

STUDENT ACCOMMODATION DEMAND AND CONCENTRATION REPORT

Whitebox Student Campus Castletroy
Groody Developments Limited

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1.0 INTRODUCTION

This Student Accommodation Demand and Concentration Report has been prepared to accompany a Large-Scale Residential Development Application (LRD) comprising a Purpose-Built Student Accommodation (PBSA) Complex on land located at the Dublin Road and Groody Road, Newcastle, Limerick. The overall development will comprise 196 no. bed clusters in five blocks of development with capacity for 1,400 no. student bedspaces.

The purpose of this report is to consider and assess whether there is sufficient demand in the area to justify the proposed PBSA and to ensure that the proposed development will not result in an oversupply of student accommodation in the Limerick Metropolitan Area.

2.0 SITE LOCATION & CONTEXT

Located approximately 3.7km from Limerick City centre, the proposed development site comprises a greenfield site within the townland of Newcastle in the Groody Valley. The site is bound to the west by Groody River, to the north by the R445, to the east by Groody Road and to the south by greenfield.



Figure 1.0 Site Location & Context

The site is located proximate (circa 1km) to the University of Limerick Campus accommodating 117,645 students in the academic year 2022/2023 and the Limerick College of Art and Design (TUS) with a student population of 1,500 situated circa 2.4km west of the site.

There is an existing segregated cycle track on both sides of the Groody Road fronting the site, with a footpath provided on the northern side of the road (opposite side to the development proposal). Both the Groody Road and the Dublin Road to the west have been identified to accommodate dedicated bus lanes under Bus Connects proposals.

3.0 PROPOSED DEVELOPMENT

The development consisting of 196 no. bed clusters, is distributed across 5 no. separate blocks, ranging in height from 5 - 8 storeys, with a total of 1,400 no. student bedspaces. The composition of each block is detailed hereunder:

- Block A comprising 8 storeys provides for 28 no. bed clusters and 224 no. bedspaces; Student library; Student union; Plant room; Bin store; and Bicycle store;
- Block B comprising 7 storeys provides for 52 no. bed clusters and 400 no. bedspaces; Reception & Office; Post room; Laundry room; Student canteen; Maintenance store; Plant room; ESB sub-station & switch room; Bin Storage; and Bicycle store;
- Block C comprising 6 storeys provides for 51 no. bed clusters and 355 no. bedspaces; Student Gym; Maintenance store; Plant room; ESB sub-station & switch room; Bin Storage; and Bicycle store;
- Block D comprising 6 storeys provides for 32 no. bed clusters and 211 no. bedspaces; Reception & Office; Post room; Laundry room; Student canteen; Student supply retail unit (60m²); Plant room; Maintenance store; Bin Storage; and Bicycle Storage;
- Block E comprising 5 storeys provides for 33 no. bed clusters and 210 no. bedspaces; Reception & Office; Laundry room; (Maintenance store; Bicycle store; and Plant room.

The development provides for 38 no. car parking spaces on site and 297 no. cycle parking spaces within secure cycle stores, within each building block.

Extensive landscaping proposals, include landscaped courtyards; (pedestrian and cycle connections from the Groody Road to the Groody Valley Green Wedge; natural landscaping and public walkways within the Groody Valley Green Wedge; and a Wetland & Biodiversity area adjacent to the Groody River. A set back has also been incorporated into the development proposal to accommodate a future bus corridor on the Groody Road fronting the site.

Ensure that all applications for new off campus purpose built student accommodation, the change of use to student accommodation in existing residential areas, or extensions to existing dwellings to facilitate student accommodation, must include details outlining the presence and distribution of any permanent residential occupiers; the extent of students renting in the private housing market; and the presence of any other housing catering primarily for students and short term lets in the area/estate. The application should address any potential impacts of the proposal on residential amenity and any permanent residents in the area.

Section 11.4.4.7 of the CDP also states that when assessing applications for student accommodation, the Council will have regard to:

The location of student accommodation: The Council will prioritise student accommodation on campus or within 1km distance from the boundary of a Third Level Institute, followed by locations within close proximity to high quality public transport corridors, cycle and pedestrian routes and green routes;

The number of existing similar facilities in the area (applicable only to off campus accommodation). In assessing a proposal for student accommodation, the Planning Authority will consider the cumulative impact of student accommodation, which exists in the locality and will resist the overconcentration of such schemes in any one area, in the interests of sustainable development and residential amenity.

Whilst HO 08 of the CDP requires details of permanent residential occupiers and the extent of students renting in the private housing market, there is no available data to provide such information. The Census of Population can only provide information on the permanent private households by type of occupancy detailing the number of units rented from a private landlord or those premises owned outright or subject to a mortgage. No information is provided on student rental numbers.

In full acknowledgement of the fact that many houses in the area around the University of Limerick are rented by students from private landlords, this report focuses on the existing and proposed provision of purpose built student accommodation in Limerick city, proximate to the site. This report will demonstrate the demand for purpose built student accommodation within Limerick City, and consider the concentration of existing and proposed facilities in relation to the subject site.

The following points will be considered throughout this report:

1. National policy objectives and demand calculations for the provision of student accommodation
2. Estimated demand and supply of student accommodation in Limerick City
3. Estimated supply and demand of student accommodation within the vicinity of the site; and
4. Conclusion regarding the concentration of student accommodation in the local area as a result of the proposed development.

This analysis is undertaken having regard to Objective GV 01 set out in the CDP pertaining to the site, which seeks to “*facilitate purpose-built student accommodation where deemed appropriate*” on the site.

5.0 NATIONAL POLICY & OUTLOOK FOR STUDENT ACCOMMODATION

5.1 National Planning Framework

The National Planning Framework (NPF) recognises that the demand for student accommodation in urban areas can further exacerbate demand for rental accommodation in urban areas. The NPF outlines that the provision of purpose built student accommodation must be proximate “*as possible to the centre of education, as well as being connected to accessible infrastructure such as walking, cycling and public transport*”

5.2 Housing for All – a New Housing Plan for Ireland

Housing for All, led by the Minister for Housing, Local Government and Heritage sets out a series of actions which will be delivered to address the housing crisis. The plan is backed by the largest ever housing budget in the history of the State, in excess of €20bn, to transform the housing system.

Housing For All contains a commitment to support technological universities to develop purpose-built student accommodation where such a requirement exists, through access to appropriate financing.

The target for new purpose built student accommodation beds under the strategy is for the provision of 7,000 bed spaces by end 2019 and a total of 21,000 additional purpose built student accommodation beds by 2024.

5.3 National Student Accommodation Strategy

The National Student Accommodation Strategy (NSAS) published in 2017 points to all current indicators that indicate a significant increase in full time students attending publicly funded Higher Education Institutes (HEI) over the next decade:

“The HEA Key Facts and Figures for 2015/2016, published in November 2016, highlighted that there were 179,354 full-time enrolments in Department of Education and Skills (DES) aided HEIs in the academic year 2015/2016 (169,363 of those students attend either a university or an institute of technology). Enrolments have increased from 173,649 in 2014/2015 and from 169,254 in 2013/2014”.

The International Education Strategy has set a growth target of 33% for the higher education sector, which will result in an increase in international students in both public and private HEIs from 33,118 in 2014/2015 to approximately 44,000 by the end of the 2019/2020 academic year.”

The Strategy also points out the potential impact of PBSA on the private rented sector:

“There are a significant number of students renting from private landlords in Ireland as was highlighted in the National Economic and Social Council (NESC) Report “Ireland’s Rental Sector: Pathways to Secure Occupancy and Affordable Supply” which was published in May 2015. The NESC report also outlined that on average, there are 2.73 persons per household in Ireland. While it is likely that the occupancy of a household comprising solely of students is going to be higher than the national average, it is a fair extrapolation to make that every 4 students housed in either PBSA or in Digs will free up an additional housing unit in the private rented sector that would otherwise have been occupied by students.”

In summary the National Strategy identifies that there will be significant continued demand for accommodation and that the delivery of additional PBSA has significant potential to free up housing for other demographics.

The NSAS identified that there was an unmet demand for 23,643 bed spaces in 2017 at a national level. The demand calculation data is based on students attending higher education institutions who have requested on campus accommodation against the number of bed spaces available on campus¹. The strategy projected that there would be an excess demand of 25,754 bedspaces in 2019 which is set to reduce to 20,986 bedspaces in 2024. The Strategy recognises that in order to comprehensively address the shortfall in student accommodation investment is required from both public higher education institutions and private developers.

The most recent progress report for the NSAS was published in Q3 2019. The report concluded that at the end of Q3 2019, 8,229 bedspaces were completed, 5,245 bed spaces were under construction and 7,771 bedspaces had been granted planning permission. This denotes a total of 21,254 bedspaces². Overall, this represents a shortfall in supply of 4,500 bedspaces based on the demand projections detailed in the NSAS. Whilst it is acknowledged that significant progress has been made in increasing the supply of purpose built student accommodation to meet the demand at a national level, it is evident that additional student accommodation is still required to meet the excess and growing demand.

The shortage of student accommodation is happening in the context of the wider housing crisis. There is a need to increase the supply of all types of housing and accommodation, including student accommodation.

5.4 Irish Student Accommodation Report

An Irish Student Accommodation Report was prepared by Cushman & Wakefield in 2023. Ireland now boasts 8 Universities, and new legislation in 2018 has allowed for the establishment of a further 5 new Technological Universities. These, combined with Institutes of Technology, Colleges of Education, constituent Colleges, private Colleges, and Further Education Colleges, allows for a broad range of choices for perspective students in terms of qualifications, education fields and location throughout Ireland. Enrolments in higher education institutes are increasing year on year as detailed in Figure 3.0, with an 18 per cent increase between 2013/14 and 2022/23. Further from 2017/18, international student enrolments have increased by approximately 42 per cent to stand at 29,500 students.

Based on CSO projections, the 20-24 population cohort is forecast to increase by 35,300 (11.5%) to 342,400 in 2026 and grow to 387,000 by 2036.

This all points to increased demand for student accommodation across the country. In November 2022, the Government agreed to support the development of long-term evidence-based policy to stimulate the optimum supply of student accommodation. DFHERIS and the HEA also propose to develop data on university owned and private student accommodation by region, to analyse demand levels and develop future policy and responses.

¹ National Student Accommodation Strategy pp15

² Quarter 3 2019 Progress Report on the National Student Accommodation Strategy pp 1

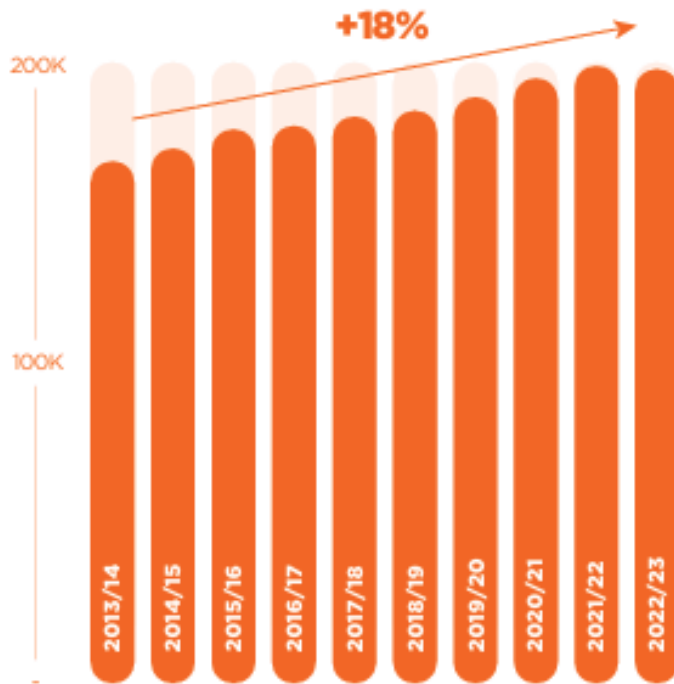


Figure 3.0 National Student Enrolment Figures

The report concludes that the Irish Market has seen much change over the past decade, on the back of intensifying demand. Further rapid action and delivery is required to ensure the long-term sustainability and the potential to create a hugely positive societal impact from the provision of this type of housing.

6.0 STUDENT CONCENTRATION

If one examines the population within a 1km radius³ of the site, the area had a population of only 10,351 persons in 2022. The low population reflects the largely commercial / undeveloped nature of land to the north and east of the site. Of that population, only 611 persons over the age of 15 years are in full time education. This represents 5.9 per cent of the total population within 1km of the site.

It is noted that this percentage also takes account of people aged between 15-18, an age group who will typically be living within their family home, who are also still attending secondary level education. However, this metric is still an effective indicator as to the level of students living in the study area.

Whilst there is no indicator / threshold of acceptability in Ireland, Edinburgh City Council's Student Housing Guidance is considered to be best practice in terms of providing the appropriate concentration levels of student accommodation in terms of maintaining the social and physical fabric of a given area. This guidance document indicates that:

Where the student population is dominant, exceeding 50% of the population, there will be a greater potential imbalance within the community".

³ There are 37 Small Areas of Population (SAPs) within or immediately adjacent to 1km buffer distance from the site

As there is no equivalent document for Limerick, it is proposed to reference this as an appropriate threshold in the assessment of the proposed student accommodation scheme.

The delivery of the proposed development will result in an additional 1,400 students living in the study area. This would increase the percentage of students living within 1km of the site from 5.9 per cent to 16.9 per cent which is within the acceptability threshold established as per Edinburgh City Council's Student Housing Guidance.

Given the low level of housing provision within 1km of the site, it was considered appropriate to examine existing student numbers over a wider area, comprising the Electoral Division (ED) of Ballysimon. This area encompasses the University of Limerick and much of the developed urban area of Castletroy. The Census of Population confirms that there were 13,641 persons over the age of 15 years living in this ED, of which 3,306 persons were students. Thus, an analysis of the population within the ED has found that students account for 24.2 per cent of the study area population.

The delivery of the proposed development within the ED will result in an additional 1,400 students living in the study area. This would increase the percentage of students living within the subject site's ED from 24.2 per cent to 31.2 per cent which is within the acceptability threshold established as per Edinburgh City Council's Student Housing Guidance.

7.0 SUPPLY AND DEMAND OF STUDENT ACCOMODATION IN LIMERICK

The NSAS detailed that there were 6,816 no. student bedspaces in Limerick in 2017. Table 7.1 outlines the projected supply and demand for student bedspaces in Limerick to 2024 which is detailed in the NSAS.

Location	Supply 2017	Demand 2017	Supply 2019	Demand 2019 (excess Demand)	Supply 2024	Demand 2024 (excess demand)
Limerick	6,816	7,724 (908)	6,831	9,000 (2,169)	8,181	9,798 (1,617)

Table 7.1 Projected supply and demand for student bedspaces in Limerick (National Student Accommodation Strategy)

The most recent progress report published in Q3 of 2019, demonstrates that there has been limited provision of new student bedspaces in Limerick since the NSAS was published in 2017. The report identifies that between 2016 and Jun 2019, 7 no. bedspaces were constructed, and an application for 143 no. bedspaces was under consideration by Limerick City and County at the time the report was published.

A review of planning applications granted permission for purpose-built student accommodation in Limerick City has been undertaken which takes into account developments permitted since the Q3 2019 report was published. Whilst there has been limited PBSA commencements of significance in the Limerick Metropolitan Area since the Q3 update in 2019, a number of planning permission have been granted including:

- 162 no. student bedspaces at Hassets Cross, Limerick (P19/710) (the application that was under consideration by the planning Authority at the time the Q3 2019 progress report was published),

- 2 no. bedspaces at O'Dwyer House, South Circular Road (20/531);
- 17 no. bedspaces at St. Gerard Street, Limerick, (20/1142);
- 80 bedspaces on a site in Rhebogue which repurposed a permission for 21 no. dwellings into a village type development for UL off campus accommodation;
- 116 bedspace on the former Railway Hotel Site, Parnell Street;
- 22 bedspaces at Courtbrack Avenue near Mary Immaculate College; and
- 202 no. student bedspaces on a site on the Old Dublin Road, Rhebogue (22/1216)

This means that in Limerick, 608 no. student bedspaces have been constructed, or granted planning permission since 2017. Based on the demand projections for 2024, this would indicate that there is a shortfall of 2,374 no. bedspaces in Limerick.

Of particular concern, is the fact that there appears to be only 87 no. additional and operational bedspaces since 2017. The remaining 521 no. bedspaces although granted planning permission, have not yet been constructed. Importantly, any large construction project, including student accommodation in excess of 100 bed spaces, is likely to take at least 18 months to complete following construction. This means that there will be no meaningful addition to the quantum of bedspaces in Limerick until after 2025 and where projects have not commenced to date, there is always uncertainty as to whether they will in fact proceed.

Table 7.2 displays the enrolment figures for University of Limerick, Technological University of the Shannon (TUS) and Mary Immaculate College for the year 2022/23. A total of 28,245 students were enrolled across the three third level institutions in Limerick City. Having regard to these enrolment figures and the number of constructed purpose-built student bedspaces as of Q4 2024 (6,910 no. bedspaces), it is submitted that the total number of purpose-built student bedspaces constructed and in operation in Limerick represents circa 24.4 per cent of the total enrolment of students for the year 2022/2023.

Third Level Institute	2020/2021	2021/ 2022	2022 / 2023
University of Limerick	14,460	14,865	14,970
Technological University of the Shannon	9,655	9,745	9,360
Mary Immaculate College	4,080	4,080	3,915
Total	28,195	28,690	28,245

Table 7.2 Full-Time Enrolment Figures for Third Level Institutions in Limerick (Higher Education Authority⁴)

8.0 CONCENTRATION OF STUDENT BEDSPACES IN VICINITY OF SITE

Table 8.1 lists the existing purpose-built student accommodation facilities in Limerick. It is noted that whilst the list is not exhaustive for all the student accommodation in Limerick, it gives a clear indication of the concentration of purpose-built student accommodation in the City.

The table demonstrates that on campus, within the University of Limerick there are in excess of 2,500 student bedspaces. Outside of the University Campus, the Groody area has three facilities

⁴ <https://hea.ie/statistics/data-for-download-and-visualisations/enrolments/key-facts-figures-2020-2021/>

accommodating circa 922 bedspaces, all within 500m of the subject site and within 1km of the University. The proposed development of 1,400 student bedspaces will significantly increase the quantum of managed student accommodation in the area, in a location that is easily accessible to the University.

Cumulatively, the proposed development and the existing student accommodation on and off campus will result in the provision of circa 4,800 bedspaces within a 1km radius of the site. Whilst such provision is significant, it only serves circa 32 per cent of full time students attending the University.

There are a further 210 bedspaces in Parkview Hall located in excess of 1.5km from the site at Rhebogue and planning permission exists for a further 202 no. bedspaces granted in 2023, but not yet constructed.

Name	Location	Approx. Distance from Site	Capacity (bedspaces)
Ashdown Student Village	Courtbrack Avenue, off South Circular Road	5.4km	210
Courtbrack Student Accommodation	Courtbrack Avenue	5.4km	8
Punchs Residence	Punch's Cross, Limerick	4.8km	72
Clontarf Hall	Clontarf Place	3.9km	48
City Campus	Edward Street, Limerick	3.8km	660
The Ostia Community	Augustinian Lane, Thomas Street v	4.2km	7
Grove Island Student Village	Grove Island, Corbally, Limerick	2.7km	300
Parkview Hall	Rhebogue, Dublin Road	1.59km	210
Cratloe Wood Village	Old Cratloe Road	6km	600
Thomond Student Village	Old Cratloe Road	6km	570
Groody Student Park	72, Groody Student Park, Castletroy	127m	147
Courtyard Student Village	70, Bru na Gruadan, Castletroy	280m	225
Brookfield Hall	Castletroy	500m	550
University of Limerick On -Campus Accommodation	University of Limerick, Garraun, Limerick	1km	2,505
Troy Village	University of Limerick (Off Campus)	137m	170
Total			6,282

Table 8.1 Existing Student Accommodation Facilities in Limerick

The map in Figure 1.0 displays the distribution and concentration of purpose-built student accommodation across limerick city in relation to the subject site.

9.0 ASSESSMENT

The proposed development seeks to deliver an additional 1,400 student bedspaces within a 1km radius of the University of Limerick, on a site zoned for residential use and promoted for the development of

student accommodation. Section 11.4.4.7 of the CDP states that the Council “*will prioritise student accommodation on campus or within 1km distance from the boundary of a Third Level Institute*”.

Having regard to existing and permitted student bedspaces (not yet constructed) in the city, based on the demand projections for 2024, as detailed in the NSAS, there remains a shortfall of 2,374 no. bedspaces in Limerick. The proposed development of 1,400 bedspaces endeavours to address this shortfall in provision.

Notwithstanding, the immediate area already accommodates circa 922 no. student bedspaces, the CDP acknowledges the need for additional provision, by identifying the suitability of the subject site to accommodate same. The proposed development will be effectively managed and controlled on a 24 hour basis, with on-site facilities provided to service student demands including a gym, canteen, local student shop and study rooms. The student facilities are not replicated in any other student accommodation facilities in the area and thus offer a new managed, product to the market.

Having regard to the zoning for the site and the objectives in the CDP supporting student accommodation on the site, associated with the need and demand for student accommodation in the city and in particular from those students attending the University of Limerick, it is considered that the development must be deemed acceptable in principle.

10.0 CONCLUSION

This report has demonstrated that there has been limited development of purpose-built student accommodation in Limerick City since the National Student Accommodation Strategy was published in 2017. In the time since the strategy was published, only 608 no. bed spaces have been constructed or granted planning permission. This has resulted in a shortfall of 2,374 bed spaces based on the 2024 demand projections for Limerick City, detailed in the Strategy. These figures highlight that there is a need to deliver more purpose built student accommodation in the city.

The proposed development is located within one kilometre of the University of Limerick, and the Development Plan sets out that the Local Authority will prioritise student accommodation development within these areas. The report has demonstrated that the proposed development would not result in the over concentration of student accommodation within 1000m of the subject site.

Overall, the proposed development is ideally located in close proximity to the University of Limerick and would positively contribute to the student accommodation housing stock Limerick City.

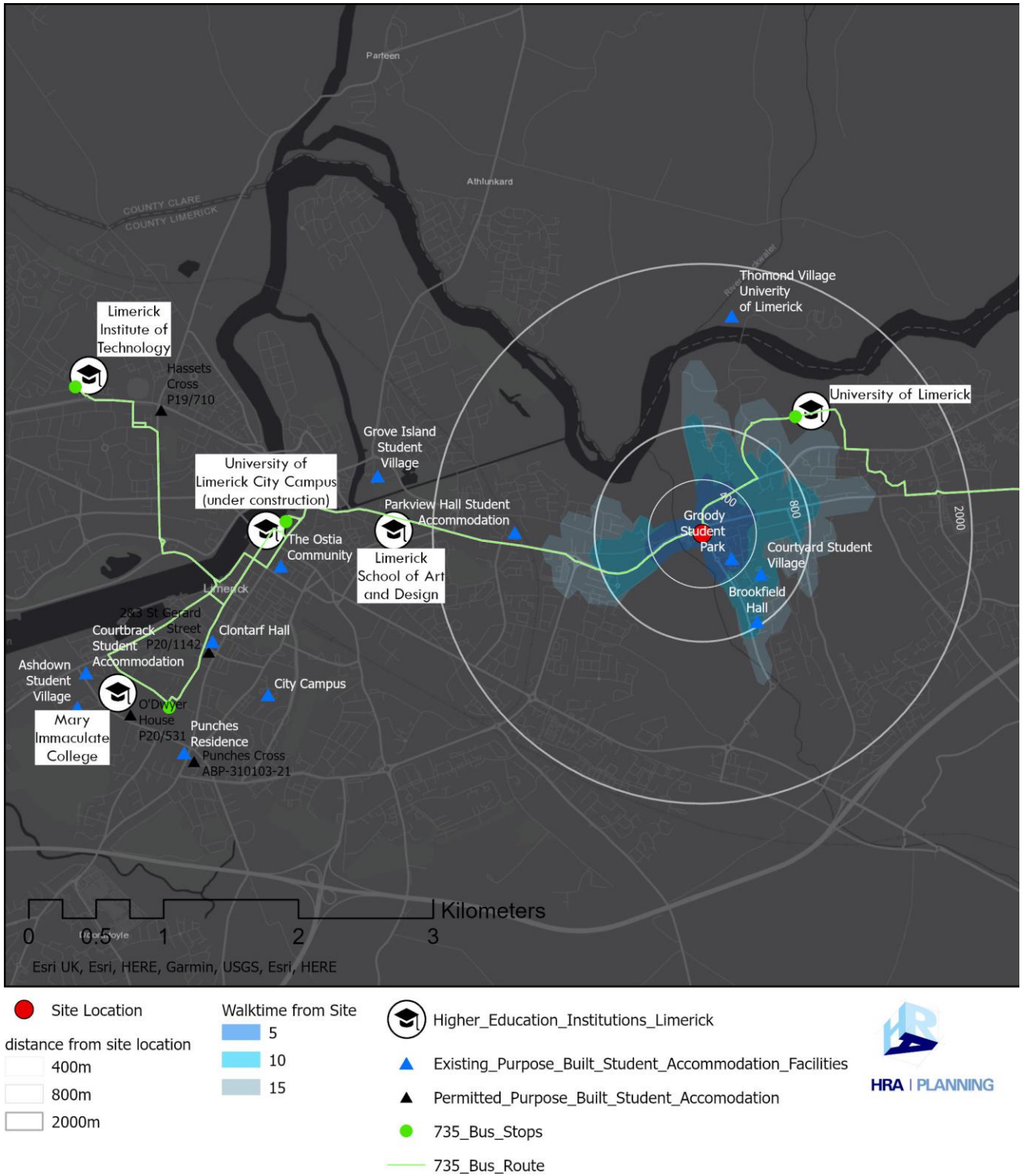


Figure 4.0 Existing Purpose Built Student Accommodation Facilities in Limerick City