

Edinburgh Hotel Schedule 2013

July 2014

Context

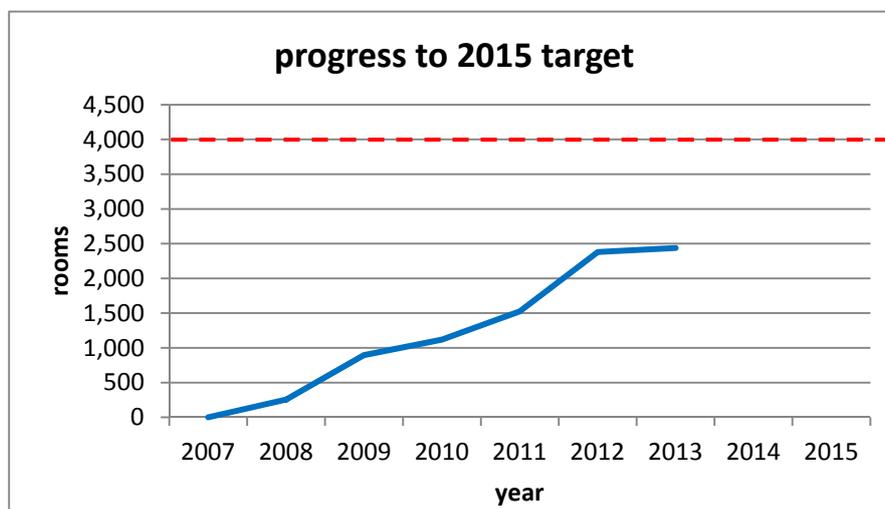
The Edinburgh & Lothians Tourism Accommodation Audit 2006 and the West Edinburgh Visitor Accommodation Analysis 2007 recommended an increase in visitor accommodation of up to 4,000 beds by 2015. This is to meet the Scottish Government's target of a 50% increase in the value of tourism in Scotland by 2015. The Council's planning policies aim to facilitate this new development.

The Edinburgh Hotel Schedule has been published on an annual basis since 2007 in response to the demand for hotel space in the city and in order to monitor progress against the accommodation target. The schedule details completions, properties under construction, planning consents, applications awaiting determination and closures.

Progress in 2013

57 rooms were completed in 2013, 892 were under construction and consent was granted for another 3,915. Of these, 2,868 were new build, 743 were change of use, 277 were extensions and 27 were refurbishments. These developments were partially offset by the loss of 38 rooms. The 57 completions represents a 93% decrease on the 2012 figure of 854.

A total of 6,351 rooms have been developed or granted consent since 2007. This is over 158% of the upper target of 4,000 additional rooms required by 2015. However, only 2,436 of these have actually been completed, amounting to 60% of the target. There are also 531 rooms still awaiting determination.



Edinburgh hotel market

The hotel sector in Edinburgh continues to display signs of growth. Although it has not escaped the effects of the recession, it does appear to be more resilient than most other commercial property sectors. There was planning consent for 3,915 rooms at the end of 2013. Occupancy levels for the year increased by 2.7% to 78.5%, placing Edinburgh second to London at 82.4%. Average daily rates (ADR) also increased in 2013. Edinburgh's ADR of £82.18 per room was behind only St. Andrews (£140.84), London (£137.90) and Aberdeen (£89.37).

Major hotel chains

Previous hotel schedules have highlighted the central role of the major hotel chains in Edinburgh's hotel development activity. This continued in 2013 with three Ibis hotels, a Motel One and a De Vere Village Urban resort under construction, totalling 780 rooms. The major hotel chains comprise a significant proportion of the total Edinburgh hotel stock as at the end of 2013.

Operator Total rooms

Travelodge	1,188
Premier Inn	949
Holiday Inn/Holiday Inn Express	802
Apex Hotels	538

These four chains operate nearly 3,500 rooms in Edinburgh out of approximately 8,000 comparable hotel rooms. Ibis will join this list in 2014 after the completion of three new hotels in the city. Construction and completion of hotels in the 4* and 5* category, which has been highlighted as a relatively under-provided sector of the market, remains at a low level with no completions in 2013.

Significant activity in 2013

- Three Ibis hotels are under construction in the Old Town, New Town and Edinburgh Park, totalling 522 rooms.
- Edinburgh's first De Vere Urban Village Resort (120 rooms) is under construction at Crewe Toll.
- Consent was granted for the change of use of 1-5 Baxter's Place to a 239 room Marriott Courtyard hotel.
- Consent was granted for construction of a new 181 bed Hyatt Place hotel in Fountainbridge.

More detailed information

The Edinburgh Hotel Schedule 2013 can be viewed on the council's website:

http://www.edinburgh.gov.uk/downloads/file/3232/hotel_development_schedule_2013

Contact

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