



City of Edinburgh Hotel Development Schedule 2016

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Explanatory notes

Cover photograph : Premier Inn Edinburgh City Centre Royal Mile

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.

*This schedule has been prepared by Planning & Transport, City of Edinburgh Council.
contact: Simon Antrobus (simon.antrobus@edinburgh.gov.uk, 0131-469-3597)*

Commentary

Development summary

This is the tenth 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.

The national target for tourism growth was for a 50% increase in the value of Scottish tourism by 2015. In order to meet this, Edinburgh's accommodation in terms of volume would need to increase by 35% to 50% by 2015. This equates to an additional 2,800 to 4,000 hotel bedrooms between 2006 and 2015.

Graph 1 shows that 868 rooms were completed in 2016, 340 are currently under construction and consent has been granted for another 2,858. Of these, 2,061 were new build, 579 were change of use and 218 were extensions.

A total of 7,098 rooms have been developed or granted consent since 2007. This is over 177% of the upper target of 4,000 additional rooms required by 2015. A total of 4,240 of these have actually been completed, amounting to 106% of the target. There are also 2,148 rooms still awaiting determination.

Edinburgh's total stock of serviced accommodation at the end of 2016 was approximately 13,600 rooms.

All completions and developments under construction in 2016 were on brownfield sites, as are all existing consents.

Graph 2 shows that the 868 room completions in 2016 was a notable increase on the previous year. The 2,858 room consents in place at the end of 2016 is a slight reduction on the 2015 figure of 2,569. The majority of completions and developments under construction in 2016 were in the City Centre.

Market analysis

The hotel sector in Edinburgh continues to display stronger signs of growth than many other commercial property sectors. There was planning consent for 2,858 rooms at the end of 2016.

Occupancy levels for the year increased by 2.1% to 80.4%. Average room rates (ARR) also increased by 3.4% in 2016 to £94.05 per room.

Previous hotel schedules have highlighted the central role of the major hotel chains in Edinburgh's hotel development activity. This continued in 2016 with two Premier Inns, a Premier Inn extension, a Hub by Premier Inn, a Marriott Courtyard and a Adagio aparthotel opening, totalling 794 rooms.

The major hotel chains comprise a significant proportion of the total Edinburgh hotel stock as at the end of 2016, with Premier Inn overtaking Travelodge as the largest provider.

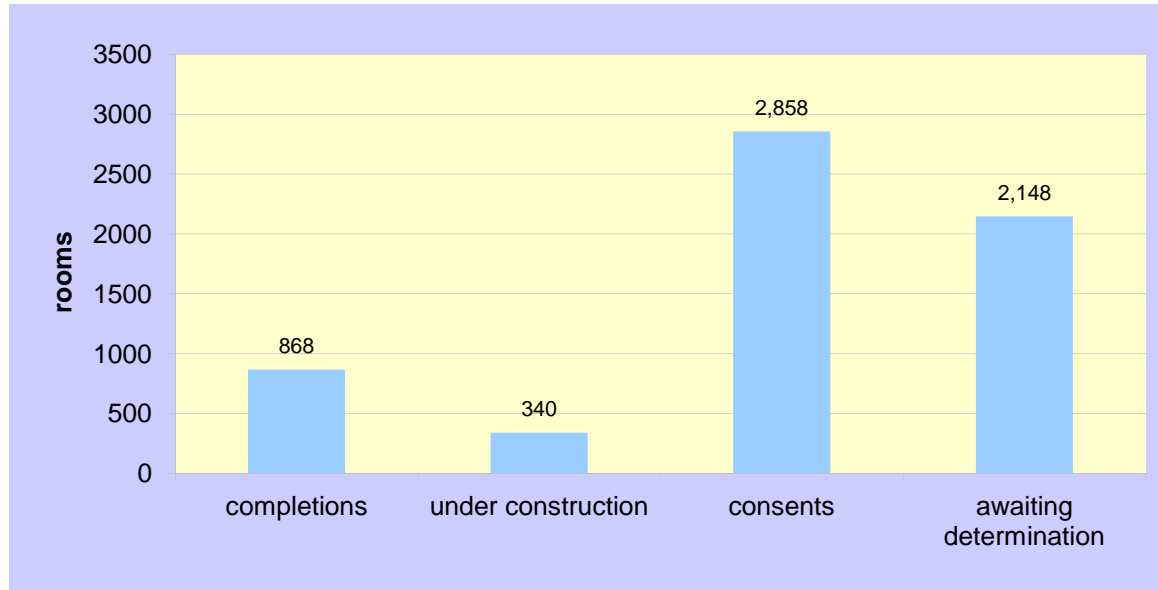
Operator	Total rooms
Premier Inn	1,348
Travelodge	1,188
Holiday Inn/Holiday Inn Express	802
Ibis/Ibis Styles	619
Apex Hotels	538

These five chains operate 4,495 rooms in Edinburgh out of approximately 9,000 comparable hotel rooms.

Significant activity in 2016

- A 157 room Hub by Premier Inn is under construction in Rose Street.
- Consent has been granted for a 235 room Leonardo Hotel in Victoria Street/Cowgate.
- A 239 room Marriott Courtyard hotel opened at Baxter's Place.
- A 128 room Premier Inn opened at York Place.
- A Premier Inn hotel and Hub by Premier Inn hotel, totalling 257rooms, opened at East Market Street.

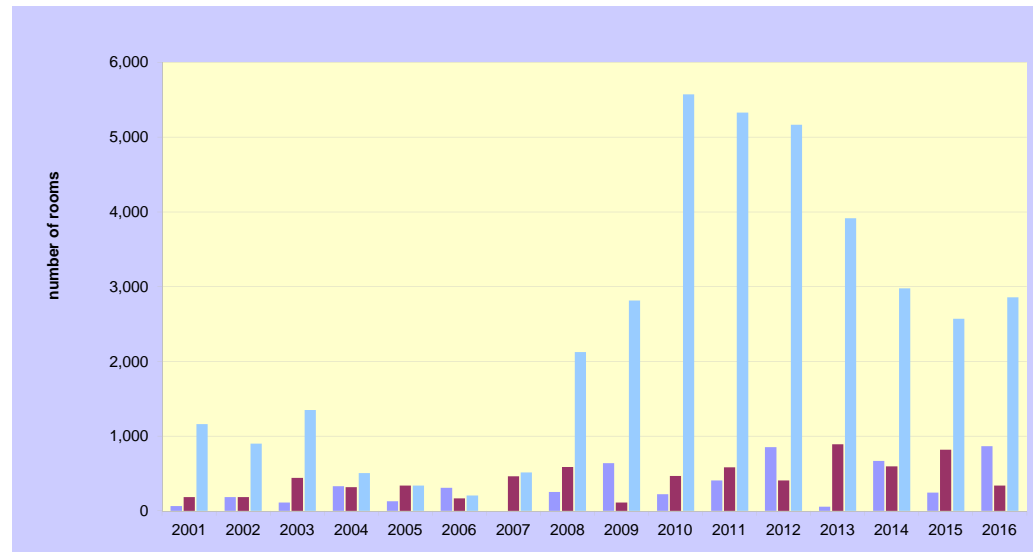
Graph 1 : Hotel developments in Edinburgh 2016



HISTORIC TRENDS : DEVELOPMENT PIPELINE (number of rooms)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
completions	68	185	112	330	131	309	0	255	640	223	407	854	57	670	244	868
under construction	185	185	442	320	342	170	465	589	115	467	584	407	892	597	818	340
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

Graph 2 : Hotel development trends 2001 - 2016



Summary of hotel developments by area and planning status, 2016 (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	refurb.	ext.	TOTAL	new build	change of use	losses	extension	refurb	TOTAL
City Centre	403	177	25		605	98	242			340	1,274	517		108		1,899
West Edinburgh					0						175			80		255
Waterfront											123			24		147
SE Edinburgh																
Other		239	24		263					0	489	62		6		557
TOTAL	403	416			868	98	242			340	2,061	579	0	218		2,858
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		306		-10	296		-143		-143							
West Edinburgh	1,825	10			1,835											
Waterfront	13															
SE Edinburgh																
Other		17			17				0							
TOTAL	1,838	333			2,148		-143		-143							

Table 1: Hotel developments completed between 1 January and 31 December 2016

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	DEVELOPMENT TYPE	WARD	ROOMS	CLASS	OPERATOR
12/04064/FUL	Baxter's Place, 1-5	Trendy Celt Ltd.	Jul-14	c/u & ext	11	239	HO	Marriott Courtyard
15/00537/FUL	Castle Street, 28	The Karagol Partnership	May-15	c/u	11	17	SA	Edinburgh Castle Apartments
12/04577/FUL	Greenside Place, 2	RW Greenside Place	Mar-13	c/u	11	8	HO	The Glasshouse
13/01758/FUL	Newcraighall Road, 91	Whitbread Group	Jul-13	ext	17	24	HO	Premier Inn
13/03407/FUL	New St/Canongate/Cranston St/East Market St	Artisan REI	Mar-14	new & c/u	11	146	SA	Adagio
13/03407/FUL	New St/Canongate/Cranston St/East Market St	Artisan REI	Mar-14	new & c/u	11	257	HO	Premier Inn/Hub by Premier Inn
14/04513/FUL	North Bridge, 19	The Hotel Collection	May-15	ext	11	25	HO	Carlton Highland Hotel
14/03423/FUL	Thistle Street, 27-35	TM Napier Ltd.	Oct-14	c/u	11	24	SA	Fountain Court Apartments
14/00691/FUL	York Place, 44	Mapeley / Consensus Capital	May-14	c/u	11	128	HO	Premier Inn
						Total rooms	868	
						No. of sites	9	

Table 2: Hotel developments under construction as at 31 December 2016

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		
14/04051/FUL	Hope Street, 4	Caledonian Heritable	Feb-15	c/u	11	13	HO		
14/04962/FUL	Market Street, 6-8	The EDI Group Ltd.	Jan-16	new	11	98	HO		
13/00393/FUL	Niddry Street, 41-43	Mr. Franco Martone	Mar-13	c/u	11	n/a	HS		
14/00125/FUL	Rose Street, 64-76	Old Mutual Property Fund	Sep-14	c/u	11	157	HO	Hub by Premier Inn	
					Total rooms	340			
					No. of sites	5			

Table 3: Hotel developments that gained planning consent in 2016

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	CONSENT EXPIRES	DEVELOPMENT TYPE	WARD	ROOMS	CLASS	OPERATOR
14/02778/FUL	Advocate's Close, 8 / Roxburgh's Court, 1	Chris Stewart Group	Jan-16	Jan-19	c/u	11	20	SA	
15/00661/FUL	Almond Road	Ability Hotels (Edinburgh) Ltd.	Mar-16	Mar-19	new	1	175	HO	
15/04053/FUL	Broadway Park, 1 [land 148m west of]	Greene King	Jun-16	Jun-19	new	3	79	HO	Farmhouse Inn
14/02814/PPP	Fountainbridge, 199 [land 60m south of]	The EDI Group Ltd.	Jun-16	Jun-19	new	9	n/a	HO	
16/05364/FUL	Gilmore Place, 36	Mr Bahman Noafshar	Dec-16	Dec-19	c/u	10	10	GH	
15/05715/FUL	King's Stables Road, 6-28 / Lady Wynd, 2	Pevenil Securities & Campus Development Management	legal*	n/a	new & c/u	11	128	HO	
16/02265/PPP	Lochside Court, 1	Whitbread Group Plc & Parabola Edinburgh Park LLP.	Aug-16	Aug-19	ext	3	80	HO	Premier Inn Edinburgh Park
14/05174/PPP	London Road, 151	Caledonian Trust plc	Nov-16	Nov-19	new	14	150	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
08/03379/FUL	Princes Street, 42-44	The Old Waverley Hotel Ltd.	Mar-16	Mar-19	ext	11	12	HO	Old Waverley Hotel
16/00937/FUL	Research Avenue [car park]	Studio Anyo & Heriot Watt University	Aug-16	Aug-19	new	2	160	HO	
15/05718/FUL	Shandwick Place, 5	Sleeperz Hotels	Jul-16	Jul-19	c/u	11	43	HO	
15/04445/FUL	Victoria Street, 1-15 / Cowgate, 18-20	Dreamvale Properties	Nov-16	Nov-19	c/u	11	235	HO	Leonardo Hotels
15/04606/FUL	West Coates, 3	D & S Mowat Ltd.	Jan-16	Jan-19	c/u	13	4	HO	
16/04279/FUL	York Lane, 11-13	Ballantrae Hotel Group	Nov-16	Nov-19	ext	11	21	HO	Ballantrae Hotel
					Total rooms		1,161		
					No. of sites		16		
		* legal - consent granted subject to legal agreement							

Table 3a: Other hotel developments with planning consent as at 31 December 2016

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	CONSENT EXPIRES	DEVELOPMENT TYPE	WARD	ROOMS	CLASS	OPERATOR
15/00487/FUL	Constitution Street, 57	Cameron Guest House	Jul-15	Jul-18	c/u	13	12	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
13/01405/FUL	Fountainbridge, 194 [land adjacent to]	Map Property and Leisure	Dec-15	Dec-18	new	9	181	HO	Hyatt Place
10/01832/PPP	Ingliston Road [RHS]	Royal Highland & Agricultural Society of Scotland	legal*	n/a	new	1	n/a	HO	
08/00260/FUL	Lothian Road, 4	Caledonian Operating Company Ltd	Dec-08	never	ext	11	50	HO	
15/01959/FUL	Minto Street, 1, 2 / Salisbury Road, 14	Mr. Shahid Hafeez	Jul-15	Jul-18	c/u	15	19	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	
09/00715/FUL	Picardy Place, 16-22	EDC (Hotels) Ltd.	Feb-15	Feb-18	ext	11	25	HO	Holiday Inn Express
14/03245/FUL	Pitt Street, 144	Buckley Building UK Ltd.	Dec-14	Dec-17	c/u	12	n/a	HS	
15/01855/FUL	Queen Street, 68-73	Beyond by SACO	Aug-15	Aug-18	c/u	11	187	SA	
14/02796/FUL	Salisbury Road, 45	Salisbury Hotel	Aug-14	Aug-17	ext	15	6	HO	Salisbury Hotel
14/03664/FUL	Smith's Place, 3	Waugh Taverns	Nov-14	Nov-17	c/u	12	17	HO	
12/04521/FUL	South Bridge, 85-87	Rapid Restaurants Ltd.	May-13	never	c/u	11	12	HO	
08/03361/OUT	St. James Centre	Henderson Global Investors	Jun-09	never	new	1	200	HO	
14/04085/FUL	Torphichen Street, 24-28	Interserve Developments	Apr-15	Apr-18	new	11	150	HO	
13/04320/AMC	West Harbour Road, 65	Granton Central Developments Ltd.	Jan-14	Jan-17	new	4	123	HO	
Total rooms							1,697		
No. of sites							18		

* legal - consent granted subject to legal agreement

Table 4: Hotel developments awaiting determination as at 31 December 2016

APPLIC. NO	ADDRESS	APPLICANT	DATE OF APPLICATION	DEVELOPMENT TYPE	WARD	ROOMS	CLASS	OPERATOR
15/02632/FUL	Constitution Street, 121	Mr. & Mrs. Herman & Abha Rodrigues	Jun-15	c/u	13	10	SA	
16/00682/FUL	Constitution Street, 130	GA Group Ltd.	Feb-16	c/u	13	25	HO	
16/02706/PPP	East Mains of Ingliston, 14	Amber Real Estate Investments Ltd	Jun-16	new	1	180	HO	
15/05580/PPP	Eastfield Road, 2 [land 160m north of]	The IBG Stakeholders	Dec-15	new	1	1,415	HO	
15/05852/FUL	Eastfield Road, 100 [land 250m west of]	Royal Highland & Agricultural	Dec-15	new	1	230	HO	
16/02258/FUL	Ettrick Road, 13	Mr Jim Barlow	May-16	c/u	10	-18	HO	
16/05454/PPP	Fettes Row / 7, 11, 13 Eyre Terrace	The Royal Bank Of Scotland PLC.	Oct-16	new	5	n/a	HO	
16/06165/LBC	Gogarmuir Road [Kirkland House]	Newcrest Residential Limited.	Dec-16	c/u	1	10	HO	
16/05692/FUL	Gorgie Road, 479	Mr D Pennycuik	Nov-16	c/u	9	22†	HS	
16/05665/FUL	Hill Place, 2-3	Royal College Of Surgeons Of Edinburgh	Nov-16	c/u	15	62	HO	Ten Hill Place
16/05690/LBC	Hill Place, 7-10	Royal College Of Surgeons Of Edinburgh	Nov-16	alt	15	-10	HO	Ten Hill Place
16/02815/PPP	Ocean Drive, 98 [car park 137m NE of]	Ocean Terminal Ltd.	Jun-16	new	13	n/a	HO	
16/05292/FUL	Princes Street, 64	LaSalle Investment Management.	Oct-16	c/u	1	137	HO	
16/05566/LBC	Queen Street, 74-77	Gloag Serviced Apartments Ltd	Nov-16	c/u	11	82	HS	
16/06202/FUL	Victoria Street, 9	MFS Edinburgh Limited.	Dec-16	c/u	1	25	SA	
						Total rooms	2,148	
						No. of sites	15	

† number of beds - not included in total

Table 5: Hotel closures between 1 January and 31 December 2016

APPLIC. NO	ADDRESS	APPLICANT	DATE OF CONSENT	DEVELOPMENT TYPE	NEW USE	WARD	ROOMS	CLASS	OPERATOR	
n/a	Leith Street, 107	n/a	n/a	new	retail	11	-143	HO	Thistle Hotel Edinburgh	
Total rooms							-143			
No. of sites										

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 - Craighentony/ 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.