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Student Demand and Concentration Report

**STUDENT ACCOMMODATION BETWEEN LADY'S LANE AND HUNTS LANE
OFF DOMINICK STREET, LIMERICK**

July 2026

EXECUTIVE SUMMARY

This report assesses the demand and supply of Purpose-Built Student Accommodation (PBSA) in Limerick City in support of a proposed 350-bedspace PBSA development at Lady's Lane and Hunts Lane off Dominick Street. The analysis demonstrates that, notwithstanding recent commencements within the PBSA sector, a residual shortfall in student accommodation provision remains, particularly in relation to centrally located, transport-accessible accommodation capable of serving multiple third-level institutions.

Full-time student enrolments in Limerick have increased significantly over the past five years, rising from 24,345 in 2019/20 to 27,400 in 2024/25, and are projected to continue growing. Based on current trends, enrolments are expected to reach approximately 29,400 students by 2028. Applying the standard 25% PBSA capture rate adopted in the National Student Accommodation Strategy 2026–2035, estimated demand for PBSA in 2028 equates to approximately 7,350 bedspaces.

The effective operational supply of PBSA in Limerick City currently stands at 6,347 bedspaces. While construction is due to commence on the Groody Student Campus in Castletroy, with Phase 1 (724 bedspaces) scheduled for completion by mid-2028, this additional capacity is primarily oriented towards the University of Limerick campus and does not address the ongoing under-provision of city-centre student accommodation. As a result, a residual shortfall of approximately 280 bedspaces is projected by 2028, even before accounting for the higher reliance on PBSA among international students.

The National Student Accommodation Strategy 2026–2035 explicitly recognises the role of PBSA in relieving pressure on the private rental sector and promoting sustainable commuting patterns. It places particular emphasis on the delivery of PBSA in city centres and transport hubs, where accommodation can serve multiple institutions and reduce reliance on private car travel.

The proposed development occupies a highly accessible city-centre location, a short walk from Limerick's Colbert Railway Station, and within walking distance of several

third-level institutions and key public transport corridors. The scheme represents a strategic city-centre PBSA development, consistent with national and local policy objectives to promote compact growth, brownfield regeneration and sustainable urban development.

In this context, the proposed Lady's Lane and Hunts Lane PBSA scheme is both justified and necessary. It will make a meaningful contribution towards addressing the residual shortfall in student accommodation provision in Limerick City, support the objectives of the National Student Accommodation Strategy, and help alleviate pressure on the wider housing market.

INTRODUCTION

Adam Kearney BA MA MIPI MRTPI of AK Planning & Development Ltd has prepared this Student Demand and Concentration Report to accompany an application for permission for a Purpose-Built Student Accommodation (PBSA) development comprising 350 student bedspaces on a site between Lady's Lane and Hunts Lane off Dominick Street, Limerick.

This report has been prepared to:

- Assess whether there is sufficient demand within the Limerick Metropolitan Area to justify the proposed PBSA development; and
- Consider whether the proposed development would result in an oversupply or over-concentration of student accommodation within Limerick City.

The report examines current and projected student enrolment trends, existing and permitted PBSA supply, and relevant national policy, with particular reference to the National Student Accommodation Strategy 2026–2035. The analysis is undertaken at a city-wide and metropolitan scale, reflecting the strategic role of city-centre PBSA in serving multiple institutions and supporting sustainable urban development.

METHODOLOGY

In the absence of any specific requirement within the Limerick City and County Development Plan 2022–2028 to apply a prescribed evidence-based methodology

for assessing PBSA demand, this report has been prepared having regard to:

- The analytical framework set out in the National Student Accommodation Strategy 2026–2035;
- Historic and current Higher Education Authority (HEA) enrolment data; and
- Established best practice previously applied in the assessment of PBSA demand, including the use of a 25% PBSA capture rate as adopted in national policy.

The assessment focuses on operational PBSA supply only, with permitted but uncommenced schemes treated separately due to uncertainty regarding delivery timelines and viability. In line with national policy and recent delivery experience, it is assumed that large-scale PBSA schemes typically require a minimum of 24 months to deliver once commenced, and that uncommenced schemes cannot be relied upon to meet short-term demand.

This approach ensures that the assessment reflects realistic and deliverable supply, rather than theoretical capacity, and provides a robust basis for evaluating the need for additional PBSA within Limerick City.

All distances referenced in this report are measured on a straight-line ('as the crow flies') basis from the subject site at Lady's Lane / Dominick Street.

PROPOSED DEVELOPMENT

The proposed development comprises a Purpose-Built Student Accommodation (PBSA) scheme on a site located between Lady's Lane and Hunts Lane off Dominick Street, Limerick, a brownfield infill site zoned 'City Centre' under the Limerick City and County Development Plan 2022–2028.

The proposed development consists of a single multi-storey PBSA block (c.6–8 storeys) providing 350 student bedspaces, together with associated communal amenities and active ground-floor uses. Pedestrian access is provided from Dominick Street and Lady's Lane, and the scheme is designed on a pedestrian and cycle priority basis, reflecting the site's city-centre location and immediate access to public transport.

The site occupies a highly accessible location within Limerick City Centre, approximately 120 metres (straight-line) from Limerick Colbert Railway Station, and within close proximity to key bus corridors, employment areas, retail streets and civic amenities.

The development is well positioned to serve students attending multiple third-level institutions within the Limerick Metropolitan Area, including:

- TUS Limerick School of Art and Design (LSAD), Clare Street: c.1.4km
- Mary Immaculate College: c.1.6km
- TUS Moylish Campus: c.2.3km
- University of Limerick, Plassey: c.4.0km

Given its city-centre and transport-hub location, the proposed development functions as a strategic multi-institution PBSA scheme, rather than being dependent on adjacency to any single campus. This approach is consistent with the objectives of the National Student Accommodation Strategy 2026–2035, which promotes the delivery of PBSA in accessible urban locations to support sustainable commuting patterns and reduce pressure on the private rental sector.

NATIONAL POLICY: STUDENT ACCOMMODATION

On a national level, demand for third-level education in Ireland is projected to continue to increase over the coming decade, driven by demographic growth, increased participation rates and sustained international student enrolment. This growth has direct implications for the provision of student accommodation, particularly within Ireland's cities and regional higher-education centres.

The National Student Accommodation Strategy 2026–2035, published by the Department of Further and Higher Education, Research, Innovation and Science, provides the current national policy framework for addressing student accommodation need. The Strategy identifies a national requirement for approximately 42,000 additional student bedspaces by 2035, including an existing

deficit of approximately 15,000 bedspaces, which is currently contributing to unsustainable commuting patterns and increased pressure on the private rental sector.

Since the introduction of the first National Student Accommodation Strategy in 2017, approximately 16,000 PBSA bedspaces have been delivered nationally. However, the Strategy acknowledges that delivery has fallen significantly short of projected requirements in recent years. As of late 2025, approximately 14,000 PBSA bedspaces have planning permission but remain unactivated, reflecting ongoing challenges relating to construction costs, financing, viability and broader market conditions.

The key national policy indicators arising from the National Student Accommodation Strategy 2026–2035 are summarised in Table 1 below.

Table 1 – National Student Accommodation Policy Context (NSAS 2026–2035)

Policy Indicator	National Position
Existing national PBSA deficit	c.15,000 bedspaces
Additional student bedspaces required by 2035	c.42,000 bedspaces
PBSA bedspaces delivered since 2017	c.16,000
PBSA bedspaces under construction (2025)	c.2,400
PBSA bedspaces with planning permission but unactivated	c.14,000+
Primary delivery mechanism	Private-sector PBSA supported by State viability measures
Preferred locations for PBSA	City centres, transport hubs, on or near campus
Strategic policy objective	Reduce reliance on the private rental sector

The Strategy places strong emphasis on the delivery of Purpose-Built Student Accommodation in accessible urban locations, including city centres and areas well served by public transport. It recognises that city-centre PBSA schemes play a critical role in serving students attending multiple institutions, supporting sustainable commuting patterns and reducing pressure on the private rental market.

The Strategy also explicitly identifies regional cities, including Limerick, as key

locations where additional PBSA provision is required to support growing student populations and balanced regional development. It acknowledges that the scale of national demand cannot be met through State-led delivery alone, and that private-sector PBSA development is essential to achieving national accommodation targets.

In parallel, the Government's national housing strategy Delivering Homes, Building Communities (2025–2030) reinforces the importance of specialist housing typologies, including PBSA, in addressing housing supply challenges. The strategy prioritises compact growth, brownfield regeneration and the efficient use of serviced land within city centres, and explicitly recognises the role of PBSA in relieving pressure on the wider private rental sector.

In this policy context, the proposed development at Lady's Lane and Hunts Lane off Dominick Street aligns directly with national objectives by delivering a large-scale, professionally managed PBSA scheme in a highly accessible city-centre location, a short walk from Limerick's primary public transport hub. The proposal represents a policy-led response to identified national and regional student accommodation need and supports the broader objectives of sustainable growth, housing delivery and urban regeneration.

PROJECTED DEMAND AND SUPPLY - LIMERICK METROPOLITAN AREA

According to the National Student Accommodation Strategy (NSAS) published in 2017, there were approximately 6,816 purpose-built student accommodation (PBSA) bedspaces available in Limerick City at that time. For the purposes of this report, a comprehensive and up-to-date review of the current PBSA stock within the Limerick Metropolitan Area has been undertaken, focusing on operational accommodation only.

This review examined all existing and operational PBSA developments within Limerick City, including their bedspace capacity and location relative to the subject site at Lady's Lane / Dominick Street. The findings indicate that the total number of operational PBSA bedspaces currently available in Limerick City is 6,347.

A summary of existing operational PBSA developments, together with their approximate straight-line distance from the subject site, is set out in Table 2 below. This table includes established PBSA schemes across the city and campus locations.

Table 2 – Existing Operational PBSA Developments in Limerick City

PBSA Name	Location	Approx. Distance from Subject Site (m)	Capacity (Bedspaces)
City Campus	Edward Street	~650	660
Ashdown Student Village	Courtbrack Avenue	~1,600	210
Parkview Hall	Dublin Road	~2,100	210
Grove Island Student Village	Corbally	~1,900	300
Cratloe Wood	Old Cratloe Road	~3,000	600
Punches Residence	O'Connell Avenue / New Street	~1,100	72
Thomond Student Village	Old Cratloe Road	~3,100	570
Clontarf Hall	Clontarf Place	~1,400	48
Drominbeg Square	Rhebogue	~2,400	80
Brookfield Hall	Castletroy	~3,300	550
Courtyard Student Village	Castletroy	~3,200	225
Thomond Village	UL (On Campus)	~4,500	525
The Quigley Residence	UL (On Campus)	~4,700	100
Dromroe Village	UL (On Campus)	~4,700	456
Cappavilla Village	UL (On Campus)	~4,900	500
Plassey Student Village	UL (On Campus)	~4,800	424
Kilmurry Village	UL (On Campus)	~5,000	500
Troy Village	UL (Off Campus)	~3,600	170
Groody Village	UL (Off Campus)	~3,600	147
Total	—	—	6,347

In addition to the existing operational stock, a number of PBSA schemes have been granted planning permission in recent years. These schemes form part of the PBSA supply pipeline and are distinct from the operational accommodation identified above. Of particular note is the Groody Student Campus in Castletroy, a large-scale PBSA development comprising 1,400 student bedspaces, which is separate from the existing Groody Village accommodation. Construction of this scheme is due to commence, with Phase 1 (724 bedspaces) scheduled for completion by mid-2028, and the remaining bedspaces to follow thereafter. This development represents a significant addition to Limerick's overall PBSA capacity and reflects the objectives of

the National Student Accommodation Strategy 2026–2035 to activate permitted schemes and increase delivery.

A summary of PBSA schemes with planning permission, together with their current delivery status, is provided in Table 3 below. This table is included for completeness and to illustrate the scale of permitted but non-activated PBSA supply within the Limerick Metropolitan Area.

Table 3 – PBSA Accommodation Projects with Planning Permission and Delivery Status

PBSA Project	Planning Ref.	Permission Granted	Bedspaces Permitted	Status	Delivered
Groody Student Campus, Castletroy	25/60113	Yes	1,400	Uncommenced	No
Railway Hotel, Parnell Street	22/1172	Yes	111	Uncommenced	No
Parkpoint, Rhebogue	23/216	Yes	96	Uncommenced	No
Old Dublin Rd Rhebogue	22/1216	Yes	202	Uncommenced	No
Hassetts Cross	19/710; 21/1820	Yes	162	Uncommenced	No
Gerald Street	20/1142	Yes	17	Uncommenced	No
Total	—	—	1,988	—	

Importantly, the assessment of effective supply is not solely a numerical exercise. The National Student Accommodation Strategy 2026–2035 places strong emphasis on the location, accessibility and functional role of PBSA. The majority of permitted and emerging schemes within the Limerick Metropolitan Area, including the Groody Student Campus, are campus-oriented and peripheral in nature, primarily serving a single institution. They do not address the identified deficit in centrally located, multi-institution PBSA within the city centre, nor do they provide the same level of access to public transport, employment and civic amenities as the subject site at Dominick Street / Lady's Lane.

While the commencement of the Groody Student Campus will materially increase overall PBSA capacity in Limerick over the medium term, it is located on the eastern periphery of the city and is primarily oriented towards the University of Limerick campus. As such, it does not address the ongoing under-provision of centrally

located, transport-accessible student accommodation capable of serving multiple third-level institutions within Limerick City.

Furthermore, the majority of other permitted PBSA schemes identified in Table 3 remain uncommenced, reflecting ongoing viability and financing challenges. Large-scale PBSA developments typically require a minimum of 24 months to deliver once commenced, and delivery timelines for permitted but unactivated schemes remain uncertain.

Accordingly, while overall PBSA capacity in Limerick is expected to increase over the medium term, the effective supply of city-centre PBSA remains limited, reinforcing the need for additional, well-located student accommodation within the urban core.

Actual full-time enrolment data for Limerick's third-level institutions, as published by the Higher Education Authority, is summarised in Table 4 below. This data demonstrates sustained growth in student numbers across the Limerick Metropolitan Area and provides the basis for projecting future demand for purpose-built student accommodation.

Table 4 – Actual Full-Time Enrolments in Limerick, 2019/20 – 2024/25 (Source: www.heai.ie/statistics)

College	FT Enrolments 19/20	FT Enrolments 24/25	% Increase
University of Limerick	13,760	16,030	+16.5%
Mary Immaculate College	3,985	4,030	+1.1%
TUS (Moylish)	5,400	5,940	+10%
TUS (LSAD) Clare St.	1,200	1,400	+16.7%
Total	24,345	27,400	+12.5%

STUDENT BEDSPACES IN THE VICINITY OF THE SITE

The subject site at Lady's Lane / Dominick Street is located within Limerick City Centre, a short walk from Limerick Colbert Railway Station, and occupies a highly accessible, transport-led urban location. The surrounding area is characterised by a

mix of commercial, civic and residential uses, with limited existing purpose-built student accommodation in close proximity.

There are no large-scale PBSA developments within 500 metres of the subject site.

The nearest operational PBSA facilities are:

- City Campus, Edward Street – c.650m
- Punches Residence, O'Connell Avenue / New Street – c.1.1km
- Clontarf Hall, Clontarf Place – c.1.4km

Other PBSA developments, including Grove Island Student Village (c.1.9km) and Parkview Hall, Dublin Road (c.2.1km), are located beyond the immediate city-centre catchment. The majority of Limerick's PBSA stock is concentrated in Castletroy and peripheral locations, primarily serving the University of Limerick campus, at distances of between 3km and 5km from the subject site.

In this context, the proposed development will not result in an over-concentration of student accommodation within the city centre. Rather, it represents a balanced and policy-compliant distribution of PBSA, addressing a clear under-provision of centrally located, transport-accessible student accommodation capable of serving multiple third-level institutions.

The Lady's Lane and Hunts Lane location is particularly suited to PBSA given its proximity to public transport, employment areas and city-centre amenities, and its ability to support sustainable commuting patterns. The proposed development therefore complements existing campus-based accommodation and contributes to a more even spatial distribution of student housing across the Limerick Metropolitan Area.

CONCLUSIONS

Full-time student enrolments in Limerick have increased significantly in recent years, rising from 24,345 in 2019/20 to 27,400 in 2024/25, representing growth of

approximately 12.5% over five years, or an average annual increase of approximately 2.4%. If this trajectory continues, enrolments are projected to reach approximately 29,400 students by 2028. Applying the standard 25% PBSA capture rate adopted in the National Student Accommodation Strategy 2026–2035, estimated demand for PBSA in Limerick in 2028 equates to approximately 7,350 bedspaces.

The effective operational supply of PBSA in Limerick City currently stands at 6,347 bedspaces. While construction is due to commence on the Groody Student Campus in Castletroy, with Phase 1 (724 bedspaces) scheduled for completion by mid-2028, this additional capacity is primarily oriented towards the University of Limerick campus and does not address the ongoing under-provision of centrally located, transport-accessible student accommodation capable of serving multiple institutions. As a result, a residual shortfall of approximately 280 bedspaces is projected by 2028, even before accounting for the higher reliance on PBSA among international students.

This imbalance has wider housing implications. Students unable to access PBSA are increasingly forced into the private rental sector, intensifying pressure on an already constrained housing market. The National Student Accommodation Strategy highlights that the provision of PBSA plays a critical role in relieving this pressure, by accommodating students who would otherwise compete for housing in the private rental sector.

In this context, the proposed 350-bedspace PBSA development at Lady's Lane and Hunts Lane off Dominick Street is both justified and necessary. The scheme will deliver centrally located, professionally managed student accommodation in a highly accessible city-centre location, a short walk from Limerick's primary public transport hub. It will complement emerging campus-based provision, support sustainable commuting patterns, and contribute to a more balanced spatial distribution of student accommodation across the Limerick Metropolitan Area.

The proposal aligns directly with the objectives of the National Student Accommodation Strategy 2026–2035 and the Government's Delivering Homes,

Building Communities (2025–2030) strategy, which prioritise compact growth, brownfield regeneration and the delivery of specialist housing typologies in accessible urban locations. Accordingly, the proposed development represents a policy-compliant and deliverable response to identified student accommodation need and will make a meaningful contribution towards addressing the ongoing undersupply of PBSA in Limerick City.

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