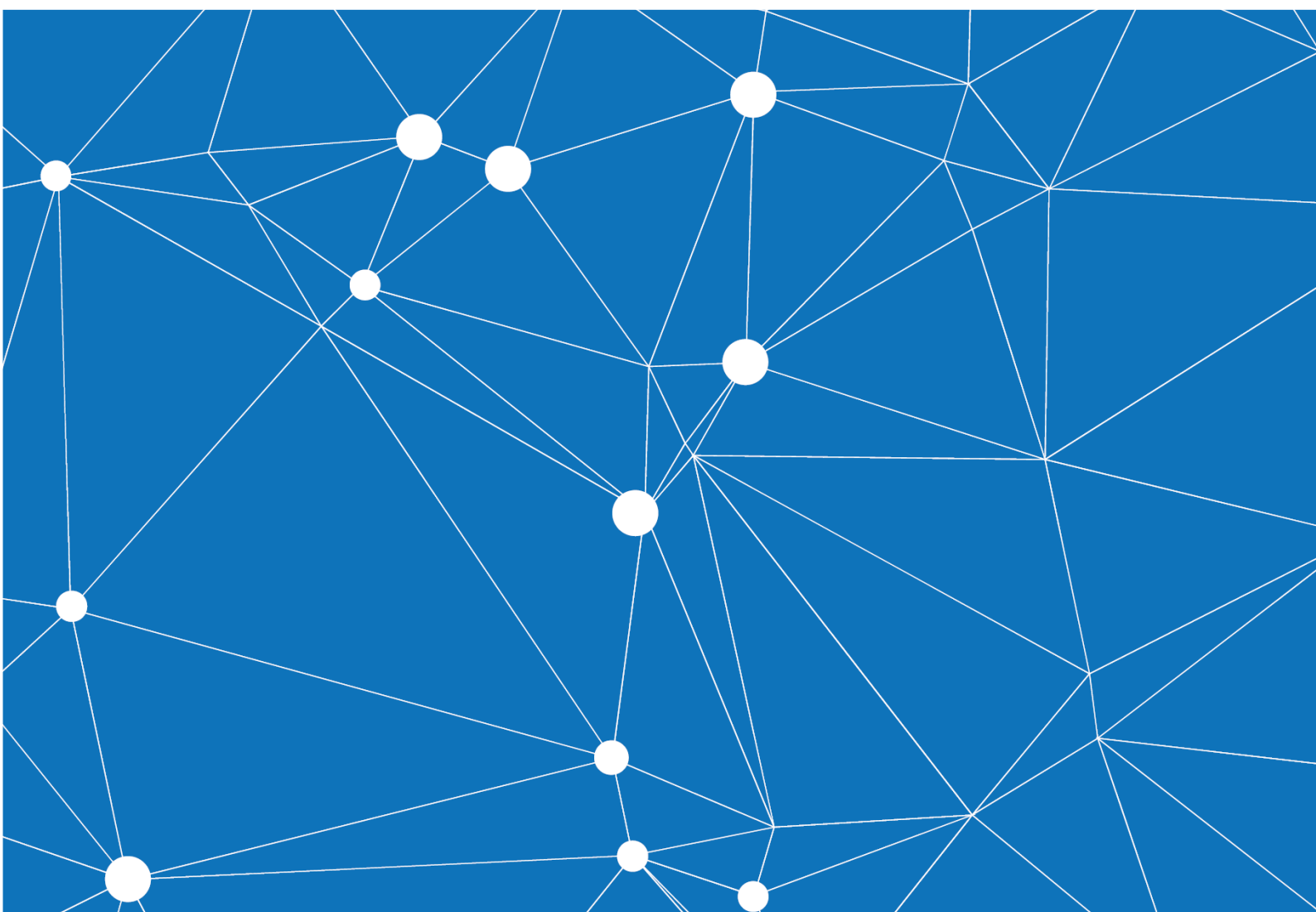


Creche and Schools Demand Assessment

Proposed Residential Development at Sandyford Central

November 2019



Document Control Sheet

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1.0 Introduction

This Creche and Schools Demand Assessment has been prepared by Future Analytics Consulting Ltd. on behalf of Sandyford GP Limited, acting in its Capacity as General Partner for 'The Sandyford Central Partnership' (the Partnership) for their proposed development, 'Sandyford Central', on a site within the former Sandyford Industrial Estate. This report provides a detailed review of the strategic, statutory and policy context that relates to the provision of childcare and educational facilities in the area. The report:

- Outlines the existing range of educational services on offer in the study area;
- Describes the demand generated by the proposed development; and
- Offers insights into the future capacity of the existing facilities.

1.1 Study Area

The subject site for the proposed development is located in the former Sandyford Industrial Estate and is approximately 1.54 ha (3.81 acres). It lies approximately 8.25km south of Dublin City Centre and is adjacent to the Stillorgan LUAS stop in the catchment area of Dún-Laoghaire Rathdown County Council (DLR Council). The site is bounded by Blackthorn Drive to the north, Carmanhall Road to the south, commercial development to the east and residential to the west. It benefits from excellent accessibility and public transport facilities, with the Stillorgan LUAS stop adjacent to the site, numerous bus routes within walking distance and easy access to the M50.

The catchment area for this study is defined by a 2km buffer created around the centre of the site. All Electoral Divisions (EDs) that intersect with this boundary and have a significant proportion of their area within the buffer zone, are included in the study area and will form the basis for the socio-economic analysis performed in later chapters. In total there are 11 EDs included for the purpose of this study and a more detailed analysis of this will take place in a later chapter of the report.

1.2 Proposed Development

The development, which will have a Gross Floor Area of 49,342 sq.m will principally consist of: the demolition of the existing structures on site and the provision of a Build-to-Rent residential development comprising 564 no. apartments (46 no. studio apartments, 205 no. one bed apartments, 295 no. two bed apartments and 18 no. three bed apartments) in 6 no. blocks as follows: Block A (144 no. apartments) is part 10 to part 11 no. storeys over basement; Block B (68 no. apartments) is 8 no. storeys over basement; Block C (33 no. apartments) is 5 no. storeys over lower ground; Block D (103 no. apartments) is part 16 to part 17 no. storeys over lower ground; Block E (48 no. apartments) is 10 no. storeys over semi-basement; and Block F (168 no. apartments) is 14 no. storeys over semi basement.

The development provides resident amenity spaces (1,095 sq.m) in Blocks A, C and D including concierge, gymnasium, lounges, games room and a panoramic function room at Roof Level of Block D; a creche (354 sq.m); café (141 sq.m); a pedestrian thoroughfare from Carmanhall Road to Blackthorn Drive also connecting into the boulevard at Rockbrook to the west; principal vehicular access off Carmanhall Road with servicing and bicycle access also provided off Blackthorn Drive; 285 no. car

parking spaces (254 no. at basement level and 31 no. at ground level); 21 no. motorcycle spaces; set-down areas; bicycle parking; bin storage; boundary treatments; hard and soft landscaping; lighting; plant; ESB substations and switchrooms; sedum roofs; and all other associated site works above and below ground.

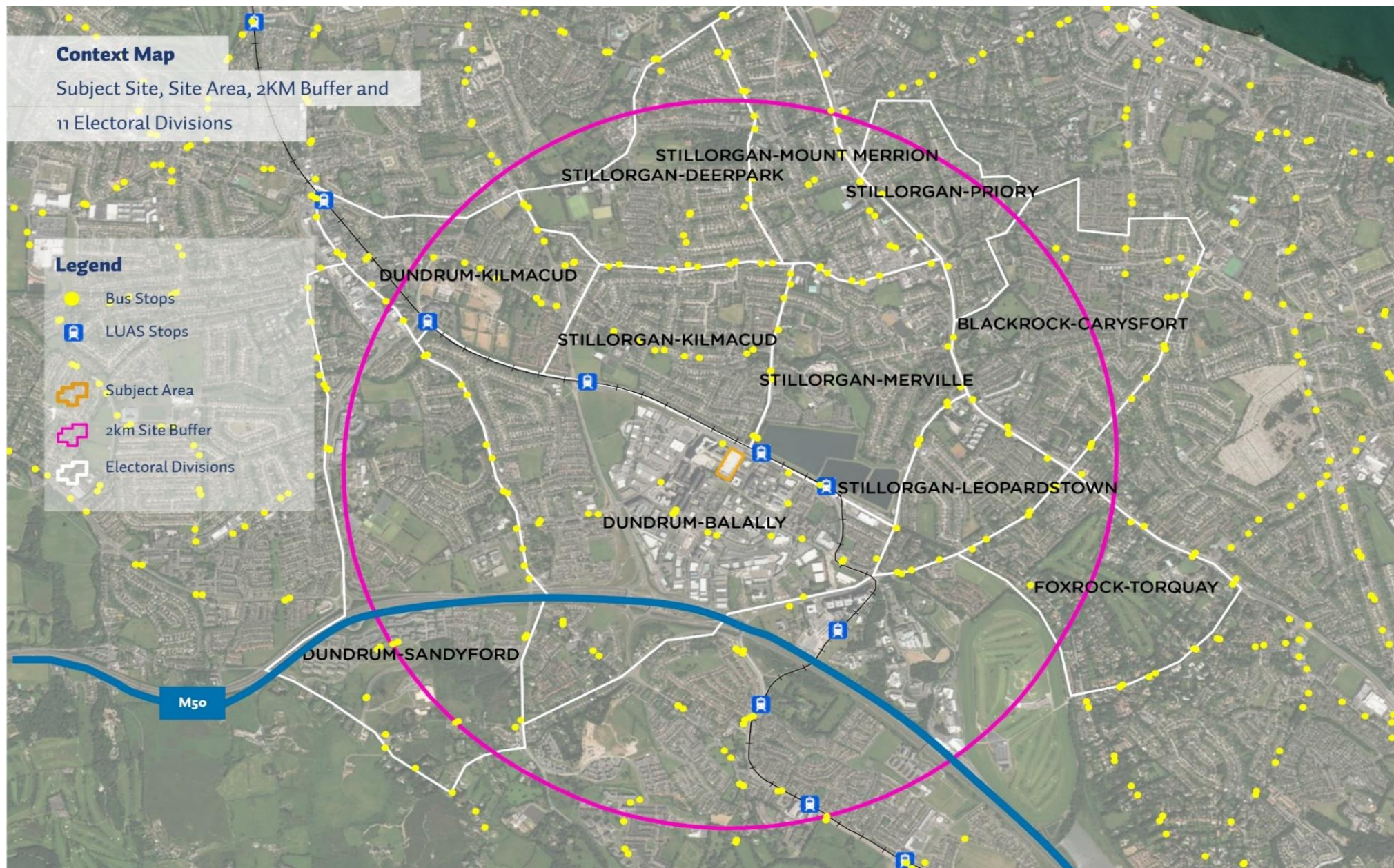


Figure 1: Subject Site, Study Area and Transport Network.

2.0 Policy

For the purpose of this report Future Analytics Consulting Ltd. (FAC) have reviewed national-level planning policy relating to childcare and schools, along with the relevant Local Authority Development Plan and associated Urban Framework Plan. The key points relating to this study, as derived from each piece of policy, will now be discussed.

2.1 Action Plan for Education 2019

Goal 4 of the Department of Education and Skills (DES) 2019 'Action Plan for Education' aims to *"intensify the relationship between education and the wider community, society and the economy"*. A fundamental part of this goal is the provision of increased choices in school type, affording parents of children with greater options.

Action 51 aims to *"make progress towards increasing the diversity of school type, in order to offer parents more choice"*. DES commitment 10.3.2, arising from the Programme for a Partnership Government, is to increase the number of non-denominational and multi-denominational schools with a view to reaching 400 by 2030.

Goal 5 is to *"lead in the delivery of strategic direction and supportive systems in partnership with key stakeholders in education and training"* and methods through which this can be achieved is via the delivery of appropriate infrastructure for learning environments. The capital programme, at €941 million for 2019, represents a very substantial commitment of resources, in order to develop the physical learning infrastructure.

Strategic Action 1 is to *"implement the National Development Plan 2018-2027 and Project Ireland 2040 in respect of the schools' sector, higher education and further education and training"*.

Action 84 seeks to *"implement the 'National Development Plan 2018-2027' in respect of the primary and post-primary school sectors"*. One of the indicators that will be used to measure the progress of Goal 5 during 2019 is the number of primary and post-primary schools.

2.2 Sustainable Urban Housing: Design Standards for New Apartments – Guidelines for Planning Authorities (2018)

Section 4.7 of the Design Standards references the provision of childcare facilities in new apartment developments. It states the following:

*"Notwithstanding the Planning Guidelines for Childcare Facilities (2001), in respect of which a review is to be progressed, and which recommend the provision of one child-care facility (equivalent to a minimum of 20 child places) for every 75 dwelling units, **the threshold for provision of any such 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. 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” (emphasis added).

This provides an element of flexibility in the provision of childcare facilities provided a sufficient demographic and/or geographical argument can be made. It also stipulates that studio and one-bedroom apartments do not need to be included in any count that estimates the number of minors in a development.

2.3 Guidelines for Planning Authorities on Sustainable Residential Development in Urban Areas (2009)

Under the chapter entitled ‘planning for sustainable neighbourhoods’ the provision of certain key community facilities is discussed, with both schools and childcare forming essential elements. As new residential developments can lead to a demand for school places, it is vital that the *“timely provision of new school buildings”* is planned for. Furthermore, it is stated that *“no substantial residential development should proceed without an assessment of existing school capacity or the provision of new school facilities in tandem with the development”*. In addition, the Guidelines recommend that development applications with over 200 units should be accompanied by a report that assess the likely school-place demand generated, and the existing capacity. This report addresses the requirement.

Regarding childcare facilities, the Guidelines note that, when assessing development applications, particularly for larger developments, it is recommended that there is a *“provision of one childcare facility (equivalent to a minimum of 20 child places) for every 75 dwelling units”*. It continues to state that the provision of such should have regard to the *“existing geographical distribution of childcare facilities and the emerging demographic profile of areas”*.

2.4 The Provision of Schools and the Planning System: A Code of Practice (2008)

The Code of Practice stipulates the methodology for forecasting future education demand. Identification of future primary school demands should be based upon:

- The anticipated increase in overall population for the city/county plan area over the next nine years (as set out in relevant development or local area plans);
- The current school-going population based on school returns;
- The increase in school going population, assuming that an average of 12% of the population are expected to present for primary education; and,
- The number of classrooms required in total derived from the above.

2.5 Childcare Facilities: Guidelines for Planning Authorities (2001)

The Guidelines instruct Local Authorities to set out objectives in Development Plans that relate to the provision of childcare facilities. A focus should be placed on promoting childcare facilities, as part of the development of sustainable communities, in locations such as: residential areas; places of

employment; educational establishments; city, town, neighbourhood and district centres; and locations convenient to public transport nodes.

Additionally, the Guidelines require the objectives section of development plans to include childcare facilities as a specific use in 'appropriate locations/zones'. These locations would include "new communities/larger new housing developments". The Guidelines state the following in relation to new housing developments:

"Planning authorities should require the provision of at least one childcare facility for new housing areas unless there are significant reasons to the contrary for example, development consisting of single bed apartments or where there are adequate childcare facilities in adjoining developments. For new housing areas, an average of one childcare facility for each 75 dwellings would be appropriate. The threshold for provision should be established having regard to the existing geographical distribution of childcare facilities and the emerging demographic profile of areas. Authorities could consider requiring the provision of larger units catering for up to 30/40 children in areas of major residential development on the basis that such a large facility might be able to offer a variety of services – sessional/drop in/after-school, etc."

Section 3.3.1 elaborates further by stating that "a standard of one childcare facility providing for a minimum 20 childcare places per approximately 75 dwellings may be appropriate" for new residential developments. However, it continues by clarifying that such guidelines are exactly that and "will depend on the particular circumstances of each individual site".

2.6 Dún-Laoghaire-Rathdown County Development Plan 2016-2022

The current Dún-Laoghaire-Rathdown County Development Plan (DLRCDP) covers the period between 2016 and 2022. It stipulates several requirements for development in the County over the lifetime of the plan.

Sandyford is designated as a 'Secondary Centre' in the DLRCDP, which means that it will function as a focal point of future growth and development. Indeed, Sandyford Business District is considered a primary growth node for the delivery of residential units. In this regard it is worth noting the population targets outlined in the DLRCDP, which themselves are taken from the Regional Planning Guidelines (RPG) 2010-2022. For 2022 the population target for Dún-Laoghaire Rathdown is listed as 240,338 persons, however this figure is an estimate based upon the 2006 Census figures from which the RPG was developed. We also note that the RPG has been superseded by the Eastern and Midland Area Regional Spatial and Economic Strategy (EMRSES), which has recently been adopted.

Sandyford Business District is considered a key location in the County and has its own policy measure.

Policy E9 states that it is "County policy to implement the Urban Framework Plan for Sandyford".

The business district refers to the combination of Sandyford Business Estate, Central Park and the South County Business Park. Due to the changing nature of the area, which has experienced major residential growth and development in recent years, it was deemed appropriate to create an Urban Framework Plan for the area.

Policy SIC6: Community Facilities: *“It is Council policy to support the development, improvement and provision of a wide range of community facilities distributed in an equitable manner throughout the County”.*

Based upon previous national policy direction, DLR Council acknowledge that community facilities should be located within or close to neighbourhood centres and be well served by public transport. Schools and childcare facilities are considered to be a fundamental part of sustainable communities.

Policy SIC7: New Development Areas: *“It is Council policy to ensure that proper community infrastructure and complementary neighbourhood facilities are provided concurrently with the development of new residential growth nodes in the County”.*

This policy measure is of particular relevance to Sandyford as it has been created specifically to address development in locations that previously did not undergo major residential growth. Measures such as Local Area Plans and Urban Framework Plans will be created for these areas to direct sustainable growth and ensure that the appropriate and necessary community facilities and amenities are delivered.

Policy SIC8: Schools: *“It is Council policy to ensure the reservation of primary and post-primary school sites in accordance with the requirements of the relevant education authorities and to support the provision of school facilities and the development / redevelopment of existing schools throughout the County.”*

This policy requires the planning authority, in conjunction with the DES, to identify suitable locations for schools which accounts for future development patterns. When identifying sites there must be consideration given *“both to the co-location of childcare provision and the potential use of school facilities by the wider community”.*

Policy SIC11: Childcare Facilities: *“It is Council policy to encourage the provision of affordable and appropriate childcare facilities as an integral part of proposals for new residential developments and to improve/expand existing childcare facilities across the County. In general, at least one childcare facility should be provided for all new residential developments subject to demographic and geographic needs. The Council will encourage the provision of childcare facilities in a sustainable manner to encourage local economic development and to assist in addressing disadvantage.”*

This policy measure is a result of DLR Council’s adherence to the ‘Childcare Facilities Guidelines for Planning Authorities’, which is discussed in this report. The policy reflects the Guidelines’ recommendation that new residential developments of 75+ dwellings should provide one childcare facility on site. However, this will have regard to geographic distribution and the existing capacity of surrounding facilities.

2.7 Sandyford Urban Framework Plan (SUFP)

The SUFP forms part of DLR’s County Development Plan.

Policy SUFP 10 Education: *“It is Council policy to either provide for and/or facilitate access to the full spectrum of educational needs required to support Sandyford Business District”.*

This policy calls for the full spectrum of educational needs, including preschools, to be provided for as the necessary supporting structures for the area.

Objective E1 states that: *“It is an objective of the Council to encourage the inclusion of childcare facilities in school campuses in mixed use areas, residential areas and office areas particularly where they can make use of identified open space areas”.*

The Council will actively encourage childcare facilities in school campuses as part of this objective.

Objective E2 reads: *“It is an objective of the Council to retain 2 no. core sites for the provision of 2 No. primary schools (equivalent) and 1 no. post primary school. The Council shall liaise with the Department of Education in the development of these site (SLO 112 Map 1)”.*

This objective highlights the Council’s forward thinking in terms of the provision of adequate education facilities to support the needs of the area.

Specific Local Objective (SLO) 112: *“To provide for primary and post primary education facilities at Legionaries of Christ lands and at Stillorgan Industrial Estate/Benildus Avenue”.*

This specific objective identifies certain sites, which are in close proximity to the study area, as the location of primary and post-primary facilities (See Figure 2 below).



Figure 2: UFP - Drawing 11 - Design Principles and Character Areas.

2.8 School Building Programme

The DES provide details on planned construction projects for new school facilities. The following two projects are listed in the most up-to-date version of this project list (dated 31st August 2019): Ballyowen Meadows Special School, Beechpark, Stillorgan and Setanta Special School, Beechpark, Stillorgan (Project 19355S and 20028K) (Status: Stage 2b – Detailed Design). The DES are committed to providing these educational facilities in the near future, with ‘detailed design’ stage in

commencement already. This will increase the educational capacity of the wider area when completed.

3.0 Approach

Having regard to the planning policy outlined in the previous section it is evident that an assessment of the existing childcare facilities in the study area is required. It is imperative that a baseline is identified which would then allow future demand estimations to be made based on demographic change and the associated impact of the proposed development. Therefore, a methodology for the assessment of school and childcare facilities has been developed in accordance with the directions provided in the aforementioned planning policies involving the following steps:

1. Determining the extent and provision of existing school and childcare facilities within the wider study area;
2. Undertaking a study of the current and potential future demographic make-up of the study area's population; and
3. Estimating the level of demand for childcare and school facilities that may arise from the development proposal.

The following chapters will utilise this methodology as a structural framework with the currently existing supply of facilities first established, followed by a demographic analysis that provides valuable insight into the characteristics of the study area's population, before finally determining the potential demand created by the proposed development.

4.0 Supply

In order to establish a baseline of existing capacity in the study area it is necessary to first identify each of the existing childcare facilities. This was undertaken through a comprehensive desktop research exercise which used publicly available information and sources. It was decided that Tusla offered the most appropriate source of information on childcare facilities as it is the dedicated State agency charged with undertaking a comprehensive reform of child protection, early intervention and family support services in Ireland. In this regard, they were deemed to provide the most definitive and accurate source of information on childcare facilities and the selection of facilities was made based upon their database, which allowed the next stage of assessment to take place.

4.1 Existing Provision

While the various policies referenced do make certain provisions for determining the requirements for childcare facilities in neighbourhoods, there is no reference to the most appropriate distances families should travel, or indeed the quantum of facilities that are appropriate in a given area. Therefore, for the purpose of this study it was deemed appropriate to audit all facilities within a 2km catchment of the subject site. This distance is roughly equivalent to a 20-minute walk and would be, therefore, within easy reach of the proposed development.

4.2 Childcare Facilities

Figure 3 provides the locations of all childcare facilities, registered with Tusla, found within this 2km study area. The green symbols correspond to each childcare facility. In total there are 41 identified locations, however some of these operate within the same location but under different names. It should also be noted that there were several more registered facilities listed on the Tusla database, however, it was found during the consultation phase that some of these have since ceased operation.

On the accompanying map there is one red symbol which indicates the location of a granted planning permission for a childcare facility. The permitted application provides for:

- Planning Application Reg. Ref. D15A/0553 relates to a granted permission for change of use from office use to childcare facility, which would increase the unit size from 375 sq.m to 435 sq.m. The granted development will allow the facility to increase the number of children in its care to 75, at any one time.

In addition to the existing childcare facilities and granted permission for a new facility, a Strategic Housing Development application for a site located at the junction of Blackthorn Drive and Carmanhall Road has been lodged with An Bord Pleanála (Case No. PL06D.304405). The proposed development, known as RB Central, will include a creche facility of approximately 486 sq.m. While it is acknowledged that a decision on the application is still pending, if successful the creche that forms part of the development will further add to the existing supply of childcare facilities in the study area.

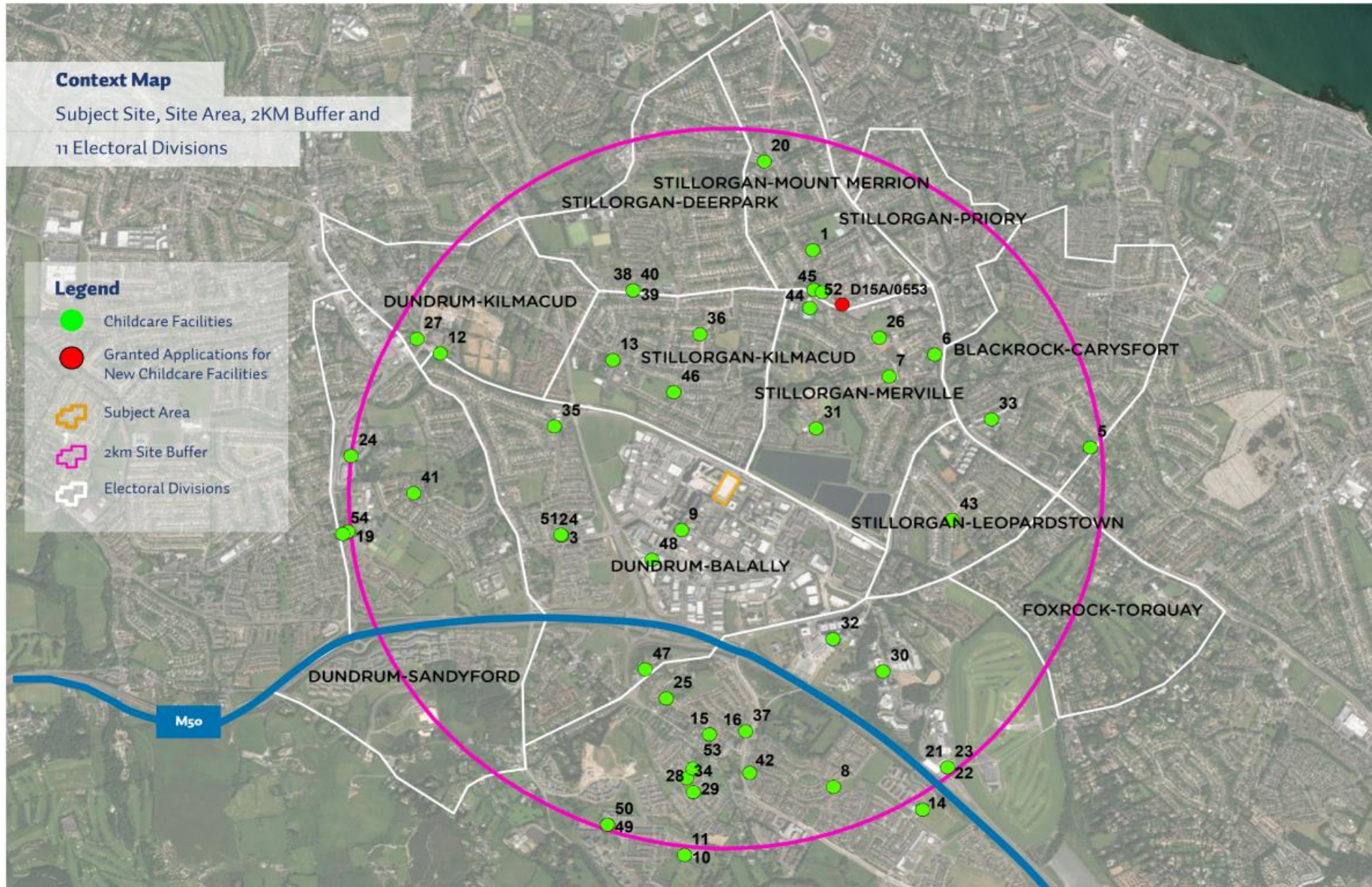


Figure 3: Location of Childcare Facilities and Granted Applications.

4.2.1 Consultation

With the locations of existing childcare facilities identified an assessment of their current capacity could be completed. With no publicly available data listing the quantum of available childcare spaces there was a necessity to contact each individual facility and request such information. Due to the understandably cautious attitudes of childcare facility owners to release such information, this proved to be a challenging task.

Table 1 offers an overview of the childcare facilities that were located in the study area and responses when attempts to contact them were made. The numbers that are found in the left column correspond to those that accompany each of the green icons found on Figure 3. Each of the facilities contacted during the course of the research were asked to provide information on the total number of pupils they can facilitate and if they have further capacity to accommodate more. These details are also provided in the table.

In total, 35 of the 41 facilities provided details of their existing capacity and pupil numbers. In total, these 35 childcare facilities accommodate 1,642 pupils. Almost all of the 35 facilities claimed to be at capacity currently, and for the foreseeable future, with waiting lists of prospective pupils extending to September of 2022 in some cases. Four of the 35 facilities stated they had capacity to enrol additional pupils, although they would not disclose how many additional pupils. Two facilities advised that they are set to close in the coming months.

Taking into account the responses received and estimating figures for the facilities that did not provide responses, it seems reasonable to suggest there are approximately 2,000 childcare spaces in the study area. Two respondents claimed to have space currently available to enrol more pupils, they are St. Brigid's Parish Playschool and Kid's Biz, however they did not provide details on the total number of spaces that remain.

Table 1: Existing Childcare Facilities and Capacities.

Map ID	Childcare Facility	Eircode	No. of Pupils	Further Capacity
1	Oatlands Before/After School & Montessori	A94KW94	136	No capacity until 2021
4	Rathdown Community Playgroup	D16AX05	Undisclosed	Set to close
5	Cocco's Creche and Montessori	A94WY28	42	No capacity until 2021
6	St. Brigid's Parish Playschool	A94P0K1	32	Yes
7	The Playroom Stillorgan		5	No capacity until 2020
9	The Park Academy Childcare Beacon South Quarter	D18YV99	130	No capacity until 2020
12	Narnia Nursery School	D16R6V0	24	No capacity until 2020
13	Narnia Nursey School Ltd.	D14KX09	22	No capacity until 2020
14	Mountainside Montessori	D18YV91	22	No capacity until 2021
15	Roola Boola Creche & Montessori	D18EY15	26	No capacity until 2021
16	Roola Boola Creche & Montessori	D18EY15	22	No capacity until 2021
17, 18	The Children's House Montessori Primary School	A94P499	44	No capacity
19	Ballinteer Pre-School	D16WK27	22	No capacity until 2021
20	Fontanells Montessori	A94R2Y4	22	No capacity
26	Glenalbyn Montessori School	A94E7K8	22	No capacity until 2022
27	Knocklyon Lodge Crèche & Montessori Ltd	D16FX25	100	No capacity until 2021
30	Giraffe Childcare Leopardstown	D18E228	108	No capacity until 2020
32	Giraffe Childcare Central Park	D18C432	70	No capacity until 2020
33	Beechwood Childcare	N/A	75	No capacity until 2020
34	Cherry Blossom Crèche & Montessori School Ltd.	D18P640	21	No capacity until 2020
35	Clever Clogs	D16P025	55	No capacity
36	Little Dale Academy	A94K8W7	Undisclosed	No capacity
37	Park Montessori School	D18N265	17	No capacity until 2020
38, 39, 40	Busy Bees Childcare Ltd	A94W8C5	70	No capacity until 2021
41	Carewell Day Nursery & Montessori	D16V250	15	No capacity until 2021
42	Gallops Montessori School	D18TW13	12	No capacity until 2021
44, 45	Star Tots Creche	A94W6W8	94	No capacity until 2021
46	Lakelands Childcare	A94HK38	38	No capacity until 2021
47	Cedar Montessori School	D18N1N8	33	No capacity until 2021
48	The Park Academy Childcare Beacon Court	D18V963	Undisclosed	No capacity, would not disclose pupil numbers
49	Giraffe Childcare Stepside	D18R202	130	No capacity until 2020
51	ABA Preschool Academy	D16AX0	36	Spaces for 2019
52	Wise Little Owls Montessori	A94CV63	77	No capacity until 2020
53	Kid's Biz	D18WV56	36	Yes
54	Hope Montessori Autism Care Centre	NA	Undisclosed	Set to close

4.3 Primary Schools

The DES provides details on enrolment figures for all primary schools on an annual basis. The DES have also created their own units of analysis, 'School Planning Areas' (SPA), through which they compile data on schools which informs decision-making. Figure 3, taken from the DES website, shows the Goatstown-Stillorgan SPA which encompasses the subject site (highlighted in yellow). This SPA does not directly correspond to the study area defined for the purpose of this report, however there is significant overlap.

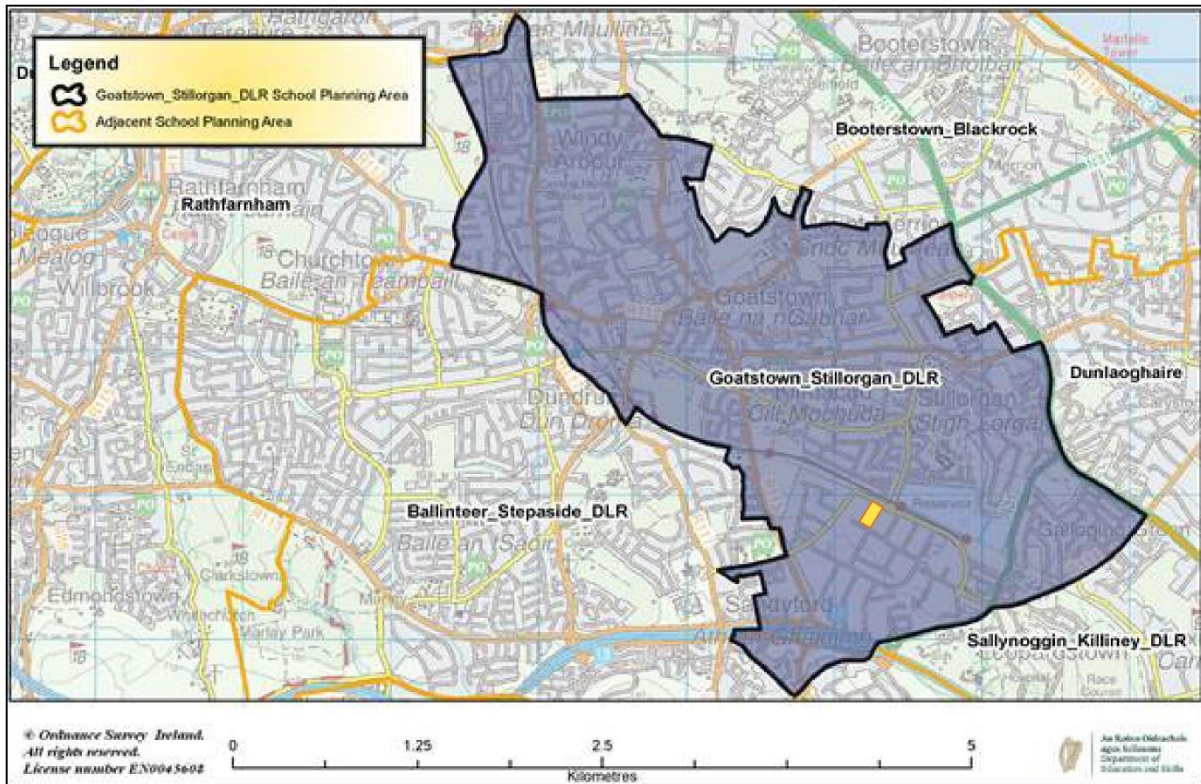


Figure 4: Goatstown-Stillorgan SPA.

Returning to the 2km buffer zone that equates to this report’s study area, DES records show that there is a total of ten primary schools in the area, five of which fall outside the Goatstown-Stillorgan SPA. Information on each school for the 2016, 2017 and 2019 academic years is provided in the following table. The ‘map ID’ refers to the ID number that accompanies the blue symbols in Figure 5.

Table 2: Primary School Enrolments.

Map ID	School Name	Eircode	2016-2017 Enrolment	2017-2018 Enrolment	2018-2019 Enrolment
1	St. Olaf’s N.S.	D16E067	484	488	494
2	St. Mary’s N.S.	D18XV90	264	263	263
3	St. Brigid’s N.S.	A94X066	98	92	100
4	S.N. Naomh Lorcan	A94KD62	439	448	450
5	St. Raphaela’s N.S.	A94R7N8	458	461	456
6	Scoil Caoimhín Naofa	A94KW94	443	459	438
7	S.N. Cnoc Anbhil	A94E2N7	464	464	477
8	S.N. San Treasa	A94EK75	459	452	452
9	Queen of Angels Primary School	D16AX05	257	271	296
10	Ballinteer Educate Together N.S.	D14Y563	234	274	331
Total			3,600	3,672	3,757

2018-2019 enrolment figures for the ten primary schools in the study area showed an increase on the figures recorded in 2016-2017, growing by 157 pupils. However, an increase in enrolment numbers was not recorded in every school, with four schools recording decreases over the three year period (Map ID 2, 5, 6 and 8). This would indicate that although growth is occurring in overall pupil numbers, there is still an existing capacity in the area. We also note the identification of a school site in the UAP and the DES commitment to deliver two additional schools in the wider area.

4.4 Post-Primary Schools

In terms of post-primary schools, or secondary schools, in the study area, the DES record there being six facilities. These schools are a mix of fee-paying and public and cater for all genders. The following table offers an overview of each school and provides the enrolment figures, as obtained from the DES statistics, for the academic years 2016-2017, 2017-2018 and 2018-2019. It also presents the Map ID that relates to the pink symbols on Figure 5.

Table 3: Post-Primary School Enrolments.

Map ID	School Name	Eircode	2016-2017 Enrolment	2017-2018 Enrolment	2018-2019 Enrolment
1	Oatlands College	A94HX38	547	545	536
2	Mount Anville Secondary School	D14A8P3	662	675	677
3	St Benildus College	A94X886	809	795	783
4	St Raphaela's Secondary School	A94NT29	564	545	563
5	Wesley College	D16NX73	930	907	914
6	St. Tiernan's Community School	D16KW26	346	356	343
Total			3,858	3,823	3,816

Enrolment figures for the 2016-2017 academic year indicated that there was a total of 3,858 students across the six post-primary schools in the study area. This total figure decreased by 35 in the following academic year (2017-2018) and again by seven the following academic year (2018-2019) with a combined total of 3,816 pupils. Although it is difficult to discern a trend in enrolment figures through a study of three consecutive years, it does offer some insight into the flexibility that these schools have in terms of accepting new students.

Figure 5 highlights the locations of all primary and post-primary schools within the defined study area. The red symbol corresponds to the location of a granted planning permission for a primary school facility. The permitted application provides for:

- Planning Application Reg. Ref. D18A/1210: Permission for the change of use of the existing building to a temporary two storey primary school (c. 822.10 sq.m) with required internal and elevation modifications necessary to accommodate the proposed education use. Temporary permission for a period no longer than five years is being sought while a new primary school building is being developed.

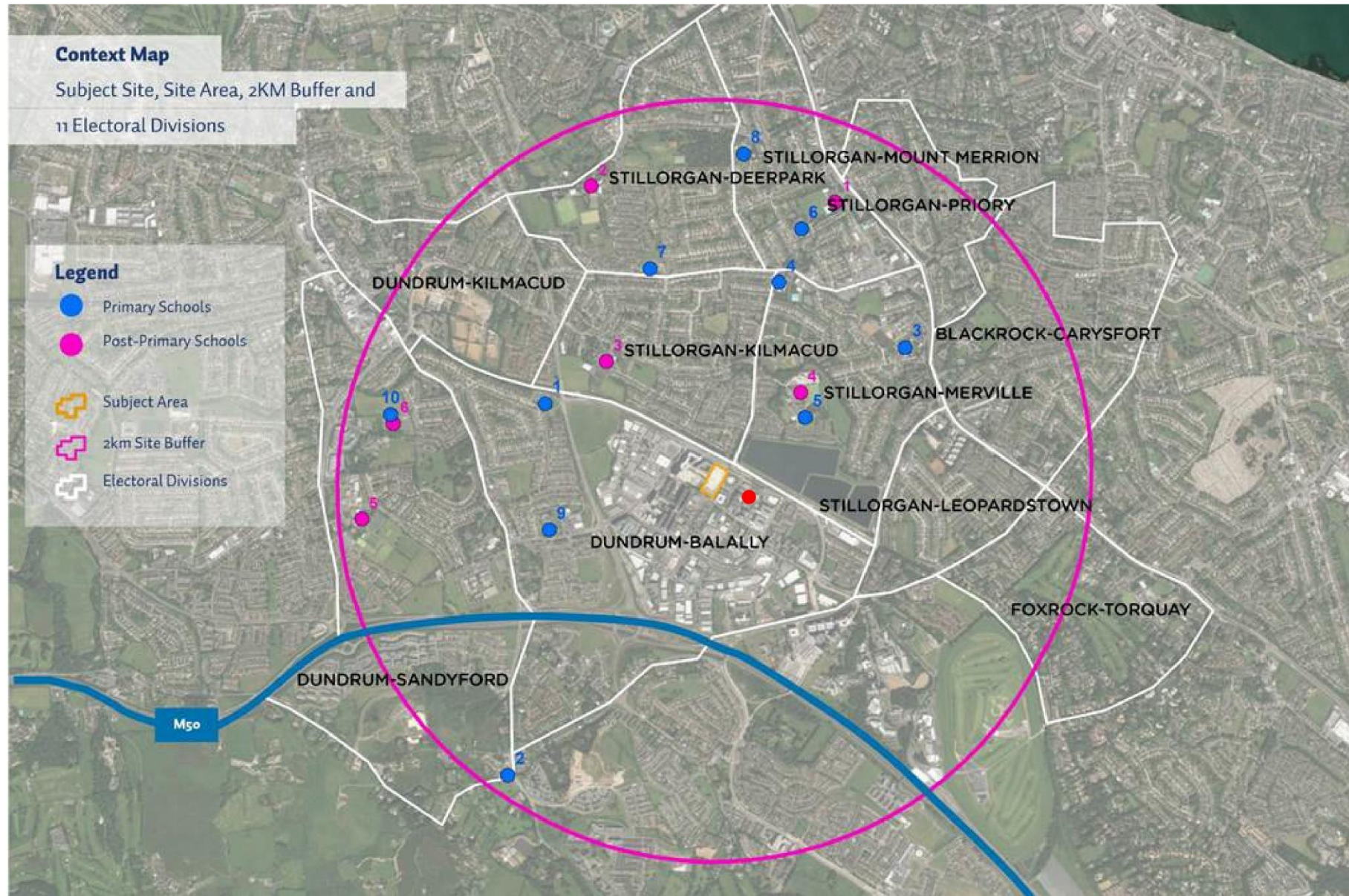


Figure 5: Location of Primary and Post-Primary Schools.

5.0 Demand

5.1 Demographic Profile

The following section will outline the demographic profile of the study area in order to provide a baseline that can be used to predict future demand. As previously stated, the study area was defined through the selection of all relevant EDs that intersected with a 2km buffer created around the subject site. In total, there are 11 EDs within this area. Table 4 provides an overview of each ED along with the population of each as recorded in both the 2011 and 2016 Census. It also offers the percentage change in population during this period as a means of highlighting growth patterns.

Table 4: Population Change 2011-2016.

ED Name	Population 2011	Population 2016	Population Change 2011-2016	Percentage Change 2011-2016
Blackrock-Carysfort	6,160	6,318	158	2.6%
Dundrum-Balally	7,049	8,035	986	14.0%
Dundrum-Kilmacud	3,196	3,274	78	2.4%
Dundrum-Sandyford	6,952	7,688	736	10.6%
Foxrock-Torquay	1,439	1,445	6	0.4%
Stillorgan-Deerpark	2,793	2,955	162	5.8%
Stillorgan-Kilmacud	3,828	3,973	145	3.8%
Stillorgan-Leopardstown	2,429	2,714	285	11.7%
Stillorgan-Merville	2,744	3,217	473	17.2%
Stillorgan-Mount Merrion	2,407	2,383	-24	-1.0%
Stillorgan-Priory	2,229	2,195	-34	-1.5%
Total	41,226	44,197	2971	7.2%

In total, there are 44,197 persons recorded as resident in the study area on the night of the 2016 Census. This amounts to an increase of 2,971 persons from the 2011 Census results, which is a 7.2% increase. Considering the geographical location of the study area, which is a suburban district in South Dublin, it is no surprise to see growth levels such as this, as they reflect the popularity of the city and region.

Change that has already occurred is generally an accurate indicator of future trends, however it is appropriate to undertake a more detailed analysis. FAC have employed a methodology for modelling population projections which is termed 'cohort component modelling'¹. Table 5 utilises this method and focuses on the existing population and the natural increases that will occur up to the year 2026 across the 11 EDs. This method discounts any potential population increase that may occur as a result of the proposed development as it focuses on natural growth rather than speculative growth resulting from potential residential developments.

¹ FAC's projection of population is underpinned by the application of the demographic cohort component methodology (CCM); the same methodology as used by the Central Statistics Office in preparing the national projections. CCM is widely used internationally as a best-in-class methodology. It provides a flexible and powerful approach to population projection by using varying comparative scenarios, each tailored around the application of qualified assumptions in mortality, fertility and migration (as aligned with the Central Statistics Office's assessments).

Table 5: Population Projections using Cohort Component Modelling.

ED Name	Population 2016	Population 2026	Population Change 2016-2026	Percentage Change 2016-2026
Blackrock-Carysfort	6,318	7,436	1,118	17.7%
Dundrum-Balally	8,035	10,018	1,983	24.7%
Dundrum-Kilmacud	3,274	4,017	743	22.7%
Dundrum-Sandyford	7,688	9,664	1,976	25.7%
Foxrock-Torquay	1,445	1,685	240	16.6%
Stillorgan-Deerpark	2,955	3,342	387	13.1%
Stillorgan-Kilmacud	3,973	4,495	522	13.1%
Stillorgan-Leopardstown	2,714	3,264	550	20.3%
Stillorgan-Merville	3,217	3,789	572	17.8%
Stillorgan-Mount Merrion	2,383	2,759	376	15.8%
Stillorgan-Priory	2,195	2,606	411	18.7%
Total	44,197	53,076	8,879	20.1%

As Table 5 shows, the population projections for the study area reinforce the existing trends that indicate this area is a popular and attractive location for people to settle. An overall growth of 20.1% of 2016 figures is predicted, which amounts to a total growth of 8,879 persons across all EDs. Clearly, the likelihood is that the study area, as is the case with the wider Dublin region, will continue to experience a strong growth in population over the coming years.

Of course, while the overall levels of population change can offer some insights into the required amenities and infrastructure that a particular location needs, it is far more beneficial to understand the changes occurring to specific cohorts, or age categories. Table 6 provides a breakdown of the recorded population change and the projections made as part of this study, categorised by age. It offers a breakdown of the area's age profile that allows analysts a more detailed overview of the specific cohorts that will experience the greatest change. Different cohorts of a population have different requirements, with young families in need of childcare and education facilities, a strong working population requiring employment opportunities, and those of retirement age possessing alternative requirements.

Table 6: Age Cohort Breakdown by Year.

Age Cohort	2016 Population	% of 2016 Total	2026 Population	% of 2026 Total
0-4	2,778	6.3%	3,561	6.7%
5-9	2,584	5.8%	3,388	6.4%
10-14	2,297	5.2%	2,899	5.5%
15-19	2,474	5.6%	2,744	5.2%
20-24	3,204	7.2%	3,103	5.8%
25-29	3,717	8.4%	3,997	7.5%
30-34	4,045	9.2%	4,427	8.3%
35-39	3,868	8.8%	4,413	8.3%
40-44	2,916	6.6%	4,421	8.3%
45-49	2,568	5.8%	4,045	7.6%
50-54	2,605	5.9%	2,994	5.6%
55-59	2,402	5.4%	2,592	4.9%
60-64	2,215	5.0%	2,573	4.8%
65+	6,524	14.8%	7,920	14.9%
Total	44,197	100%	53,076	100%

Using Census 2016 data it is possible to establish the current population of persons aged 0 to 19 years. It is found that this particular cohort amounts to 10,133 people. This is approximately 22.9% of the overall total.

The age cohorts which are projected to record the largest percentage change over the projected 10-year period are: the 20 to 24 group, which is anticipated to see a 1.4% reduction in its overall proportion of the study area's total population, reducing from 3,204 in 2016 to 3,103 in 2026; the 40 to 44 age cohort is projected to witness an increase from 2,916 in 2016 to 4,421 in 2026, which is forecasted to see its proportion of the total grow by 1.7%; and the 45 to 49 age cohort, where a growth rate of 1.8% is anticipated between 2016 to 2026, resulting in its population growing from 2,568 in 2016 to 4,045 in 2026.

The 0 to 4 age cohort is the most relevant to this study as it comprises the standard target age range for childcare facility providers. In 2016 this cohort of the population amounted to 6.3% of the overall total population. This is projected to increase to 6.7% of the total population in 2026, which in real terms will see a total figure of 3,561. Although an increase occurs, it is not an overly significant rise with an additional 783 children of this age category projected to reside in the study area.

It is also worth noting the proportion of the population that are of school-going age, which we will consider to be those persons aged between 5 and 19. The datasets used for this study did not offer a breakdown of age by each year and as a result it is difficult to split the population into primary and post-primary school-goers. In 2016, approximately 16.6% (7,355) of the area's population were aged 5 to 19 and, therefore, could be considered as the school-going population. The proportion of school-goers to increase to 17.1% (9,031) of the total population in 2026.

5.2 Impact of the Proposed Development

The proposed development consists of a mix of residential apartments totalling 564 units. This total is divided between the different apartment sizes as follows: 46 no. studio apartments; 205 no. one bedroom apartments; 295 no. two bedroom apartments; and 18 no. three bedroom apartments. As per the policy guidelines there is no requirement to include studio or one bedroom apartments in any analysis of the likely generated demand on childcare facilities that may arise from a proposed new development. This means that both the studio and one bedroom apartments can be excluded from the analysis. A final count on the total number of two and three bed apartments in the scheme amounts to 313 no. units. Two scenarios have been investigated in this regard.

Scenario A: Census 2016 statistics record Ireland's average household size as being 2.73 persons per unit, however the average household size for the study area is slightly less at 2.71 persons per unit². Taking the latter and applying the 2016 figure for the proportion of children aged 4 or under (6.3%), it is possible to estimate the total number of residents that may reside in the future proposed development. The projected figures for 2026 are also used in this scenario as they offer a comparison between current and future potential demand. Table 7 provides an understanding of the method through which a final total for pre-school children could be arrived at.

² CSO statistics for the 11 EDs records a total of 44,197 residents found throughout 16,311 households.

Table 7: Scenario A Methodology for Pre-School Children.

No. of Units	Persons per Unit	No. of Residents	% 0-4 Population	No. of 0-4
2016 Census Proportion				
564	2.71	1,528	6.3% (2016)	96
313	2.71	848	6.3% (2016)	53
2026 Projection Proportion				
564	2.71	1,528	6.7% (2026)	102
313	2.71	848	6.7% (2026)	57

Calculations were made using the average persons per unit figure and both the total unit count and the reduced unit count (based on the childcare guidelines). Taking the reduced apartment figure of 313, which excludes all studio and one bed apartments, the total number of potential residents within these units came to 848 persons. When the 2016 proportion of 0 to 4 year olds is applied to this figure we get an approximate figure of **53 children** of this age cohort who could be accommodated within the development. Using the 2026 projections we see that **57 children** aged 0 to 4 could be accommodated in the scheme when the studio and one-bedroom apartments are discounted.

If we apply this methodology to the cohort of the population that are of school going age, we can determine the approximate number that could reside in the proposed development. As highlighted in a previous section the proportion of children aged between 5 and 19 found in the study area is approximately 16.6% of the overall total, rising to 17.1% of the total under the 2026 projected scenario. Table 8 offers an estimation of the total school-aged population for the proposed development, once more including and excluding one-bedroom apartments.

Table 8: Scenario A Methodology for School-Aged Children.

No. of Units	Persons per Unit	No. of Residents	% 5-19 Population	No. of 5-19
2016 Census Proportion				
564	2.71	1,528	16.6% (2016)	254
313	2.71	848	16.6% (2016)	141
2026 Projection Proportion				
564	2.71	1,528	17.1% (2026)	261
313	2.71	848	17.1% (2026)	145

Scenario B: Another method of determining the approximate number of pre-school children that could potentially reside in any future proposed development is through an analysis of the Census household data. By analysing the household formations found in Dún Laoghaire-Rathdown it is possible to estimate the proportion of households that contain children. The Census records private households by type, with categories that range from a single occupant to married couples and children. In Dún Laoghaire-Rathdown, it is found that approximately 46% of all households contain children. This figure is an aggregate of all the categories that specifically refer to children being among the inhabitants of a household.

Table 9 takes this figure and, through logical reasoning, applies it to the proposed development under the full analysis scenario (with all units included) as well as the limited analysis scenario which removes all single unit apartments. The population projections to 2026 are also utilised to offer alternative options. Under the full unit scenario, a total of 44 children aged between 0 and 4 years is estimated, while under the limited scenario there is a total of 25 in 2016. While under the full unit scenario, a total of 47 children aged between 0 and 4 years is estimated and under the limited scenario total of 26 is estimated in 2026.

Table 9: Scenario B Methodology for Pre-School Children.

Total Units	Units with Children (46%)	Persons/Unit	Residents	% 0-4	No. of 0-4
2016 Census Proportion					
564	259	2.71	703	6.3% (2016)	44
313	144	2.71	390	6.3% (2016)	25
2026 Projection Proportion					
564	259	2.71	703	6.7% (2026)	47
313	144	2.71	390	6.7% (2026)	26

Once more, we apply the same methodological approach to determine the potential number of children that are of school-going age, as outlined in Table 10 below. It takes the 16.6% figure from 2016 and applies this to both full unit count and reduced unit count, and also takes the 17.1% figure from the 2026 projections and does the very same.

Table 10: Scenario B Methodology for School-Aged Children.

Total Units	Units with Children (46%)	Persons/Unit	Residents	% 5-19	No. of 5-19
2016 Census Proportion					
564	259	2.71	703	16.6% (2016)	117
313	144	2.71	390	16.6% (2016)	65
2026 Projection Proportion					
564	259	2.71	703	17.1% (2026)	120
313	144	2.71	390	17.1% (2026)	67

It is worth noting that Census data (2011 and 2016) show that 60% of privately rented households within DLR Council area do not have children. Applying this to the proposed development, this would mean that 188 of the two and three bedroom dwellings would not include children.

To break this down further, we specifically examined the characteristics of typical renters in the area. It was found that, 24.5% of current renters within DLR Council are married or cohabiting couples with no children. 35.5% of privately rented households are occupied by single persons. The proposed scheme will be a PRS Scheme. We can therefore apply these characteristics to the scheme which will be wholly rented accommodation. Table 11 below provides a breakdown demonstrating that the expected number children to occupy the scheme on this basis is 21.

Table 11: Projected Number of Pre-School Children Expected within a PRS Scheme.

Total Units	Units with Children (40%)	Persons/Unit	Residents	% 0-4	No. of 0-4
2016 Census Proportion					
564	226	2.71	611	6.3% (2016)	39
313	125	2.71	339	6.3% (2016)	21
2026 Projection Proportion					
564	226	2.71	611	6.7% (2026)	41
313	125	2.71	339	6.7% (2026)	23

The above analysis indicates that based on 2016 Census information and the characteristics of the occupants of rented accommodation, the proposed PRS scheme will only accommodate 21 children between the ages of 0 to 4 years. For completeness, the same scenario has been projected for 2026 which indicates that 23 children aged 0 to 4 years would be accommodated.

5.3 Further Analysis/Observations

Although the analysis performed on the study area initially indicates that there is an existing issue with capacity in terms of childcare facilities, and that the projected population of the relevant age cohort is set to grow in the coming decade, it does not offer a holistic view of the current conditions.

5.3.1 Accessibility

Firstly, this area of Dublin is one of the most accessible and well-connected locations in the country, possessing a range of public transport options, along with an extensive road network. Parents of young children tend to drive them to childcare facilities and school; therefore, it would be incorrect to assume that parents will only select a childcare facility based upon its proximity to their home. Instead, it is more likely the parents will choose to enrol their children in locations closer to where they work, facilities that have been recommended, or in areas they have previous experiences with. In this regard, it is useful to highlight the approximate distances that a person can travel by car from the study area.

Figure 6 is the visualisation of a drivetime analysis performed for this study which shows the extent to which a person could travel by car in set times. This is useful as it showcases the geographical reach that people living in the area and in possession of a private car have. The extent to which they can travel in such short spaces of time provides even greater opportunity and choice when selecting a childcare facility. As it shows, almost the entirety of Dún-Laoghaire Rathdown is accessible within 15 minutes, while parts of Dublin City, South Dublin Council and North Wicklow are also achievable in this time. In other words, the range of childcare facilities and schools available to parents goes far beyond the imposed limits of the study area.

5.3.2 Quarterly National Household Survey

While the drivetime analysis highlights the wide geographical extent within which parents of pre-school children could feasibly seek out childcare facilities, it does not address the level of take-up that occurs. The CSO's **Quarterly National Household Survey** (QNHS) release produced a special study specifically on childcare for Q3 of 2016³. This release is especially relevant for the purposes of this study as it indicates the extent to which childcare facilities are utilised by the general population. Table 12 is an adaption of a similar table found in the QNHS and it shows the range of methods parents utilise for the purposes of caring for their pre-school children.

³ The QNHS is released by the CSO each quarter and surveys a random sample of the population. Percentage totals may amount to over 100% due to some respondents providing multiple answers.
https://pdf.cso.ie/www/pdf/20170706100048_QNHS_Childcare_Quarter_3_2016_full.pdf

Table 12: Type of Childcare Utilised.

Type of Childcare	Dublin	State
Parent/Partner	62%	62%
Unpaid Relative/Friend	16%	17%
Paid Relative/Friend	3%	3%
Childminder/Au-Pair/Nanny	8%	13%
Childcare Facility	25%	19%
Other	1%	1%

Interestingly, the vast majority of pre-school children are cared for by parents while a total of 25% of respondents in Dublin stated that they use childcare facilities. The State average is even lower, with approximately 19% of respondents claiming they use childcare facilities. It is reasonable to assume that the CSO's QNHS is an accurate and representative measure of the population, therefore, applying it to the estimations previously made on total pre-school children is a logical step. Table 13 provides the figures that were arrived at under both 'Scenario A' and 'Scenario B' under the 2016 Census figures in Section 5.2. It uses these figures, for both total unit number and reduced unit number, and applies the 25% figure of Dublin based respondents who stated they use childcare facilities.

Table 13: Scenarios A and B 2016.

	# of Units	# of 0-4 Year Olds	Total @ 25%
Scenario A (2016)	564	96	24
	313	53	13
Scenario B (2016)	564	44	11
	313	25	6

As Table 13 shows there would be a significant reduction in the total amount of children that require access to childcare facilities, under both scenarios and with both unit counts. The reduced unit count in Scenario A would see approximately 13 children requiring facilities, whereas the reduced unit count in Scenario B would leave only 6 children requiring such facilities. It is, therefore, entirely possible that sufficient capacity currently exists to accommodate these children if the proposed development was to take place. Table 14 applies the 2026 projections to the same methodology.

Table 14: Scenarios A and B 2026.

	# of Units	# of 0-4 Year Olds	Total @ 25%
Scenario A (2026)	564	102	25
	313	57	14
Scenario B (2026)	564	47	12
	313	26	7

5.4 Recommendations

As the analysis shows, there is no definitive method of establishing the potential number of pre-school children that may be resident in the proposed development. All methods are based upon various assumptions and estimates, with the most logical methodology usually offering an appropriate compromise. Of the multiple assumptions made it was decided that those made under Scenario A, utilising the projections to 2026 and the reduced unit count (as per the Guidelines), offered the most logical conclusion.

Table 15: Chosen Methodology for Assessing Pre-School Children.

2026 Projections for 0-4 Year Olds				
No. of Units	Persons per Unit	No. of Residents	% 0-4 Population	No. of 0-4
313	2.71	848	6.7% (2026)	57

While some of the assumptions, particularly those that included the QNHS findings, resulted in significantly reduced numbers of children that may require childcare facilities, it was decided that the estimates requiring the least explanation were the most appropriate. However, it is still considered that several of these alternative assumptions offer legitimate rationale for the further reduction of total number of pre-school children in the proposed development.

The selected scenario focuses on a development where all studio and one-bedroom units are removed, as the 'Design Standards for New Apartments' and 'Guidelines for Childcare Facilities' recommend (DHPLG, 2018 & Irish Government, 2001). This results in a total of 313 no. units for consideration. Using Census 2016 data an average of 2.71 persons per unit were found to reside in the combined 11 EDs selected for the study area and applying this to the 313 no. units results in a total resident population of 848. Demographic projections made to 2026 find that the proportion of the study area's population aged 0 to 4 years old will be 6.7% of the total. Applying this to the 848 residents results in an estimated population of 57 children of pre-school age in the proposed development.

The 2001 'Guidelines for Childcare Facilities' call for a minimum floorspace per child, which ranges depending on age: 0 to 1 year olds require 3.7 sq.m; 1 to 2-year olds require 2.8 sq.m; and, 2 to 6-year olds require 2.32 sq.m of floorspace. Therefore, the average floorspace required is approximately 2.94 sq.m, and when applied to the estimated 57 children results in the requirement of a childcare facility with floorspace of approximately 167.58 sq.m. The proposed scheme includes a creche of 354 sq.m, which is well in excess of the requirements.

5.4.1 Previous Scheme

We note the approval of a similar scheme on the subject site previously. The proposal was determined by An Bord Pleanála and included;

'Demolition of all buildings and structures on the site and the construction of 460 no. apartments in 6 no. 5 to 14 storey blocks above podium. Ancillary on-site facilities including gym, yoga / spin studio, crèche, lounge / café and communal meeting room. Basement with 454 no. car parking spaces and 516 no. bicycle parking spaces. Vehicular access to Carmanall Road.'

Of the 460 apartments proposed 367 comprised two and three bedroom units. The scheme proposed a 231.90 sq.m creche. The Inspectors Report on the application (ABP – 301428-18) and ultimately the final planning permission included the following condition;

'(a) The crèche layout shall be revised such that it incorporates the adjoining apartment unit C105 within Block C. The associated private open space shall be incorporated into the crèche open space.'

This resulted in an additional 105 sq.m being added to the creche. The application was supported by a Schools and Creche Assessment Report; however, the report did not include a full demographic analysis of the area or a review of existing creches. We reference the '*Design Standards for New Apartments, Guidelines for Planning Authorities (2018)*' which (as noted previously) specifically states;

*'the threshold for provision of any such 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**'.*

The subject report includes a detailed review of the demographics of the study area and provides an evidence based approach to determining the demand the development will generate for a creche and the appropriate size that will facilitate this demand.

Having due regard to the planning policy above, we must also consider the legacy of the economic crash which illustrates that a defined need should be established and critical mass before a childcare facility can be successful. Purpose-built creche facilities provided in accordance with the policy requirements, can remain vacant and unoccupied when space is not taken up by a childcare provider. This can be attributed to several factors including; the adequacy and profile of existing childcare facilities within the immediate area, or simply inadequate demand as a result of the development needs. The resultant effect can manifest into unused commercial property or floor space within a residential development which over time and without maintenance, can physically deteriorate reducing the visual amenity of the development for the residents and result in an uneconomic use of land.

We also note that the subject proposal includes significantly less two and three bedroom units (46 units less) which does not generate the same need for a childcare centre. In this regard, it is our view that the proposed creche can provide for the demand that will be generated by the subject proposal.

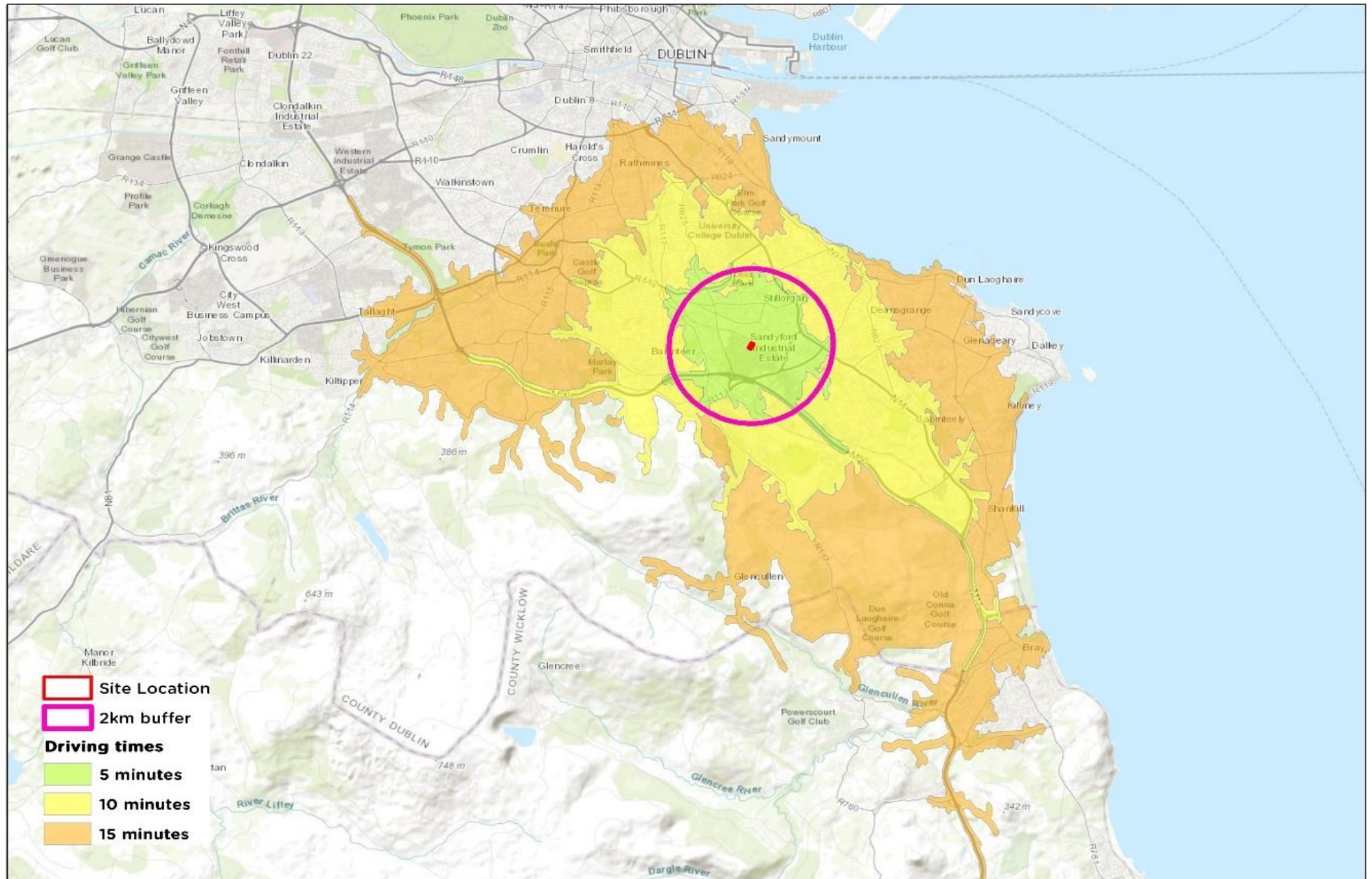


Figure 6: Drive-time Analysis Map.

6.0 Conclusion

The previous sections have outlined the existing conditions of the area selected for this study and provide a projection of its future demographic composition. As per the recommendations of various Government Guidelines, a full demographic analysis was performed, in conjunction with an assessment of the existing childcare and school facilities in the area. This comprehensive assessment has provided a clear evaluation of the potential future demand that may arise as a result of the delivery of the proposed development.

The following summary demonstrates that the proposed creche onsite in fact exceeds the floor area required to provide for the projected number of 0 to 4 year olds that will reside within the scheme;

- **Unit Mix:** The proposed development will consist of 564 no. apartments (46 no. studio apartments, 205 no. one bed apartments, 295 no. two bed apartments and 18 no. three bed apartments).
- **National Policy Guidance** recommends the provision of one child-care facility, catering for a minimum of 20 child places, for every 75 units. However, the provision of such facilities should take into account the development scale and mix as well as the existing distribution of childcare facilities and the area's *"emerging demographic profile"*. The Guidelines also state that *"one-bedroom or studio type units should not generally be considered to contribute to a requirement for any childcare provision"*.

In accordance with national policy guidance, studios and one-bedroom units have been discounted for the purposes of this calculation resulting in 313 no. two and three bedroom units.

- **Population Projection:** In order to estimate the future total number of pre-school children in the proposed development a calculation was made which applied the household average (2.71) and projected proportion of 0 to 4 year olds (6.7%) to the 313 units requiring analysis. This returned an estimated total of **57 children** requiring childcare.
- The final total of 57 children has been determined as a maximum scenario.
- The CSO's Quarterly National Household Survey found that only 25% of parents utilise formal childcare facilities to care for their pre-school children. If applied to the final estimated account of 57 children, a reduced total of **14 children** can be deemed to require the provision of childcare facilities.
- As detailed under Scenario B, the CSO figure for the proportion of households containing children (46%) applied to the proposed development results in a total estimate of **25 children** requiring a childcare facility.
- When examining this further in relation to the specific characteristics of renters (Census 2016), 24.5% of current renters within DLR Council are a married or cohabiting couple with no children and 35.5% of privately rented households are by single persons. These figures indicate that the future occupants of the proposed PRS scheme are not likely to include children.

- In addition, the drive-time analysis performed also identified the extent to which a person driving a car could travel from the subject site. It found that almost all of the Dún Laoghaire-Rathdown area, and part of Dublin City, South Dublin and Wicklow are all achievable in 15-minutes, thereby dramatically increasing the service options available to parents.

In conclusion, a final total of 57 children is deemed to be the most reasonable estimate arrived at subsequent to analysis. As demonstrated, this is in excess of the number of children likely to reside within the scheme, based on the typical characteristics of renters in the area and the existing household composition of the area.

As per the 2001 'Guidelines for Childcare Facilities', which stipulate an average of approximately 2.94 sq.m of floorspace per child in a childcare facility, it is proposed that a childcare facility of approximately 167.58 sq.m be provided as part of the scheme.

It is therefore considered that the proposed 354 sq.m creche facility would comfortably meet the requirements of government guidelines and easily support the needs of the inhabitants of the proposed development.

Appendices

Housing Trends in Dún-Laoghaire Rathdown

Summary Findings:

- 78,601 private households in DLRCOCO
- 15,907 households in DLRCOCO privately rent
- 20.2% of all households in DLRCOCO are renting privately
- 35.5% of privately rented households are by single persons
- A further 24.5% of renters are married or cohabiting couple with no children
- 60% of all privately rented properties in DLRCOCO have no children

Dún Laoghaire-Rathdown	All Types of Occupancy	Rented from Private Landlord	% Rented from Private Landlord
All private households	78,601	15,907	20.2%
All persons in private households	213,468	43,592	20.4%
One person	17,576	2,512	14.3%
Married couple	13,082	1,395	10.7%
Cohabiting couple	3,618	2,081	57.5%
Married couple with children	24,867	3,898	15.7%
Cohabiting couple with children	1,997	723	36.2%
One parent mother with children	5,716	934	16.3%
One parent father with children	933	158	16.9%
Married couple with other persons	674	143	21.2%
Cohabiting couple with other persons	425	274	64.5%
Married couple with children and other persons	1,468	313	21.3%
Cohabiting couple with children and other persons	178	59	33.1%
One parent mother with children and other persons	794	136	17.1%
One parent father with children and other persons	135	26	19.3%
Two or more family units with or without other persons	997	118	11.8%
Non-family households containing related persons	1,759	512	29.1%
Households comprised of unrelated persons only	4,382	2,625	59.9%

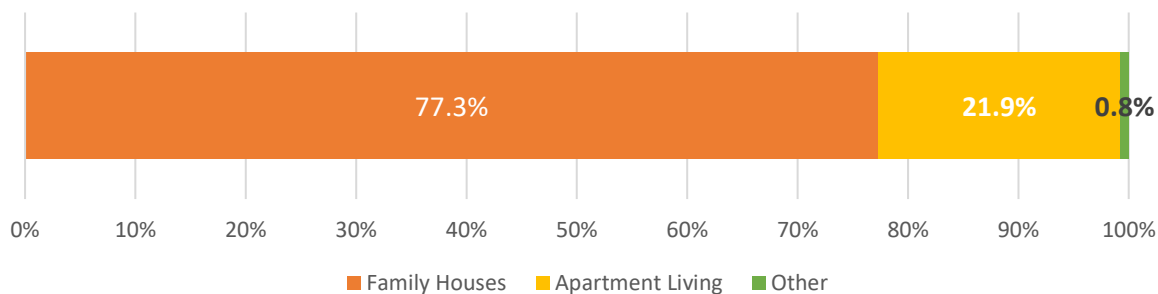
Renters by Age

Age	All Types of Occupancy	Rented from Private Landlord	%
Under 25 years	2,030	1,429	9.0%
25-29 years	3,452	2,460	15.5%
30-34 years	6,495	3,520	22.1%
35-39 years	8,120	3,175	20.0%
40-44 years	7,828	1,987	12.5%
45-49 years	7,518	1,241	7.8%
50-54 years	7,832	788	5.0%
55-59 years	7,285	486	3.1%
60-64 years	6,556	310	1.9%

65 years and over	21,452	510	3.2%
All ages	78,568	15,906	

46.6% of renters are under 35 years of age and just 21% are above the age of 44.

Accommodation Type



Renting by Age of Stock

	All Types of Occupancy	Rented from Private Landlord	% Rented from Private Landlord
Before 1919	4,835	912	18.9%
1919 to 1945	4,932	409	8.3%
1946 to 1960	10,735	675	6.3%
1961 to 1970	10,925	734	6.7%
1971 to 1980	10,850	1,120	10.3%
1981 to 1990	8,763	1,533	17.5%
1991 to 2000	8,107	2,086	25.7%
2001 to 2010	13,064	5,472	41.9%
2011 or later	1,838	847	46.1%
Not stated	4,519	2,118	46.9%

In DLR, the preference to privately rent newer stock is apparent. This is partially to do with the change in stock type to higher concentrations of apartment type dwellings over single family dwellings over the past two decades.