

## EVIDENCE OF THE DEMAND FOR CHILDCARE WITHIN THE WEST HAMPSTEAD AREA

### **Introduction**

The purpose of this document is to outline and evidence the demand for childcare within the vicinity of 13 Woodchurch Road, London NW6 3PL. The definition of 'childcare' in relation to this document refers to all settings registered with OFSTED to provide care and an EYFS education to children aged under 5 years of age.

As a part of N Family Club's appraisal of the site, a competitor analysis of the area was carried out in order to establish the need for a new nursery. This involved collecting data on all the nurseries and preschools operating within a 1 mile radius of the site, with particular attention paid to available spaces. Information has been collected through internet research, the OFSTED information portal, and direct contact with the nurseries themselves.

### **Competitor Analysis**

A competitor analysis of the area found there to be 25 settings within a 1 mile radius of the site.

We were able to make direct contact with 21 of the 25 settings. Out of the 21 settings contacted, 19 are operating some form of waiting list for spaces. This number includes all of the settings rated by OFSTED to be 'Requires Improvement'.

As well as a shortage of overall availability, we also identified a distinct lack of full-time childcare provision in the area, as well as care for children aged under 2 years of age. Of the 25 settings analysed, 10 are term-time only, and 13 of the 25 do not take children younger than 2 years old.

A full breakdown of the competitor analysis can be found in this document's appendix.

### **Measured Interest - N Family Club's Sales Campaign**

The success of N Family Club's own pre-launch sales campaign acts as further testimony to the shortage of childcare places in the area. Following the launch of the campaign just 7 weeks ago, 59 of the future nursery's places have already been sold. Additionally, enquiries have been consistently high, with 160 to date.

### **Demographic Statistics**

Demographic statistics for the area provide an explanation for the high demand for childcare within the area, as well as providing a projection of future demand. We used a CACI location analysis software to obtain the demographic metrics of the site's ward, Swiss Cottage.

The area has an extremely high number of children aged 0-4 years - 7,452 in a 1 mile radius. In way of comparison, London averages 6,100 in a 1 mile radius.

Statistics also suggest that the atypical number of young children will be a future as well as present trend - birth rates are incredibly high, with 1,582 recorded within a 1 mile radius for 2018. This is in comparison to an average of 1,327 for the city. Additionally, there is a high proportion of women of typical child-bearing age (25-39 years) in the area - 18,377 compared to London's average of 14,515.

### **Conclusion**

With the vast majority of the area's childcare settings operating waiting lists for places, it is clear that there is a local need for more nurseries. This becomes particularly apparent when noting the high percentage of term-time only settings, and those that do not accept younger children. The size of nurseries does not impact the availability of spaces - an example being the nearby Bright Horizons Active Learning West Hampstead. This site has a capacity of 164, yet currently has no places available for babies until 2020.

Demographic statistics provide confidence that this trend will continue into the future, with much higher than average numbers of children, births, and women of child-bearing age.

Finally, the level of interest that N Family Club's own pre-launch sales campaign is generating provides us with a live indicator of the shortage of quality childcare places in the vicinity. We have a great deal of confidence that we will quickly reach the site's allotted capacity, and therefore hope to see this increase from 80 to 100 places.

**Appendix I - Competitor Analysis**

Nursery	Ofsted rating	Children on roll/ Capacity at last Ofsted inspection	Distance from Site	Term-Time Only?	Notes
Bright Horizons West Hampstead Day Nursery	Outstanding	76/84 (2016)	0.01 miles	No	<b>Currently no spaces available for any age group, with an 8 month waiting list for the baby room.</b>
Acol Nursery Centre	Good	44/50 (2016)	0.2 miles	No	<b>Waiting list in place.</b> Open 50 weeks per year.
Bright Horizons Active Learning West Hampstead	Good	158/164 (2017)	0.3 miles	No	<b>No baby spaces until 2020. Spaces for 3 year olds.</b>
Centro Infantil Menchu	Good	18/22 (2016)	0.4 miles	No	<b>Currently a waiting list.</b> Previous Ofsted rating Requires Improvement. Bilingual Latin-American nursery open 48 weeks a year. For children over 2 years.
Rainbow Montessori Nursery School (Sherriff Road)	Good	28/ 30 (2017)	0.4 miles	Yes	<b>Limited spaces available.</b> Term-time only for children over 2 years. Open 08.30-15.15.
Kilburn Grange Children's Centre	Outstanding	44/44 (2016)	0.4 miles	No	<b>No spaces available; long waiting list.</b> Open to children older than 2 years all year round, 8-6.
Chaston Nursery	Requires Improvement	58/60 (as of 2018)	0.4 miles	No	<b>Small waiting list for baby places and no preschool places for the foreseeable.</b> Open 49 weeks a year for 0-5 year olds.
Treetops Kilburn	Good	38/70 (2017)	0.4 miles	No	<b>1 full time space remaining for pre-schoolers.</b>
Broadhurst School	Good	110 on roll	0.5 miles	Yes	<b>No spaces until January.</b> Independent pre-prep school for 2.5-5 year olds, open term time only.
Langtry Children's Centre	Outstanding	73/72 (2016)	0.5 miles	No	<b>Waiting list in place.</b> Open 48 weeks a year for children older than 2 years, 08:00-18:00.
Abacus Ark Nursery School Maida Vale	Good	89/60 (2017)	0.6 miles	No	<b>Currently no spaces.</b> Open 47 weeks a year for children older than 12 months, open 08:00-18:00.
Nido Montessori Nursery	Not yet rated	Unavailable	0.7 miles	Yes	<b>Waiting list in place.</b> Part of Casa Dei Bambini, with provision for 0-3 year olds from 08:00-18:00, term time only. Opened in Nov 2018.
Villas Nursery	Good	13/15 (2017)	0.7 miles	Yes	<b>Currently "completely full".</b> Open to children older than 2 years, term time only 09:00-15:00.

Ready Steady Go St John's Wood	Outstanding	42/44 (2016)	0.7 miles	Yes	<b>No spaces until September 2020.</b> Open to full-time 3-5 year olds only. Sessions run from 09:00-14:00, term-time only.
Bright Horizons Active Learning JW3	Requires Improvement	91/87 (2018)	0.9 miles	No	<b>6 month waiting list</b> for 0-3 year olds. Preschool places available.
Carlton Hill Community Nursery	Outstanding	84/66 (2013)	0.9 miles	No	Part of the LEYF organisation. Registered charity.
North Bridge House Preparatory School	Outstanding	225/ unavailable (as of 2016)	0.9 miles	Yes	Part of a private school open term-time only for children aged 2 years 9 months and over.
Casa Dei Bambini Montessori School	Good	19/28 (2017)	0.9 miles	Yes	<b>Waiting list in place.</b> Part of Nido Montessori, provision for 3-6.5 year olds 08.30-15.30 term time only.
Bright Horizons St John's Wood	Good	97/92 (2018)	0.9 miles	No	Previous Ofsted rating Requires Improvement & an official complaint made to Ofsted in early 2018. Spaces available.
Crickets Montessori Nursery School	Outstanding	76/50 (2016)	1 mile	Yes	<b>Waiting list in operation - no spaces until Jan 2020.</b> For children aged 2.5 years and over, term-time only.
Pinocchio Nursery	Requires Improvement	10/26 (2016)	1 mile	No	<b>Waiting list.</b> Open 49 weeks a year 08:00-18:00 for children older than 5 months.
Busy Bees Fortune Green Montessori Nursery	Good	59/40 (2018)	1 mile	No	Part of Busy Bees. Baby spaces available now, pre-school places available in July/ August.
Anglo-Russian Pre-School	Good	15/25 (2016)	1 mile	Yes	Bilingual private pre-school for anglo-russian children.
Jelli Tots Nursery	Outstanding	42/50 (2015)	1 mile	No	Open 09:00-15:30, 46 weeks a year for children over 2 years old. Formal complaint made in 2017 after a child left the premises unsupervised.
Al Ghadeer Nursery	Requires Improvement	Unavailable	1 mile	Yes	<b>Waiting list in place.</b> Term-time only setting for children older than 3 years. During its last inspection, the school received a warning for being over capacity.

