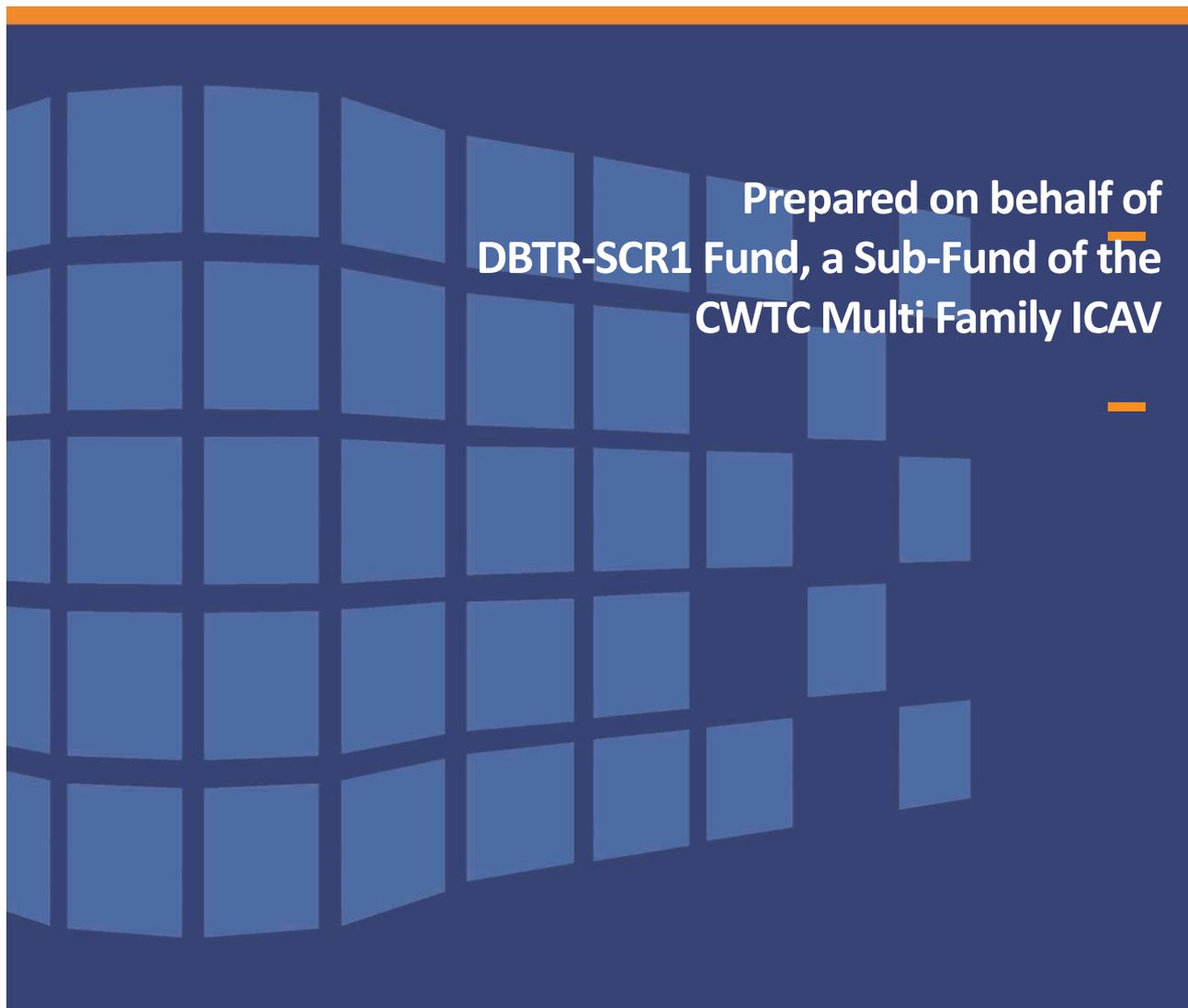


Childcare Demand Report

Proposed Strategic Housing Development on the former Player Wills site and undeveloped land owned by Dublin City Council at South Circular Road, Dublin 8.

December 2020



Prepared on behalf of
DBTR-SCR1 Fund, a Sub-Fund of the
CWTC Multi Family ICAV

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Document Control Sheet

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1 Introduction

DBTR-SCR1 Fund, a Sub-Fund of the CWTC Multi Family ICAV intend making an application for a proposed Build to Rent Strategic Housing Development (SHD), comprising apartments and shared accommodation at the former Player Wills site and undeveloped land owned by Dublin City Council at South Circular Road, Dublin 8, see **Figure 1**.



FIGURE 1 LOCATION OF SUBJECT SITE

The total number apartments is set out below.

Building Ref.	Shared Accommodation	Studio	1 Bed Apartment	2 Bed Apartment	3 Bed Apartment	2 Bed Duplex Apartments	3 Bed Triplex Apartments(3 bed)	Total
PW 1	240	12	23	8	4	-	-	287
PW 2	-	16	268	92	38	1	-	415
PW 4	-	-	-	-	-	2	7	9
PW 5	-	12	1	5	3	-	-	21
Total	240	40	292	105	45	3	7	732

TABLE 1 NUMBER & MIX OF PROPOSED UNITS

To support the application McCutcheon Halley Planning Consultants were appointed to undertake a Childcare Demand Report to ascertain the likely demand for places resulting from the proposed development, if any. Accordingly, this report provides details on current capacity for existing childcare facilities in the catchment area, along with the demand for places likely to be generated by the proposed development.

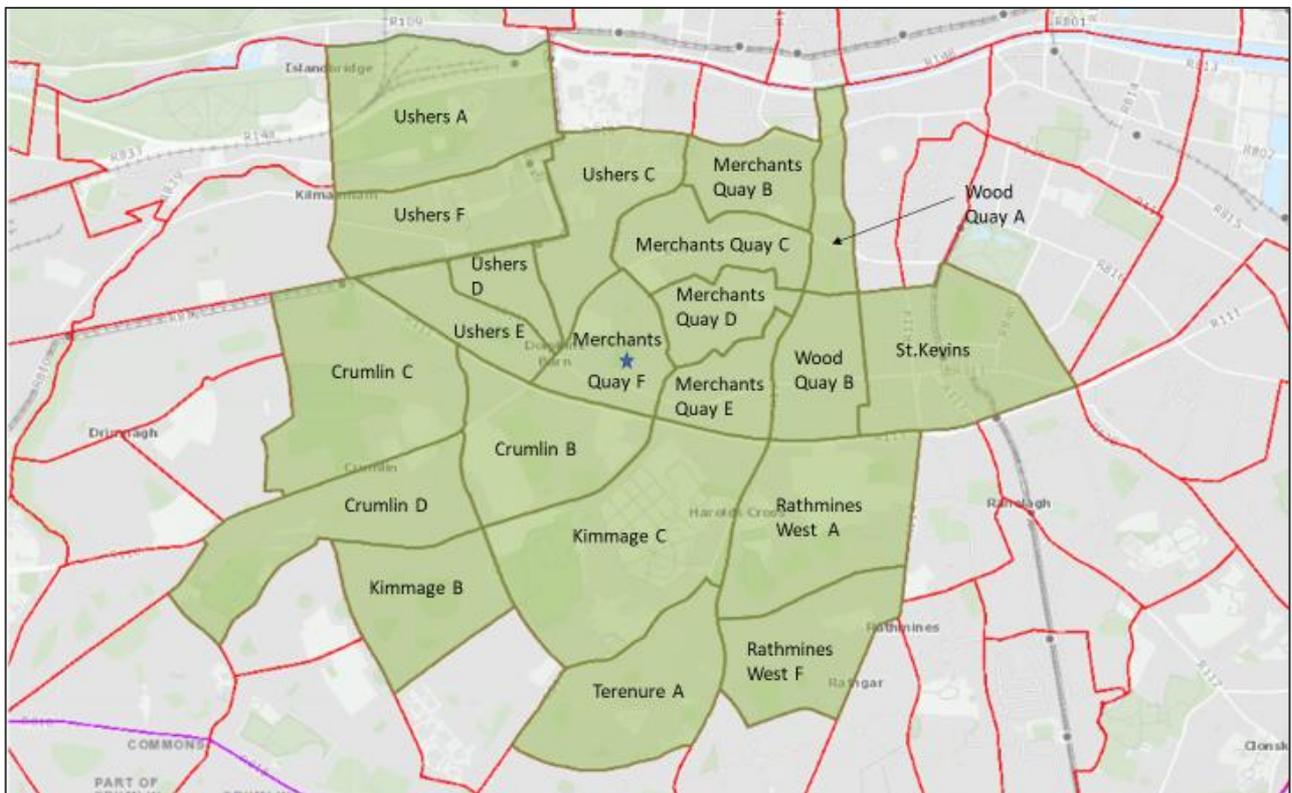
1.1 Methodology

Within the context of this urban location, it was deemed appropriate to audit the existing childcare provision within 1km of the subject site/an approximately 15-minute or less walk. Given the sites location and access to public transport, this distance is deemed a reasonable catchment for future occupants of the proposed development to access childcare services.

In accordance with the Childcare Guidelines for Planning Authorities, 2001, this assessment establishes the following:

- The emerging demographic profile of the area
- The existing geographical distribution of childcare facilities in the study

Within the 1km zone 21no. EDs were identified; Merchants Quay B, Merchants Quay C, Merchants Quay D, Merchants Quay E, Merchants Quay F, Ushers A, Ushers C, Ushers D, Ushers E, Ushers F, Crumlin C, Crumlin B, Crumlin D, Kimmage C, Kimmage B, Rathmines West A, Rathmines West F, Wood Quay B, Wood Quay A, Terenure A and St.Kevins, illustrated in **Figure 2**. The subject site is located within the Merchants Quay F ED.



A variety of sources were consulted in the preparation of this report including;

- Dublin City Childcare Committee
- Pobal Maps for information on existing childcare facilities
- TUSLA (Child and Family Agency) Early Years Inspectorate Report

The above sources were supplemented with a phone survey of the identified childcare facilities to ascertain their capacities. It should be noted that it was not possible to get definitive information on capacities due to low response levels and facilities citing commercial sensitivities/data protection issues.

Pre-school inspection reports were available for all of the childcare facilities identified. However, none of these reports were up to date for the current year (2019/2020), and a telephone survey was undertaken in November 2020 to verify the TUSLA data. As a result of the phone survey, contact could not be made for 5 no. of the 17 no. creche's in the Study Area.

Dublin Childcare Committee were contacted in November 2020 for information and they advised they have no information relating to current or future supply or capacity of childcare facilities.

2 Planning Policy

The relevant policy for the provision of childcare facilities is as follows;

2.1 Childcare Guidelines for Planning Authorities, 2001

Appendix 2 of the 'Childcare Guidelines for Planning Authorities' established an indicative standard of one childcare facility per dwellings in new housing areas (Paragraphs 2.4 and 3.3.1. refer). One facility providing a minimum of 20 childcare places is now considered to be a reasonable starting point in this regard.

It provides that the results of any childcare needs analysis carried out as part of a county childcare strategy should also be considered.

Appendix 2 also states that the threshold for provision should be established having regard to the existing geographical distribution of the childcare facilities and the emerging demographic profile of areas.

2.2 Dublin City Development Plan 2016-2021

Policy SN17 of The Dublin City Development Plan states that Dublin City Council will:

'Facilitate the provision in suitable locations of sustainable, fit-for-purpose childcare facilities in residential, employment, and the educational settings, taking into account the existing provision of childcare facilities and emerging demographic trends of the area'

2.3 Design Standards for New Apartments – Guidelines for Local Authorities, 2018

'4.7 Notwithstanding the Planning Guidelines for Childcare Facilities (2001), in respect of which a review is to be progressed, and which recommends the provision of one childcare facility (equivalent to a minimum of 20 childcare places) for every 75 dwellings, the threshold for the provision of any such facilities in apartment schemes should be established having regard to the scale and the unit mix of the proposed development and the existing geographical distribution of childcare facilities and the emerging demographic area.'

These guidelines also state:

'One bedroom or studio type units should not generally be considered to contribute to a requirement for any childcare provision and subject to location, this may also apply in part or whole, to units with two or more bedrooms.'

3 Demographic Profile

In advance of analysing the local demographics, some key State and Dublin City facts that emerged from the 2016 Census and relevant to this assessment are:

- Birth rates are continuing to fall since 2009
- The number of pre-school children in the State fell by 7%
- The States 65 years and over age group had the largest increase in population, rising by 19.1%
- The population aged 65 and over in Dublin City increased by 13%
- Dublin city has one of the lowest young dependency ratios (0-14) in the State, at 27.9%
- The average age in Dublin City is 39.7 years, higher than the State average which is 37.4

3.1 Census 2016 Relevant Statistics

The results for the EDs presented in **Table 1** and the key points in terms of childcare requirements are set out below.

According to Census 2016, the population of the catchment area for the site is 68,945 which represents an increase of 4.14% during the intercensal period. 5% (3,447) of the study areas population is aged 0-4 years.

28.7% (19,787) of the population within the 21no. ED are identified as 'One Person Households' and 'Couples without Children' in Census 2016, higher than the State average of 22%.

In the **0-4** age category:

- 7% of the State population is aged 0-4
- 5.5% of Dublin City's population is aged 0-4
- 5.0% of the population across the 21no. EDs is aged 0-4

In the Female 25-44 age category:

- 19% of Dublin City's population are females aged 25-44
- 22.1% of the 21no. EDs are females aged 25-44

In the Female 45+ age category:

- 18% of Dublin City's population are females aged 45 and over
- 15.5% of the 21no EDs population are aged 45 and over, slightly lower than the County average

In the 65+ age category:

- 13% of Dublin City's population is aged 65 years and over
- 10.7% of the 21no. EDs population is aged 65+, lower than the County average
- The 65+ age group has increased by 7.8% from 2011 to 2016 throughout the 21no. ED

4 Proposed Development

4.1 Future Demand as a Result of the Proposed Development

The 'Urban Housing and Design Standards for New Apartment' Guidelines for Planning Authorities states that 'one-bedroom or studio type units should not generally be considered to contribute to a requirement for any childcare provisions and subject to location this may also apply in part or whole, to units with two or more bedrooms.'

The proposed development includes 240 no. single occupancy shared accommodation private living spaces. These units are not suitable for families and accordingly are not considered in this assessment.

The total number of proposed apartment units is 492 no. Excluding the Shared Accommodation units (240 no.), Studio apartments (40 no.) and 1 bed units (292 no.), there are 160 no. that are 2 bed plus units and thus are suitable for accommodating families.

It is noted that this assessment takes a worst-case scenario approach and notwithstanding the advice provided in the *Design Standards for New Apartments*, all of the proposed 2-bedroom units are included in calculating the number of pre-school children that will be generated by the proposed development.

The Table below establishes the future demand likely to be generated from the proposed development.

Relevant Statistics	No. of Units Suitable for Families	160
State (2016 Census)	Average Household Size	2.75
	% of population aged 0-4 (State)	7%
	% of population aged 0-4 (Dublin City)	5.5%
	% of population aged 0-4 (avg. of 21 no. EDs)	5.0%
	Q3, 2016 QHNS Childcare State Creche Uptake	19%
	Q3, 2016 QNHS Childcare Dublin Creche Uptake	25%
Proposed Development	No. of future occupants in units suitable for families	440
	No. of children aged 0-4 (using State's 7%)	31
	Q3, 2016 QNHS Childcare (State 19% utilise creche)	6
	Q3, 2016 QNHS Childcare (Dublin 25% utilise creche)	8

TABLE 1 NUMBER OF CHILDREN GENERATED BY THE PROPOSED

Utilising the State's average household size of 2.75 persons, 160 no. units suitable for families will generate 440 no. people. The percentage of children aged 0-4 within the 21no. EDs is 5.0%. This is lower than the Dublin City and national percentage. This report takes a conservative approach and applies the national rate of 7%. Applying this value to the number of future occupants of 'family apartment units', the proposed development would generate 31 no. children in the 0-4 (preschool) age category. This is a conservative estimate compared to Dublin City (5.5%) which would generate a lower 24 no. children, and the Study Area's 5% which would generate 22 no. children.

The Quarterly National Household Survey, Childcare, Quarter 3, 2016 is the most recent published information on childcare uptake in creche settings. It identifies that the percentage of pre-school children minded by parents is 62%, meaning 38% of pre-school children attend some sort of childcare facility or are minded informally by a family friend or an unpaid relative. The most common non-parental childcare type identified in the survey for pre-school children is a creche/Montessori/playgroup facility. This type of childcare is used by 19% of the State's pre-school age children, while the Dublin uptake is higher at 25%.

Applying the Dublin childcare uptake ratio of 25% to the proposed development, then the number of pre-school children generated by the proposed development will be 8 no. childcare spaces are needed.

However, this assessment assumes that the introduction of the Government's Early Childhood Care and Education (ECCE) Programme has likely increased the percentage utilising creches and accordingly assumes that all 3 and 4 year old children generated by the proposed development will require care in a childcare facility and that the higher Dublin uptake of 25% of 0-2 year olds will require care in a childcare facility.

In 2016 there were 3,478 no. 0-4 year olds in the Study Area and more specifically 2,197 no. (63.2%) 0-2 year olds and 1,281 no. (36.8%) 3 and 4 year olds. Accounting for 25% of 0-2 year olds (549 no.) and all of the 3 and 4 year olds in the Study Area, it is concluded that total of 1,830 no. children aged 0-4 within the catchment require a place in a creche setting.

It is established that the proposed development would generate a maximum of 31 no. 0-4 year olds. Based on the Census breakdown of children in these age categories, of the 31 no. preschool, 20 no. (63.2%) will fall within the 0-2 year old age cohort, and 11 no. (36.8%) will fall within the 3 and 4 year old age cohort (eligible for ECCE free preschool years).

Of the 20 no. 0-2 year olds, 5 no. (the higher Dublin update of 25%) will require care in a childcare facility. It is assumed that all of the 11 no. 3 and 4 year olds will avail of 2 free ECCE preschool years in a childcare facility. Therefore, **16 no. children** would require childcare in a creche facility.

5 Childcare Audit

17no. facilities providing for a total of 692 no. childcare places were identified within the 1km catchment area of the proposed development site/ an approximately 15-minute or less walk. 5 no. facilities. As established above, there is an existing demand within the catchment for 1,830 no. pre-school spaces and so there is an existing deficit.

Name	Walk Time (Minutes)	Capacity
Tír na nÓg Early Childhood Development Service	10	42
Dolphin Creche	9	6
Whitefriars Preschool & Afterschool	15	14
The First Steps Trust Ltd	11	32
Child's Play	13	46
Loreto Preschool Crumlin	14	24
Fatima Groups United Children's Day Care Centre	10	60
Mercy Family Centre	12	94
Sophia Nurturing Centre Cork Street	14	11
Kiddies Korner	14	45
Footprints Early Years Ltd	9	24
Menni Services	15	6
Nest Childcare and Montessori	11	34
Creative Kids and Co.	16	38
Pearse College Community Creche	14	100
Marist Creche	15	31
St. Clare's Harold's Cross	15	85
Total		692

TABLE 2 CAPACITY OF CHILDCARE FACILITIES WITHIN 1KM CATCHMENT

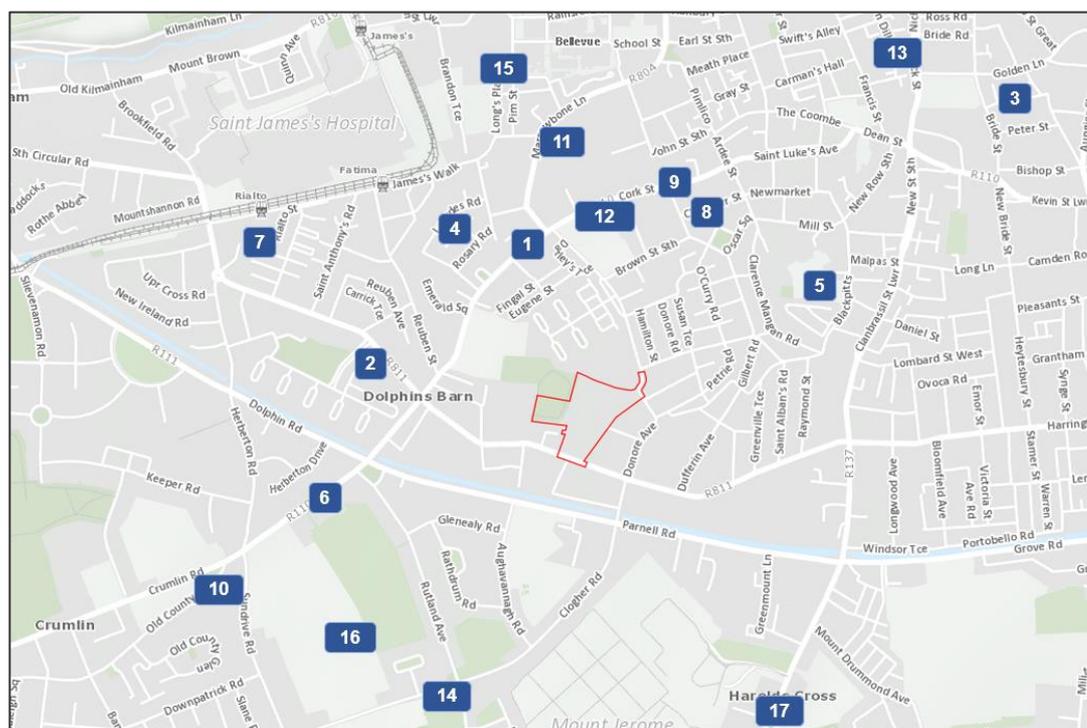


FIGURE 3 LOCATION OF EXISTING CHILDCARE FACILITIES

5.1 Extant Permissions

A review of both the Dublin City Council and An Bord Pleanála planning databases identified that there are 2 no. childcare facilities permitted within 1 km of the subject site within extant permissions, See **Table 3**.

Reg. Ref.	Address	Description	Decision	Distance
ABP-307221-20	Former Bailey Gibson Site 326-328 South Circular Road, Dublin 8.	416 no. residential units, creche (233 sq.m for 54 no. children) and associated works.	Permitted	0.3 km or c. 5 minutes' walk time
4040/17	Former St. Clare's Convent, Harold's Cross, Dublin 8.	172 no. units and crèche (c. 254 sq.m.)	Permitted	1.2 km or 15 minutes' walk

TABLE 3 EXTANT PERMISSIONS

The Bailey Gibson permission provides for a creche of 233 sq.m capable of accommodating 54 no. children. The development comprises 416 no. apartment and townhouse units, 146 no. of which are suitable for families. This will generate a population of 402 no. persons, of which (7% State average) 28 no. children will be aged 0-4 years old. Of the 28 no. children yielded, 18 no. (63.2%) will be aged 0-2 years and 10 no. (36.8%) will be aged 3 and 4 years. Of the 18 no. 0-2 year olds, 5 no. (higher Dublin update of 25%) will require childcare in a creche and it is assumed that all 3 and 4 year olds will avail of 2 free ECCE preschool years in the childcare facility. On this basis, the development will generate 15 no. children requiring placement in a childcare facility. The granted creche facility can more than accommodate the population of 0-4 year olds generated while providing additional childcare for the under supply in the wider area.

The Former St Clare's Covent site will provide for a creche of c. 254 sq.m capable of accommodating c. 65 no. children. Of the 172 no. residential units, 127 no. are 2+ bed units and capable of accommodating families. On this basis, the development will generate 349 no. people, and 24 no. preschool children aged 0-4 years. Of the 24 no. children yielded, 15 no. (63.2%) will be aged 0-2 years and 9 no. (36.8%) will be aged 3 and 4 years. Of the 15 no. 0-2 year olds, 4 no. (higher Dublin update of 25%) will require childcare in a creche and all of the 3 and 4 year olds will avail of 2 free ECCE preschool years in the childcare facility. In total, the development will generate 13 no. children in need of childcare placement. A desktop search of the National Building Control Office confirms that development has commenced at this site.

Together with the existing childcare demand in the catchment, these 2 no. extant permissions would result in a cumulative demand for 1,858 no. childcare spaces.

Once operational, these facilities will increase the existing childcare places available by 119 no. spaces and so there would be 811 no. creche spaces available.

6 Assessment

The Childcare Guidelines indicate that in new communities/new housing areas, planning authorities should require the provision of at least one childcare facility for new housing areas and other areas of residential development unless there are significant reasons to the contrary. For housing, a benchmark provision of one childcare facility per 75 dwellings is recommended.

As noted in Section 4, the proposed development incorporates 240 no. shared living units and 492 no. BtR units with 160 no. units deemed suitable for accommodating families. There is thus a requirement for 2 no. childcare facilities to satisfy the Childcare Guidelines. Each facility should provide a minimum of 20 childcare spaces and so a facility capable of supporting 40 spaces is required.

The Guidelines state that any modification to the indicative standard should have regard to;

1. The make-up of the proposed residential area i.e. an estimate of the mix of community the housing area seeks to accommodate.
2. The results of any childcare needs analysis carried out as part of a county childcare strategy or carried out as part of a local or action area plan or as part of the development plan in consultation with county childcare committees, which will have identified areas already well-served or alternatively, gap areas where there is under provision, will also contribute to refining the base figure.

The scheme incorporates studio and 1-bedroom units and shared living units, and this is in response to the ongoing trend toward smaller household size, see Unit Mix Justification Report appended to the Planning Statement. Census 2016 confirmed that 66% of households within 1km of the subject site comprise 1-2 persons. In addition, the 2016 Census indicates that, if the number of 1-2 person dwellings is compared to the number of 1-2 person households, there are approximately two and half times as many 1-2 person households as there are 1-2 person homes. The application area is located in an urban location close to centres of employment, driving demand for studio and one-bedroom apartments by young professionals and workers.

The Design Standards for New Apartment, 2018, state that the threshold for the provision of childcare facilities in apartment schemes should be established having regard to the scale and unit mix of the proposed development and the existing geographical distribution of childcare facilities and the emerging demographic profile of the area.

Census data establishes that birth rates are continuing to fall within the State and notwithstanding the higher percentage of 0-4 year olds in the study area, it is anticipated that this will align with the State/Dublin City statistic.

This assessment identifies a good geographical spread of existing childcare facilities within the 1km catchment area but there is an existing deficiency.

The proposed scheme will generate a maximum of 31 no. children within the 0-4 age category. The CSO establishes that not all children are cared for in childcare facilities and the uptake is 25% in Dublin. This assessment recognises that the introduction of the ECCE scheme has increased the number of children in the 3-4 year age category and applies a 100% uptake to this age group. Conservatively, the proposed development would generate a childcare demand for 16 no. children.

6.1 Proposed Childcare Facility and Minimum Floor Area

Schedule 7 of the Childcare Regulations, 2016, establish the minimum floor space requirements for childcare facilities.

To calculate the minimum floor area required it is assumed that;

Total number of children generated by the development/ 4 age groups (0-1, 1-2, 2-3, 3-6)

The total number of preschool children generated for this development is 16 no, 5 no. aged 0-2 years and 11 no.3-4 year olds.

A creche with a gross floor area of 275 sq.m together with a play area of 141 sq.m is proposed. The architectural drawing (PL 1400) illustrates that approx., 131.55 sq.m is 'clear floor area', which relates to designated space for children.

Applying the clear floor areas set out in the Childcare Regulations,131.55 sq.m provides for 49 no. children in total, see **Table 4**.

Age Group	No. of Children	Floor Area Required per Child	Total Clear Floor Area Provided as per the Drawings
0-1 year	7	3.50	24.5 sq.m
1-2 years	15	2.80	42 sq.m
2-3 years	12	2.35	30.55 sq.m
3-6 years	15	2.30	34.5 sq.m
Total	49	-	131.55 sq.m

TABLE 4 MINIMUM SPACE REQUIREMENTS

The proposed childcare facility thus provides for the childcare need generated by the scheme and the additional area will contribute an additional 33 no. childcare spaces to the needs of the wider catchment.

7 Conclusion

This assessment takes a conservative approach;

- i. It applies the State rather than Dublin City and/or catchment percentage of 0-4 years olds to estimate the number of children of pre-school age that would be generated by the proposed development;
- ii. It applies the published Quarterly National Household Survey uptake in childcare in the Dublin area only to the 0-2 year age category;
- iii. It recognises that the introduction of the ECCE scheme has increased the number of children aged 3-4 years attending creches.

Applying all of the above factors, the conservative childcare demand generated by the proposed development would be 16 no. spaces.

The provision of 49 no. spaces is compliant with the 2001 Childcare Guidelines for Planning Authorities which would require a scheme of this size to deliver a creche capable of accommodating 40 no. places.

Having regard to the capacity and geographical distribution of facilities identified in the catchment area, together with the existing and projected demographic profile, the proposed childcare facility is appropriately sized to cater for the most conservative future forecast needs of the development. The facility is oversized and will thus augment the supply deficit identified in the catchment.