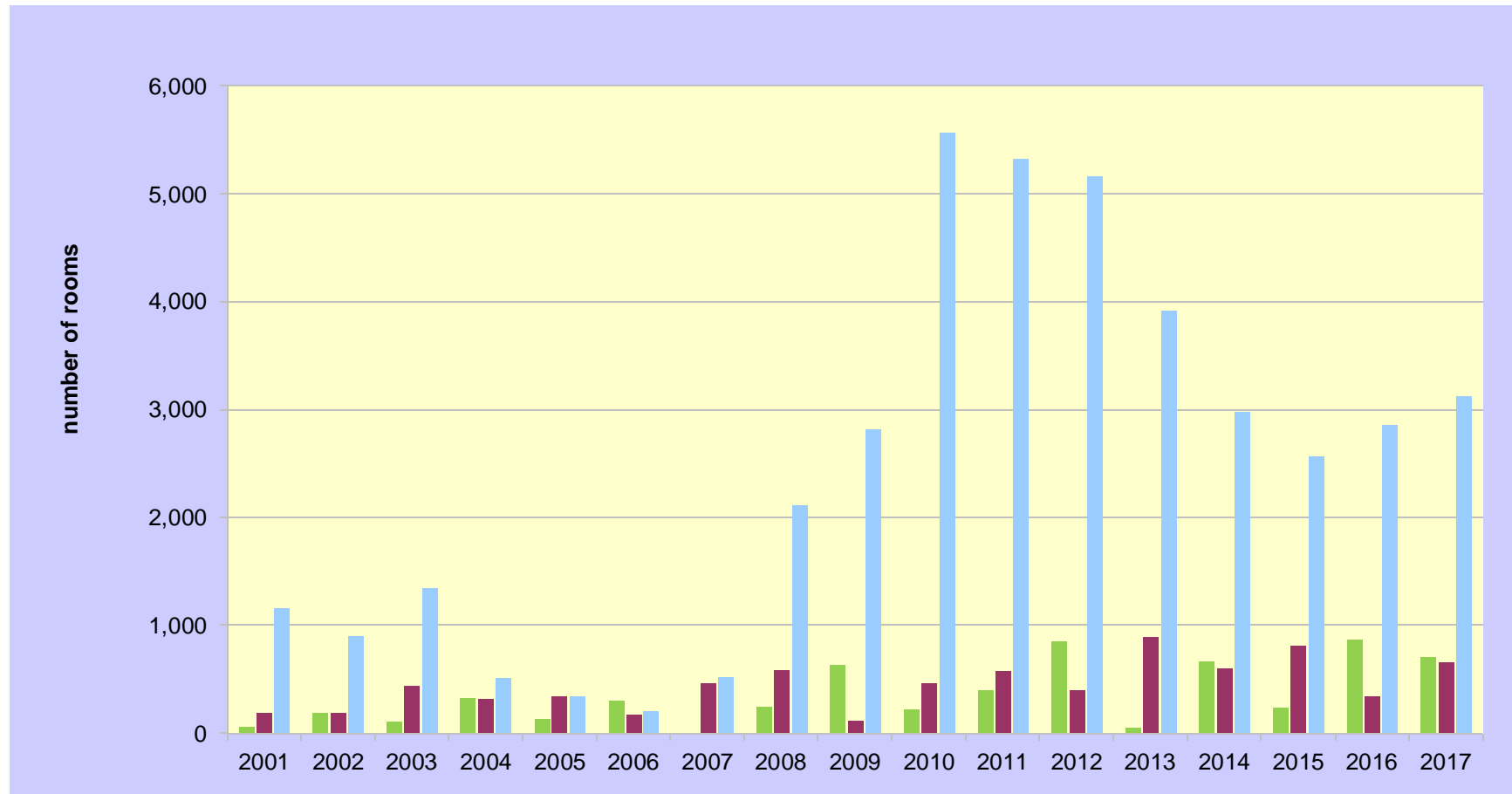
Graph 1 : Hotel developments in Edinburgh 2017



HISTORIC TRENDS : DEVELOPMENT PIPELINE (number of rooms)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
completions	68	185	112	330	131	309	0	255	640	223	407	854	57	670	244	868	706
under construction	185	185	442	320	342	170	465	589	115	467	584	407	892	597	818	340	661
consents	1,163	900	1,351	507	340	209	517	2,124	2,813	5,573	5,330	5,165	3,915	2,979	2,569	2,858	3,132

Graph 2 : Hotel development trends 2001 - 2017



Summary of hotel developments by area and planning status, 2017 (no. of rooms)

MAJOR DEVELOPMENT AREAS	1) Completions					2) Under construction					3) Consents					
	new build	change of use	extension	refurb.	TOTAL	new build	change of use	alt.	ext.	TOTAL	new build	change of use	losses	extension	refurb	TOTAL
City Centre	181	272			453	248	156	-10	12	406	1,093	977		117		2,187
West Edinburgh						175			80	255	410	10				420
Waterfront											123	23		24		170
SE Edinburgh											291	64				355
Other	239	14			253											
TOTAL	420	286			706	423	156		92	661	1,917	1,074		141		3,132
MAJOR DEVELOPMENT AREAS	4) Awaiting determination					5) Closures										
	new build	change of use	ext	refurb	TOTAL	new build	change of use	refurb.	TOTAL							
City Centre	658	36			694		-18		-18							
West Edinburgh	1,415				1,415											
Waterfront	298				298											
SE Edinburgh																
Other			21		21		-45		-45							
TOTAL	2,371	36	21		2,428		-63		-63							

Table 1: Hotel developments completed between 1 January and 31 December 2017

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	DEVELOPMENT TYPE	WARD	ROOMS	CLASS	OPERATOR
16/02950/FUL	George Street, 127-129	CL Serviced Apartments	Mar-15	c/u	11	72	SA	Eden Locke
15/04053/FUL	Broadway Park, 1 [land 148m west of]	Greene King	Jun-16	new	3	79	HO	Farmhouse Inn
13/01405/FUL	Fountainbridge, 194 [land adjacent to]	Map Property and Leisure	Dec-15	new	9	181	HO	Hampton by Hilton
16/05364/FUL	Gilmore Place, 36	Mr Bahman Noafshar	Dec-16	c/u	10	10	GH	Balmore
13/00393/FUL	Niddry Street, 41-43	Mr. Franco Martone	Mar-13	c/u	11	n/a	HS	High Street Hostel
14/00125/FUL	Rose Street, 64-76	Old Mutual Property Fund	Sep-14	c/u	11	157	HO	Hub by Premier Inn
16/00937/FUL	Research Avenue [car park]	Studio Anyo & Heriot Watt University	Aug-16	new	2	160	HO	Courtyard by Marriott
15/05718/FUL	Shandwick Place, 5	Sleeperz Hotels	Jul-16	c/u	11	43	HO	Sleeperz
15/04606/FUL	West Coates, 3	D & S Mowat Ltd.	Jan-16	c/u	13	4	HO	Dunstane House Hotel
16/05692/FUL	Gorgie Road, 479	Mr D Pennycuik	Feb-17	c/u	9	22†	HS	West Side Hostel
				† number of beds - not included in total	Total rooms		706	
					No. of sites		10	

Table 2: Hotel developments under construction as at 31 December 2017

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	DEVELOPMENT TYPE	WARD	ROOMS	CLASS	OPERATOR
15/00661/FUL	Almond Road	Ability Hotels (Edinburgh) Ltd.	Mar-16	new	1	175	HO	Hampton by Hilton
16/05665/FUL	Hill Place, 2-3	Royal College Of Surgeons Of Edinburgh	Jan-17	c/u	15	62	HO	Ten Hill Place
16/05690/LBC	Hill Place, 7-10	Royal College Of Surgeons Of Edinburgh	Jan-17	alt	15	-10	HO	Ten Hill Place
16/02265/FUL	Lochside Court, 1	Whitbread Group Plc & Parabola Edinburgh Pa	Aug-16	ext	3	80	HO	Premier Inn Edinburgh Park
14/04962/FUL	Market Street, 6-8	The EDI Group Ltd.	Jan-16	new	11	98	HO	
08/03379/FUL	Princes Street, 42-44	The Old Waverley Hotel Ltd.	Mar-16	ext	11	12	HO	Old Waverley Hotel
16/05566/LBC	Queen Street, 74-77	Gloag Serviced Apartments Ltd	Feb-17	c/u	11	82	HS	Mode
12/04521/FUL	South Bridge, 85-87	Rapid Restaurants Ltd.	May-13	c/u	11	12	HO	
14/04085/FUL	Torphichen Street, 24-28	Interserve Developments	Apr-15	new	11	150	HO	
					Total rooms		661	
					No. of sites		9	

Table 3: Hotel developments that gained planning consent in 2017

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	CONSENT EXPIRES	DEVELOPMENT TYPE	WARD	ROOMS	CLASS	OPERATOR
17/01215/FUL	Abbey Strand, 23	c/o Burd Haward Architects	Jun-17	Jun-20	c/u	11	10	SA	
17/04320/FUL	Bridge Street, 31, Newbridge	Mr. Vince Crolla	Dec-17	Dec-20	new	1	41	HO	
15/02632/FUL	Constitution Street, 121	Mr. & Mrs. Herman & Abha Rodrigues	legal*	n/a	c/u	13	10	SA	
16/00682/FUL	Constitution Street, 130	GA Group Ltd.	legal*	n/a	c/u	13	25	HO	
16/02706/PPP	East Mains of Ingliston, 14	Amber Real Estate Investments Ltd	legal*	n/a	new	1	180	HO	
15/05852/FUL	Eastfield Road, 100 [land 250m west of]	Royal Highland & Agricultural	Sep-17	Sep-20	new	1	230	HO	
17/01695/FUL	Gilmerton Road, 411	Mr Khandaker Hossain	Jun-17	Jun-20	c/u	16	n/a	HS	
16/06165/LBC	Gogarmuir Road [Kirkland House]	Newcrest Residential Limited.	Feb-17	Feb-20	c/u	1	10	HO	
17/03587/FUL	High Street, 93	Gold Brothers (Scotland) Ltd.	Sep-17	Sep-20	ext	11	n/a	HS	
15/05715/FUL	King's Stables Road, 6-28 / Lady Wynd, 2	Pevenil Securities & Campus Development Management	Aug-17	Aug-20	new & c/u	11	128	HO	
17/04170/FUL	Merchant Street, 8	Dr. Zahurul Islam	Nov-17	Nov-20	c/u	11	n/a	HS	
17/03457/LBC	North Bridge, 18	G1 Group	Nov-17	Nov-20	c/u	11	11	HO	
16/02815/PPP	Ocean Drive, 98 [car park 137m NE of]	Ocean Terminal Ltd.	legal*	n/a	new	13	n/a	HO	
17/04024/FUL	Pitt Street, 144	Buckley Building UK Ltd.	Dec-17	Dec-20	c/u	12	n/a	HS	
17/01066/FUL	Prince of Wales Dock, 1 [land 37m SE of]	The Royal Yacht Britannia	legal*	n/a	c/u	13	23	HO	
16/05292/FUL	Princes Street, 64	LaSalle Investment Management.	Sep-17	Sep-20	c/u	1	137	HO	
17/02669/FUL	Queen Street, 68-73	c/o Savills	Nov-17	Nov-20	c/u	11	280	HO	
17/03375/FUL	St. Andrew Square, 21-22	S. Harrison Developments Ltd.	Nov-17	Nov-20	c/u	1	72	HO	
17/03791/FUL	Smith's Place, 3	SF (Edinburgh) Ltd.	legal*	n/a	c/u	12	29	HO	
16/06202/FUL	Victoria Street, 9	MFS Edinburgh Limited.	Mar-17	Mar-20	c/u	1	25	SA	
16/04279/FUL	York Lane, 11-13	Ballantrae Hotel Group	Nov-16	Nov-19	ext	11	21	HO	Ballantrae Hotel
							Total rooms	1,232	
							No. of sites	21	
* legal - consent granted subject to legal agreement									

Table 3a: Other hotel developments with planning consent as at 31 December 2017

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	CONSENT EXPIRES	DEVELOPMENT TYPE	WARD	ROOMS	CLASS	OPERATOR
16/00700/FUL	Dewar Place [site 56m W of]	Axcel Hospitality (Edinburgh) Ltd.	Jun-17	Jun-20	new	11	150	HO	
14/01177/PPP	Eyre Terrace, 7, 11, 13	Royal Bank of Scotland	legal*	n/a	new	5	100	HO	
14/03847/FUL	Fountainbridge, 159 [site at former]	Hanover Leisure F-bridge & West Register (Realisations) Ltd.	legal*	n/a	new	9	180	HO	Urban Villa
14/02814/PPP	Fountainbridge, 199 [land 60m south of]	The EDI Group Ltd.	Jun-16	Jun-19	new	9	n/a	HO	
10/01832/PPP	Ingliston Road [RHS]	Royal Highland & Agricultural Society of Scotland	legal*	n/a	new	1	n/a	HO	
14/05174/PPP	London Road, 151	Caledonian Trust plc	Nov-16	Nov-19	new	14	150	HO	
08/00260/FUL	Lothian Road, 4	Caledonian Operating Company Ltd	Dec-08	never	ext	11	50	HO	
14/03230/FUL	Morrison Street, 189	Edinburgh Haymarket	Dec-15	Dec-18	new	11	190	HO	
10/02373/FUL	Morrison Street, 189	Tiger Haymarket	Mar-11	never	new	11	245	HO	
16/01952/LBC	New Street, 5	Edinburgh Castle Ltd.	Aug-16	Aug-19	c/u	11	20	SA	Apple Apartments
15/03773/FUL	Ocean Drive, 101	Atlas Hotels	Jun-16	Jun-19	ext	13	24	HO	Holiday Inn Express
09/00715/FUL	Picardy Place, 16-22	EDC (Hotels) Ltd.	Feb-15	Feb-18	ext	11	25	HO	Holiday Inn Express
15/01855/FUL	Queen Street, 68-73	Beyondr by SACO	Aug-15	Aug-18	c/u	11	187	SA	
08/03361/OUT	St. James Centre	Henderson Global Investors	Jun-09	never	new	1	200	HO	
15/04445/FUL	Victoria Street, 1-15 / Cowgate, 18-20	Dreamvale Properties	Nov-16	Nov-19	c/u	11	235	HO	Leonardo Hotels
14/05305/AMC	West Harbour Road, 65	Granton Central Developments Ltd.	Aug-16	Aug-18	new	4	123	HO	
16/04279/FUL	York Lane, 11-13	Ballantrae Hotel Group	Nov-16	Nov-19	ext	11	21	HO	Ballantrae Hotel
							Total rooms	1,900	
							No. of sites	17	

* legal - consent granted subject to legal agreement

Table 4: Hotel developments awaiting determination as at 31 December 2017

APPLIC. NO	ADDRESS	APPLICANT	DATE OF APPLICATION	DEVELOPMENT TYPE	WARD	ROOMS	CLASS	OPERATOR
17/04304/FUL	Builyeon Road South, 7	c/o Faye Cass	Sep-17	ext	1	21	HO	Premier Inn South Queensferry
17/05652/FUL	Cowgate, 233	RCSCM	Dec-17	c/u	11	36	HO	
17/02227/PPP	Dewar Place, 2	Scottish Power Energy Networks & C220	May-17	new	11	550	HO	
15/05580/PPP	Eastfield Road, 2 [land 160m north of]	The IBG Stakeholders	Dec-15	new	1	1,415	HO	
16/05454/PPP	Fettes Row, 34 / 7, 11, 13 Eyre Terrace	The Royal Bank Of Scotland PLC.	Oct-16	new	5	n/a	HO	
17/05306/AMC	Granton Harbour plots 29 and 35	Granton Central Developments Ltd.	Nov-17	new	4	298	HO / SA	
17/05039/FUL	King's Stables Road, 18-20	Peveril Securities & Campus Development Management	Oct-17	new	11	108	HO	
Total rooms						2,428		
No. of sites						7		

Table 5: Hotel closures between 1 January and 31 December 2017

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	DEVELOPMENT TYPE	NEW USE	WARD	ROOMS	CLASS	OPERATOR
16/02258/FUL	Ettrick Road, 13	Mr Jim Barlow	Jun-17	c/u		10	-18	HO	Royal Ettrick Hotel
n/a	Great King Street, 34	n/a	n/a	c/u		11	-18	HO	Howard Hotel
16/00436/FUL	Polwarth Terrace, 108	Mr. Keith Jeffs	Mar-16	c/u		10	-7	HO	Lindsay Guest House
n/a	Strathearn Road, 100	n/a	n/a	c/u		10	-20	HO	Gillis Centre
Total rooms							-63		
No. of sites							4		

EXPLANATORY NOTES

WARD

Ward 1 - Almond Ward
Ward 2 - Pentland Hills Ward
Ward 3 - Drum Brae/ Gyle Ward
Ward 4 - Forth Ward
Ward 5 - Inverleith Ward
Ward 6 - Corstorphine/ Murrayfield Ward
Ward 7 - Sighthill/ Gorgie Ward
Ward 8 - Colinton/ Fairmilehead Ward
Ward 9 - Fountainbridge/ Craiglockhart Ward
Ward 10 - Meadows/ Morningside Ward
Ward 11 - City Centre Ward
Ward 12 - Leith Walk Ward
Ward 13 - Leith Ward
Ward 14 - Craighentiny/ Duddingston Ward
Ward 15 - Southside/ Newington Ward
Ward 16 - Liberton/ Gilmerton Ward
Ward 17 - Portobello/ Craigmillar Ward

CLASS

GH Guest House
HO Hotel
HS Hostel
SA Serviced Apartments
SH Small Hotel

1-5* VisitScotland grading where known

Guest House

A Guest House is usually a commercial business and will normally have a minimum of four letting bedrooms, of which some will have en suite or private facilities. Breakfast will be available and evening meals may be provided.

Hotel

A Hotel will normally have a minimum of twenty letting bedrooms, of which the majority will have en suite or private facilities. A Hotel will normally have a drinks licence (may be a restricted licence) and will serve breakfast, dinner and normally lunch.

Hostel

Backpackers style accommodation provided by a private operator or nonprofit making membership organisation. Normally let on a Self-Catering nightly basis where accommodation will often, but not exclusively, be in shared rooms. Larger Hostels may also provide full catering or other extended services and facilities.

Serviced Apartments

Self catering apartments with services such as housekeeping, reception, and in-room dining also provided.

Small Hotel

A Small Hotel will normally have a maximum of twenty letting bedrooms and a minimum of six. The majority of the bedrooms will have en suite or private facilities. A Small Hotel will have a drinks licence (may be a restricted licence) and will serve breakfast, dinner and normally lunch. It will usually be run by the owner(s) and will reflect their style and personal input.

ROOMS

This figure refers to the number of rooms except in the case of hostels, where it refers to the number of beds. Bed figures refer to hostels only.