

PROJECT NO. 34.02/2022



Student Demand and Concentration Report

Mixed Use Development at Canal Bank, Pa Healy Road, Limerick

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ON BEHALF OF: Revington
Developments Limited

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1.0 INTRODUCTION

RW Nowlan & Associates have prepared this student demand and concentration report to accompany a planning application for a mixed use development at Canal Bank, Pa Healy Road, Limerick. The overall development includes a student accommodation block with 189 bed spaces. RW Nowlan & Associates have undertaken this report as a professional planning service provider to ensure that the proposed development would not result in an oversupply of student accommodation in the area.

METHODOLOGY

This report has been prepared based on the Dublin City Council policy to require applicants: *...”to submit evidence to demonstrate that there is not an over-concentration of student accommodation within an area, including a map showing all such facilities within 0.25 km of a proposal.”*¹ The Dublin City Council policy is utilised as standard good practice as there is no equivalent policy included in the Development Plan for Limerick. The methodology is based on the following steps:

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 of student accommodation within vicinity of the site;
4. Conclusion regarding degree of over-concentration, if any, in the local area as a result of the proposed development.

2.0 PROPOSED DEVELOPMENT

The proposed development is for a mixed use development on a 4 hectare brownfield site. The proposed development comprises residential development in the form of apartments and houses, a student accommodation block, a creche facility with café, and three small retail units to serve the local population incl. student population. Vehicular access is from two access points from Pa Healy Road in the southern boundary of the site. The site is adjoined to the north by the canal and a walkway and cycle route. The

proposed development layout proposes to maximise the availability of this cycle way by creating a central spine road that is connected to the canal cycle route, thus providing maximum opportunity to access the University of Limerick from the site.

The development contains seven blocks of residential accommodation ranging in height from three to 10 storeys.

Block one is a student accommodation block and provides 61 apartments ranging from three to four bedrooms, totalling 189 bed spaces. The building has a stepped profile from three to six storey facing the Pa Healy Road. The student building also contains three small retail units of approximately 86m² and a café of approximately 144m². The retail units and café in the building will provide amenity space as well as services to the student units.

The remaining six blocks contain 363 build to rent apartments. Each block contains a mix of studio, one bedroom and two bedroom units with balconies and roof gardens for residents. The development also includes 18 four bedroom houses on the eastern side of the site. The houses comprise 16 terraced units and two detached units with private gardens and car parking spaces.

A community facilities building is provided as the centre point of the development. This facility will contain a creche suitable for ~70 children, a café, management offices and social space for residents of the build to rent and student accommodation.

Approximately 20% of the development site is communal and public open space. This will provide residents with a high quality amenity space in which to walk, play and spend their free time. A feature of the development is full public access through the site from east-west to provide an urban layout and also to allow option for pedestrians or cyclists to divert their route from Limerick University to the city at unsocial hours with passive building protection along open space/green space. The proposed

¹ *Dublin City Development Plan 2016-2022*, p. 334.

development therefore achieves a significant improvement of permeability and connectivity that will serve the proposed population of the site but also the general public in the wider area

Vehicular access will be provided in the form of a central spine road with direct front access to the houses and individual entrance points to the car parks of the apartment buildings. 149 car parking spaces are provided throughout the development and 420 secure bicycle parking spaces are also provided. The internal access road within the proposed development is 5m wide. Cycle lanes are provided along the eastern and northern boundaries of the site in accordance with development plan objectives.

3.0 NATIONAL POLICY RE STUDENT ACCOMMODATION

Given Ireland's age structure of the population, the number of entrants into third level education is projected to increase in absolute terms for each year during the next decade even allowing for maintaining current secondary school transfer rates.² For example, while in 2017 the total number of entrants recorded was 183,642, by 2030 this is projected to increase to 222,514.

One of the Actions set out in the Rebuilding Ireland initiative³ included the implementation of affordable renting initiatives as well as encouraging build-to-rent developments to enhance the supply of student accommodation. The Government published in 2017 a National Student Accommodation Strategy⁴. This strategy identified an excess demand in 2017 of 23,634 bed spaces in purpose built student accommodation. This excess demand is defined as the difference between the demand for student accommodation bed spaces nationwide and the supply including projects not yet built in 2017 but where planning permission had been granted. For 2019 the strategy projected this shortfall of accommodation to increase to 25,754 bed spaces. This was based on an assumed increase in accommodation between 2017 and 2019 of ca. 7,000 bed spaces.

² *Projections Of Demand For Full Time Third Level Education, 2018 – 2040*, Dept. of Education and Skills, November 2018, p. 5.

³ *Rebuilding Ireland, Action Plan for Housing and Homelessness*, Government of Ireland, July 2016.

⁴ *National Student Accommodation Strategy*, Government of Ireland, 2017.

The most recent progress report of the *National Student Accommodation Strategy* was published in the third Quarter of 2019 ⁵ concluded that at the end of Quarter 3 of 2019 a total of 21,254 bedspaces were either under construction, completed or with planning permission. This resulted in a shortfall in 2019 of 4,500 bedspaces remaining to be provided. While it is clear that significant progress has been made in closing the gap between supply and demand at national level, there is still a need to provide additional accommodation to meet the growing demand for accommodation as student enrolment numbers increase.

4.0 DEMAND AND SUPPLY IN LIMERICK

For Limerick the National Strategy estimated an expected shortfall in accommodation in 2019 of 2,169 bed spaces.⁶ This shortfall should decrease to 1,617 bed spaces in 2024 due to an increase in supply of 1,365 bed spaces from the base year in 2017. The progress report does not specify the figures of completions by area in the country. It is therefore not possible to ascertain how many of the ca. 10,000 additional bed spaces that were provided between 2017 and 2018, were provided in Limerick.

It is possible to do an analysis of the number of student bedspaces that have been granted permission through the Strategic Housing Development procedure. This procedure applies to all planning applications for student accommodation with a number of student bedspaces greater than 200. Of the 14 planning permissions that were granted by An Bord Pleanála up to end Q2 2019 (most recent progress report), nine were in Dublin with a total number of 5,348 bed spaces. There were two permissions in Galway for 1,068 bed spaces, two permissions in Cork for 674 bed spaces and one permission in Kildare for 483 bed spaces. There were no permissions granted in Limerick for strategic housing development for student accommodation in Limerick, notwithstanding the growing student population in this city. It should be noted that the majority of bedspaces that were granted planning permission in Dublin were in

⁵Quarter 3 2019 Progress Report on the National Student Accommodation Strategy, Government of Ireland, 2019.

⁶ National Student Accommodation Strategy, Government of Ireland, 2017, p. 26.

a scheme for UCD: 3,006 bed spaces. It is therefore reasonable to assume that the vast majority of bed spaces that have been granted permission since 2017 have been in the Dublin area.

On the demand side, the national strategy estimates a demand for student bed space accommodation of 9,000 spaces in 2019.⁷ This represents an increase of 16.5% of the demand in 2017 (7,724). This figure can be compared with the enrolment figures in the three third level colleges in Limerick. These are shown in the table below. As the demand for student bed spaces in 2017 according to the national strategy was 7,724, this represents approx. one third of the total enrolment of students in that year (see table). The demand for student accommodation is only set to increase with Minister for Further and Higher Education Simon Harris announcing that almost 5,000 additional university spaces have been secured for the 2021/22 academic year⁸.

College	Full-time Enrolments	Part-time Enrolments	Entrants
University of Limerick	12,416	1,056	2,578
Mary Immaculate College of Education	3,657	141	857
Limerick Institute of Technology	5,003	929	1,470
Total	21,076	2,126	4,905

Table 1 – Enrolments in Third Level Colleges (source Dept. of Education and Skills)

⁷ *National Student Accommodation Strategy*, Government of Ireland, 2017, p. 26.

⁸ <https://www.irishtimes.com/news/politics/next-academic-year-will-see-5-000-extra-students-at-college-compared-to-2-years-ago-1.4458718>

The localised demand for student bed spaces may increase significantly following University of Limerick's new campus development on the old Dunnes Stores site at Sarsfield's Street which is approximately one km distance from the site. It should also be noted that a campus facility of Limerick Institute of Technology is located in close proximity to the site on Clare Street.

5.0 STUDENT BED SPACES IN VICINITY OF THE SITE

The table below lists the purpose built student accommodation facilities in Limerick. While this table may not be exhaustive, it does clearly show that the facilities are mostly concentrated around the Castletroy area close to the Limerick University with some smaller facilities near Mary Immaculate College.

Name	Location	Capacity (bed spaces)
Punches Residence	Corner O'Connell Avenue and New Street	72
Grove Island Student Village	Dublin Link Road, Limerick	300
Ashdown Student Village	Courtbrack Avenue, off South Circular Road	210
Clontarf Hall	Close to Mary Immaculate College	48
Alphonsus Court	St. Alphonsus Street	Unknown
Cratloe Wood	Near Limerick Institute of Technology	600
Thomond Student Village	Old Cratloe Road	570
Brookfield Hall	Castletroy	550
Courtyard Student Village	Bru na Gruadan, Castletroy	Unknown
Groody Student Park	Close to University of Limerick	396

Parkview Hall	Between University of Limerick and the City	210
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Table 2 – Existing Student Accommodation Facilities in Limerick

Only one of the facilities listed in the table above is within one kilometre from the proposed development site. An examination of the planning register shows that there have been no new planning permissions for student accommodation in the vicinity of the site. It is unlikely that such planning applications will be made as the area to the north of the site (across the canal) is zoned public open space while the area to the south (opposite Pa Healy Road) is subject to flood risk and less suitable for residential accommodation. The area to the east of the site (east of Park Road) is zoned mixed use but has been mostly developed already.

Based on the number of enrolments each year in the three colleges in Limerick, which is close to 5,000 new students each year, the proposed development would only provide accommodation for less than 4% of these students. It would therefore not result in an oversupply in the local area, but would certainly contribute to the easing of housing pressures for student accommodation in this area

It is significant to note that the localised demand for student bed spaces may increase significantly if and when University of Limerick would occupy a campus facility in the Opera development project which is less than one km distance from the site.

6.0 CONCLUSIONS

- **There are no existing or permitted student accommodation facilities in the immediate vicinity of the site and it is unlikely that these would be provided in the future given the lack of suitable zoned land for such development.**
- **The proposed development would absorb a small proportion (approximately four percent) of the estimated shortfall in Limerick of student accommodation.**

- While it is possible that there have been planning permissions granted for purpose built student accommodation since 2017, such permissions would not be in the vicinity of the site and are unlikely to be of significant size as no permissions have been granted for student accommodation in Limerick under the Strategic Housing Development procedure.
- From our review, it does not appear that any planning permission for large scale student accommodation have been granted in Limerick. The proposed development would help to alleviate some degree of pressure on those seeking student accommodation
- The analysis shows that the proposed development will not result in an overconcentration of student accommodation in the area.