

Project No. 34.11/2021



# Childcare Demand Analysis

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RE: Proposed SHD  
Application for Lands at  
BallyKeeffe, Raheen,  
Limerick

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**DATE: December 2021**

on behalf of: DW Raheen  
Developments Ltd.

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## **1.0 INTRODUCTION**

DW Raheen Developments Ltd. (the Applicant) is seeking planning permission for a residential development on lands located in BallyKeeffe, Raheen, Limerick. RW Nowlan & Associates has been commissioned by the Applicant to prepare this Childcare Demand Analysis Report to accompany a Strategic Housing Development (SHD) application to An Bord Pleanala.

This report has been undertaken to examine the likely demand for childcare places as a result of the proposed development and ensure long term supports are in place for the childcare needs of residents.

This report is set out as follows;

1. Introduction
2. Site Context and Proposed Development
3. Planning Policy Context
4. Demographic Trends & Facilities
5. Analysis & Estimate of Demand
6. Conclusion

## **2.0 SITE CONTEXT & PROPOSED DEVELOPMENT**

The ca. 10.4 hectare site is greenfield land that is enclosed by existing residential development to the south, east and west and open land to the north. The northern boundary is formed by a former and disused railway line. The land to the north of that is enclosed by the National Road N18. The western boundary is formed by the regional road R510. Most of the south-eastern boundary is formed by boundary walls of established residential development. The lands are relatively flat and there are no restrictions on the future development of the lands for residential development. An existing roundabout provides vehicular access to the site. The dedicated arm of the roundabout for this access is currently blocked off.

The site has been zoned for residential development within the Limerick City Development Plan 2010-2016 and the Southern Environs Plan 2021-2027. The proposed development is a residential development that provides a mixture of houses, duplex units and apartments.

The proposed development description is set out in the statutory notices as follows;

DW Raheen Developments Ltd. are seeking a ten year permission for a strategic housing development consisting of the provision of 384 residential house and apartment units on a ca. 10.44 hectare site located in Ballykeeffe, Raheen, Co. Limerick.

The site is greenfield land that is enclosed by existing residential development to the south and east, the R510 to the west and open land to the north. Access to the site is provided by an existing entrance off a roundabout on the R510 regional road.

The proposed development will provide as follows:

- 202 no. housing units, comprising a variety of forms to include bungalows, detached, semi-detached and terraced houses. A mix of house sizes are proposed to include 20 no. two bedroom houses, 156 no. three bedroom houses and 26 no. four bedroom houses.
- 182 apartment and duplex units across 25 small scale blocks, 2 to 4 storeys in heights, throughout the development. The apartments and duplexes provide a mix of one, two, three and four bed units, comprising of 10 no. four bedroom duplex units, 10 no. three bedroom duplex units, 6 no. two bedroom duplex units, 18 no. three bedroom apartments, 92 no. two bedroom apartments and 46 no. one bedroom apartments.

The proposed development also includes;

- A childcare facility measuring 761.75m<sup>2</sup>, providing 79 childcare places (55 full time and 24 after school places), located at the south-western edge of the development.
- The provision of 377 no. car parking spaces and 311 secured bicycle parking spaces.
- The provision of 3 no. ESB sub-stations, ancillary services and infrastructure works including foul and surface water drainage, attenuation areas, landscaped public open spaces

(approximately 29,500m<sup>2</sup>, or 28.2% of the total site area), landscaping, lighting, internal roads, cycle paths, and footpaths.

A Natura Impact Statement (NIS) and Environmental Impact Assessment Report (EIAR) have been prepared in respect of the proposed development.

### **3.0 PLANNING POLICY CONTEXT**

#### *National Planning Framework (NPF)*

Project Ireland 2040 - National Planning Framework (NPF 2040) is the primary articulation of spatial, planning and land use policy within Ireland and provides an overarching framework for all other policies. The NPF 2040 recognises the changing demographic of household size throughout the country stating:

“7 out of 10 households in the State consist of three people or less, with an average household size of 2.75 people. This is expected to decline to around 2.5 people per household by 2040.” (page 95)

The NPF 2040 also recognises the importance of appropriate childcare provision for future growth and acknowledges that childcare is reaching full capacity in Ireland noting that:

“The continued provision and enhancement of facilities and amenities for children and young people, such as childcare, schools, playgrounds, parks and sportsgrounds, remains necessary and will need to be maintained at similar levels for the foreseeable future thereafter.” (page 88)

“Childcare provision in Ireland is reaching capacity and new planning approaches and sustained investment will be required, particularly in areas of disadvantage and population growth, to increase capacity and enable existing services to meet regulatory and quality requirements”. (page 89)

National Policy Objective 31 (page 90) aims to:

“Prioritise the alignment of targeted and planned population and employment growth within investment in: .....A childcare/ ECCE planning function, for monitoring, analysis and forecasting of investment needs, including identification of regional priorities”

With regard to the provision of childcare facilities, the NPF 2040 highlights the importance of sustainable and improved planning in order to provide quality childcare that will meet regulatory and quality environments for future population growth.

*Childcare Facilities – Guidelines for Planning Authorities (2001) & Circular Letter PL3/2016*

The Childcare Facilities – Guidelines for Planning Authorities (the Childcare Guidelines) seek to ensure high quality childcare services that are easily accessible, affordable and appropriate for all are provided as part of future development proposals. With regard to childcare facilities within residential developments the Childcare Guidelines state: “a standard of one childcare facility providing for a minimum of 20 childcare places per approximately 75 dwellings may be appropriate”. They continue by clarifying that “these are a guideline standard and will depend on the particular circumstances of each individual site”.

In this regard Appendix 2 of the guidelines states that the benchmark provision of one childcare facility per 75 dwellings is recommended and that this threshold for provision should be established “having had regard to the existing geographical distribution of childcare facilities and the emerging demographic profile of areas”. The guidelines state that modification to this indicative standard should have regard to the make-up of the proposed residential area and the results of any childcare needs analysis undertaken as part of a county childcare strategy.

Circular Letter PL3/2016 issued by the Department of the Environment, Community and Local Government outlines Government’s policy with respect to increasing access to childcare and until new Childcare Guidelines are issued requesting planning authorities to expediate planning consultations, applications and referrals relating to the provision of childcare facilities. The Circular Letter advises that the Child Care (PreSchool Services) Regulations 2006 set out a range

of childcare related standards for these facilities and that An Tús, the Child and Family Agency, is responsible for inspecting services and enforcing compliance with these Regulations. Planning authorities are therefore requested to exclude matters relating to Appendix 1 set out in the Childcare Guidelines including minimum floor area requirements per child from their considerations.

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

The Guidelines for Planning Authorities on Sustainable Residential Development in Urban Areas (2009) (the SRDUA) aim to ensure the sustainable delivery of residential development throughout the country. With regard to childcare facilities, these guidelines note the recommendation of “the provision of one childcare facility (equivalent to a minimum of 20 child places) for every 75 dwelling units” as specified by the Childcare Guidelines and continues stating that: “The threshold for such provision should be established having regard to the existing geographical distribution of childcare facilities and the emerging demographic profile of areas, in consultation with city/county childcare committees”.

Having regard for the above, it is highlighted that the guidelines acknowledge the need to consider the availability of existing childcare facilities in an area as there may be appropriate provision to accommodate the demand generated by new residential schemes without over providing childcare services.

*Sustainable Urban Housing: Design Standards for New Apartments (2020)*

The Sustainable Urban Housing: Design Standards for New Apartments, Guidelines for Planning Authorities 2020 (the Apartment Standards) acknowledges the standard of childcare facilities recommended in the Childcare Guidelines of one childcare facility (equivalent to a minimum of 20 child places) for every 75 dwelling units. However, the Apartment Standards re-iterate the Childcare Guidelines with respect to each site being considered on its individual merit.

It is highlighted that these guidelines acknowledge the need to consider unit mix and the level of family size units when delivering the level of childcare facilities required for residential schemes.

#### *Limerick City Development Plan (2010-2016)*

Policy SC.7 within the Limerick City Development Plan states that;

“It is the policy of Limerick City Council to encourage the provision of childcare facilities in appropriate locations, including residential areas, City Centre and neighbourhood centres, in areas of employment and educational institutions and convenient to public transport nodes”.

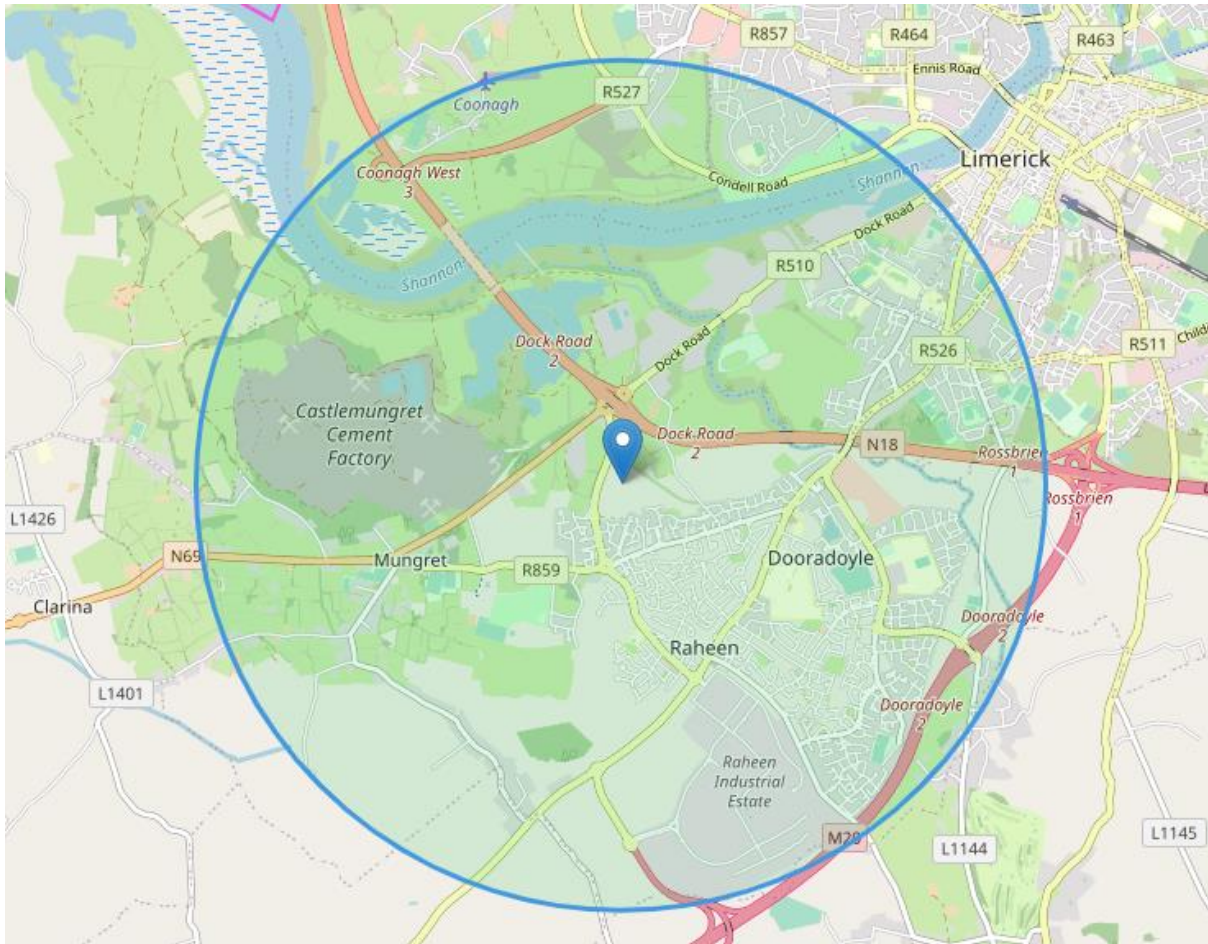
## **4.0 DEMOGRAPHIC ANALYSIS**

Population figures from the Central Statistics Office (CSO) Census of Population recorded in 2016 and the Module on Childcare Quarter 3 2016 of the National Household Quarterly Survey (July 2017) were used to create a profile of the study area including population statistics and childcare figures. An TUSLA, the Child and Family Agency, website provides information on existing childcare facilities. The An Bord Pleanála and Limerick City and County Council online planning search facilities also provided information on both existing and permitted childcare facilities within and near the study area.

### **4.1 STUDY AREA**

It is considered that to appropriately assess the demographic trends within the vicinity of the site, a study area of 3km around the subject site should be examined. The demographic profile of the study area has been created utilising population statistics, at Electoral Division (ED) level, from the 2016 Census as found on the CSO website. The subject site is located within the Ballycummin (CSO Ref. 21051) ED in Limerick. The 3km study area includes 4 no. additional EDs as described in Appendix A. For the purposes of this report, the total figures from the study area as a whole are calculated from the 5 no. individual ED level statistics.





**Figure 1:** Study Area (3km) Map

#### 4.2 DEMOGRAPHIC OVERVIEW

The demographic profile of persons aged 0-4 years within the State, Limerick City and County, Study Area and Ballycummin is described in Table 1 below.

Area	Total Pop	0 Yrs	1 Yrs	2 Yrs	3 Yrs	4 Yrs	Total 0-4 Yrs	Total 0-4 Yrs (%)
State	4,761,865	62,257	64,029	66,318	68,076	70,835	331,515	7.0%
Limerick City and County	194,899	2,536	2,538	2,615	2,654	2,792	13,135	6.7%
Study Area	30,603	500	431	494	439	491	2,355	7.7%
Ballycummin	18,833	351	282	344	318	335	1,630	8.7%

**Table 1:** Demographic Overview 0-4 Age Group. Source: cso.ie

Based on the population statistics above, in 2016, 7.0% of the overall State population were aged between 0 and 4 years. The percentage within the study area was slightly higher at 7.7% and even higher in the ED in which the subject site is located at 8.7%.

Area	Total Population	Females 25-44 Yrs	Females 25-44 Yrs (%)
State	4,761,865	719,363	15.1%
Limerick City and County	194,899	27,707	14.2%
Study Area	30,603	5,126	16.7%
Abbey B	18,833	3,425	18.1%

**Table 2:** Demographic Overview Female 25-44 Age Group. Source cso.ie

For the purposes of this review, it is presented that females are most likely to have children between the ages of 25 and 44 years old. In the State overall, 15.1% of the population is female between 25 and 44 years old. Limerick City and County has a similar percentage of females within this age range with 14.2%. The ED in which the subject site is located and the study area recorded a higher percentage of 18% and 16.7% in the 2016 census.

#### **4.3 CHILDCARE DEMAND**

The Module on Childcare Quarter 3 2016 of the National Household Quarterly Survey as reported in July 2017 provides detail on the types of childcare being used in Ireland. Nationally, the most commonly used non-parental childcare type for pre-school children is a 'creche/ Montessori/ playgroup/ after-school facility', with 19% of preschool children availing of this type of childcare in 2016. The most common form of childcare for those of pre-school age was by a parent or partner at 62%. Based on the population of the study area between 0-4 years of 5,126 this would translate to a requirement of 974 no. childcare spaces within the study area.

The Early Childhood Care and Education Programme (ECCE) was introduced in January 2010 for children who turn 3 years old. The programme provides children with their first formal experience of early learning before entering primary school. The number of children benefiting from the ECCE programme increased since its introduction with 52,600 no. children enrolled in 2010 and

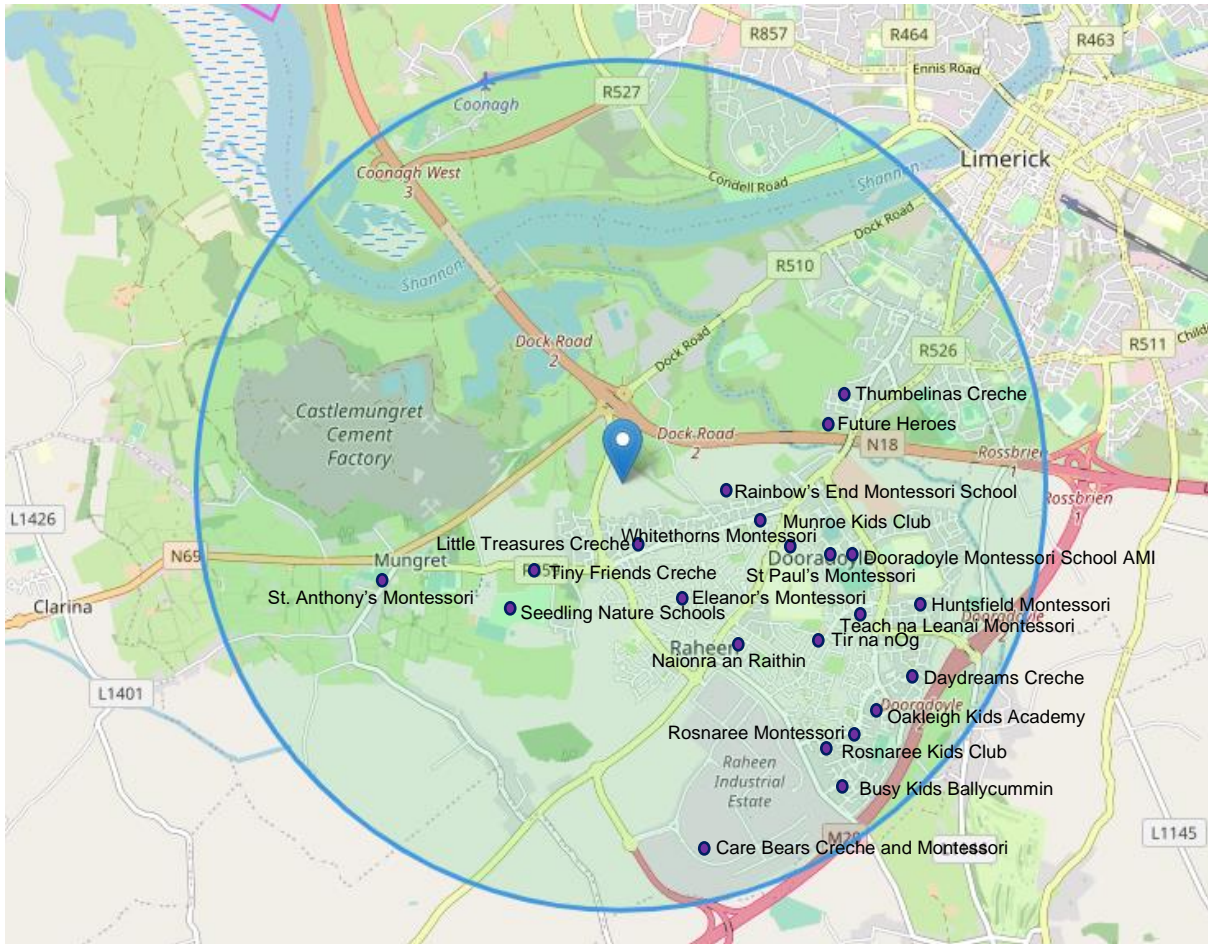
73,964 no. children enrolled in 2016 and 100,000 in 2018. This is largely due to children being permitted to avail of the programme for 2 years rather than 1 year since 2016.

Area	Population	0-2 Yrs	%	3-4 yrs	%
Study Area	30,603	1,425	4.7%	930	3%

**Table 3:** Percentage of Childcare Age Children in the Study Area

#### **4.4 EXISTING FACILITIES**

An assessment of the current level of childcare services provided within the study area has been undertaken using the An Pobal website as well as the Tusla website. The Annual Early Years Sector Profile Report 2018/2019 published by the Department of Children and Youth Affairs reports that in Limerick 7,499 no. children were enrolled in childcare and there were 421 no. vacant places. This is a vacancy rate of 6% and effectively means that childcare is available in Limerick but current facilities are close to capacity at present.



**Figure 2:** Childcare Facilities Within the Study Area (3km from subject site)

A list of childcare providers within the study area based on information provided on the An Pobal website and Tusla website is outlined in Table 4 below. There are currently 22 no. childcare facilities within 3km of the subject site. The total number of places provided is presented as 724 but it must be noted that this is an underrepresentation of the total figure as information was not available for 3 no. facilities. As noted above, Limerick is recorded to have a 6% vacancy rate for childcare places which would equate to a minimum of 43 places available within 3km based on the data set out in Table 4 below.

Name	Address	Services	Age Profile	Capacity
<b>Thumbelinas Creche</b>	Glencarragh, South Circular Road, Limerick	Full Day/ Part Time/ Sessional	1-6	46
<b>Future Heroes</b>	The Mews, Ballinacurra House, Limerick	Full Day	2-6	44



<b>Rainbow's End Montessori School</b>	23 Russell Close, Russell Court, Ballykeeffe, Limerick	Sessional	2-6	9
<b>Munroe Kids Club</b>	Fr. Russell Road, Dooradoyle, Limerick	Full Day/ Part Time/ Sessional	1-6	44
<b>Whitethorns Montessori</b>	3 St. Nessun Park, Dooradoyle, Limerick	Sessional	2-6	22
<b>Dooradoyle Montessori School AMI</b>	St. Paul's Centre, Dooradoyle, Limerick	Sessional	3-6	22
<b>St Paul's Montessori</b>	St. Paul's National School, Dooradoyle, Limerick	Sessional	2-6	22
<b>Huntsfield Montessori</b>	1 The Meadows, Huntsfield, Dooradoyle, Limerick	Sessional	2-5	6
<b>Eleanor's Montessori</b>	47 Cragaun, Fr. Russell Road, Limerick	Sessional	2-6	30
<b>Teach na Leanai Montessori</b>	23 Lawndale Drive, Dooradoyle Estate, Limerick	Sessional	2-6	11
<b>Tir na nOg</b>	74 Raheen Gardens, Raheen, Limerick	Full Day/ Part Time/ Sessional	0-6	19
<b>Daydreams Creche</b>	No Information Provided			
<b>Oakleigh Kids Academy</b>	Oakleigh Woods, Dooradoyle, Limerick	Full Day	0-6	70
<b>Rosnaree Kids Club</b>	No Information Provided			
<b>Rosnaree Montessori</b>	69 Rosnaree, Churchill Meadows, Raheen, Limerick	Sessional	2-5	11
<b>Busy Kids Ballycummin</b>	Ballycummin Village, Raheen, Limerick	Full Day	0-6	125
<b>Care Bears Creche and Montessori</b>	The Loughmore Centre, Loughmore Avenue, Raheen Business Park, Limerick	Full Day/ Part Time/ Sessional	0-6	65
<b>Naionra na Raithin</b>	No Information Provided			
<b>Seedling Nature Schools</b>	No Information Provided			
<b>Tiny Friends Creche</b>	Old School House, Mungret, Limerick	Full Day	0-6	65
<b>Little Treasures Creche</b>	Racefield Centre, Fr. Russell Road, Limerick	Full Day/ Part Time/ Sessional	0-6	95
<b>St. Anthony's Montessori</b>	Mungret Soccar Club, Rathmale, Mungret, Limerick	Sessional	3-5	18
<b>Total</b>				<b>724</b>

**Table 4:** Existing Childcare Facilities in the Study Area. Source:

[https://www.tusla.ie/uploads/content/Limerick\\_Aug21.pdf](https://www.tusla.ie/uploads/content/Limerick_Aug21.pdf)

## 5.0 ESTIMATE OF DEMAND

In order to ascertain the projected demand for the childcare places an analytical approach has been used, which includes the following factors, in addition to the policy context outlined above:

- Site Location and access;
- Housing mix proposed;
- Level of current childcare facilities in the vicinity;
- Demographic profile; and
- Estimate of Demand.

### 5.1 SITE LOCATION AND ACCESS

The site is mainly circular in shape and accessed by an existing roundabout on the R510 regional road.

To the north of the development site are lands zoned for open space. These lands are owned by the applicant, DW Raheen Developments Ltd. A masterplan has been prepared for the future development of these lands should a change in the current zoning designation be achieved in the future.

The south of the development site is bounded by the Inis Mor Housing estate and the Ballinvoher housing estate to the south-eastern boundary. The proposed development includes houses on this boundary to reduce any impact of the development on the existing residential population.

The eastern boundary of the site is also bordered by the lands owned by the applicant but zoned for open space at present, as seen in the North section above.

To the western boundary of the development site is the R510 Regional Road. The existing roundabout to the south-west will provide the access point to the proposed development. Across the R510 to the west is mainly undeveloped lands with some existing residential housing in the Ard Aulin estate.

### 5.2 PROPOSED HOUSING MIX

The mix of housing types and sizes proposed will influence the future resident population. Larger units with more bedrooms are more likely to be occupied by households with children. Table 5 below illustrates the proposed dwelling mix for the application site.

Unit Type	Studio	1 Bed	2 Bed	3 Bed	4 Bed	Total
Apartment	-	46	92	18	-	156
Duplex	-	-	6	10	10	26

<b>Houses</b>	-	-	20	156	26	202
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**Table 5:** Proposed Dwelling Mix

### **5.3 LEVEL OF CURRENT CHILDCARE FACILITIES IN THE VICINITY**

As set out in section 4.4 above, there are currently 22 childcare facilities within 3km of the subject site providing 724 childcare places at present.

### **5.4 DEMOGRAPHIC PROFILE**

As set out in Section 4, the demographic profile of those aged 1-4 years in the study area is higher than that of the State at 7.7%. In 2016 the national average household size was 2.75. According to the NPF the average household size is expected to decline to 2.5 people by 2040. The decline in average household size suggests that family sizes are becoming smaller, therefore there will be a decline in the number of childcare places required. In calculating the demand likely to be generated by the proposed development and the future demand for childcare places, the 2016 figures have been used in order to provide a robust analysis.

As evidenced by the Module on Childcare Quarter 3 2016 of the National Household Quarterly Survey (CSO, 2017) not all preschool children attend childcare facilities and it is considered that there will always be a significant portion of children who do not attend or attend only occasionally. It is recorded that 19% of pre school children use creche/ Montessori/ playgroup/ after-school facilities. The introduction of the National Childcare Schemes for the over 3's may have led to some increase, but still not all children are expected to attend childcare facilities.

### **5.5 ESTIMATE OF DEMAND**

The Childcare Guidelines, Residential Density Guidelines, Apartment Standards and local planning policy recognise the need to assess proposals based on their locational merits. In this regard the Apartment Standards state: "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".

With regard to the proposed development, the threshold for provision of facilities should be established having regard to:

- Scale and unit mix within proposed development;
- Existing geographical distribution of childcare facilities; and
- Emerging demographic profile of the area.

#### **5.5.1 SCALE AND UNIT MIX WITHIN PROPOSED DEVELOPMENT**

There are 46 no. one bedroom units proposed within the development which are excluded from the childcare demand analysis. Based on the above, it is established that 338 no. apartment, duplex and housing units should form the basis of the demand analysis as it is most likely that children would live in these units. This would result in the following requirement for childcare provision within the development;

**338 no. units / 75 dwellings = 4.5 X 20 no. places = 90 no places required.**

The above represents an over estimate of places required as there is policy to support the discounting of 50% of 2 bedroom units as not all of these units would accommodate children. For the purposes of ensuring that an adequate supply of childcare places are provided within the development, in this instance all 2 bedroom units were included in the calculation above.

#### **5.5.2 EXISTING GEOGRAPHICAL DISTRIBUTION OF CHILDCARE FACILITIES**

As set out above, there are currently 724 childcare places available within the study area.

#### **5.5.3 EMERGING DEMOGRAPHIC PROFILE OF THE AREA**

Based on the Childcare of the National Household Quarterly Survey (2016) which recorded that 19% of preschool children, Nationally, attended a childcare facility and that all preschool children over 3 years can avail of 2 years of National Childcare Schemes such as the Early Childhood Care and Education (ECCE) programme it is assumed for robustness that:

- 19% of those aged 0-2 years will attend a childcare facility; and
- 100% of those aged 3-4 years will attend a childcare facility in order to avail of national childcare schemes.

Based on the 2016 national average household size of 2.75 providing an anticipated population within the proposed development of 1,048 and applying these childcare



attendance assumptions the demand for childcare spaces within the proposed development is set out in Table 6 below.

Age	Population 0-4	% Requiring Childcare	No. Required Places
0-2 Years	$1,056^1 * 4.7\%^2 = 50$	$50 * 19\%^3 =$	10
3-4	$1,056^1 * 3\%^2 = 32$	$32 * 100\%^4 =$	32
<b>Total</b>			42

1. Units (384 no.) \* average household size (2.75)

2. % of population is that age cohort based on state 2016 figures

3. % of preschool children attending Creche / Montessori / Playgroup / After-school facilities Nationally.

4. Assume all (100%) within the 3-4 year cohort attend to avail of national childcare schemes.

**Table 6:** Anticipated Demand for Childcare

In consideration of the specific determining factors associated with this development such as unit mix, level of childcare provision in the area and trends in childcare facility attendance it is considered appropriate to provide a facility to accommodate 42 no. childcare places.

## 6.0 CONCLUSION

RW Nowlan & Associates have prepared this report on behalf of DW Raheen Developments Ltd. to accompany an SHD application for the development of 202 no. houses and 182 apartment and duplex units in Ballykeeffe, Raheen, Limerick. The proposed development comprises 46 no. 1 bedroom apartment units, 92 no. 2 bedroom apartment units, 18 no. three bedroom apartment units, 6 no. two bedroom duplex units, 10 no. three bedroom duplex units, 10 no. four bedroom duplex units, 20 no. two bedroom houses, 156 no. three bedroom houses and 26 no. four bedroom houses. This report provides an overview of the proposed development and highlights the relevant planning policies and objectives relating to the provision of childcare facilities as outlined in policy documents.

Considering existing childcare facilities within a 3km radius of the subject site alongside policy documents, CSO data, it is concluded that demand for childcare services is relatively high. Within the study area, a 3km radius from the subject site, there are 22 no. existing services providing 724 no. childcare places.

Based on the demand analysis the following apply:

- Application of the Childcare Guidelines excluding studio and one bed units would necessitate the provision of a childcare facility with 90 no. places.
- A robust analysis of projected childcare demand allowing for mix of units proposed, household size, childcare practises and the ECCE Programme found that demand for 0 – 4 years childcare places shall be no more than 42 no. places.

Considering existing facilities in the study area, population demographics, relevant policy and guidelines, it is concluded that a childcare facility with a mid-point between the maximum and minimum estimate providing 66 no. childcare places will exceed the demand generated by the proposed development.

**Yours Sincerely,**



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**R.W. Nowlan & Associates**

#### APPENDIX A – Electoral Division Data

<b>Identity No.</b>	<b>Area</b>	<b>Total Pop</b>
	State	4,761,865
	Limerick City and County	194,899
	Study Area (3km)	30,603
ED3409_21051	Ballycummin	18,833
ED3409_20005	Ballinacurra A	1,962
ED3409_20006	Ballinacurra B	1,371
ED3409_20011	Castle D	2,081
ED3409_20065	Limerick North Rural	6,801