



City of Edinburgh Student Housing Development Schedule 2017

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Cover photograph : Brae House, Student Housing Company, Abbeyhill

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 eighth student accommodation schedule to be produced by the City of Edinburgh Council. It has been developed in response to the growing number of planning applications and developments in this sector. The schedule focuses on purpose-built student accommodation, rather than privately rented houses, and details completions, properties under construction, planning consents, applications awaiting determination and closures.

Graph 1 shows that 1,874 bedspaces were completed in 2017, 485 are currently under construction, consent has been granted for 2,074 and there were 384 awaiting determination.

All completions, developments under construction and consents in 2017 were on brownfield sites. For the third year, the number of those completed and under construction outwith the city centre exceeded those in the city centre.

Current accommodation provision

There were 18,988 purpose-built student bedspaces in Edinburgh at the end of 2017, up from 17,215 at the end of 2016, of which 88% were of the self-catering variety.

University of Edinburgh	7,196
Heriot-Watt University	2,023
Edinburgh Napier University	1,751
Unite	1,408
Student Housing Company	986

Queen Margaret University	800
iQ	639
Telford College	550
Fresh Student Living	402
CRM Students	364
Collegiate AC	396
Mansion	331

Market analysis

There are c.58,000 students attending the four universities in the Edinburgh area. Of these, c.16,000 are international students. The consequent demand for student accommodation means that rents in Edinburgh are higher than the UK average.

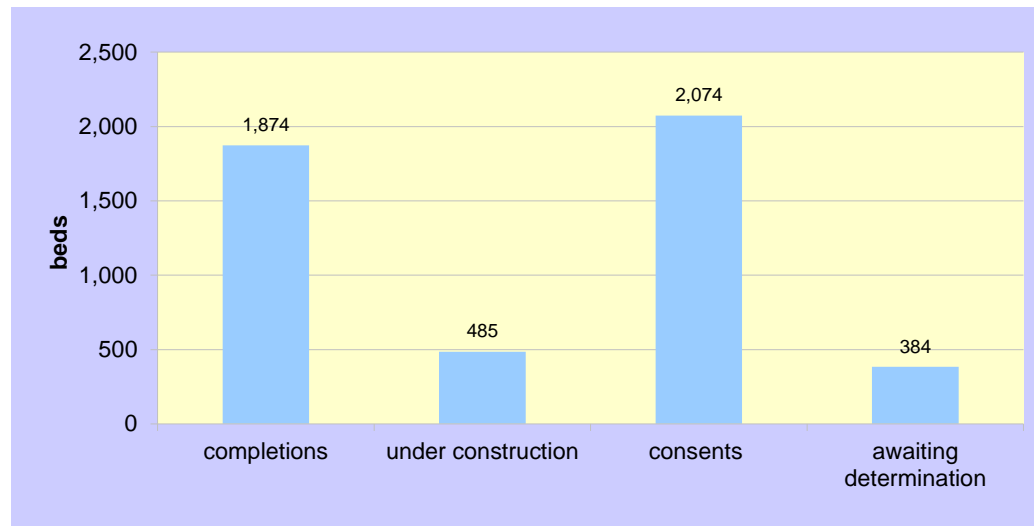
The number of units under construction has dropped significantly since 2016, signalling a decrease in completions in 2018.

Significant activity in 2017

- Completion of 237 bed spaces on Bernard Terrace/Lutton Place for Unite.
- Completion of a 240 bed development at Bothwell Street for Downing Students.
- Completion of a 256 bed development at Gorgie Road for Fresh Student Living.

- Completion of a 579 bed development at St. Leonard's Street for Unite.
- Construction has started on a 261 bed development at 125a Fountainbridge.
- Consent was granted for a 216 bed development at 160 Dundee Street.

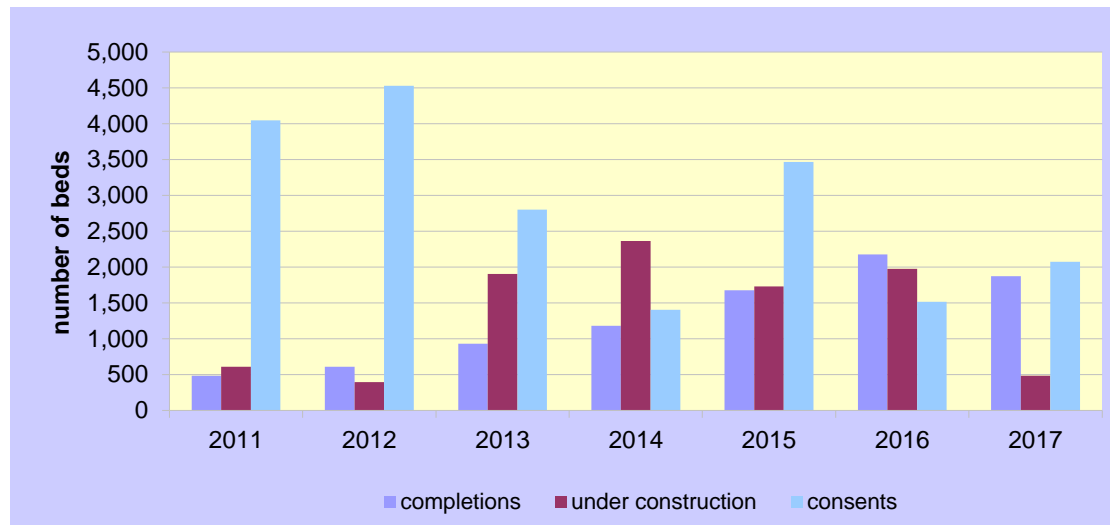
Graph 1 : Student housing developments in Edinburgh 2017



HISTORIC TRENDS : DEVELOPMENT PIPELINE (number of beds)

	2010	2011	2012	2013	2014	2015	2016	2017
completions	888	486	611	932	1,181	1,677	2,178	1,874
under construction	337	611	395	1,905	2,362	1,728	1,974	485
consents	1,708	4,046	4,528	2,800	1,406	3,467	1,517	2,074

Graph 2 : Student housing development trends 2010 - 2017



Summary of student housing developments by area and planning status, 2017 (no. of beds)

MAJOR DEVELOPMENT AREAS	1) Completions					2) Under construction				3) Consents 2017					
	new build	change of use	extension	refurb.	TOTAL	new build	change of use	refurb.	TOTAL	new build	change of use	refurb.	extension	losses	TOTAL
City Centre	138	237			375	313			313	403					403
West Edinburgh															
Waterfront															
SE Edinburgh						100			100						
Other	1,499				1,499	72			72	89	337		7		433
TOTAL	1,637	237			1,874	485			485	492	337		7		836
MAJOR DEVELOPMENT AREAS	4) Existing Consents					4) Awaiting determination						5) Closures			
	new build	change of use	extension	refurb.	TOTAL	new build	change of use	extension	refurb.	losses	TOTAL	new build	change of use	refurb.	TOTAL
City Centre	102	245			347			12			12			-106	-106
West Edinburgh															
Waterfront	120				120										
SE Edinburgh	83				83										
Other	208	442	38		688	347	25				372				
TOTAL	513	687	38		1,238	347	37				384			-106	-106

Table 1: Student housing developments completed between 1 January and 31 December 2017

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	DEVELOPMENT TYPE	WARD	BEDS	OPERATOR
13/04278/FUL	Bernard Terrace, 20-26 / Lutton Place, 19	Buile Developments Ltd.	Aug-14	new	15	237	Unite
14/05255/FUL	Bothwell Street, 14, 16-18	DPI Ltd.	Jun-15	new	12	240	Downing Students
14/02521/FUL	Buccleuch Place 1-13, Buccleuch Street 30, 32, 34	The University Of Edinburgh	Mar-15	c/u	15	237	University of Edinburgh
14/04674/FUL	Buccleuch Street, 46-56, Meadow Lane, 7, 9, 10, 11, 12	The University Of Edinburgh.	Dec-15	new	15	138	University of Edinburgh
14/02288/FUL	Causewayside, 195-213	Melford Developments / Paramount Printers.	Mar-15	new	15	187	Prestige Student Living
12/03392/FUL	Gorgie Road, 396	Chamic Developments Ltd.	Oct-14	new	7	256	Fresh Student Living
14/03643/FUL	St. Leonard's Street, 102	UNITE Group plc.	Feb-15	new	15	579	Unite
						Total beds	1,874
						No. of sites	7

Table 2: Student housing developments under construction as at 31 December 2017

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	DEVELOPMENT TYPE	WARD	BEDS	OPERATOR
15/00590/FUL	Fountainbridge, 125a	Vita Edinburgh 1 Ltd/Mecca Bingo Ltd.	Feb-16	new	9	261	
15/03566/FUL	Gilmerton Road, 4, 6, 10	83S Ltd.	Feb-16	new	16	100	
15/05556/FUL	Muirhouse Avenue, 4	Mr Robert MacKenzie	Jun-16	new	4	72	
15/04357/FUL	Potterrow, 24 (site 25m north of)	Macdonald Estates.	May-16	new	11	52	
				Total beds		485	
				No. of sites		4	

Table 3: Student housing developments with planning consent in 2017

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	CONSENT EXPIRES	DEVELOPMENT TYPE	WARD	BEDS	OPERATOR
17/00861/FUL	Calton Road, 63	Buile Developments Ltd/City Wall Properties (Scotland) Ltd.	Aug-17	Aug-20	new	11	83	
15/05422/FUL	Dundee Street, 160 (land 56m west of)	Melford Developments.	Dec-17	Dec-20	new	9	216	
17/00806/FUL	Gilmerton Road, 4, 8, 10 [Goods Corner]	Kenworth Student Living	Dec-17	Dec-20	ext.	16	7	
16/04400/FUL	Haymarket Yards, 22	Scape Homes HM Limited And CGM Holdings Ltd.	*legal	n/a	new	11	104	
16/04158/FUL	Mayfield Road, 200	Braidburn Students Ltd.	Feb-17	Feb-20	new	16	89	
17/03675/FUL	Robb's Loan, 47 [Pentland House]	Edinburgh Napier University	*legal	n/a	c/u	1	337	
		*legal - consent subject to conclusion of legal agreement						
					Total beds		836	
					No. of sites		6	

Table 4: Student housing developments with planning consent prior to 2017

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	CONSENT EXPIRES	DEVELOPMENT TYPE	WARD	BEDS	OPERATOR
16/04087/FUL	Gorgie Road, 555, 1F	Edinburgh Letting Solutions	Nov-16	Nov-19	c/u	7	12	ELS Students
16/04088/FUL	Gorgie Road, 555, 2F	Edinburgh Letting Solutions	Nov-16	Nov-19	c/u	7	16	ELS Students
14/03341/FUL	St John's Road, 64	Mr James Donachie	Feb-15	Feb-18	c/u and ex	6	16	
10/02401/FUL	Jeffrey Street, 43-59 [site 37m S of]	Capital Land (Holdings) Ltd.	Jan-14	Jan-17	new	11	102	
16/01999/FUL	Murieston Crescent, 27, 29	Northwich Properties Ltd.	*legal	n/a	new	7	120	
16/01889/FUL	Mayfield Road, 234 / Braefoot Terrace, 14, 15	S 83 Ltd.	Nov-16	Nov-19	new	16	83	
16/00191/FUL	Shrub Place, 7	Ziggurat (Shrubhill) LLP	Dec-16	Dec-19	ext	12	38	
16/00152/FUL	Murano Place, 2	Ziggurat (Murano) LLP	Jun-16	Jun-19	new	12	9	
15/05715/FUL	King's Stables Road, 6, 8, 13, 15, 18-20, 21, 28 / Lady Wynd, 2	Capital Land (Holdings) Ltd.	*legal	n/a	c/u & ext	11	245	
15/04761/FUL	Murieston Crescent	Mr Jamie O'Rourke	Mar-16	Mar-19	new	7	101	
14/05174/PPP	London Road, 151	Caledonian Trust plc	Nov-16	Nov-19	c/u	14	350	
15/04795/FUL	St Peter's Place [St Kentigern's Church]	E L S Ltd.	*legal	n/a	c/u & ext	9	31	
14/05075/FUL	Stanley Place, 40	Fortis Developments Ltd.	Sep-16	Sep-19	new	14	98	
16/04784/FUL	Leith Walk, 84-90	Akdeniz Supermarket	Dec-16	Dec-19	c/u & ext	13	17	
		*legal - consent subject to conclusion of legal agreement			Total beds		1,238	
					No. of sites		14	

Table 5: Student housing developments awaiting determination as at 31 December 2017

APPLIC. NO	ADDRESS	APPLICANT	DATE OF APPLICATION	DEVELOPMENT TYPE	WARD	BEDS	OPERATOR
17/05115/FUL	Duncan Street, 20	Kenneth Reid Architects	Nov-17	c/u	15	25	
16/05217/PPP	Riccarton Mains Cottage, 1 [land 320m SE of]	H & H Group plc	Nov-16	new	2	250	
16/06275/FUL	Lanark Road, 35	Lanark Road Living Ltd.	Dec-16	new	2	97	
17/04459/FUL	Lothian Road, 91		Sep-17	c/u	11	12	
				Total beds		384	
				No. of sites		4	

Table 6: Student housing closures between 1 January 2017 and 31 December 2017

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	DEVELOPMENT TYPE	NEW USE	WARD	ROOMS	OPERATOR
14/05147/FUL	James Craig Walk, 27, 29, 31	TIAA Henderson Real Estate.	Sep-16	c/u	retail	11	-106	
				Total rooms	0		-106	
				No. of sites	0		1	

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 - Craigentinny/ Duddingston Ward

Ward 15 - Southside/ Newington Ward

Ward 16 - Liberton/ Gilmerton Ward

Ward 17 - Portobello/ Craigmillar Ward