



THORNTON O'CONNOR  
TOWN PLANNING

Student Demand and Concentration Report

## Planning Application

In respect of a Student Accommodation  
Development at

Cúirt Na Coiribe,  
Headford Road,  
Terryland,  
Galway,  
County Galway

Submitted on Behalf of  
Exeter Property Ireland III Limited

June 2020



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STUDENT DEMAND AND CONCENTRATION REPORT**

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## 1.0 INTRODUCTION

### 1.1 Purpose of this Report

In response to the request of An Bord Pleanála in their Opinion dated 30<sup>th</sup> August 2019 (ABP Ref. 304929-19), the following '*Student Demand and Concentration Report*' has been produced to detail the requirement for additional student housing in Galway City in the near to medium term future. The specific information requested by the Board is as follows:

*'A student demand and Concentration Report having regard to established student accommodation developments and extant permissions for student accommodation developments.'*

This separate report has been produced to comply with the request of the Board's Opinion and to supplement the information provided throughout the accompanying Planning Application.

The existing development permitted under GCC Reg. Ref. 00/249 allowed for the following dual-use of the available bed spaces:

*'88 No. residential apartments to include use for student and tourist occupation,'*

### 1.2 Layout of this Report

The following is the layout of this report:

- Section 2.0: Location Context and Supporting Infrastructure**
- Section 3.0: Rationale for Student Accommodation;**
- Section 4.0: Student Housing Supply in Galway City;**
- Section 5.0: Growth and Strength of Galway Higher Education Institutions;**
- Section 6.0: Population and Demographic Change;**
- Section 7.0: Growth of International Student Populations in Ireland;**
- Section 8.0: Conclusion.**

**2.0 LOCATION CONTEXT AND SUPPORTING INFRASTRUCTURE**

**2.1 Site Location**

The site of Cúirt Na Coiribe is located just north of the junction of the Headford Road, the N6 National Road and the Sean Mulvey Road, in Terryland, Galway City. This is a prominent location above the Terryland River and associated public open space.

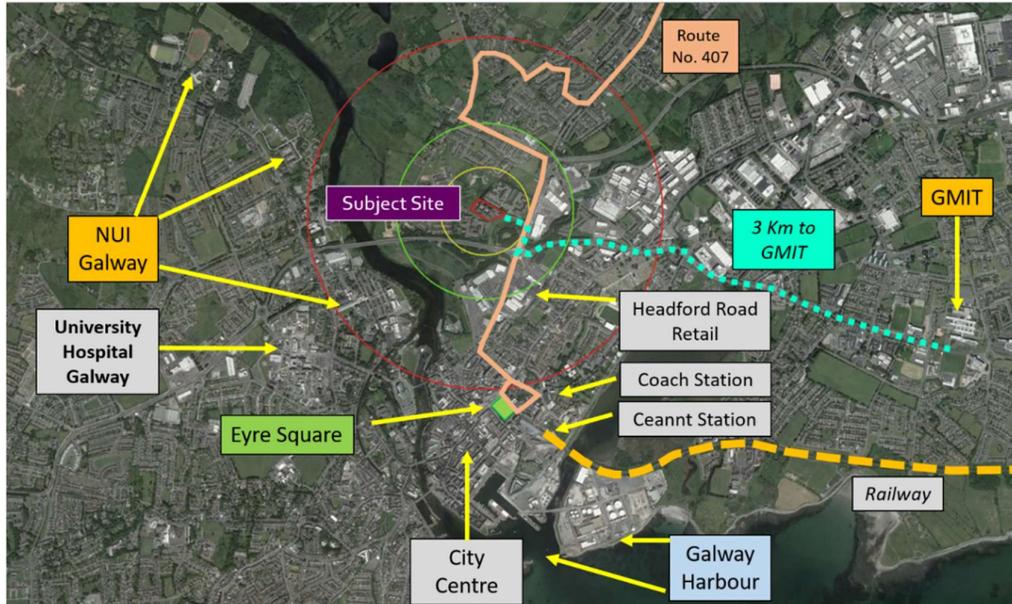


**Figure 2.1 Map Showing the Location of Cúirt Na Coiribe, and Associated Land Holding.**

(Source: Myplan.ie, OSI Map, annotated by Thornton O'Connor Town Planning, 2020)

## 2.2 Site Context and Supporting Infrastructure

The site is situated close to the centre of Galway, just over 1km from Eyre Square (see Figure 2.2 below) or a 6 No. minute cycle ride. It is also well situated in that it is close to NUI Galway, a 7 No. Minute Cycle via the Quincentenary bridge. Being close to the junction of the N6, the Headford Road and Sean Mulvoy Road provides an abundant access to the Galway region and to the wider National Road Network.



**Figure 2.2:** Wider Aerial View of Galway City, with Cúirt na Coiribe in Context, outlined in Red (Indicative Only). Distance Radii from site of 250 m (Yellow), 500 m (Green) and 1 Km (Red).

(Source: Google Earth, Annotated by Thornton O'Connor Town Planning, 2020)

Located around 1 km north of the centre of Galway City, the subject site sits above the Terryland River valley as it crosses the northern suburbs. The current development is within comfortable walking distance of the majority of the City Centre, and the main campus of NUI Galway.

Located on a slight hill above the Terryland River, the subject site is nestled in an area of mixed residential housing (Dun Na Coiribe) and student accommodation (Gort na Coiribe), generally ranging in height from 3 to 4 No. storeys. The site is easily accessible from the road network and has connections to the walking trails along the River and also to the Quincentenary bridge.

### 3.0 RATIONALE FOR STUDENT ACCOMMODATION

#### 3.1 Why Purpose Built Student Accommodation?

In recent years the higher education sector in Ireland has continued to grow. This is not only fueled by secondary school leavers and postgraduate students, but also those returning to education and improving their skills and professional capabilities in the changing economy of Ireland. As our economy returns to growth, we have seen pressure on the traditional rental market accessible to students, especially recent school leavers who lack the work experience, earnings or savings to be able to compete in a volatile rental market. As the wider housing crises has deepened this has placed additional financial pressure on students.

The *Higher Education Authority* of Ireland (HEA) keeps track of key statistics in relation to higher level education in Ireland, and for their key facts and figure for 2016/17 the following statistics were provided.<sup>1</sup>

For the academic year 2016/2017 the total number of students in Ireland reached 225,628 No. This is in conjunction with a 10% growth in full time undergraduate students in the past 5 No. years. Combined, these figures account for 6% of the adult population of Ireland engaged in some form of higher education.

*'Overall, enrolments to the higher education system continue to increase, with over 225,000 full-time, part-time and remote students enrolled in HEA funded institutions in 2016/17. This represents an increase of 1% on the previous year. The number of full-time new entrants to undergraduate higher education now exceeds 43,000, a figure that is 5% higher than five years ago, thus reflecting a continuing demand for higher education in Ireland.'*

– Dr. Graham Love, Higher Education Authority Chief Executive, January 2018<sup>2</sup>.

Galway is known as a city of tourism, and as a city of education. The growth of NUI Galway and GMIT has meant that there is now in and around 24,000<sup>3</sup> No. students studying in Galway Higher Education Institutions (HEIs). A further population of students participate in Education, Training and Skills qualifications and diplomas at Levels 4-7 in other Further Education and Training facilities (FETs) (this is detailed further in Section 5.1).

The higher education sector in Galway City also helps to provide close links with regional employers in Information Communication Technology (ICT or IT), Pharmacology, med-tech, film and television and hospitality.

The provision of Purpose Built Student Accommodation (PBSA) (as defined by *Rebuilding Ireland 2016*<sup>4</sup> and the subsequent *National Student Accommodation Strategy 2017*) is seen as an important step in developing a diversity of accommodation types, and catering to the life cycle of housing tenancy and demand which is subject to change within one's lifetime. Student Accommodation can assist students to live in a comfortable setting, to develop core life skills, helping students to remain focused on study and student engagement. This will

<sup>1</sup> <http://hea.ie/assets/uploads/2018/01/HEA-Key-Facts-And-Figures-2016-17-.pdf>

<sup>2</sup> IBID

<sup>3</sup> Including c. 17,727 No. in NUIG

<sup>4</sup> <https://rebuildingireland.ie/>

help to counteract long commutes from the wider Galway Region and beyond and provide greater support and stability for those who return to other regions at weekends or public holidays.

There is a continuing shortfall in dedicated student accommodation supply in the region according to the *National Student Accommodation Strategy (2017)*<sup>5</sup>. With NUIG and GMIT set to grow in the near future, there is a likelihood of even further demand beyond 2023. Due to rising rents and the shortage of housing in the rental sector, those in third level education require dedicated accommodation during term time whilst they are attending lessons. This helps to form a healthy mix of tenure in the availability of rental accommodation in the region.

### 3.2 Sustainable Settlement and Commuting Patterns -Towards Compact Growth

The majority of HEIs and FETs are located within urban centres. This has been a success story for many cities and towns throughout the country where their status and graduates have attracted additional economic growth. A more recent trend has seen the combination of urban sprawl and the locations where young families have established since the 'Celtic Tiger' period, resulting in longer and more complicated commuting patterns.

This has meant that due to housing affordability during the past 15 No. years, a number of young families have established themselves in the hinterlands and ex-urban areas of major settlements. This has meant that a significant number of the current influx of college age students are now living further and further away from the central urban campuses of Higher Education Institutions. Coupled with the rising cost of living, including operation and insurance cost for cars, this has resulted in many young first time students engaging in long commutes to education. The shortage in PBSA and other accommodation suitable to students has further exacerbated this trend.

According to an article in the Irish Times '*Third-level students facing expensive, long commutes as rents rise*' dated 17<sup>th</sup> August 2019<sup>6</sup>, there is an increasing trend of students facing long commutes:

*'The proportion of third-level students travelling more than two hours a day is increasing, with 17 per cent now doing so, according to the latest census.'*

Without the security and independence of student accommodation, whether through PBSAs, the private rental sector or 'digs', many students will face longer unsustainable commutes and a loss of the "college experience". This can contribute to additional stress, physical and mental health effects, diminished socialisation, low extracurricular engagement with college societies/clubs and sport, reduced networking opportunities, difficulties in securing placement/ internships as well as early entry to the workforce. Such factors can lead to higher drop out rates, and a disenfranchisement with the benefits of higher education.

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<sup>5</sup> <https://www.education.ie/en/Publications/Policy-Reports/National-Student-Accommodation-Policy.pdf>

<sup>6</sup> <https://www.irishtimes.com/news/education/third-level-students-facing-expensive-long-commutes-as-rents-rise-1.3988608>

*'The availability and affordability of student accommodation is a countrywide issue. For many students filling out their CAO forms, accommodation is higher on their list of priorities than their course preferences when considering university.'*

*– Lorna Fitzpatrick -President of Union of Students Ireland (Irish Times, 2019)<sup>7</sup>*

The increasing commuter range of new enrollments to HEIs is becoming unsustainable due to the under provision of public transport throughout the urban sprawl and hinterlands of the country's largest settlements. Therefore, there is potential for Student Accommodation to reduce these unsustainable commuting patterns.

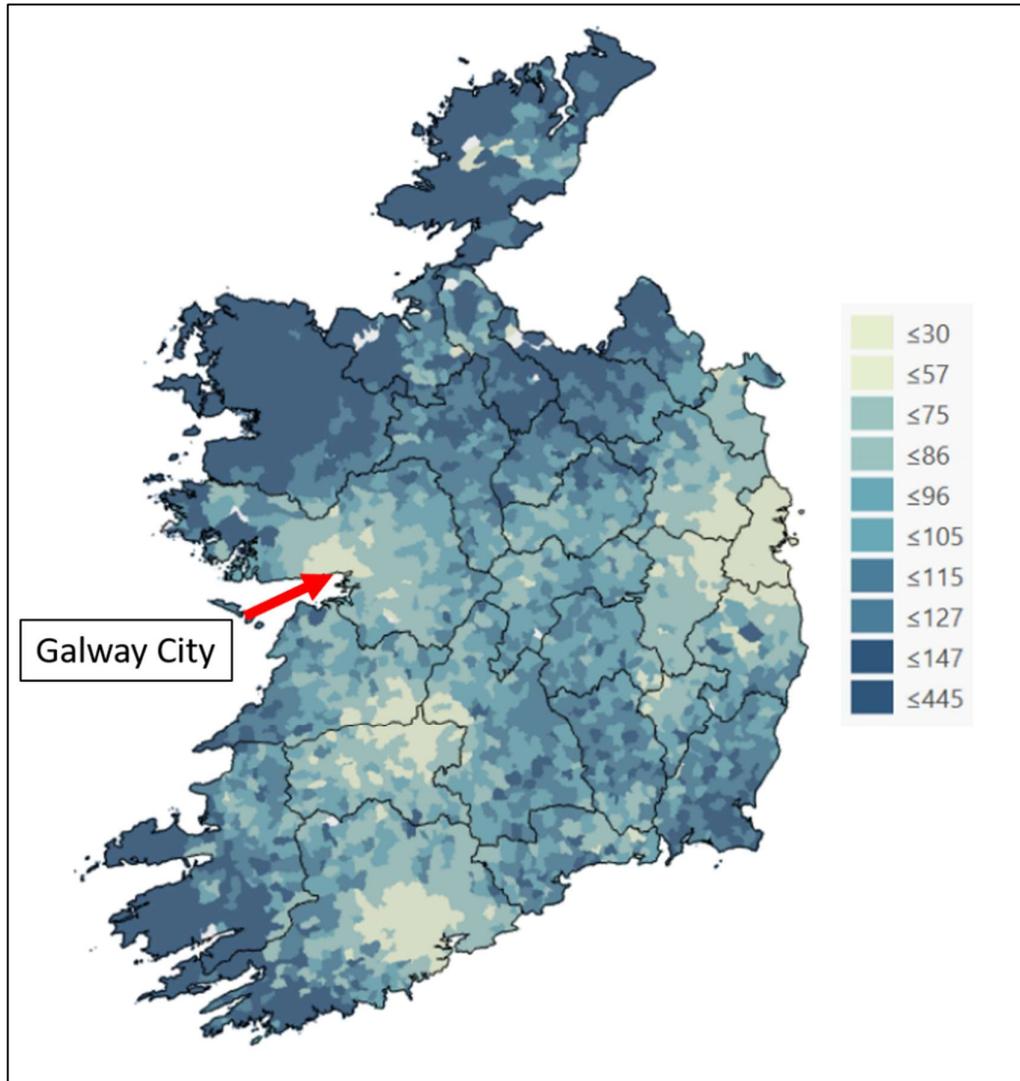


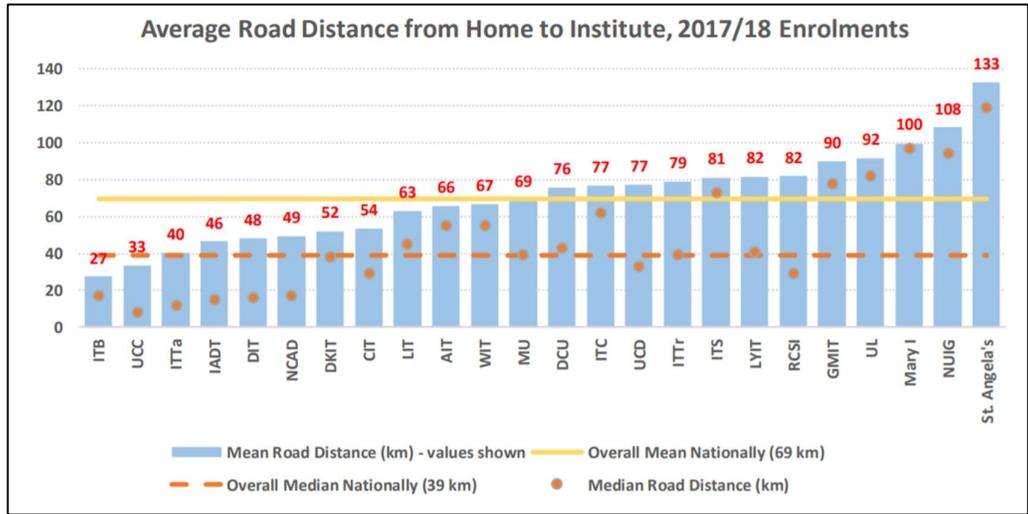
Figure 3.1: Distance in Km from Registered Home to HEIs Based on Home Address Data

(Source: *Higher Education Spatial Socio-Economic Profile October 2019 by HEA, annotated by Thornton O'Connor Town Planning, 2020*)

<sup>7</sup> <https://www.irishtimes.com/news/education/third-level-students-facing-expensive-long-commutes-as-rents-rise-1.3988608>

As can be seen in Figure 3.1 there is a distinct spatial pattern of potential commutes radiating outward from Galway City. This indicates that for a large number of Electoral Divisions surrounding Galway, the majority of students enrolled in HEIs are commuting a similar relative distance to institutions within the Galway City region. (This is further explored in Section 5.1).

When it comes to the overall catchment of NUIG and GMIT, the table provided below in Figure 3.2 demonstrates that for GMIT enrolments in 2017/18 were from on average up to 90 Km from campus, and for NUIG this rose as high as 108 Km.



**Figure 3.2: NUIG and GMIT both drew enrolments from a distance above the National Mean**

(Source: *Higher Education Spatial Socio-Economic Profile October 2019 by HEA*)

The wide spatial distribution of enrolments to Galway City HEIs demonstrates that their strength and attractiveness reaches a wide part of the west and midlands. In order to promote healthy lifestyles and sustainable commuting patterns it is important that accommodation alternatives are provided within Galway City in order to avoid further congestion of roads and public transport into Galway City.

There is a wider offering of third level education in Galway City in addition to NUI Galway, such as Galway and Mayo Institute of Technology. The other Further Education and Training institutions (FETs) offer a mix of further education, diploma courses and apprenticeships programs which can provide vital upskilling and retraining for the challenges of a low-carbon economy and a shortage of skilled manual workers.

As an International city and focal point of the 'Wild Atlantic Way', there is also strong demand for foreign language students during the summer months, as well as additional off-term tourist accommodation which is typical of many student accommodation complexes.

There is pent up demand for additional housing, rental accommodation and a wider diversity of tenure within Galway to provide for the varied accommodation needs of the population. The provision of PBSAs within range of public transport and in central locations close to third-level institutions can assist in reducing unsustainable commuting patterns into the

region. This can aid in delivering consolidated growth and more sustainable communities by providing higher densities, sustainable and adaptable buildings, and shorter commutes.

### 3.3 Overview of National Student Accommodation Strategy

There are currently no set statutory standards within the consolidated *Planning and Development Acts 2000-2018*. The most applicable standard is contained within the legislation known as *Section 50 Finance Act 1999 - Guidelines on Residential Developments for 3<sup>rd</sup> Level Students*. These earlier guidelines were established as a tax relief scheme for earlier qualifying developments. For further detail please see Section 6.1.4 which sets out these standards in relation to the student accommodation policy of *Galway City Council Development Plan 2017-2023* which requires that student accommodation developments 'generally' be of the type laid out in *Section 50 Finance Act 1999*.

When it comes to the assessment of current student accommodation developments, the aims and objectives of the *National Student Accommodation Strategy (2017)* provide guidance and an evidence base for the delivery of Purpose-Built Student Accommodation (PBSA) and other forms of residential development aimed at students such as 'digs'.

Under *Action Plan for Housing and Homelessness, Rebuilding Ireland (2016)*, the Government set out a commitment to prepare a strategy for student accommodation to meet the need of this demographic and free up additional housing stock for the general rental market. The *National Student Accommodation Strategy (2017)* states the following:

*'The impact of an additional 21,000 student accommodation bedspaces, in addition to an additional 1,500 digs spaces, will free up at least an additional 5,000 rental units for the wider rental sector.'*

Ireland's higher education sector has been an important engine of our economic success and continues to grow and expand. The demand for higher education contributes to housing demand within our already constrained supply. Additional demand for housing around Higher Education Institutions, means that there is an increase in demand on many types of housing, especially the rental sector. With demand for higher education spaces expected to rise by up to 27% more by 2030, demand for accommodation is also anticipated to rise sharply.

Thus, the strategy recognises the following in relation to the role Student Accommodation can play in housing supply and planning outcomes:

*'Appropriately located high-quality, purpose-built and professionally managed student accommodation, can make educational institutions more attractive to students from Ireland and abroad, and can also become a revitalizing force for regeneration areas.'*

The *National Student Accommodation Strategy (2017)* states that as of 2016 some 179,354 No. students enrolled for full-time courses in Higher Education Institutions in Ireland. This sizeable population requires appropriate housing which suits the economic and academic needs of student life and wellbeing. The report recognised there is emerging pent up demand for spaces which are not currently being met by permitted developments. Figure 3.3 below depicts the existing purpose-built student accommodation bedspaces in 2017.

Current and Projected Supply and Demand						
	Supply 2017	Demand 2017 (excess demand)	Supply 2019	Demand 2019 (excess demand)	Supply 2024	Demand 2024 (excess demand)
<b>Dublin</b>	12,432	30,298 (17,866)	18,142	35,913 (17,771)	28,806	42,375 (13,569)
<b>Cork</b>	3,788	5,486 (1,698)	4,352	6,463 (2,111)	5,490	7,391 (1,901)
<b>Galway</b>	3,230	5,491 (2,261)	3,887	6,093 (2,206)	4,702	6,652 (1,950)
<b>Limerick</b>	6,816	7,724 (908)	6,831	9,000 (2,169)	8,181	9,798 (1,617)
<b>Waterford</b>	2,365	2,459 (94)	2,365	2,584 (219)	2,365	2,708 (343)
<b>Other locations</b>	4,810	5,617 (807)	5,110	6,388 (1,278)	5,110	6,716 (1,606)
<b>Overall Total</b>	<b>33,441</b>	<b>57,075 (23,634*)</b>	<b>40,687</b>	<b>66,441 (25,754*)</b>	<b>54,654</b>	<b>75,640 (20,986*)</b>

Figure 3.3: Current and Projected Supply and Demand

(Source: *National Student Accommodation Strategy (2017)*)

Through the provision of 920 No. student accommodation bedspaces, the subject scheme can contribute positively towards addressing the deficit in the supply of purpose-built student accommodation bedspaces in Galway City. The existing 398 No. bedspaces (following the demolition of 7 No. bedspaces in the ancillary services building) will retain their original permission which allows for short stay lets throughout the year. It is proposed that the additional 515 No. bedspaces only be permitted to operate as short stay accommodation during the summer months as is an established precedent for many student accommodation developments.

### 3.2.1 Student Accommodation Targets

Student Accommodation (especially PBSAs) has the potential to release a large quantum of the rental market to meet housing demand. This is true of the national and local level with Galway City facing a similar localised issues of housing supply. Within the *National Student Accommodation Strategy*, it stated that:

*'The impact of an additional 21,000 student accommodation bed spaces, in addition to an additional 1,500 digs spaces, will free up at least an additional 5,000 rental units for the wider rental sector.'*

The demand for higher education contributes to housing demand within our already constrained supply. Additional demand for housing around Higher Education Institutions, such as NUIG and GMIT, means that there is a large squeeze on many types of housing, especially the rental sector. With demand for higher education spaces expected to rise by up to 27% by 2030, demand for accommodation is set to follow suit.

Thus, the Strategy recognises the following in relation to the role Student Accommodation can play in housing supply, and planning outcomes:

*'Appropriately located high-quality, purpose built and professionally managed student accommodation, can make educational institutions more attractive to students from Ireland and abroad, and can also become a revitalizing force for regeneration areas.'*

The *National Student Accommodation Strategy (2017)* states that as of 2016 some 179,354 No. students enrolled for full-time courses in higher education institutes in Ireland. This sizeable population requires appropriate accommodation which suits the economic and academic needs of student life and wellbeing. The report recognised there is emerging pent up demand for spaces which are not currently being met by permitted developments. The following tables outline this, where applicable the Galway context is highlighted:

Existing PBSA Bed Spaces 2017			
Location	HEI	Private	Total
Dublin	7,147	5,285	12,432
Cork	813	2,975	3,788
Galway	764	2,466	3,230
Limerick	2,590	4,226	6,816
Waterford	446	1,919	2,365
Other locations	0	4,810	4,810
Overall Total	<b>11,760</b>	<b>21,681</b>	<b>33,441</b>

**Figure 3.4: Existing Purpose Built Student Accommodation as of 2017**

(Source: *National Student Accommodation Strategy (2017)*)

Year	Projected PBSA (HEI & private)	Projected Demand for PBSA
2017 (current)	33,441	57,075
2019	40,687	66,441
2024	54,654	75,640

**Figure 3.5: Projected Purpose Built Student Accommodation Units, and Demand**

(Source: *National Student Accommodation Strategy (2017)*)

Since the completion of the *National Student Accommodation Strategy* there have been a number of largescale on-campus PBSAs which have started construction or received planning permission. The assessment of the current picture in Galway will be discussed in Section 4.o.

The continued projected shortfall in available PBSA spaces is likely to have a further impact on the housing and accommodation supply in the Galway Metropolitan Area.

#### 4.0 STUDENT HOUSING SUPPLY IN GALWAY CITY

##### 4.1 Planning History of Student Accommodation in Galway City

For the completion of this report a survey was conducted of Student Accommodation within Galway City. This includes operational PBSAs, facilities with Student Accommodation as part of their permission and extant planning permissions. The following survey was conducted on the 20<sup>th</sup> March 2020.

For Table 4.1 above the following colour coding is used to represent the status of each known facility or planning permission:

- Blue = In operation
- Yellow = Under Construction
- Green = Permitted Development

**Table 4.1 Known Student Accommodation Facilities and Permissions in Galway City:**

Student Accommodation in Galway City			
Location	Bed Spaces/ Units	Distance	Planning Reg. Ref.:
<b>Off-Campus Student Accommodation</b>			
Gort na Coiribe	660 No. Bedrooms <i>(Mixed with short term accommodation and short stay beds)</i>	50 Metres <i>(Neighbouring Development)</i>	Reg. Ref. 01/473
Menlo Park Self Catering Apartments, Coolough Road, Galway	16 No. Two bed apartments, 18 No. Duplexes and 2 No. townhouses	467 Metres	Reg. Ref.: 00589 <i>(As amended by 01687)</i>
IVS Student Accommodation, Bohermore Road  <i>(Now known as Swuite Bohermore)</i>	77 No. Bedspaces  <i>(With Aparthotel Permission also)</i>	681 Metres	Reg. Ref. 16/40
Centrepoint, Liosban Industrial Estate, Galway	125 No. Bedspaces  <i>(Arranged in 41 No. House units)</i>	945 Metres	Reg. Ref.: 99/700  <i>(As Amended by 00/539, 00/865, 00/866, 03/1055, and 06/35)</i>
Fairgreen Road,	147 No. Bedspaces	1.1 Km	Reg. Ref.: 16/156 <i>(ABP: PL61.247406), as amended by 18/93.</i>
Queen Street, New Harbour, Galway	345 No. Bedspaces	1.26 Km	Reg. Ref.: 17/121

Glasan Student Accommodation	70 No. Maisonettes 60 No. Semi-detached Houses 7 No. Apartments	2.75 Km	Reg. Ref.: 98/810  (As Amended by 99/120 and 01/367)
Ceann Bóirne	11 No. Apartments	2.78 Km	Reg. Ref.: 03/584
Former Westwood Hotel	395 No. Bedspaces	1.7 Km	ABP 301693
<b>On-Campus Student Accommodation</b>			
Corrib Student Village -NUIG, Greenfields, Galway	176 No. Apartments 764 No. Bedspaces	1.1 Km	89/820  (As amended by 03/410)
NUI Galway Northern Campus, Upper Newcastle Road, Galway	429 No. Bedspaces	1.2 Km	15/221
North Campus (SHD)  (NUIG)	674 No.	2.45 Km	ABP Reg. Ref. 303846

#### 4.2 Student Accommodation Mapping Exercise

In order to further demonstrate the spatial relationship of all of these facilities in relation to Cúirt Na Coiribe, a map has been prepared which details the above-mentioned planning permissions and existing facilities.

Appendix C of the *National Student Accommodation Policy (2017)* states the following in regard policy contained within the *Dublin City Development Plan 2016-2022* as an example of screening against the possibility of an "overconcentration" of student accommodation:

*'The applicant will be requested to submit evidence to demonstrate that there is not an overconcentration of student accommodation within an area, including a map showing all such facilities within 0.25 Km of a proposal.'*

In the interest of due diligence, evidence and mapping adhering to this policy will also be provided. Additionally, following a Variation of the *Dublin City Council Development Plan 2016-2022*, this mapping exercise was expanded to 1 No. Kilometre. Drawing from national best practice, radii of 250 metres and 1 No. Kilometre are shown emanating from the subject site in Figure 4.1 below.

The requirement for additional student accommodation bedspaces beyond those set out above is detailed extensively in the following sections.



**Figure 4.1: Student Accommodation in Galway, with approximate 250m (Yellow) and 1 Km (Red) radii from the subject site in Red (Indicative only)**

**(Source: Google Earth, annotated by Thornton O'Connor Town Planning, 2020)**

As a result of the dual nature of some permissions as self-catering apartments / holiday homes and aparthotels (including that of the subject site), a clear picture of older student accommodation permissions is somewhat unclear. There are also a number of private lettings, hostels and 'digs' which cannot be easily counted as part of a complete survey of available student accommodation within Galway City. Therefore, this is not a complete list and only reflects purpose built and managed facilities of scale within the vicinity.

Dedicated PBSAs as demonstrated are needed to cater to both current and future demand, with Galway City set to become an important centre for emerging research and innovation co-operation and co-location between employment and Higher Education.

**5.0 GROWTH AND STRENGTH OF GALWAY HIGHER EDUCATION INSTITUTIONS**

**5.1 Current Picture of Higher Institutes of Galway City**

As mentioned throughout this report there are a number of HEIs and FETs within Galway City. The following section provides additional details on each of these facilities, especially NUIG and GMIT.

To provide a clear picture of the relative location of third level education in Galway City to the proposed development, the following Figure 5.1 provides a map of their locations.



**Figure 5.1: Location of HEIs and FETs in Relation to subject Site**

(Source: Google Earth, annotated by Thornton O’Connor Town Planning, 2020)

The following Table 5.1 sets out the name and distance from Cúirt Na Coiribe of the Higher Education Institutions indicated within Figure 5.1 above.

**Table 5.1: Locations of Third Level Institutions in Galway**

Locations of Third Level Institutions in Relation to Cúirt Na Coiribe			
No.	Name of Institute	Location	Distance in Km
No. 1	National University of Ireland Galway (NUIG)	3 No. Campuses: <ul style="list-style-type: none"> <li>• University Road</li> <li>• Upper Newcastle Road</li> <li>• Dangan Road</li> </ul>	830 – 2 Km
No. 2	Galway Mayo Institute of Technology	Old Dublin Road Campus.	2.6 Km
No. 3	School of Design and Creative Arts (GMIT)	Cluain Mhuire, Wellpark.	1.5 Km
No. 4	Galway & Roscommon Education and Training Board (GRETB)	Tuam Road, and Bohermore Roundabout.	750 Metres
No. 5	Galway Community College Further Education	Wellpark Road.	1.08 Km
No. 6	Galway Technical Institute	Father Griffin Road, The Claddagh.	1.95 Km
No. 7	Galway Business School	GCI House, Grattan Road, Salthill.	2.75 Km
No. 8	Galway Cultural Institute	GCI House, Grattan Road, Salthill.	2.75 Km

### 5.1.1 National University of Ireland Galway (NUIG)

The National University of Ireland Galway is the largest higher level institute in the Galway region with circa 17,727 No. students enrolled in the 2016/17 academic year<sup>8</sup>.

#### Spatial Distribution of new Enrolments 2017/18

An analysis of the socio-economic profile and spatial distribution of student enrolments was conducted by the HEA in October 2019<sup>9</sup>. This report provided an insight into where students were coming from for the 2017/18 academic year and the relative socio-economic backgrounds of those areas based on the deprivation index. The following Figures 5.2 and 5.3 detail the spatial distribution of new enrolments in relation to NUIG.

<sup>8</sup> <https://hea.ie/assets/uploads/2019/10/Institutional-Profiles-2016-17.pdf>

<sup>9</sup> <https://hea.ie/assets/uploads/2019/10/Higher-Education-Spatial-Socio-Economic-Profile-Oct-2019.pdf>

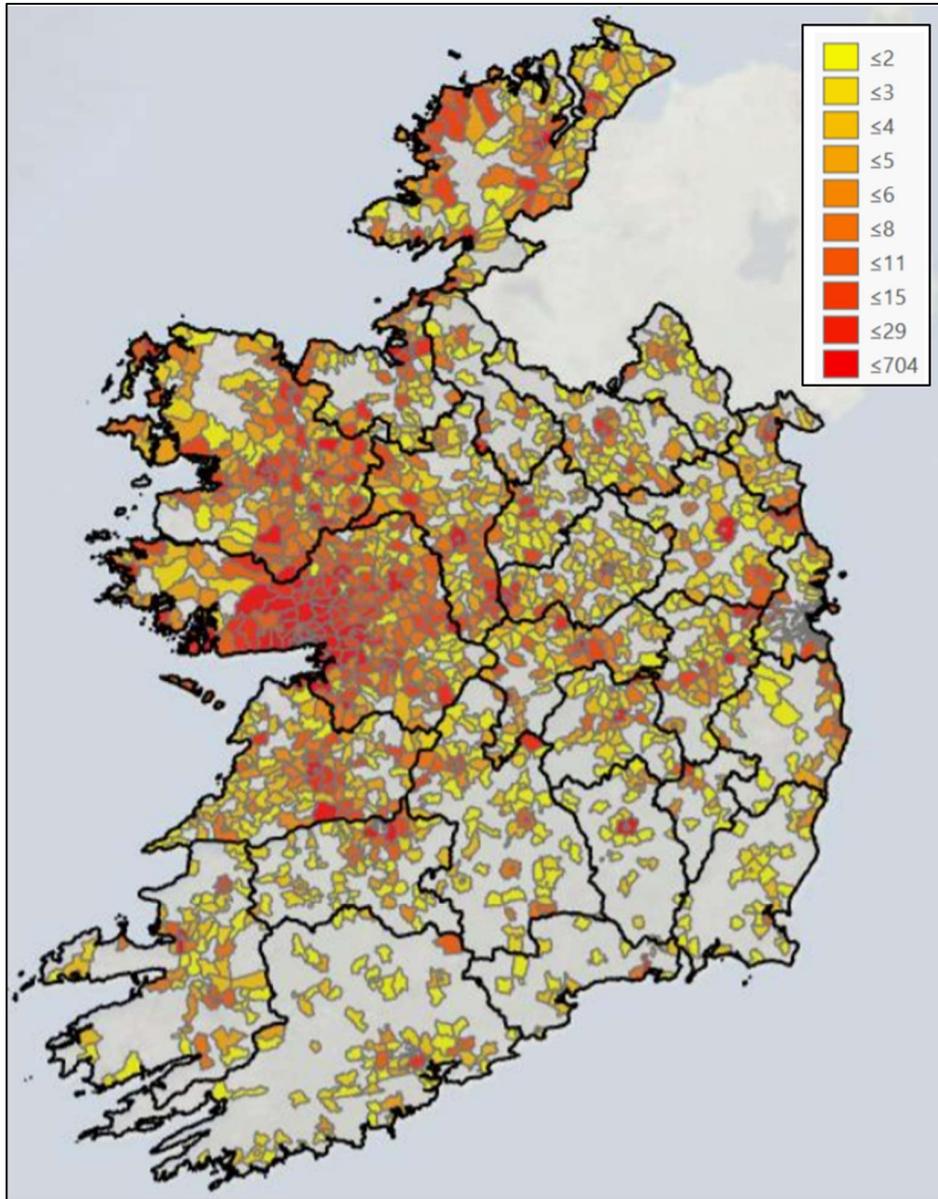


Figure 5.2: Spatial Distribution of NUIG Enrolments

(Source: *Higher Education Spatial Socio-Economic Profile 2019* by HEA, annotated by Thornton O'Connor Town Planning, 2020)

The above Figure 5.2 demonstrates the concentration of enrollments per ED for NUIG. A significant concentration of students originate from close to Galway City and from other major settlements. For a closer profile of this distribution please see Figure 5.3 below:

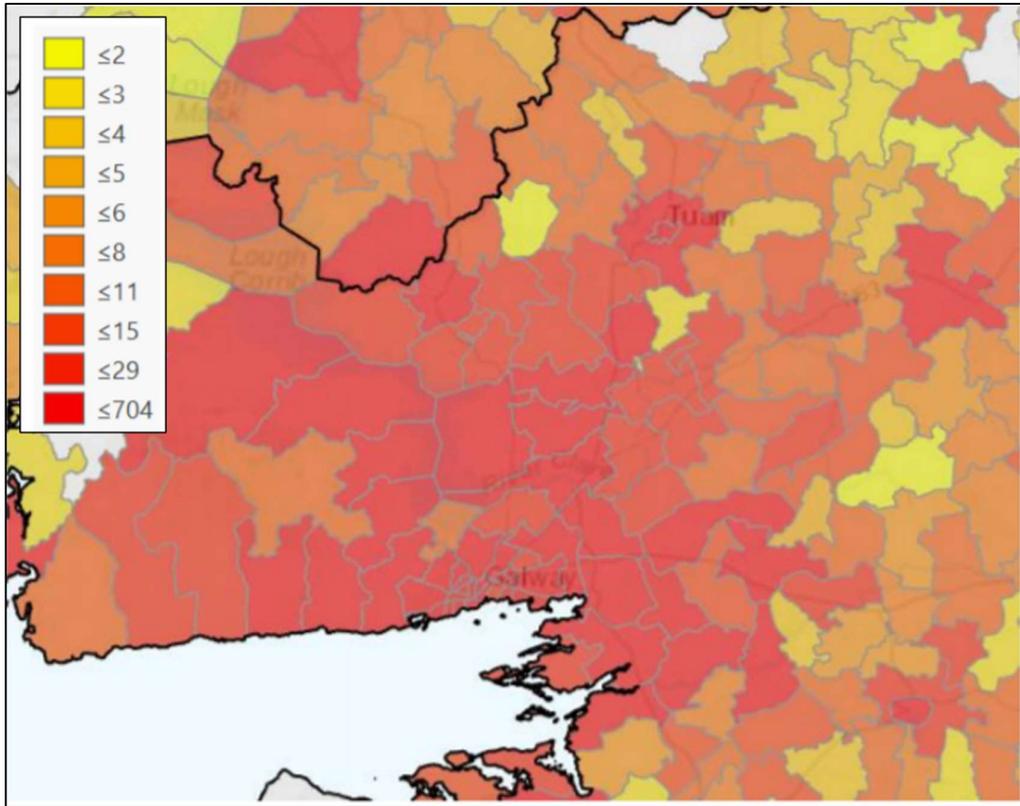


Figure 5.3: NUIG Enrollments focused on Galway City

(Source: *Higher Education Spatial Socio-Economic Profile 2019* by HEA, annotated by Thornton O'Connor Town Planning, 2020)

The success of NUIG draws a large cohort of its population from the Galway City region, however as there is a wider geographic spread of enrollments from across the country there is also the potential for unsustainable commuting patterns. It is therefore reasonable to assume that the attraction of students from such a wide part of the country places an additional pressure on the student accommodation supply of Galway City.

### 5.1.2 Galway and Mayo Institute of Technology (GMIT)

The Galway and Mayo Institute of Technology is also a large higher level institute located on the Dublin Road in the east side of Galway, with an additional satellite campus at Cluain Mhauire (Please refer to Table 5.1/ Figure 5.1). As of the 2016/17 academic year, there were a total of 6,382 No. students attending undergraduate and postgraduate programs in GMIT.

A similar study of the spatial distribution of students was conducted for GMIT, the following Figures 5.4 and 5.5 demonstrate that there is a closer relationship to the west region for GMIT than can be seen for NUIG.

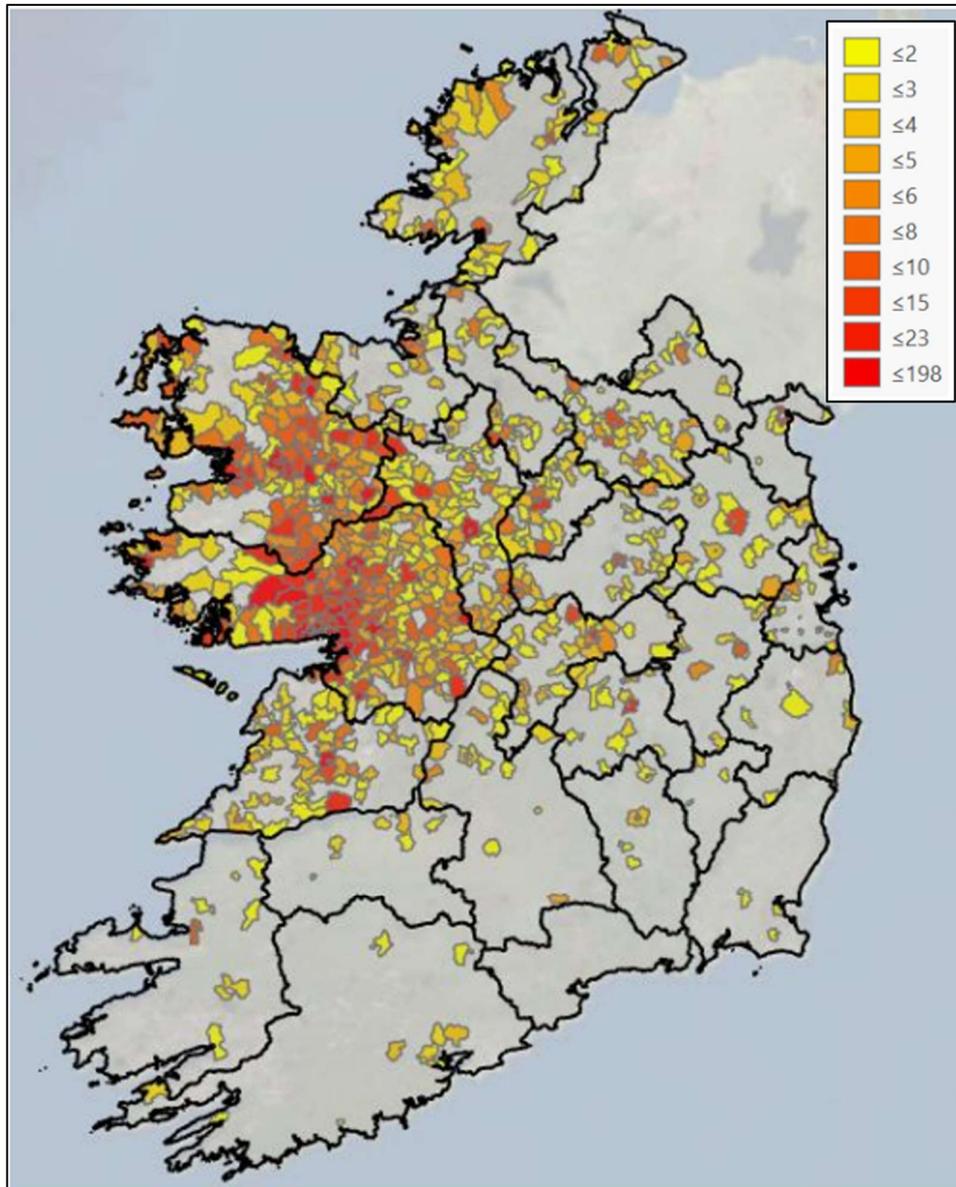


Figure 5.4: Spatial Distribution of GMIT Enrolments

(Source: *Higher Education Spatial Socio-Economic Profile 2019* by HEA, annotated by Thornton O'Connor Town Planning, 2020)

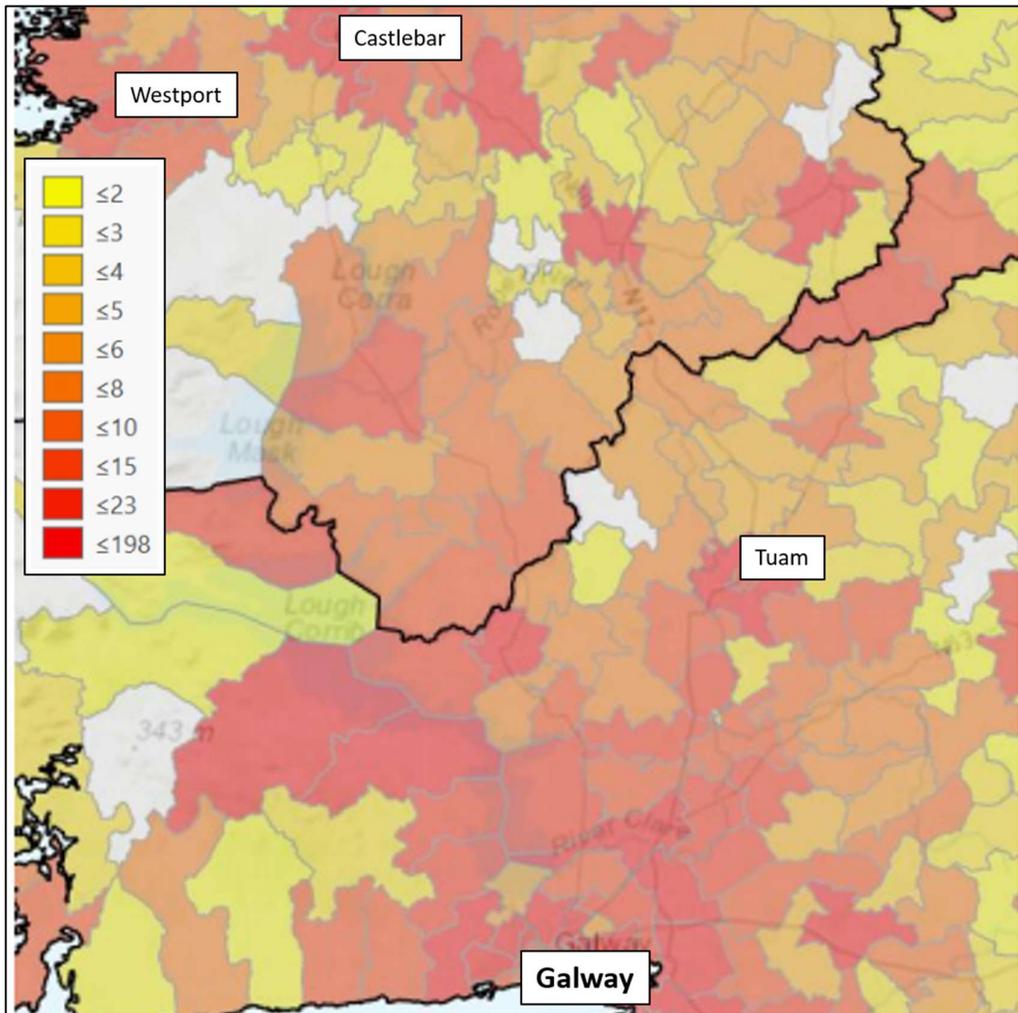


Figure 5.5: Galway Region GMIT Enrolments

(Source: *Higher Education Spatial Socio-Economic Profile 2019* by HEA, annotated by Thornton O'Connor Town Planning, 2020)

Although the majority of new students attending GMIT originate from County Galway, there is still a significant spread beyond the public transport network. This further indicates that there will be an increased pressure on Galway city to provide suitable accommodation for students in order to promote sustainable travel and compact growth.

### 5.1.3 Other Higher Education Institutes, Further Education and Training (FET)

The Galway Metropolitan area is also further enriched by a collection of Further Education and Vocational Training facilities. These colleges and training centres provide a number of accredited and diploma courses in a number of specialties and skills. The following FETs are located within Galway City and are close to Cúirt Na Coirbe.

### **School of Design and Creative Arts (GMIT- Cluain Mhauire Campus)**

This satellite campus was until recently the Centre for Creative Art & Media. Located on a mixed campus, this satellite campus of GMIT provides close relationships with film, radio and television specialties.

Through co-location with a number of other organisations and resources, this campus is connected with media and broadcasting as well as teaching resources and post-primary courses in the Galway Education Centre. There is also facilities connected to RTÉ located within the campus.

### **Galway Community College**

The Galway Community College is a further education facility with a range of certificates, diploma's and accredited awards across multiple disciplines. There is also a range of courses which support further advancement to other institutions such as portfolio preparation and entry level /beginner courses.

### **Galway and Roscommon Education and Training Board (GRETB)**

The Galway and Roscommon Education and Training Board provides a number of level 4 and level 5 diploma's in further education across a range of skills. Mostly geared towards adult learning and re-skilling, the GRETB offers a number of courses funded under the Vocational Training Opportunities Scheme (VTOS).

### **Galway Business School**

The Galway Business School offers a range of business, entrepreneur and sales & marketing focused Bachelor's degree's for full time and part-time students. There are also a number of additional training courses and certificates for upskilling and a postgraduate foundation programme.

This facility is also co-located with the Galway Cultural Institute. This smaller school provides a range of foundational, advanced and applied English language courses, including in support of teacher training.

### **Galway Technical Institute (GTI)**

The Galway Technical Institute provides a range of further education courses at level 5 and level 6 across a number of faculties. This includes the following areas:

- Applied Health & Social Sciences
- Art & Design
- Business
- Technology - Design & Engineering
- IT & Computing
- Fashion



- Hairdressing & Beauty Therapy
- Media
- Sports
- General Studies

The GTI provides a number of on campus studio's /companies which facilitate in-work training for students in a number of fields including GTI Radio.

#### **5.1.4 Assessment of Education Facilities**

The presence of two Higher Education Institutes and a complimentary system of accredited Further Education Colleges as well as centres for training and skills provides for a diverse education environment in Galway City. The presence of additional FETs within the Metropolitan area provides a pipeline for advanced entry to NUIG and GMIT, as well as diploma and bachelor's equivalent courses in a number of fields.

The inter-dependent nature of post-secondary education within Galway City provides for a large student population. This is likely to result in further competition for accommodation within the Metropolitan area. As such previous assessments as mentioned in Section 3.0 are likely to undercount the projected demand for student accommodation in the near to medium term.

As the Irish economy and wider society recover from recent economic shocks, the education, training and upskilling of the population provides for an important competitive advantage for Galway City and the west of Ireland. Through diversifying the workforce and providing for innovation and entrepreneurial opportunities, the multiple HEIs and FETs of Galway City are well placed to support continued economic growth.

The provision of additional student accommodation capacity in Galway city will therefore compliment the education sector within the Metropolitan area, reduce pressure on the rental sector and provide added income for local businesses which would otherwise be spent on long unsustainable commutes.

## 5.2 National Development Plan Investment and Med-Tech Agglomeration

Given the high concentration of Higher Education and Medical-Technology firms in the Galway City region, the following projects and programmes are proposed by the *National Development Plan* which will support further research and development and their connections to enterprise and employment.

*'The NPF sets the ambition of ensuring that jobs growth in the Eastern and Midland Regional Assembly area is at least matched by that of the **Northern and Western** and Southern Regional Assembly areas combined, a total of 660,000 No. new jobs. This ambition for Ireland's regions will be achieved **by investing**, through the National Development Plan, **in making places attractive for enterprise investment**, deeply rooted sectoral clustering driven by effective collaborations and **built around investments in Higher Education and Further Education Training (FET)**. The way in which skills and talent are nurtured, developed, deployed and retained is central to both national and regional ambitions.'*

Specific Research Centres which include Galway based Higher Education Institutes are as follows:

- **INSIGHT**: research across data analytics, machine learning, artificial intelligence and related ICT challenges, hosted across University College Dublin (UCD), DCU, **National University of Ireland Galway (NUIG)**, UCC, NUIM, TCD and Royal Irish Academy.
- **CONFIRM**: research centre for advanced, smart manufacturing; application of sensor technology to manufacturing and industry 4.0 – hosted by UL in partnership with Tyndall National Institute, UCC, CIT, **NUIG**, Athlone IT, NUIM and Limerick IT.
- **CURAM**: research into next generation medical devices, biomaterials, drug delivery, device design- hosted by **NUIG** with UCD, UCC, TCD, UL and RCSI.

The partnership between Higher Education Institutes for these research programmes demonstrates a commitment to co-operation and investment in undergraduate and post-graduate Research and Development across multiple sectors and disciplines. The highlighted programmes will contribute to the clustering of employers within the Galway City region who are attracted by the quality and quantity of well-educated graduates produced in the region.

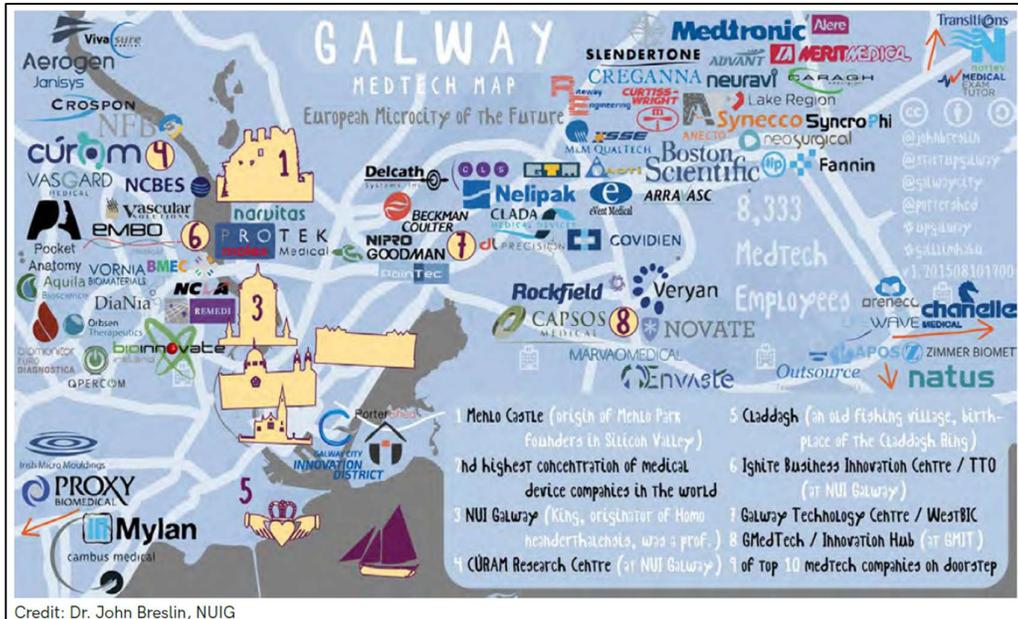


Figure 5.6: Medical-Technology Clusters in the Galway City Region

(Source: *Draft Regional Spatial and Economic Strategy for the Northern and Western Regional Assembly (2018)*<sup>10</sup>)

As can be seen in Figure 5.6, there is an agglomeration of med-tech companies within the Galway Metropolitan area. The HEIs and FETs of Galway are well placed to continue this close relationship through the abovementioned research and investment funded under the *National Development Plan 2018-2027*.

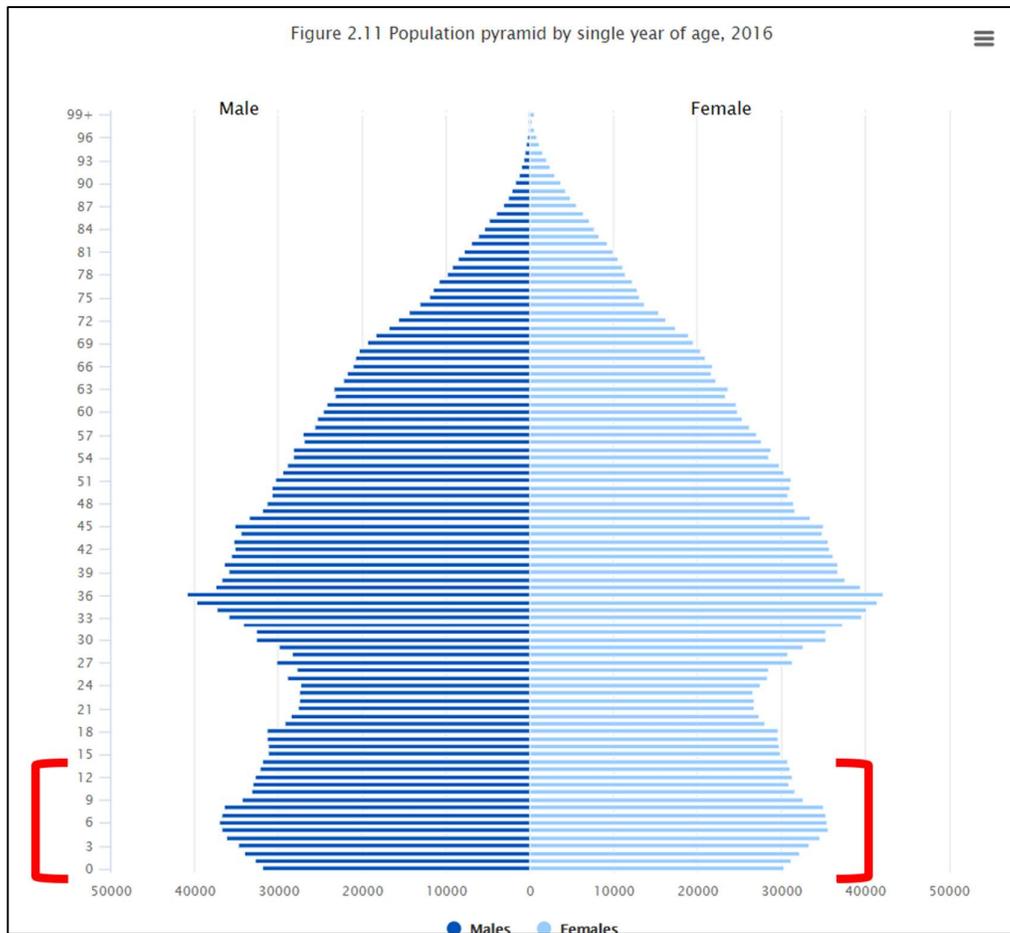
Through providing a larger student accommodation facility at the subject site, the proposed development can help to facilitate growth in research and development within local HEIs, particularly at undergraduate level.

<sup>10</sup> As of March 2020, the finalised version of the Adopted RSES does not contain up to date graphics/maps and figures representing all adopted changes.

## 6.0 POPULATION AND DEMOGRAPHIC CHANGE

### 6.1 Population Growth: The arrival of 'Generation Z'

According to the 2016 Census, and the ratio of births to deaths in the years since, there are currently up to 1,325,000 people aged between 0-19 in Ireland. There is a substantial population of young people who are set to reach the ages of 17-23 within the next decade which will see a significant influx of people to third level education.



**Figure 6.1:** Census 2016 Population Pyramid. There are over 1 Million people aged 0-14 years old as highlighted in the bulge annotated above.

(Source: CSO Ireland, 2016 Population Projections, annotated by Thornton O'Connor Town Planning, 2020)

As visualised by the population pyramid in Figure 6.1, the 2016 Census illustrates that there is a steady climb towards the cohort of population who have been born since the early 2000s and will be attending college within the next 12 No. years. A significant number of these new entrants will require student accommodation during full-time education due the continuing outlook of housing supply and the significant draw of population to Universities, Colleges and Technological Universities which are in major cities and towns.

According to 'Projections of demand for full-time third level education 2018-2040'<sup>11</sup> by the Department of Education and Skills, the current rate at which secondary school leavers attend third level institution remains high. The findings of this report are as follows:

*'The most recent data matching exercise was conducted using Higher Education Authority 2016/2017 Student Record System entrants, and second level final year data from the Department of Education and Skills post primary pupils' database for 5 No. academic years previous to 2015/2016.*

<b>Final year second level</b>	<b>Percentage who entered third level in September 2016</b>
June 2016	48.16
June 2015	11.21
June 2014	3.14
June 2013	1.45
June 2012	0.72

*Adding these results together indicates that 64.67% of any final year second level cohort will transfer to a HEA third level institution before reaching the mature student age.'*

This means that from leaving secondary school, some 65% of students will enroll in third level education before they reach the age of 23. If current rates of secondary school leavers entering third level education are to continue, there will be a significant demand for places in the coming years.

The 2018 projections conducted by the Department of Education and Skills show that even if the rate of school leavers attending Higher Education Institutes does not increase by 2029, there will be a historic peak in the numbers of people attending Irish Universities, Colleges and Institutes of Technology. The *Projections of demand for full-time third level education 2018-2040* report states the following as their predictions up to the year 2040.

*'Under scenario S1 (baseline) total enrolments will rise each year up to 2030 and peak at 222,514, an increase of over 38,870 on 2017 levels, **driven primarily by demographic trends**. After 2030 numbers will fall steadily to reach 203,000 by 2040. Scenario S2, which holds the transfer rate steady but increases international enrollments by an additional 25 per cent over S1, will add an additional 3,658 students by 2030, and over 7,300 by 2040. Under S3 where both the transfer rate and international students rise strongly, enrollments in 2030 are projected to be 58,556 higher than 2017.'* [Our Emphasis]

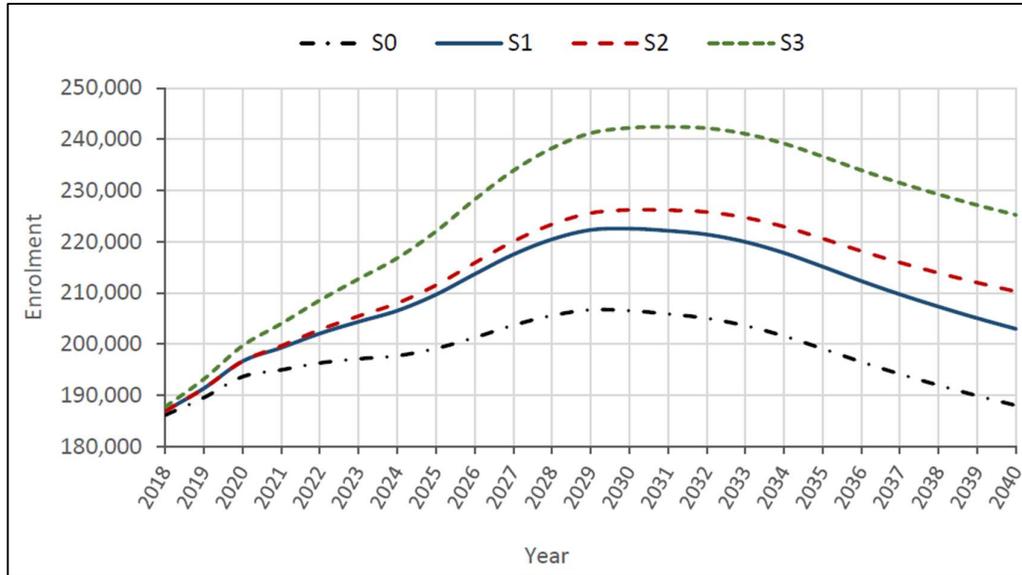
<sup>11</sup><https://www.education.ie/en/Publications/Statistics/projections/projections-of-demand-for-full-time-third-level-education-2018-2040.pdf>

	S1 (baseline)	S2	S3	S0
2017		183,642		
2018	186,890	186,890	187,689	186,091
2019	191,324	191,324	193,141	189,506
2020	196,609	196,609	199,626	193,591
2023	204,339	205,437	212,691	197,085
2026	213,624	215,819	228,202	201,241
2029	222,264	225,556	241,167	206,653
2030	222,514	226,172	242,198	206,488
2031	222,109	226,133	242,392	205,850
2032	221,379	225,769	242,145	205,003
2035	215,091	220,578	236,607	199,063
2038	207,269	213,854	229,203	191,921
2040	202,925	210,241	225,193	187,972

**Figure 6.2: Projected Third Level Education Enrollment, Including Undergraduate, Postgraduate and International Students.**

**(Source: Department of Education, *Projections of demand for full time third level education, 2018-2040*)**

Under scenario 'So', the transfer rate to third level is modelled as falling by 10% to 2027, however even with such a drop off the significant population influx will still see a peak in demand for third level education spaces by 2029. Therefore, to further visualise the trend of these scenarios the following Figure 6.3 is provided depicting a graph of these scenarios between 2018 and 2040.



**Figure 6.3: Scenarios for all Enrollments in 3<sup>rd</sup> Level Education 2018-2040**

**(Source: Department of Education, *Projections of demand for full time third level education, 2018-2040*)**

In the short term as demonstrated in Section 6.2, there is a current shortfall in the supply of purpose built student accommodation. As the population of third level students increases up to the year 2029, there will be an increased demand for PBSAs. The provision of student accommodation is capable of supporting a reduction in students renting from the private rental sector, thus freeing up more housing supply for other demographics. The proposed development of 920 No. student accommodation bedspaces at the subject site is capable of supporting the ongoing growth of students attending HEIs in Galway City. The existing bedspaces will be retained under their original permission GCC Reg. Ref. 00/249 and available as student accommodation and short stay tourist accommodation throughout the year.

## 6.2 Residual Purpose Built Student Accommodation Demand 2019-2024:

There is a very likely scenario of enrollment in HEIs (both undergraduate and postgraduate) to surpass 250,000 No. students within the next few years. The longer-term projections envisage a peak in demand for third level education spaces by 2029-2031, due to the current large population of young people in the state. The challenge of providing adequate student accommodation is currently falling short of existing and indicative demand. The following table accounts for known PBSA planning permissions granted to date in Galway City (see Table 4.1 above), and the proposed expansion of Cúirt Na Coiribe.

Anticipated Student Bedspace Demand 2019-2024					
Supply in 2017	Demand 2017	Permitted to Date November 2019	Projected Supply 2024	Projected Demand 2024	Residual Demand (Permitted + Purposed Included)
3,320	5,491 (Excess 2,161)	4,881 (Excess Demand 610)	4,702 (Surplus of 179)	6,652 (Excess Demand of 1,771)	6,652 4,881 + 515 = 5,396 (Excess Demand of 1,256)

In the short to medium term the permitted developments and the proposed developments will keep up with demand, however as growth in HEIs continues there will be a shortfall in spaces again by 2024 which is set to continue to increase to 2029-2031 based on native population factors alone.

It is foreseeable that the provision of 515 No. additional bedspaces to an existing student accommodation facility will meet immediate demand and continue to be important over the next decade of growth in third level education.

## 7.0 GROWTH OF INTERNATIONAL STUDENT POPULATIONS IN IRELAND

### 7.1 Growth in International Students from EEA and Beyond

A recent additional trend in the growth of Irish HEIs has been the increasing internationalisation of the student population. This has resulted in a large cohort of students arriving from the UK, the EU, North America and several other regions. The HEA surveyed students in 2017 and found the following factors drew them to Ireland:

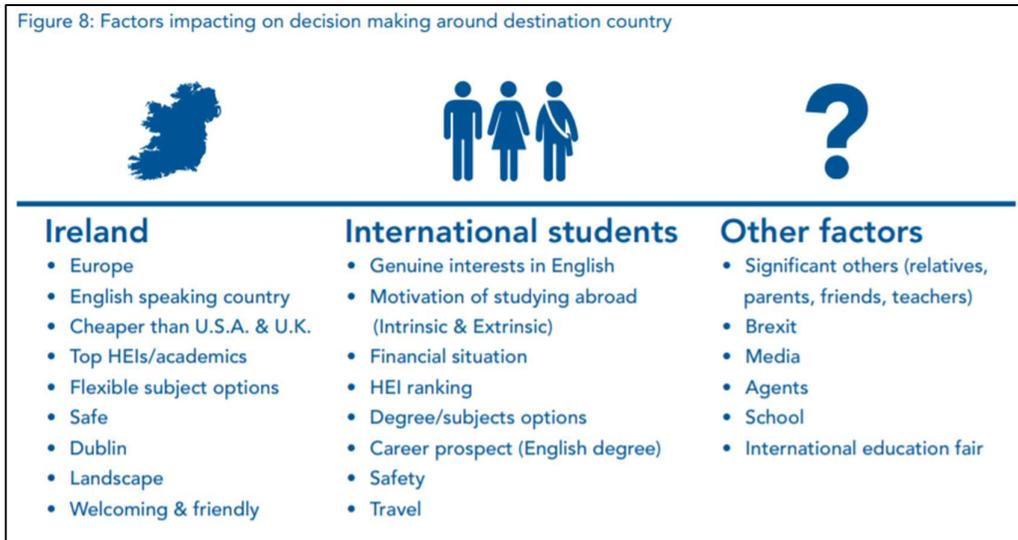
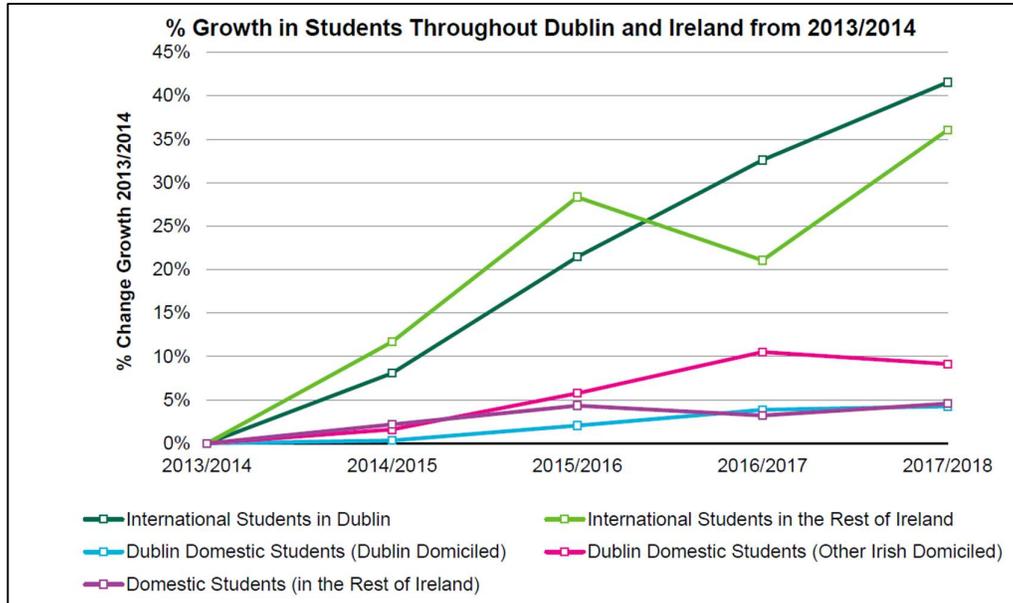


Figure 7.1: Factors Impacting International Students Choice of Ireland as Place of Study

(Source: *Internationalisation of Education (2018)* by HEA)

It is considered that the 'Brexit' factor could see significantly increased demand for Student Accommodation places in Ireland as the only majority English-speaking Country within the EU.

This growth sector has provided new external revenue for HEIs whilst also contributing to the college environment socially, culturally and through new perspectives and ideas which have helped to shape research and academic outcomes. This level of growth in international students has also greatly exceeded that of domestic students which has remained somewhat consistent with demographic trends.



**Figure 7.2: Growth of Student Populations for the Academic Years 2013/14 to 2017/18**

(Source: HEA Statistics, 2017/18)

While Dublin is the main attractor of many International Students, there is also significant growth occurring in the rest of Ireland due to the higher living costs associated with Ireland, in particular in Dublin City. International students account for some 2,778<sup>12</sup> No. NUIG students as of 2017 for example. As the housing crises and significant cost of living continue nationwide, there is a likelihood that international students may continue to look beyond Dublin for education opportunities.

Additional unknown factors such as Brexit may also provide a significant change in the countries of origin of students attending Irish Universities and Colleges. This additional uncertainty could provide an additional influx of EU students to Ireland through systems such as Erasmus or for full time undergraduate and postgraduate education.

<sup>12</sup> *Internationalisation of Education (2018) by HEA*

## 8.0 CONCLUSION

As demonstrated throughout this report there is a strong and diverse education sector in Galway City which provides for a large population of undergraduate students. This creates a significant demand on the available accommodation spaces in PBSAs, private rentals, 'digs' and on the holiday home/ hostel market. The proposed development seeks to densify the existing building at Cúirt Na Coiribe and provide an additional 515 No. bedspaces, communal amenities and facilities. This will result in an overall development of 920 No. bed spaces.

There is an impending surge of young people due to attend higher level education over the next decade, with a peak around 2029/30. If the rate of third level entry continues at current levels many of these students are set to achieve some form of higher-level award within 5 No. years of their Leaving Certificate. This will generate a significant population of potential future students who will further increase demand for student accommodation within Galway City over the next decade.

The longer-term planning outlook of this development provides for the sustainable renovation, retrofitting and expansion of the Cúirt na Coiribe development. Through a series of adaptations, extensions and additions such as solar panels and SuDS infrastructure, the proposed development seeks to provide a resilient response to the challenges as set out in the NPF and the Climate Action Plan 2019. This will in turn provide a high-quality facility capable of catering to residents needs over the next 10 - 15 No. years. This accords with current projections of population growth, the expansion of HEIs and Further Education institutes, the increasing internationalisation of third level education in Ireland and the skills and expertise required for climate change adaptation.

It is therefore considered that following the factors discussed in this report there are a number of influences on student population which will require additional student accommodation within sustainable distances of Higher Education Institutions. The proposed development is well placed to respond to this demand and provide a high quality development with improved facilities for future residents.