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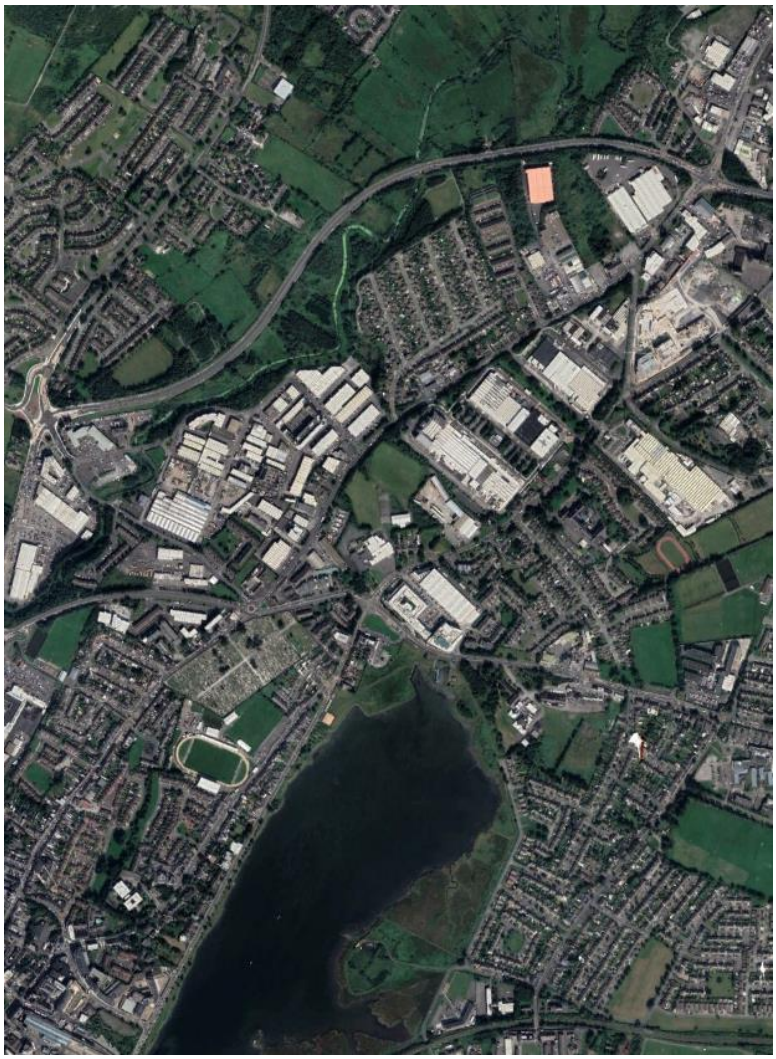
CHILDCARE DEMAND AUDIT – LANDS AT SANDY ROAD

FOR ASSESSMENT OF PROPOSED MASTERPLAN AT SANDY ROAD, GALWAY



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1.0 EXECUTIVE SUMMARY

Land Development Agency (LDA)[1] have requested Tom Phillips and Associates (TPA) to prepare a childcare capacity audit in relation to lands at Sandy Road, Galway City, to be developed through a master planning scheme to determine the provision of childcare facilities within the study area.

1.1 Masterplan Site Context

The c. 8.8 ha subject site, spread across 5 no. individual blocks, is situated approximately 1.5 km to the northeast of Galway City Centre, within the Mervue area. Block A is c. 3.69 ha, Block B c. 2.95, Block C c. 0.65 ha, Block D c. 1.12, while Block E is c. 0.4 ha. The site is located within the existing built-up area of Galway City, along the Tuam Road, which is an important arterial route in and out of the City Centre. Sandy Road runs from the Joyce Roundabout to the roundabout at the junction of Headford Road and Bóthar na dTreabh, a distance of c. 700m. Access to Blocks A,B and D is along Sandy Road. Block D is can also be accessed along the Sean Mulvoy Road. Block C is accessed along the Tuam Road, while block E is accessed from with the Tuam Road or the Moneenageisha Road.

Figure 1.1: Indicative Site Location, aerial view. Source: Esri Satellite Basemap/TPA.

[1] Land Development Agency, 2nd Floor Ashford House, Tara Street, Dublin 2, Dublin, D02 VX67

The site comprises of an extensive mixture of zonings, although the Blocks A, B and E are generally characterised as commercial, and enterprise uses. Block D is largely characterised by open space, while Block C currently contains a vocational education centre. The Sandy Road site is of strategic importance and will have the potential to provide housing and places to work for thousands of people over the course of its development.

There are 2 no. bus routes which serve the site, numbers 405 and 407, which run along Headford Road and Tuam Road respectively. There are 2 no. schools which serve children and young adults with special needs situated c. 800m from the subject site (Lakeview School and Rosedale School). Scoil San Phrionsias lies c. 500m northwest of the site. Galway Shopping Centre lies c. 900m southwest of the subject site.

1.1 Childcare Demand Assessment

The Land Development Agency. have requested that a childcare capacity audit be undertaken for the study area to determine the existing level of childcare provision and potential requirement for additional facilities at this location. An audit was undertaken by Tom Phillips + Associates[2] utilising desktop methods in March 2022 (updated in May 2022) in this regard and can be summarised as follows:

- We note that the subject site is located within an established industrial area where there were only 7 No. operational childcare facilities identified within c.15-minute walking distance from the site with over 290 No. childcare spaces on offer at the time of the capacity audit (March 2022 updated in May 2022).
    - An estimated 69 No. vacant places (c. 24% of total capacity) were potentially available to accommodate new enrolments at the time of the survey. Further survey work is required to determine current capacities in the area.
- The current local childcare provision is found to be potentially adequate as the local estimated demand for childcare spaces such as creche, Montessori, preschool and afterschool services was only 127 No. spaces, while the local childcare network supplies 293 No. spaces.
    - Potential lack of supply of childcare spaces was found to be limited to children aged below 1 years old.

The proposed residential-led regeneration scheme will likely create its own demand, depending on the number of units proposed.

[2] Tom Phillips + Associates, 80 Harcourt Street, Dublin 2, D02 F449. Suite 437 + 455, No. 1 Horgan's Quay, Waterfront Sq, Cork City, T23 PPT8

2.0 RELEVANT PLANNING GUIDANCE

2.1 National Planning Guidance for the Provision of Childcare Facilities

The *Childcare Facilities: Guidelines for Planning Authorities (2001)* produced by the Department of Housing, Planning and Local Government state the following with respect to the provision of new communities/larger 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."***
>
> *[**Our emphasis,** Section 2.4, p. 5]*

2.2 Sustainable Urban Housing Guidelines - Apartments

The *Sustainable Urban Housing: Design Standards for New Apartments Guidelines for Planning Authorities (2020)* also includes specific guidance with respect to childcare provision in the design and development of apartment schemes, as follows:

> *"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."*
>
> *[**Our emphasis**, Section 4.7]*

In respect of these requirements, the composition of the subject development proposal, geographic distribution of existing childcare facilities and the demographic profile of the study area are assessed in Sections 3.0 to 5.0 to follow.

2.3 Galway City Development Plan 2023-2029 (CDP)

The assessment area is located within the Galway City Council administrative area and is to be governed by the provisions of the upcoming *Galway City Development Plan 2023-2029 (CDP).* Specific policies for the development of childcare facilities within the *GCDP* include:

Table 2.2: Childcare Policies included in *CDP 2023-2029*	
Policy	**Description**
Policy 7.7	**Childcare**
1	***Facilitate the development of childcare facilities****, including afterschool services, at a number of suitable locations, such as, within residential areas****, places of employment, city centre, neighbourhood and district centres, schools, in the vicinity of educational and community establishments and adjacent to public transport nodes*** *in consultation with the Galway Childcare Committee.*
2	***Contribute to the provision of childcare facilities by requiring that such facilities be provided in conjunction with residential developments over 75 dwelling units. An exception can only be considered where*** *it can be clearly established and professionally supported that adequate childcare facilities* ***already exist to service the area and where acceptable alternative arrangements to support childcare, play and or other child specific facilities are deemed acceptable.***
	Our Emphasis

The Development Plan recognises that in all new housing area with over 75 No. units there must be a provision of 1 No. childcare facility with a capacity to accommodate 20 children at any one time. These requirements are in line with the *Guidelines for Planning Authorities on Childcare Facilities (DECLG 2001)* and to create sustainable residential neighbourhoods.

In relation to large scale retail centre locations to which the subject lands are in close proximity to the Plan states:

> ''the provision of a drop-in childcare facility for shoppers will be encouraged. The Plan recognises the contribution that good quality, well-located facilities can have on making neighbourhoods sustainable and achieving the ambitions of the '15-minute city' concept.'' *[CDP, Ch 7]*

Specific Development Standards in relation to Childcare Facilities state that childcare facilities will be assess on the following criteria:

- *The suitability of the site/premises for the type and size of facility proposed, taking into consideration the effects on the existing amenities of the area. Contribution to placemaking and to the '15-minute city' and walkable neighbourhood concepts.*
- *Adequacy of vehicular/pedestrian access and parking provisions, which may be required to include satisfactory and safe collection/drop-off areas where appropriate, for both customers and staff where it is merited by the scale of the development and the resultant intensity of vehicular movements.*
- *Availability of public transport facilities within the area.*
- *Provision of an adequate outdoor play area within the curtilage of all full day care facilities. This outdoor play area shall be so located to have minimum impact on the amenity of surrounding properties, particularly in residential areas and should also be separate from car parking and service areas.*

- *The design of the structure and capability of it being assimilated satisfactorily into the built environment/site. In this regard appropriate purpose-built facilities are encouraged.*
- *Where new facilities are proposed, these should comply with all relevant legislation and regulations, in particular the Child Care (Preschool Services) Regulations 2006.*
- *Applicants are also advised to consult with the TUSLA, Health Services Executive Environmental Health Officers, Galway City and County Childcare Committee and the Chief Fire Officer.*

[CDP, Section 11.13}

3.0 DEMOGRAPHIC PROFILE

For the purposes of the demographic analysis, the study area comprises 2 No. distinct enumeration areas identified by the Central Statistics Office (CSO) of relevance to the subject development, as follows:

1) The local Electoral Divisions (EDs);
2) Small Areas (SAs); and
3) The larger Galway City local authority (LA) administrative boundary.

These enumeration areas (identified in Figure 3.1) provide demographic information for the local and regional populations which are likely to be impacted by the subject development.

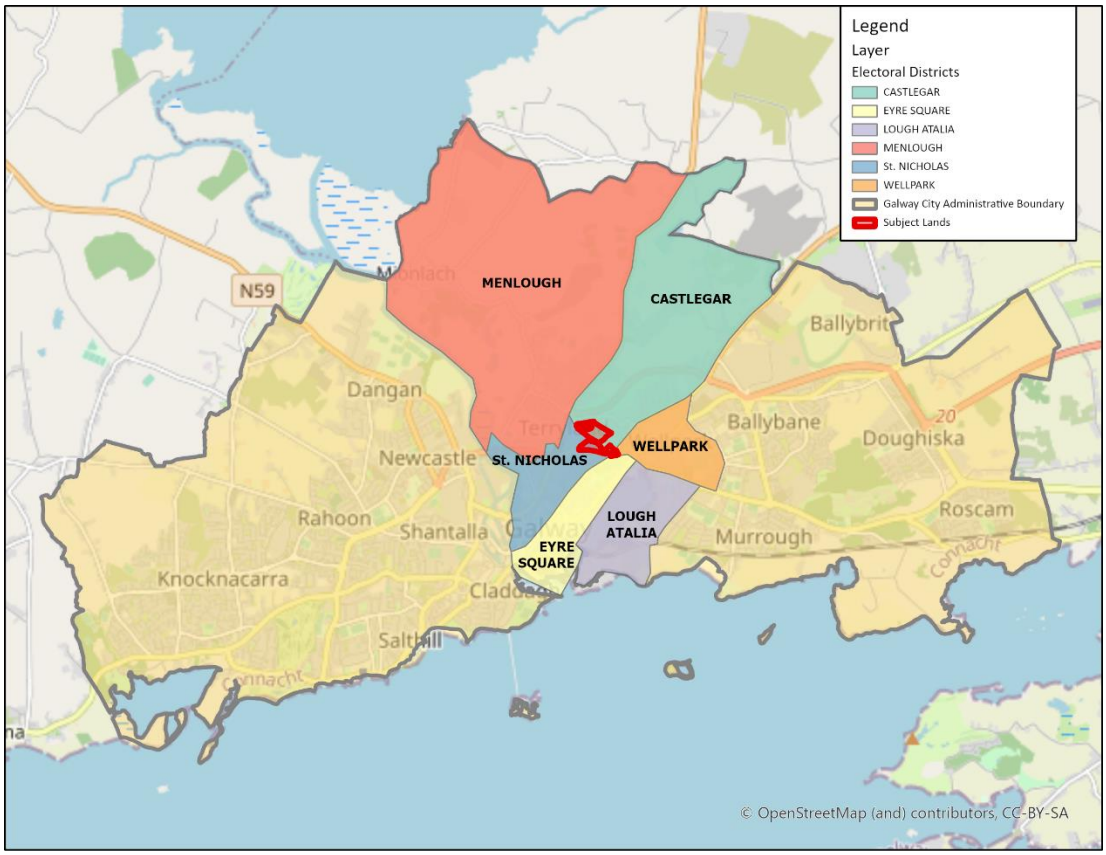

Figure 3.1: Extent of CSO enumeration areas utilised in demographic analysis. Location of subject site within the Castlegar and St. Nicholas EDs indicated by red polygon. Source: CSO/TPA, 2022.

The proposed development site is located partially within the 'Castlegar' Electoral Division (ED), Wellpark and the 'St. Nicholas' ED, which had a combined population of 8,115 No. persons at the time of the 2016 Census. Whereas the combined population of all EDs immediately adjacent to the subject site was 18,251 No. persons as of the 2016 Census. The population for this area appears to have been declining overall in the last 5 years compared to the rest of Galway City which has grown by 4.2%.

Table 3.1: Population Trends at Local Electoral Division Level (Source: CSO 2011, 2016).

Local Electoral Divisions	2011	2016	% Change
Castlegar	4,135	4,053	**-2.0%**
Mionlach	4,990	5,118	**+2.6%**
St. Nicholas	2,598	2,394	**-7.9%**
Eyre Square	4,461	4,108	**-7.9%**
Wellpark	1,843	1,668	**-9.5%**
Lough Atalia	920	910	**-1.1%**
Cumulative ED Study Area	18,947	18,251	**-3.7%**

Age Profile

The majority of the study area population falls within the 'Adult' (24-64 years) age cohort comprising 56.4% of the total population, which higher than the Local Authority average for this group (54.8%). The 'Preschool', 'Primary', 'Secondary' and 'Older Adult' cohorts form a slightly lower percentage of the overall population within the cumulative ED Area than the rest of Galway City, at 6.1%, 8.7%, 6.3% and 11.2% respectively.

Table 3.2: Comparison of Age Profile of ED and LA Study Areas (Source: CSO 2016).

Age Cohorts	Combined ED Area		Galway City	
Population	**Population**	**% Total**	**Population**	**% Total**
Preschool (0-4 years)	742	**4.1%**	4,772	**6.1%**
Primary (5-12 years)	1,007	**5.5%**	6,840	**8.7%**
Secondary (13-18 years)	797	**4.4%**	4,934	**6.3%**
Young Adults (19-24 years)	3,468	**19.0%**	10,173	**12.9%**
Adults (25-64 years)	10,286	**56.4%**	43,101	**54.8%**
Older Adults (65+ years)	1,951	**10.7%**	8,848	**11.2%**
Total	18251	**100.0%**	78,668	**100.0%**

The table below reflects changes in age cohorts for the local ED area as well as Galway City. At a local level as identified earlier, the population has declined with highest reduction in the 'Secondary' age cohort (20.8%) followed by the 'Preschool' age cohort (12.5%). The 'Young Adult' and 'Adult' age cohorts have also seen a reduction by 5.7% and 5.9% respectively. Whereas the 'Secondary', Young Adult', and 'Adult' population all increased in the 5-year period in Galway City. We also find that there has been a significant increase in the 'Older Adults' age cohort (25.6%) which has increased at a similar rate as the rest of Galway City

(25.3% increase). It is also noted that the preschool population in this area seems to have declined at a much higher rate as compared to the Galway City as a whole.

Table 3.3: Comparison of Age Profile of ED and LA Study Areas (Source: CSO 2016).

Age Cohorts	Combined ED Area			Galway City		
Population	**2011**	**2016**	**% Change**	**2011**	**2016**	**% Change**
Preschool (0-4 years)	848	742	**-12.50%**	4,869	4,772	**-1.99%**
Primary (5-12 years)	928	1,007	**+8.51%**	6,217	6,840	**+10.02%**
Secondary (13-18 years)	1,006	797	**-20.78%**	4,735	4,934	**+4.20%**
Young Adults (19-24 years)	3,677	3,468	**-5.68%**	9,998	10,173	**+1.75%**
Adults (25-64 years)	10,935	10,286	**-5.94%**	42,651	43,101	**+1.06%**
Older Adults (65+ years)	1,553	1,951	**+25.63%**	7,059	8,848	**+25.34%**
Total	**18947**	**18251**	**-3.67%**	**75,529**	**78,668**	**+4.16%**

Birth Rates and Infant Mortality Rate

The latest 'Vital Statistics Yearly Summary' published by the CSO in May 2021, recognises that births have continued to fall since 2010 in Ireland, and states that,

> *''There were 55,959 births registered in 2020, 28,902 male births and 27,057 female births, a decrease of 3,837 on 2019. The 2020 total is 25.4% lower than in 2010 when 74,976 births were registered.*
>
> *The 55,959 births represent an annual birth rate of 11.2 per thousand population. This rate is 0.9 per thousand population lower than in 2019.''*

However, the infant mortality rates have declined over the years since 2010, from 3.8 deaths per 1000 live births to 2.7 deaths per 1000 live births at a national level.

On a regional level, Galway City has seen a total of 770 births in 2020, compared to 2,116 births in Galway County and 55,959 births nationally. Galway city held a birth rate[3] of 10.1 births per 1000 population in 2020, compared to 11.2 births per population in the State. Whereas the infant mortality rates[4] are one of the highest in Ireland with 3.9 deaths per 1000 live births in Galway City, compared to 4.3 deaths per 1000 live births in Galway County and 2.7 deaths per 1000 live births nationally.

[3] Births per year per 1,000 population. Annual rates based on estimated usual residence 2020 population.
[4] Infant mortality rates: Deaths of infants under one year per 1,000 live births, classified by area of residence of mother.

A recent article published by RTE in June 2021[5], finds that birth rates are falling all over the world along with Ireland, and these changes are due to a number of reasons including declining fertility rates. The Sociologist Dr. Carmel Hannan says that much of the decision making around families and children was linked to religion, but this has now changed and stated that,

> *'' Secularisation and decline in religious affiliation and attendance have been strongly linked with declining fertility rates, but they're also linked to other changes such as women's increasing education, the control of contraception, and the ability to make choices and decisions because some constraints have been removed.''*

Estimated Child population in the region as of 2021

For the purpose of estimation of child population in the region, the Small Area enumeration data with respect to the local population has been utilised so as to capture the population within c.1km radius. The Small Areas (SAs) captured within the study area are indicated in Figure 3.2 below.

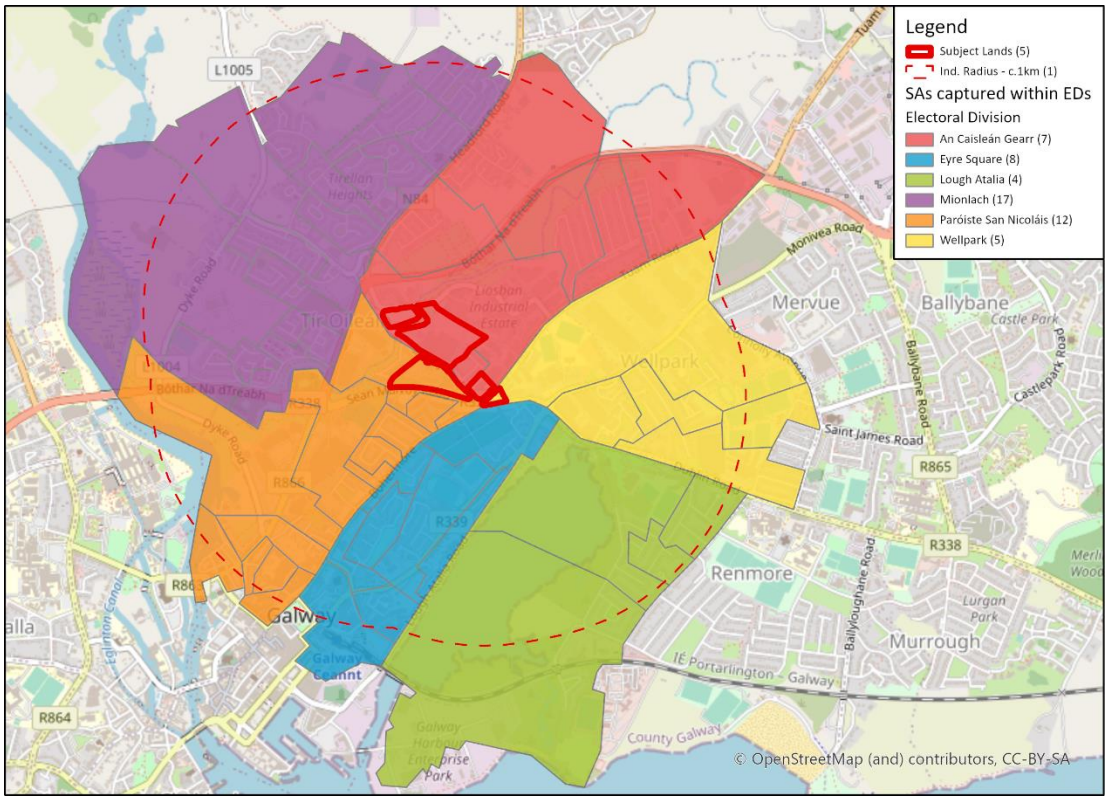

Figure 3.2: Extent of CSO enumeration areas utilised in demographic analysis. Location of subject site (indicated by red polygon) in relation to surrounding SAs Source: CSO/TPA, 2022.

The total population in the SA study area stood at 12,118 No. persons in 2016 compared to 78.668 No. persons in Galway City as a whole. Out of this, there were an estimated 459 No. 'Preschool' children between the age 0-4 years within the SA study area. When the yearly regional birth rates recorded for Galway City from 2017 to Q3 of 2021 are applied to the combined SA study area population, an estimated additional 696 No. children are born

[5] Source: https://www.rte.ie/brainstorm/2021/0519/1222517-ireland-birth-rates-falling/

compared to an additional 4,521 No children born in Galway City. Similarly, when the regional Infant Mortality Rates recorded for Galway City from 2017 to Q3 of 2021 are applied to the combined SA study area, there is an estimated 3 No. deaths. This results in an estimated net live birth count of 693 No. children in the combined SA study area versus 4,498 No. children in Galway City.

Table 3.4: Estimated child population from 2017-2021[6]

Year[7]	Combined SA Study Area			Galway City		
	Births[8]	Infant Deaths[9]	Net new births	Births[10]	Infant Deaths[11]	Net new births
2017	149	0.8	148	968	4.9	963
2018	154	0.8	153	999	4.9	994
2019	136	0.7	135	881	4.7	876
2020	122	0.5	122	795	3.4	791
2021	135	0.7	135	878	4.5	874
2017-2021	**696**	**3**	**693**	**4521**	**22**	**4498**

Therefore, based on the regional birth rates and infant mortality rates recorded by the CSO in 2020, there is an estimated 693 No. children within the SA study area since the 2016 Census. However, we note that the number of children aged 0-4 years recorded in the Census 2016 would have shifted to the 5-12 age cohort as of 2022 as 6 years has passed since the last Census. Similarly, the number of children recorded within the 5-12 years age cohort would have shifted to the 13-8 years age cohort as of 2022. Thus, the estimated population of children aged 0-4 years within the SA Study area is 693 No. children and 459 No. children within the 5-12 years age cohort. **This brings the estimated total child population in the area to 1,152 No. children.**

3.2 Potential Childcare Uptake Statistics in the West

According to the CSO 2016 'Module on Childcare' released in 2017[12], the use of parental childcare fell from 75% to 70% between 2007 and 2016 at a national level, indicating an increase in demand for childcare nationally.

In terms of types of childcare availed by school-going status and region the CSO published Table 3 which highlights that in the Western region (which includes Galway City) 49% of 'preschool' children (0-4 years) availed of non-parental childcare of which 15% of children availed of 'creche/montessori/playgroup/afterschool' facilities. A lower 32% availed of non-parental childcare at the 'primary' school age (5-12 years) of which 8% of children availed of 'creche/montessori/playgroup/afterschool' facilities. Cumulatively, an average of 38% of

[6] Data on regional birth rates and infant mortality rates were sourced from the CSO Vital Statistics Yearly Summary published in May 2021, available at: https://www.cso.ie/en/releasesandpublications/ep/p-vsys/vitalstatisticsyearlysummary2020/
[7] We note that the yearly Birth Rates and Infant Mortality Rates recorded in Galway City have been applied in the calculations. For the year 2021, Birth Rates and Infant Mortality rates have been applies using the average between Q1 to Q3 of 2021. Data as of Q4 2021 is not yet available.
[8] ((Total SA study area population/1000) *Birth Rate).
[9] ((Total SA study area live births/1000) *Infant Mortality Rate).
[10] ((Total LA population/1000) *Birth Rate).
[11] ((Total LA live births/1000) *Infant Mortality Rate).
[12] Source: https://www.cso.ie/en/releasesandpublications/er/q-chi/qnhschildcarequarter32016/

children aged 0 to 12 years availed of non-parental childcare in the West out of which 11% of children availed of 'creche/montessori/playgroup/afterschool' facilities.

Table 3: Types of childcare used by children by school-going status and region, Quarter 3 2016

% of children[1]

Pre-school children

	Border	Midland	West	Dublin	Mid-East	Mid-West	South-East	South-West	State
Type of childcare									
Parent / Partner	65	56	59	62	65	51	67	65	62
Unpaid relative or family friend	16	13	18	16	16	16	20	22	17
Paid relative or family friend	2	5	2	3	5	1	4	2	3
Childminder / Au Pair / Nanny	13	18	21	8	13	13	13	12	13
Creche / Montessori / Playgroup / After-school facility	15	14	15	25	14	28	17	16	19
Other	1	<1	<1	1	<1	1	1	1	1
Total pre-school children using non-parental childcare	**45**	**47**	**49**	**46**	**45**	**53**	**45**	**45**	**46**
Unweighted sample	*198*	*136*	*234*	*525*	*244*	*189*	*230*	*316*	*2,072*

Primary school children

	Border	Midland	West	Dublin	Mid-East	Mid-West	South-East	South-West	State
Type of childcare									
Parent / Partner	72	74	79	71	75	74	77	76	74
Unpaid relative or family friend	21	18	16	15	12	11	17	19	16
Paid relative or family friend	4	2	2	3	4	2	4	3	3
Childminder / Au Pair / Nanny	8	7	8	8	8	10	7	7	8
Creche / Montessori / Playgroup / After-school facility	8	7	8	11	7	9	7	7	8
Other	1	<1	1	<1	<1	1	1	<1	<1
Total primary school children using non-parental childcare	**37**	**33**	**32**	**35**	**29**	**31**	**32**	**32**	**33**
Unweighted sample	*413*	*249*	*450*	*896*	*515*	*341*	*437*	*549*	*3,850*

All children aged 0-12

	Border	Midland	West	Dublin	Mid-East	Mid-West	South-East	South-West	State
Type of childcare									
Parent / Partner	69	68	72	67	72	66	73	72	70
Unpaid relative or family friend	19	16	17	15	13	13	18	20	16
Paid relative or family friend	4	3	2	3	4	2	4	2	3
Childminder / Au Pair / Nanny	10	11	13	8	10	11	9	9	10
Creche / Montessori / Playgroup / After-school facility	10	10	11	17	9	16	11	10	13
Other	1	<1	1	<1	<1	1	1	<1	1
Total children aged 0-12 using non-parental childcare	**40**	**38**	**38**	**39**	**35**	**39**	**37**	**38**	**38**
Unweighted sample	*611*	*385*	*684*	*1421*	*759*	*530*	*667*	*865*	*5,922*

[1]Percentages add up to more than 100% because some children used more than one type of childcare

Figure 3.1: Types of childcare used by status/region (% children) Source: QNHS, Quarter 3 2016, CSO[13].

When the above childcare uptake rates (11%) are applied to the SA study area child population (1,152 no. children), an estimated 127 No. children aged 0-12 years will opt for childcare services in the form of 'creche/ montessori/ playgroup/afterschool' facilities within the SA Study area. Whereas, 438 No. children aged 0-12 years will opt for non-parental childcare as a whole.

Thus, the local childcare demand is estimated to be to the order of 127 to 438 No. childcare spaces.

[13] As noted by CSO, Percentages add up to more than 100% because some children used more than one type of childcare.

4.0 REGIONAL CHILDCARE CAPACITY

The latest *Annual Early Years Sector Profile Report 2020/2021*[14] (EYSP) identified a vacancy rate of 27% in Galway, equivalent to 1,826 No. vacant places across the Local Authority during the survey year. This rate is significantly higher than the previous year (7%), with only 749 No. vacant spaces recorded within the area from 2018-2019.

Table 4.1: Capacity Summary of Galway City Childcare Services (EYSP 2016/17 - 2018/19)				
County (Year)	**Enrolled**	**Vacant places**	**Vacancy rate**	**Waiting List**
Galway (2020/21)	**6,809**	**1,826**	**27%**	-
Galway (2018/19)	10,679[15]	749[16]	7%[17]	1,074[18]
Galway (2017/18)	10,514[19]	571[20]	6%[21]	620[22]

Galway also recorded an increase in the total number of services (addition of 10 No. childcare services from the previous survey year). However, we note that the total number of services with more than 1 No. child enrolled in Galway decreased from 2017/18 to 2018/19, with 288 No. services providing childcare to an average enrolment of 48 No. children in 2018/19.

Table 4.2: Services Summary of Galway City Childcare Services (EYSP 2016/17 - 2018/19)				
County (Year)	**Children enrolled**	**Total No. of Services**	**No. of services with (>=1) child enrolled**	**Average enrolled per facility**
Galway (2018/19)	10,679[23]	288[24]	223[25]	48[26]
Galway (2017/18)	16,514	278[27]	234[28]	45[29]

4.1 Local Childcare Network

The study area for the childcare survey captures 47 No. Small Areas which fall within the 6 No. Electoral Divisions of St. Nicholas, Wellpark, Lough Atalia, Mionlach, Eyre Square and Castlegar (see Figure below). The area held a total population of 459 No. preschool aged children (0-4

[14] The latest available Early Years Sector profile report for 2019-20 at the time of this audit was not referred to in this regard as it excluded the enrolment data due to Covid-19 related difficulties.
[15] *Annual Early Years Sector Profile Report 2018/2019,* Pg 90
[16] *Annual Early Years Sector Profile Report 2018/2019,* Pg 90
[17] *Annual Early Years Sector Profile Report 2018/2019,* Pg 90
[18] *Annual Early Years Sector Profile Report 2018/2019,* Pg 90
[19] *Annual Early Years Sector Profile Report 2017/2018,* Appendix I
[20] *Annual Early Years Sector Profile Report 2017/2018,* Appendix I
[21] *Annual Early Years Sector Profile Report 2017/2018,* Pg 70
[22] *Annual Early Years Sector Profile Report 2017/2018,* Appendix I
[23] *Annual Early Years Sector Profile Report 2018/2019,* Pg 90
[24] *Annual Early Years Sector Profile Report 2018/2019,* Appendix II
[25] *Annual Early Years Sector Profile Report 2018/2019,* Appendix II
[26] *Annual Early Years Sector Profile Report 2018/2019,* Appendix II
[27] *Annual Early Years Sector Profile Report 2017/2018,* Pg 41
[28] *Annual Early Years Sector Profile Report 2017/2018,* Appendix II
[29] *Annual Early Years Sector Profile Report 2017/2018,* Appendix II

years), 601 No. primary school aged children (5-12 years) and 496 No. secondary school ages children (13-18 years) within the area as of the 2016 Census.

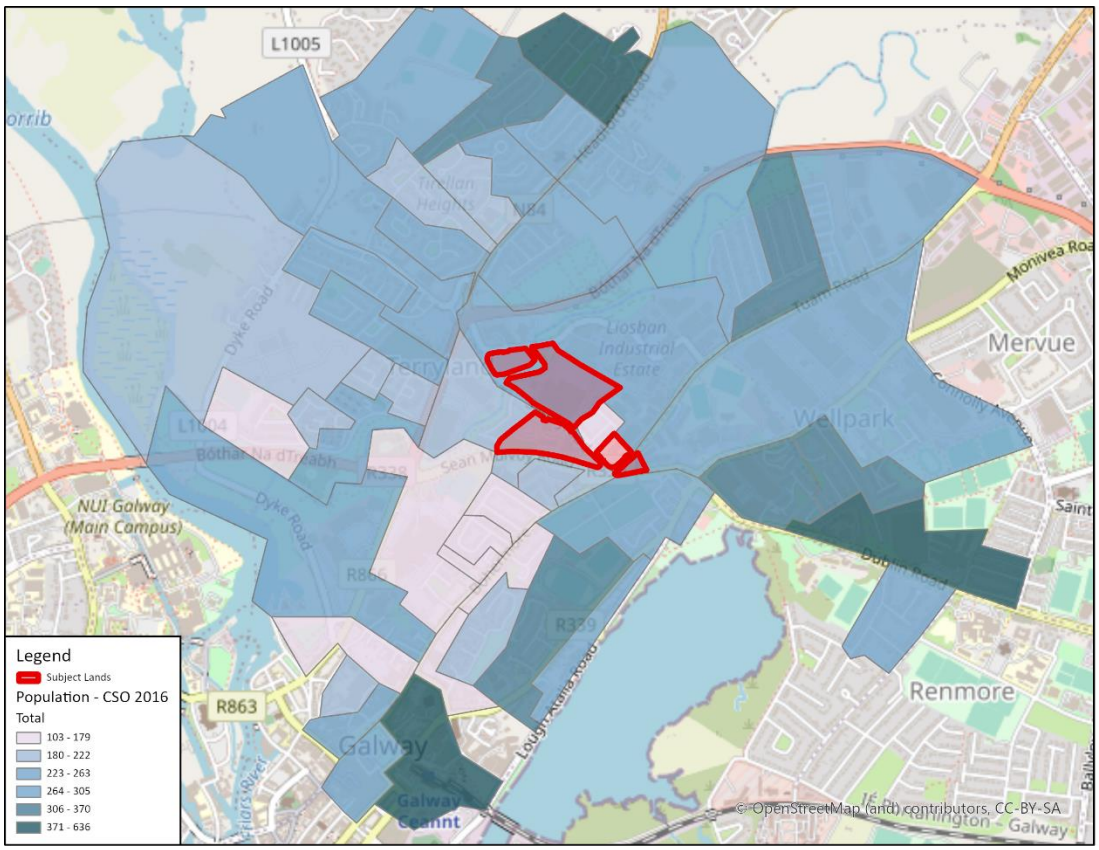

Figure 4.1: CSO 2016 population by Small Areas located within the 15-minute walking catchment.
*Methodology note: Small area boundaries of which over 50% fell outside the catchment area was excluded.

As the Early Years Sector Profile data is only available at the county level, TPA conducted an independent survey in March 2022 to determine the capacity of existing childcare operators in the area.

A total of 7 No. operational childcare facilities were identified within a c.15-minute walking distance of the subject site during the course of the audit, as shown in Figure 4.2 and Table 4.3 overleaf. There is also one additional drop in facility at the Connacht Hotel (Friendly Fellows Club) which has the capacity to accommodate 24 no. children at any one time between 3 to 6 years old.

As seen from the Table 4.3 a majority of the childcare facilities cater to the preschool age of 1 year and above with seemingly only 2 no. facilities (Child's Play Creche and Mervue Community Creche) that cater to children below 1 years old.

When the local childcare network capacity is compared with the total population of children aged 0 to 12 years, there is adequate provision of childcare spaces supplied in the study area. There are total of 1,152 No. children aged 0 to 12 in the study area which captures 47 No Small Areas. **When the regional childcare uptake for non-parental childcare percentage for the West region which includes Galway is applied as calculated in section 3.2 of this report, there is a estimated demand of 127 to 438 no. childcare spaces within the study area.**

The local childcare facilities have the combined capacity to accommodate 293 No. childcare spaces. Therefore, there is sufficient provision of childcare spaces within the area to meet the estimated demand.

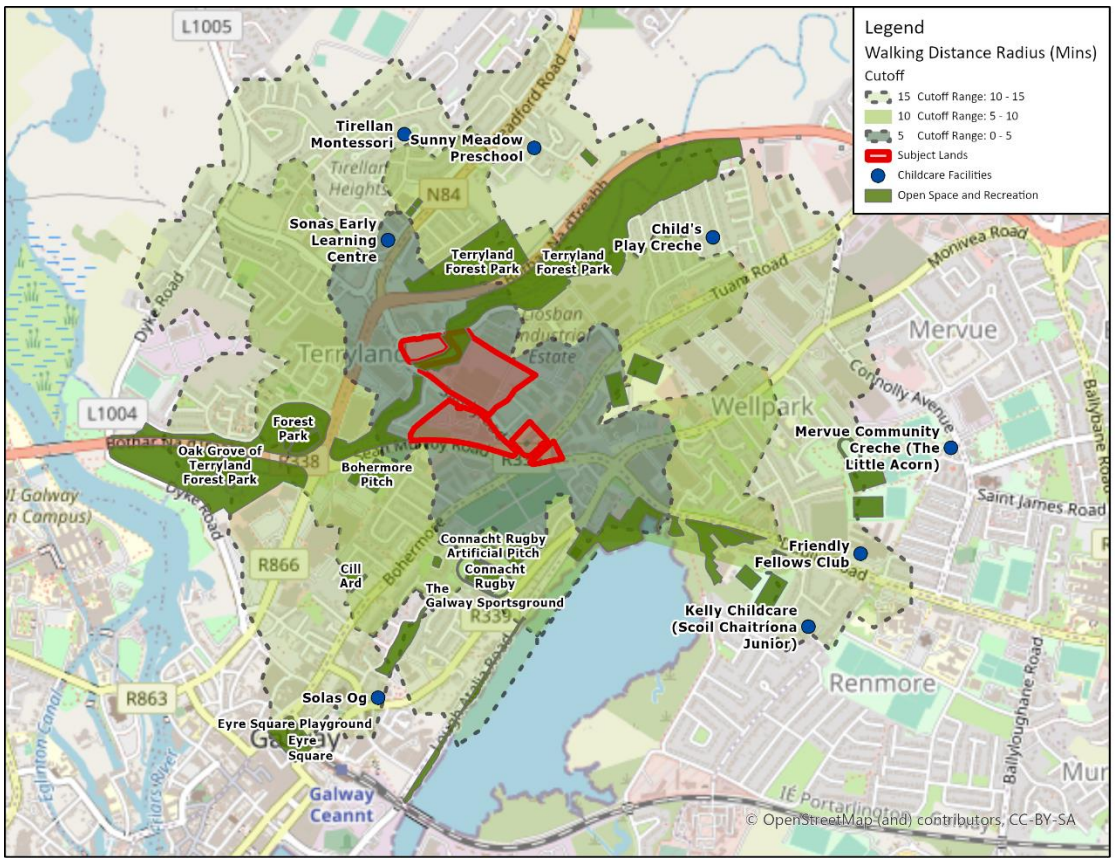

Figure 4.2: Location of childcare infrastructure in vicinity of subject site, March 2022.

Table 4.3: Childcare facilities identified within a 15-minute walk from subject site.

No.	Facility Name	Type	Age Group	Max Capacity[30]
1	**Child's Play Creche TU2015GY064**	Full Day	0-6 years	**40**
2	**Sonas Early Learning Centre TU2015GY115**	Full Day	1-6 years	**64**
3	**Mervue Community Creche (The Little Acorn) TU2015GY259**	Full Day	0-5 years	**79**
4	**Tirellan Montessori TU2015GY205**	Sessional	2-6 years	**22**
5	**Sunny Meadow Preschool TU2015GY252**	Sessional	2-6 years	**44**
6	**Solas Og (Cope Galway Watersid House) TU2015GY073**	Sessional	2-6 years	**22**
7	**Kelly Childcare (Scoil Chaitríona Junior) TU2015GY191**	Sessional	2-6 years	**22**

[30] TUSLA Register of Early years services for September 2022, available at: https://www.tusla.ie/services/preschool-services/list-of-pre-school-services-by-county/

Total Indicative Capacity	**293**

5.0 CONCLUSION

A total of 7 No. existing facilities were identified within the study area, which currently provide over 293 No. childcare places to local residents of which 69 No. spaces potentially remain for new enrolments. When compared to the study area population of children aged 0 to 12 years (1,152 No. children aged 0-12 as of 2016), there is a demand for 127 to 438 No. childcare spaces. Therefore, the local demand for childcare services is potentially adequate.

The local childcare facilities have the combined capacity to offer 293 No. childcare spaces (May 2022) which is within the range of childcare demand in the area. However, the area would benefit from additional childcare services in the area as the provision accommodates only for the lower range of estimated demand in the area. The proposed residential-led regeneration scheme will likely create its own demand, depending on the number of units proposed.

It was also found that there is limited supply of childcare spaces for younger preschool children within the area which indicates the potential need for additional childcare facilities that cater to children below 1 years old.

Further survey work is required to determine the current childcare capacity of existing facilities within the study area.

Appendix A: Independent Childcare Capacity Audit - Facilities Record March 2022 (updated in May 2022)

Table A: Childcare facilities identified within a 15-minute walk from subject site.										
No.	**Facility Name**	**Type**	**Age Group**	**Insp Date**	**Insp Enrolment[31]**		**Max Capacity[32]**	**Indicative Capacity[33]**		**Indicative Full day Capacity[34]**
					AM	**PM**		**AM**	**PM**	
1	**Child's Play Creche TU2015GY064**	Full Day	0-6 years	25.11.2020	37	n/a	**40**	**3**	n/a	**3**
2	**Sonas Early Learning Centre TU2015GY115**	Full Day	1-6 years	20.04.2021	45	30	**64**	**19**	**34**	**19**
3	**Mervue Community Creche (The Little Acorn) TU2015GY259**	Full Day	0-5 years	24.02.2020	63	54	**79**	**16**	**25**	**16**
4	**Tirellan Montessori TU2015GY205**	Sessional	2-6 years	21.09.2021	18	-	**22**	**4**	**-**	**4**
5	**Sunny Meadow Preschool TU2015GY252**	Sessional	2-6 years	07.05.2021	17	9	**44**	**27**	**35**	**27**
6	**Solas Og (Cope Galway Watersid House)[35] TU2015GY073**	Sessional	2-6 years	-	-	-	**22**	**-**	**-**	**-**

[31] This data was sourced from the latest available TUSLA inspection report available at: https://www.tusla.ie/services/preschool-services/creche-inspection-reports/. Accessed 9th May 2022.
[32] Source: https://www.tusla.ie/services/preschool-services/list-of-pre-school-services-by-county/
[33] The indicative capacity was calculated by finding the difference between the TUSLA enrolment data versus the Maximum capacity of each facility. Where the inspection reports were more than a year old, each facility was contacted via telephone and email to get information on updated enrolment data. We note that for a number of facilities which were not reachable, the latest inspection report data was utilised to calculate an indicative capacity.
[34] The indicative full day capacity was calculated by finding the difference between the lower indicative AM or PM capacity versus the maximum capacity.
[35] TUSLA Inspection Report data for this facility was not available on the TUSLA website as of 10th May 2022.

7	**Kelly Childcare (Scoil Chaitríona Junior) TU2015GY191**	Sessional	2-6 years	30.09.2021	11	n/a	**22**	**11**	**-**	**-**
						Total Indicative Capacity	**293**	**69**	**94**	**69**