

City of Edinburgh Student Housing Development Schedule 2019

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Explanatory notes

Cover photograph :

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 tenth 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 363 bedspaces were completed in 2019, 697 are currently under construction, consent has been granted for 1,728 and there were 771 awaiting determination.

All completions, developments under construction and consents in 2019 were on brownfield sites. For the fourth year in five, the number of those completed and under construction outwith the city centre exceeded those in the city centre.

Current accommodation provision

There were 19,793 purpose-built student bedspaces in Edinburgh at the end of 2019, up from 18,988 at the end of 2018. The major providers, operating over 500 beds, are:

University of Edinburgh	7,465
Heriot-Watt University	2,023
Edinburgh Napier University	1,231
Unite	1,739
Student Housing Company	986

Queen Margaret University	800
iQ	911
CRM Students	776

Market analysis

There is 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.

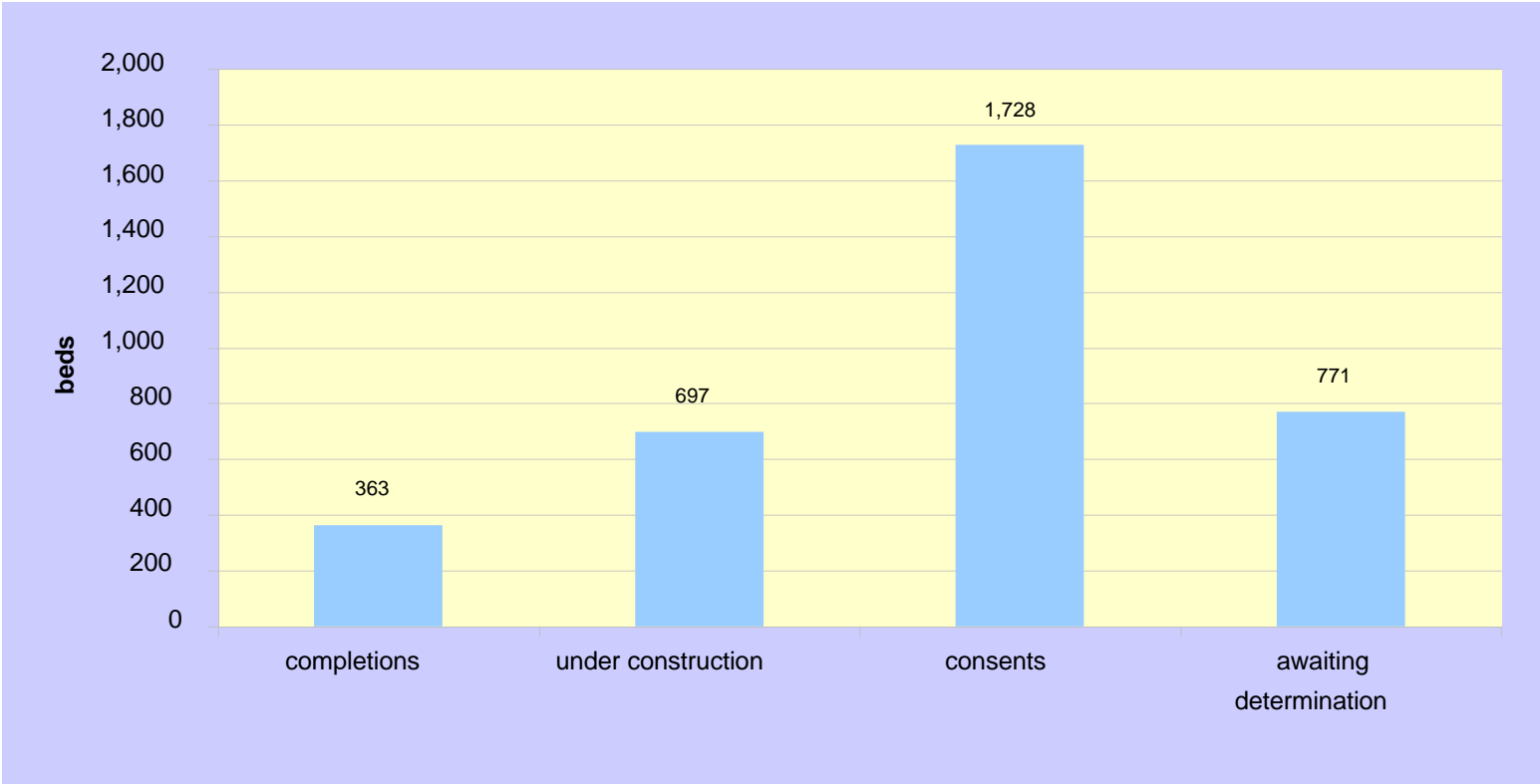
The number of units under construction has increased slightly since 2018, signalling an increase in completions in 2020.

Significant activity in 2019

- Completion of 245 bed spaces on King's Stables Road for Hello Student.
- Completion of a 52 bed development on Potterrow for Fresh Student Living.
- Construction has started on a 216 bed development on Dundee Street.
- Construction has started on a 355 bed development at Robb's Loan.

- Consent was granted for a 323 bed development at the Sciennes Road site of the Royal Hospital for Sick Children.
- Consent was granted for a 394 bed development on Westfield Road.
- Consent was granted for a 198 bed development on London Road.

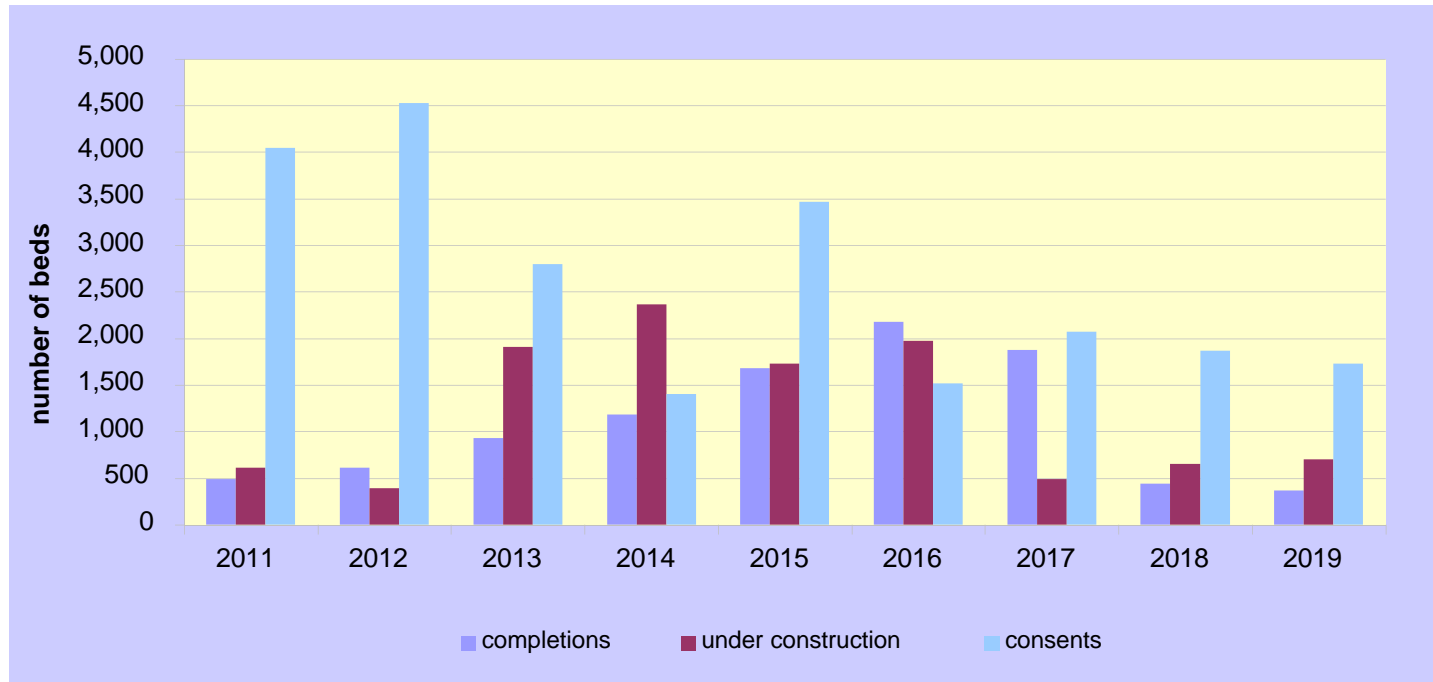
Graph 1 : Student housing developments in Edinburgh 2019



HISTORIC TRENDS : DEVELOPMENT PIPELINE (number of beds)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
completions under	888	486	611	932	1,181	1,677	2,178	1,874	440	363
construction consents	337	611	395	1,905	2,362	1,728	1,974	485	652	697
	1,708	4,046	4,528	2,800	1,406	3,467	1,517	2,074	1,866	1,728

Graph 2 : Student housing development trends 2010 - 2019



Summary of student housing developments by area and planning status, 2019 (no. of beds)

MAJOR DEVELOPMENT AREAS	1) Completions					2) Under construction				3) Consents 2019					
	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	52	245			297	299			299						0
SE Edinburgh					0				0						0
Waterfront					0				0						0
West Edinburgh		28	38		66		398		398	852	423				1,275
Elsewhere					0				0						0
TOTAL	52	273	38	0	363	299	398	0	697	852	423	0	0	0	1,275
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	104	12			116						0	0	0	0	0
SE Edinburgh					0						0	0	0	0	0
Waterfront					0						0	0	0	0	0
West Edinburgh	306	31			337	771					771	0	0	0	0
Elsewhere					0						0	0	0	0	0
TOTAL	410	43	0	0	453	771	0	0	0	0	771	0	0	0	0

Table 1: Student housing developments completed between 1 January and 31 December 2019

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	DEVELOPMENT TYPE	WARD	BEDS	OPERATOR
15/05715/FUL	King's Stables Road, 6, 8, 13, 15, 18-20, 21, 28 / Lady Wynd, 2	Capital Land (Holdings) Ltd.	Aug-17	c/u & ext	11	245	Hello Student
15/04357/FUL	Potterrow, 24 (site 25m north of)	Macdonald Estates.	May-16	new	11	52	Fresh Student Living
CITY CENTRE TOTAL						297	
SOUTH EAST TOTAL						0	
WATERFRONT TOTAL						0	
WEST TOTAL						0	
16/04087/FUL	Gorgie Road, 555, 1F	Edinburgh Letting Solutions	Nov-16	c/u	7	12	ELS Students
16/04088/FUL	Gorgie Road, 555, 2F	Edinburgh Letting Solutions	Nov-16	c/u	7	16	ELS Students
16/00191/FUL	Shrub Place, 7	Ziggurat (Shrubhill) LLP	Dec-16	ext	12	38	Liberty Living
ELSEWHERE TOTAL						66	
						Total beds	363
						No. of sites	5

Table 2: Student housing developments under construction as at 31 December 2019

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	DEVELOPMENT TYPE	WARD	BEDS	OPERATOR
17/00861/FUL	Calton Road, 63	(Scotland) Ltd. Melford	Aug-17	new	11	83	Student Roost
15/05422/FUL	Dundee Street, 160 (land 56m west of)	Developments.	Dec-17	new	9	216	
CITY CENTRE TOTAL						299	
SOUTH EAST TOTAL						0	
WATERFRONT TOTAL						0	
WEST TOTAL						0	
18/02708/FUL	Hillside Crescent, 11	IQSA	Nov-18	c/u	12	27	iQ
17/03675/FUL	Robb's Loan, 47 [Pentland House]	Edinburgh Napier University	May-18	c/u	1	355	
14/03341/FUL	St John's Road, 64	Mr James Donachie	Feb-15	c/u and ex	6	16	
ELSEWHERE TOTAL						398	
						Total beds	697
						No. of sites	5

Table 3: Student housing developments gaining planning consent in 2019

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	CONSENT EXPIRES	DEVELOPMENT TYPE	WARD	BEDS	OPERATOR
CITY CENTRE TOTAL							0	
SOUTH EAST TOTAL							0	
WATERFRONT TOTAL							0	
WEST TOTAL							0	
19/00114/FUL	Duncan Street, 20	KED Properties	May-19	May-22	c/u	16	24	
19/01149/FUL	London Road, 61-62 [land at]	Summix TRT Developments Ltd	Jun-19	Jun-22	new	14	198	
18/03617/FUL	Mayfield Road, 224-234, 14 - 15 Braefoot Road	S 83 Ltd	Mar-19	Mar-22	new	16	158	
18/02719/FUL	Sciennes Road (Royal Hospital for Sick Children)	Downing Students (Meadows) LP Inc	*legal	n/a	c/u & new	15	323	
18/02210/FUL	Slateford Road, 144-180	Kirkton Investments Ltd	Jun-19	Jun-22	c/u	9	76	
19/04141/FUL	Stanley Place, 44	Scott Hobbs Planning	*legal	n/a	new	14	102	
19/01970/FUL	Westfield Road, 24	Turley (Dublin Street) Edinburgh	*legal	n/a	new	7	394	
ELSEWHERE TOTAL							1,275	
*legal - consent subject to conclusion of legal agreement					Total beds		1,275	
					No. of sites		7	

Table 4: Student housing developments with planning consent prior to 2019

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	CONSENT EXPIRES	DEVELOPMENT TYPE	WARD	BEDS	OPERATOR
16/04400/FUL	Haymarket Yards, 22	Scape Homes HM Limited And CGM Holdings Ltd.	Feb-18	Feb-21	new	11	104	
17/04459/FUL	Lothian Road, 91		May-18	May-21	c/u	11	12	
CITY CENTRE TOTAL							116	
SOUTH EAST TOTAL							0	
WATERFRONT TOTAL							0	
WEST TOTAL							0	
16/06275/FUL	Lanark Road, 35	Lanark Road Living Ltd.	Aug-18	Aug-21	new	2	97	
18/00154/PPP	London Road, 139	City of Edinburgh Council	Dec-18	Dec-21	new	14	n/a	
16/04158/FUL	Mayfield Road, 200	Braidburn Students Ltd.	Feb-17	Feb-20	new	16	89	
15/04795/FUL	St Peter's Place [St Kentigern's Church]	E L S Ltd.	Sep-18	Sep-21	c/u & ext	9	31	
16/01999/FUL	Murieston Crescent, 27, 29	Northwich Properties Ltd.	Feb-18	Feb-21	new	7	120	
ELSEWHERE TOTAL							337	
							Total beds	453
							No. of sites	7

Table 5: Student housing developments awaiting determination as at 31 December 2019

APPLIC. NO	ADDRESS	APPLICANT	DATE OF APPLICATION	DEVELOPMENT TYPE	WARD	BEDS	OPERATOR
CITY CENTRE TOTAL						0	
SOUTH EAST TOTAL						0	
WATERFRONT TOTAL						0	
WEST TOTAL						0	
19/03380/FUL	Lanark Road, 35	Scott Hobbs Planning	Aug-19	new	9	134	
19/04557/AMC	London Road, 151	Halliday Fraser Munro Planning (Victoria Street).	Sep-19	new	14	377	
19/04768/FUL	Mayfield Road, 224	Hybrid Planning & Development.	Oct-19	new	16	136	
19/04858/FUL	Mayfield Road, 200	Lanark Student Living Ltd.	Oct-19	new	16	138	
19/04425/FUL	Murieston Crescent, 27-29	Maven Property (Murieston) LP.	Nov-19	new	7	120	
ELSEWHERE TOTAL						771	
						Total beds	771
						No. of sites	6

Table 6: Student housing closures between 1 January 2018 and 31 December 2019

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	DEVELOPMENT TYPE	NEW USE	WARD	ROOMS	OPERATOR
CITY CENTRE TOTAL							0	
SOUTH EAST TOTAL							0	
WATERFRONT TOTAL							0	
WEST TOTAL							0	
ELSEWHERE TOTAL							0	
					Total rooms	0	0	
					No. of sites	0	0	

Map 1 - Major Development Areas

