

Economic Rationale for, and Impacts of, a Proposed Mixed Use Development on Lands at Ratoath, Co. Meath

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1. Introduction and Overview

This report is prepared on behalf of McAleer & Rushe and Corcom Development Partners (henceforth 'MRC') by Dr. Pat McCloughan, Managing Director of PMCA Economic Consulting. It provides an evidence-based study of the employment potential of certain lands in Ratoath, Co. Meath (the 'Subject Lands') held by MRC. The Subject Lands extend to 19.2 hectares (47.5 acres) and of particular interest within the Subject Lands are 9.8 hectares (24.3 acres) zoned as E2 General Enterprise and Employment in the Draft Meath County Development Plan 2020-2026 ('Draft CDP'). It is estimated in this study that the following *likely direct permanent employment/jobs* could be delivered on the 9.8 hectares (24.3 acres):

- 80 persons working on a full-time equivalent (FTE) basis at a new Enterprise Hub, reflecting the experience of The Mill Enterprise Hub ('The Mill') in Drogheda, which MRC have considered and visited.
- 52 FTEs in a 4-Star Hotel with 80 bedrooms, function rooms, conference centre and leisure centre (with gym and swimming pool).
- 118 FTEs in a Nursing Home with 120 bedrooms (all en-suite).
- Together the three new employment buildings could generate 250 new FTEs by 2026 (from a potential 296 FTEs), which would represent a sizeable contribution towards the objective of facilitating more employment in this rapidly growing settlement, which like many other settlements in Meath is characterised by a very high rate of outbound commuting (79% in 2011 and 2016) and a very low jobs-to-population ratio (10% in those years).

To enable the significant new employment development to be realised on the 9.8 hectares (24.3 acres) within the Subject Lands, it is proposed that the E2 General Enterprise and Employment zoning in respect of the 9.8 hectares (24.3 acres) be amended to C1 Mixed Use in the new Meath CDP 2020-2026. This change would incentivise the Proposed Development to occur, and the range of employment uses under C1 Mixed Use are more appropriate for Ratoath, given the very strong skills and educational attainment of its residents. Without the proposed re-zoning of the 9.8 hectares (24.3 acres), MRC would not have an incentive to embark on the Proposed Development and the projected permanent new jobs would not occur. On the other hand, the estimated 250 new FTEs arising from the Proposed Development would imply a lowering of the outbound commuter *rate* from the 79% in 2016 to 75% in 2026, thus an appreciably large fall in the extent of outward commuting from Ratoath, and accordingly retention of greater social as well as economic impacts locally within the settlement (generally speaking in settlements like Ratoath, lowering the outbound commuter *rate* is a more purposeful goal to pursue than attempting to reduce the *number* of outbound commuters).

In what follows, both the economic rationale and the employment impacts of the Proposed Development are considered, with reference to analysis of the baseline socio-economic performance of Ratoath using official Central Statistics Office (CSO) data.¹

¹ The estimated 250 permanent new jobs likely to be created in Ratoath as a direct result of the Proposed Development do not include their knock-on impacts (i.e. the additional jobs created or sustained in other economic sectors besides those directly impacted) or the temporary jobs associated with the construction of the three new economic buildings in Ratoath.

2. Map of the Subject Lands and Proposed Zoning Change

Figure 1 shows the Subject Lands of MRC, which extend to 19.2 hectares (47.5 acres) and comprise:

- Agricultural/unzoned lands (8.4 hectares/20.7 acres).
- Lands zoned G1 Community Infrastructure in the Draft CDP (1.0 hectare/2.5 acres).
- Lands zoned E2 General Enterprise and Employment in the Draft CDP (9.8 hectares/24.3 acres).

It is sought that the 9.8 hectares (24.3 acres) zoned E2 General Enterprise and Employment in the Draft CDP are re-zoned C1 Mixed Use in the Meath CDP 2020-2026 in order to incentivise MRC to deliver significant new employment for Ratoath comprising (1) an Enterprise Hub, (2) a 4-Star Hotel with 80 bedrooms, function rooms, conference centre and leisure centre (with gym and swimming pool) and (3) a Nursing Home with 120 bedrooms (all en-suite).

In the absence of the proposed zoning change in respect of the 9.8 hectares (24.3 acres), it is highly unlikely that the Proposed Development would occur. It is also noted that the Subject Lands are located in the vicinity of the Strategic Employment Site identified for Ratoath in the Draft CDP, which provides a *“unique opportunity to strengthen the relationship between Ratoath and the equine industry, including Fairyhouse Racecourse and the Tattersalls International Equestrian facilities, which are important equine assets of national and international significance, has been identified as an area where future employment opportunities could be generated”* (p. 111 of the Draft CDP, Volume 1, Written Statement). The proposed Development on the Subject Lands is compatible with, and complementary to, the vision of developing Ratoath’s strengths in equine/equestrian activities on the Strategic Employment Site.

Figure 1: The Subject Lands showing Proposed Land Use Zoning Objectives for the County Meath CDP 2020-2026

Fairyhouse Road Lands: Land Zoning



Source: MRC, PMCA Economic Consulting.

3. Economic Rationale for the Proposed Zoning Change

3.1. Introduction

As well as incentivising MRC to deliver the new employment buildings, the rationale for the zoning change from E2 General Enterprise and Employment to C1 Mixed Use for the 9.8 hectares (24.3 acres) within the Subject Lands is based on the following needs in Ratoath (in no particular order of importance):

- More high quality employment in Ratoath to enhance its overall employment performance.
- Combat the very high outbound commuting rate from the settlement (noting the focus on reducing the outbound commuter *rate* as opposed to the *number* of outbound commuters).
- Address the costs associated with outbound commuting, including climate change.
- Build on the very strong skills and educational attainment in Ratoath.
- Take advantage of the strong IT skills and broadband availability in Ratoath.
- Enhanced delivery under C1 Mixed Use than E2 General Enterprise and Employment.
- Need for more housing supply.

3.2. More High Quality Employment to Enhance Ratoath's Overall Employment Performance

The Draft CDP (Volume 1) observes that Ratoath had 4,260 resident workers (in any location) in 2016 but just 922 persons were working in the settlement, implying a jobs-to-resident workers ratio of only 0.216, the second lowest of the key settlements considered in the Draft CDP (p. 58) (Laytown-Bettystown-Mornington-Donacarne (LBMD) had the lowest ratio at 0.164).

The Draft CDP goes on to say that (p. 66): *"Ratoath, [LBMD], Enfield, Kilcock, and Stamullen have all developed on the basis of outbound commuting to Dublin ... Social and physical infrastructure and employment provision in these settlements has struggled to keep pace with population growth."*

The Draft CDP then comments on the potential to create new jobs in Ratoath where it says that (p. 106):

"Ashbourne and Ratoath have the potential to strengthen their employment base and develop as important centres of employment due to their strategic location, connectivity with surrounding settlements, and the availability of a skilled workforce."

In regard to the Draft CDP's Economy and Employment Strategy for Ratoath, it states that (pp. 111-112):

"Ratoath is currently the fourth largest town in County Meath. As recognised in the Regional Spatial and Economic Strategy Ratoath is one of the towns recording the highest population growth rates in the country over the last ten years (>32%) which has a lower level of employment provision."

"The key Planning challenge for Ratoath is to facilitate a Plan led evidence based transition from an unsustainable commuter settlement to a sustainable settlement based on the 'live work' community model championed by the Economic Strategy for County Meath 2014-2022. This will enable the town to capitalise on the existing highly skilled and educated work force currently resident within the town."

"In summary the development strategy for Ratoath will give emphasis to the creation of jobs and the provision of social and community infrastructure that is essential in the creation of a vibrant and active sustainable community."

The Proposed Development on the Subject Lands by MRC is consistent with this vision for Ratoath in the Draft CDP.

The detailed composition of employment in Ratoath in 2011 and 2016 is shown in Table 1, based on analysis of the Central Statistics Office's POWSCAR data in those years, which enables identification of inbound and outbound commuters as well as those both living and working in settlements or any geographical delineation, such as a whole local authority area for example.²

Table 1 reveals that the 922 jobs in Ratoath in 2016 comprised 712 jobs held by people resident in County Meath and 210 held by people living outside of Meath (inbound commuters). The cohort of people at work that generally matters most to a local authority (like Meath County Council) is the former (that is, *those both living and working in the local authority area*, in this case County Meath). Accordingly, a key goal of local economic development policy is to maximise that particular cohort, which in turn will serve to maximise the economic impact of employment *within* the local authority area.

The key jobs cohort of people living in Meath and working in Ratoath in turn consists of (a) those both living and working in the settlement and (b) those living elsewhere in Meath and working in Ratoath. To Meath County Council, (a) and (b) are just as important because the Council's aim is to support economic development of the whole local authority area (understandably enough). However, from a wider policy perspective, the cohort in (a) is particularly noteworthy because it affords the most direct route to maximisation of economic impact *locally within the settlement*, and entails other benefits, such as less time spent travelling to and from work (within a local authority area) and lower emissions.

Looking at Table 1, the number of people both living and working in Ratoath (cohort (a)) rose in absolute terms by 21, while the number living elsewhere in Meath and working in the settlement (cohort (b)) increased by 8. The proportionate increases witnessed in cohorts (a) and (b) are modest (5.7% and 2.6% respectively), whereas the number of inbound commuters grew by 16% (albeit from a relatively low base).

Table 1: Details of the Composition of Employment in Ratoath in 2011 and 2016

Composition of Employment in Ratoath in 2011 and 2016				
Key Labour Market Variables	Census Year and Change (2011-2016)			
	2011	2016	Change	% Change
Population	9,043	9,533	490	5.4%
Living in Meath & Working in Settlement	683	712	29	4.2%
Living in Settlement & Working in Settlement	371	392	21	5.7%
Living Elsewhere in Meath & Working in Settlement	312	320	8	2.6%
Living Outside Meath & Working in Settlement: Inbound Commuters	181	210	29	16.0%
Living in Settlement & Working Outside Meath: Outbound Commuters	2,561	2,678	117	4.6%
Total Jobs in Settlement	864	922	58	6.7%
Key Labour Market Rates				
Jobs-to-Population Ratio	9.6%	9.7%	0.1%	1.2%
Outbound Commuter Rate	78.9%	79.0%	0.1%	0.1%

Source: CSO POWSCAR 2011 and 2016, PMCA Economic Consulting analysis.

Note: Population and demographic data for Ratoath in comparative context in 2006, 2011 and 2016 are given in Table A1-Table A3 (p. 15).

Striking in the above table is the number of outbound commuters from Ratoath, who numbered 2,678 in 2016, dwarfing the cohorts of those living in Meath and working in the settlement (712), and the inbound commuters (210).

² POWSCAR is short for Place of Work, School or College Census of Anonymised Records and is part of the CSO's Census results (however the POWSCAR data is not publicly available).

Also striking in Table 1 are the key labour market rates at the bottom of the table, derived using the preceding facts on the key labour market variables. Particularly noteworthy are: (1) the extremely low jobs-to-population ratios for Ratoath, which coincided at only 10% (rounded) in 2011 and 2016 (the corresponding ratios for County Meath were 21% in each of those years and the respective ratios for the State were 39% and 41%); and (2) the very high outbound commuter rate for Ratoath of 79% (rounded) in 2011 and 2016 (the outbound commuter rates for Co. Meath were 54% in 2011 and 55% in 2016).

It is important to be mindful of how the outbound commuter rate is calculated in Table 1: for example, the outbound commuter rate of 79% (rounded) in 2016 is the number of persons living in the settlement and working outside of *County Meath* (i.e. 2,678) divided by the sum of that number (2,678) and the number of persons living in Meath and working in the settlement (i.e. 712) (which is 3,390) (the outbound commuter rate in 2011 is calculated correspondingly, 79% rounded). Measured in this way the outbound commuter caters for Meath County Council's (or any local authority's) objective of maximising the number of people both living and working *within* County Meath (or the local authority area in question).

Another important observation to make is that the outbound commuter *rate* is more important than the *number of* outbound commuters. The outbound commuter rate contextualises the absolute number of outbound commuters in the context of the number of people working within a given settlement or local authority area. It is extremely likely (practically a certainty) that the number of outbound commuters from Ratoath will continue to grow in the coming years, because of the inevitable growth in the Dublin labour market. However, if the number of persons working in Ratoath increases faster than the number of outbound commuters, then the outbound commuter *rate* for Ratoath will fall.

This favourable outcome is achievable, but is unlikely to obtain by relying on general economic growth alone (i.e. in the absence of an external stimulus to employment in Ratoath). On the other hand, an external stimulus, like MRC's proposal for the settlement during 2020-2026, coupled with general economic growth, could reduce the outbound commuter rate for Ratoath. This outcome is considered in Section 4, where the *likely direct employment impact* of the Proposed Development in 2026 is estimated.

3.3. Combat the Very High Outbound Commuting Rate from Ratoath

Ratoath is characterised by a very (even extremely) high outbound commuter rate (79% in 2016) within a county that had the highest outbound commuter rates of any local authority area outside the capital in 2011 and 2016 (54% and 55% respectively). To be fair, Meath County Council are proactively seeking to facilitate more employment *within* Meath, and the Draft CDP is far-sighted in striving to facilitate the ambition contained in the Economic Development Strategy for County Meath (2014-2022), where it emphasises supporting employment development in key settlements, including Ratoath.

The E2 General Enterprise and Employment zoning attaching to the Subject Lands is inappropriate for Ratoath, which has an appreciably large supply of very skilled workers with other favourable socio-economic characteristics (outlined further below). To support high quality new employment opportunities being delivered in Ratoath, it is necessary to amend to the more appropriate C1 Mixed Use zoning.

In 2019 Meath and Kildare County Councils together commissioned a survey to gauge the appetite among outbound commuters to work in their counties of residence. According to results in the public domain, nearly 90% said they are 'very interested' in working closer to home, while 41% would be prepared to take a pay cut to work nearer to where they live.³

³ See *The Irish Times* article on the survey results (8 October 2019) (available online [here](#)).

3.4. Address the Costs Associated with the Outbound Commuting, including Climate Change

The very high outbound commuting from Ratoath entails wider socio-economic and environmental costs as well as economic costs, including (but not limited to):

- *Getting up very early to travel to work* – the proportion of the population aged five years and over in Ratoath leaving home to travel to work, school or college before 7am in 2016 was 15%, which while lower than the 18% in County Meath (reflecting Ratoath’s proximity to Dublin) was higher than the 13% in the country as a whole.⁴
- *Journey time to and from work* – the proportion of the population aged five years and over in Ratoath having a journey time to work, school or college of at least 1 hour in 2016 was 13%, which while lower than the corresponding proportion of 15% for Meath was higher than the 8% in the State.⁵
- Further to the preceding fact, a recent survey carried out by the AA (Automobile Association) found that almost one-third of motorists are spending more time in their daily commute compared with 12 months ago and a growing reliance on car for commuting. While the survey indicates that car reliance is on the rise (nationwide), it also found that *motorists are conscious of the negative climate and environmental implications of heavy reliance on car for commuting and are willing to switch to public transport if they felt it was reliable.*
- The travel times endured by outbound commuters from Ratoath, which numbered almost 2,700 in 2016, mean that they have less time to devote to their families and local communities, in turn implying *less social capital locally* compared with where there were more employment opportunities closer to home.

3.5. Build on the Very Strong Skills and Educational Attainment in Ratoath

Among those both living and working in Ratoath and the outbound commuters from the settlement are comparatively strong skills available locally, which can be harnessed and promoted to attract much-needed quality employment in the settlement. Of particular relevance are the following facts:

- *Occupational skills* – the proportion of people living in Ratoath with a background or skills in senior and professional-related occupations was 46% in 2016, much higher than the 35% in County Meath and 36% in the State in that year.⁶
- *Persons at work by relevant industry* – the proportion of residents of Ratoath working in commerce/trade/professional services was 49% in 2016, compared with the proportions of 46% and 47% observed in Meath and the State respectively in that year.⁷
- *Educational attainment* – the percentage of people living in Ratoath aged 15 years and over with a third-level degree or higher qualification was 35% in 2016, which was appreciably higher than the 26% in County Meath and the 28% in the country as a whole in the same year.⁸

In view of the evidence showing the appetite for outbound commuters to work closer to home in Meath, an employment stimulus like the Proposed Development is likely to attract interest from his cohort of workers, thereby enhancing the deliverability of the initiative.

⁴ The details are given in Table A4 (p. 16).

⁵ The details are set out in Table A5 (p. 16).

⁶ The details are presented in Table A6 (p. 17).

⁷ The details are provided in Table A7 (p. 17).

⁸ The details are shown in Table A8 (p. 18).

3.6. Take Advantage of the Strong IT Skills and Broadband Availability in Ratoath

Reinforcing the attractiveness, and competitiveness, of Ratoath as a location for high quality, knowledge-oriented employment are the further facts that access to broadband and IT skills are relatively high in the settlement (the latter by virtue of household access to a personal computer and broadband).

- The proportion of households with a personal computer in Ratoath in 2016 was 81%, which was much higher than County Meath (72%) and the State (68%).⁹
- The proportion of households with broadband access in the settlement was 89% in 2016, considerably larger than the 73% in Meath and that 71% in the country as a whole.¹⁰

3.7. Enhanced Delivery under C1 Mixed Use than E2 General Enterprise and Employment

The proposed zoning change to the Subject Lands would incentivise the developer to deliver the proposed new employment-generating buildings in Ratoath, the benefits of which would accrue to residents and Meath County Council.

As outlined in the Draft CDP (Volume 1, p. 438), the E2 zoning has the 'Objective':

"To provide for the creation of enterprise and facilitate opportunities for employment through industrial, manufacturing, distribution, warehousing and other general employment/enterprise uses in a good quality physical environment."

The 'Permitted Uses' for E2 zoning specified in the Draft CDP (Volume 1, p. 438) are:

"Bring Banks, Builder's Providers, Childcare Facility, Car Park (incl. Park and Ride), CHP/Waste to Energy Facilities, Domestic Fuel Depot, Energy Installation, Enterprise & Business Start Ups, Enterprise/Training Centre, Factory Shop, Furniture Showroom (only where product displayed is manufactured on site), Go Kart Track, Industry – General, Industry – Light, Heavy Vehicle Park, Logistics, Mart/Co-op, Motor Repair/Servicing, Plant & Tool Hire, Recycling Facility (Civic & Amenity), Science & Technology Based Enterprise, Telecommunication Structures, Transport Depot, Warehousing, Utilities."

The 'Open for Consideration' Uses for E2 zoning on the same page of the Draft CDP are:

"Abattoir, Car Dismantler/Scrap Yard, Construction & Demolition Waste Recycling Facility, Garden Centre, Leisure Facilities, Motor Sales, Offices 100 – 1,000m², Service Station, Restaurant/Café, Veterinary Surgery, Waste Recycling/Transfer/Sorting Centre, Wholesale Warehousing/Cash and Carry."

"Uses which are 'open for consideration' or not identified as 'permitted' under the E2 zoning objective will only be considered where they do not compromise the objective of the overall zoning objective of E2 lands, for general enterprise and employment uses."

On the other hand, the C1 Mixed Use zoning in the Draft CDP has the 'Objective' (Volume 1, p. 437):

"To provide for and facilitate mixed residential and employment generating uses."

⁹ The details are given in Table A9 (p. 21).

¹⁰ The details are shown in Table A10 (p. 21).

The 'Guidance' associated with C1 Mixed Use zoning in the Draft CDP states that (Volume 1, p. 437):

"Lands identified for mixed use development are only appropriate in higher tier settlements. The objective on these lands is to provide opportunities for high density mixed use employment generating activities that also accommodate appropriate levels of residential development thereby facilitating the creation of functional 'live work' communities. These areas are generally located in proximity to high frequency public transport corridors."

"In order to achieve balanced development the percentage of residential development in C1 zones shall generally not exceed 50 % of the quantum of development."

The 'Permitted Uses' of C1 Mixed Use zoning in the Draft CDP specify as follows (p. 437):

"B & B/Guest House, Bring Banks, Childcare Facility, Children Play / Adventure Centre, Community Facility/Centre, Convenience Outlet, Cultural Facility, Education (Primary or Second Level), Education (Third Level), Enterprise Centre, Health Centre, Healthcare Practitioner, Home Based Economic Activities, Hotel/Motel/Hostel, Offices <100m², Offices 100 to 1,000m², Offices >1,000m², Service Station, Place of Public Worship, Pub, Residential/Sheltered Housing, Restaurant/Café, Utilities."

The 'Open for Consideration' Uses for C1 Mixed Use zoning on the same page of the Draft CDP are:

"Betting Office, Car Park (incl. Park and Ride), Cinema, Conference/Event Centre, Dance Hall/Night Club, Drive Through Restaurant, Funeral Home, Garden Centre, Hospital, Industry – Light, Leisure/Recreation/Sports Facilities, Motor Sales/Repair, Offices>1,000m², Plant & Tool Hire, Research & Development, Retirement Home/Residential Institution/Retirement Village, Science & Technology Based Enterprise, Shop, Supermarket, Take-Away/Fast Food Outlet, Telecommunication Structures, Veterinary Surgery, Wholesale Warehousing/Cash and Carry."

Dr. McCloughan considers that the 'Guidance', 'Permitted Uses' and the 'Open for Consideration' Uses in respect of the C1 Mixed Use zoning in the Draft CDP are more appropriate for the 9.8 hectares (24.3 acres) site within the Subject Lands than the 'Objective', 'Permitted Uses' and the 'Open for Consideration' Uses pertaining to the E2 General Enterprise and Employment zoning in the Draft CDP, because the economic uses of the former are more in keeping with the very strong skills in, and strategic location of, Ratoath.

3.8. Need for More Housing Supply

Notwithstanding the rapid growth in population in Ratoath during 2006-2011, in which the settlement has become the fourth largest urban area in County Meath (after Navan, Ashbourne and Laytown-Bettystown-Mornington-Donacarney (LBMD) in East/Coastal Meath) and which includes a very youthful population (Table A1-Table A3), there remains a significant need for more housing, a reality brought into sharp focus in the result of General Election 2020 and the vote for more affordable housing for the next generation of workers.

4. Employment Impact of the Proposed Economic Buildings

4.1. Direct Employment Impact due to the New Economic Buildings by 2026

The direct employment impacts of the proposed new economic buildings on the 9.8 hectares (24.3 acres) within the Subject Lands during the new Meath CDP 2020-2026 are shown in Table 2. In brief, the new economic buildings will be capable of accommodating *potential* permanent employment of 296 FTEs (at capacity) and *likely* permanent employment of 250 FTEs when spare capacity is factored in (the impacts do not include the temporary employment involved in the construction of the new economic buildings).

Table 2: Proposed New Economic Buildings on the Subject Lands and their Direct Employment Impacts by 2026

New Economic Building	Gross Area (sqm)	Employment Ratio (sqm)	Employment Density (sqm/FTE)	Potential Employment (FTEs)	Likely Employment (FTEs)
<i>The Mill Enterprise Hub (Drogheda, Co. Louth)</i>	1,394	0.50	5.81	120	80
1. Ratoath Enterprise Hub	1,394	0.50	5.81	120	80
2. 4-Star Hotel	5,420	0.06	5.81	58	52
3. Nursing Home	5,500	0.12	5.81	118	118
Total (1-3)	12,314			296	250

Source: MRC and PMCA Economic Consulting analysis (information on The Mill from that organisation, see footnote 11 below).

Note: The Mill in Drogheda is shown in italics for illustrative purposes only because it helps to inform the employment impacts of the proposed new economic buildings (1-3).

The employment characteristics of the proposed economic buildings – the Ratoath Enterprise Hub, the 4-Star Hotel and the Nursing Home – are informed in part by the experience of The Mill in Drogheda shown in italics at the top of the table (for illustrative purposes only), an analysis of the commercial viability for the development of a nursing home on the site undertaken on behalf of MRC by Care Solutions (www.caresolutions.ie) and an analysis of the commercial viability for the development of a hotel and leisure centre on the site undertaken by independent leisure and hospitality consultant Joe Quinn working in conjunction with the Hotel Division of McAleer & Rushe.

The Mill opened in 2014, on lands in the northern environs of Drogheda provided by Louth County Council with funding support from public bodies and businesses in the region (foreign-owned and indigenous enterprises). A registered charity, all of the offices in The Mill were occupied by tenants within a year (but not all of the desks within the offices were taken up, implying spare capacity). In 2016, The Mill doubled in size to its current gross floor area of 1,394m² (15,000ft²), of which about half is available for employment (hence the employment ratio of 0.50 per m² of gross area in Table 2). The employment capacity of The Mill is 120 FTEs, which is equivalent to an employment density of 5.81m²/FTE (given as (1,394m² x 0.50)/120) (63ft²/FTE). Currently the tenants at The Mill together employ 80 FTEs, implying a capacity utilisation rate of two-thirds.¹¹ Applying these features of The Mill to the gross areas of the economic buildings leads to the estimates of potential and likely direct permanent employment of 296 FTEs and 250 FTEs respectively.

¹¹ Dr. Pat McCloughan learned of these features of The Mill when he, along with representatives of Corcom and McAleer & Rushe visited The Mill in February 2020. Dr. McCloughan would like to thank The Mill's Innovation and Enterprise Manager (Breannán Casey) for taking the time to show the team on behalf of MRC around the facility and outlining its growth to date. From other consultancy work in the region, Dr. McCloughan is aware that The Mill is highly regarded as a significant asset for entrepreneurship and enterprise development.

The Ratoath Enterprise Hub will seek to replicate the success of The Mill and thus is assumed to have the same gross area, employment ratio and employment density as The Mill, resulting in potential new employment of 120 FTEs and likely new employment of 80 FTEs when spare capacity is incorporated.

The 4-Star Hotel is estimated to be capable of employing a potential 58 FTEs consistent with the employment characteristics in Table 2 (the details of the breakdown of the potential 58 FTEs by function/staff type are presented in Table A11 in the Annex of Supplementary Information, p. 19). In regard to the likely number of FTEs working at the new hotel, the two-thirds capacity utilisation rate observed at The Mill (and applied to the proposed Ratoath Enterprise Hub) is unlikely to be relevant for the hotel, because generally speaking hotel staff tend to be less scarce compared with the skills of tenants working in enterprise and innovation hubs. Accordingly we require an alternative rule-of-thumb for estimating the likely FTEs in the new hotel from the 58 potential FTEs.

For this purpose, we may apply the 'shadow price of labour', one of the key technical parameters in the Public Spending Code. According to the Department of Public Expenditure and Reform (2018), the shadow price of labour is "*Used to adjust labour impacts as the social opportunity cost of labour resource may be lower than the market rate due to underemployed resources*" (p. 5) and is specified in the range of 80-100%. PMCA considers that the mid-point of this range (90%) may be used to derive the likely FTEs from the 58 potential FTEs in respect of the proposed new hotel in Ratoath. This results in likely FTEs of 52 as shown in Table 2.¹²

The Nursing Home is estimated to be able to accommodate potentially 118 FTEs, the details of which are set out in Table A12 of the Annex (p. 19). Because of the strict regulation of nursing homes in the State, where for example the Health and Information Quality Authority (HIQA) carry out inspections for the benefit of patients and their families, it is assumed that the required 118 FTEs for the 120 bedroom facility will also be the likely number of FTEs (i.e. 118) (by necessity).

Summing up on the direct (permanent) employment impact of the proposed three new economic buildings on the Subject Lands in Ratoath, the buildings together will have total area of 12,314m² (132,542ft²) with a combined capacity to employ 296 FTEs and a likely 250 FTEs when spare capacity and the opportunity cost of employment is taken into account. In the next part of the impact analysis, the focus is placed on the likely 250 FTEs due directly to the proposed new buildings.¹³

4.2. Impact of the Proposed Development on the Composition of Employment in Ratoath

4.2.1. Scenario of No Proposed Development

In the event of no change to the E2 zoning on part of the Subject Lands in Ratoath, MRC will have no incentive to develop new permanent jobs on the lands. The outcome of this scenario is shown in Table 3 below, which reproduces the key labour market variables and rates for Ratoath in 2011 and 2016 from earlier Table 1 (p. 4) and adds to them the projected values for the settlement in 2026. The details of the table are outlined overleaf.

¹² The reference for the DPER (2018) paper is: O'Callaghan, D. and Prior, S. (2018), 'Central Technical Appraisal Parameters: Discount Rate, Time Horizon, Shadow Price of Public Funds and Shadow Price of Labour', Staff Paper 2018, IGEES (Irish Government Economic and Evaluation Service) (pp. 44) (the paper is available online [here](#)).

¹³ Some further details on the specification of the 4-Star Hotel are as follows: it will occupy an area of 4 acres; 3 stories; 80 bedrooms; function rooms and conference centre; leisure centre including swimming pool, gym, studio and separate entrance/reception; and 250 parking spaces. Further details on the Nursing Home specification include: site area of 3 acres; 2 stories; 120 single bedrooms, all with en-suite bathrooms; parking spaces 90; cycle spaces 30.

Table 3: Impact of No Proposed Development on the Composition of Employment in Ratoath in 2026

Composition of Employment in Ratoath in 2011, 2016 and 2026 (Projected)			
Key Labour Market Variables	Census Year		
	2011	2016	2026
Population	9,043	9,533	11,033
Living in Meath & Working in Settlement	683	712	774
Living in Settlement & Working in Settlement	371	392	438
Living Elsewhere in Meath & Working in Settlement	312	320	336
Living Outside Meath & Working in Settlement: Inbound Commuters	181	210	276
Living in Settlement & Working Outside Meath: Outbound Commuters	2,561	2,678	2,928
Total Jobs in Settlement	864	922	1,050
Jobs due to General Economic Growth			1,050
Jobs due to the Proposed Development			0
Key Labour Market Rates			
Jobs-to-Population Ratio	10%	10%	10%
Outbound Commuter Rate	79%	79%	79%

Source: CSO POWSCAR 2011 and 2016, PMCA Economic Consulting analysis.

Consider firstly in Table 3 the total number of jobs in the settlement. The total number of jobs in Ratoath increased from 864 in 2011 to 922 in 2016, which represented an absolute rise of 58 or an average annual growth rate of 1.3% on a compound average growth rate (CAGR) basis during 2011-2016. To put the 1.3% CAGR observed in Ratoath during the last two Censuses into perspective, the corresponding average annual growth rate in the total number of jobs in County Meath was slightly higher at 1.5%, and that for the State was higher again at 2.2%.¹⁴

To estimate the likely number of jobs in Ratoath due to general economic growth (independently of the Proposed Development), it is reasonable to assume that the 1.3% CAGR in the total number of jobs in the settlement will obtain between 2016 and 2026, resulting in the estimate of 1,050 persons at work in Ratoath in 2026 due to general economic growth.¹⁵

Next, to estimate the number of persons living in Meath (both in Ratoath and elsewhere in the County) and working in the settlement in 2026, we first note from Table 3 that the 683 such persons in 2011 constituted 79% of the total 864 jobs in Ratoath in that year, which fell slightly to 77% in 2016 (based on the 712 persons living in Meath and working in the settlement and the 922 total jobs in Ratoath in that year). At the rate of change in the proportion of 79% in 2011 to the 77% in 2016 (-0.5% CAGR), the corresponding proportion in 2026 would be 74%, resulting in the projection of 774 persons living in Meath and working in Ratoath in 2026 (i.e. 0.74 *times* the 1,050) (figures subject to rounding).

¹⁴ Analysis of CSO POWSCAR reveals that there were 38,822 persons at work in Co. Meath in 2011, which grew to 41,757 in 2016. The corresponding numbers for the State are 1,770,644 and 1,970,738. The comparably low growth rates in employment in Ratoath and Meath during 2011-2016 further underline the need for new jobs-generating initiatives in the County (beyond reliance on general economic growth), as intended in the Draft CDP.

¹⁵ The headline target of the Economic Development Strategy for County Meath (2014-2022) is to facilitate an additional 7,500 jobs in the County by 2022 (compared with 2011). At the 1.5% CAGR observed for Meath during 2011-2016, the number of jobs would grow to 45,573 in 2022, but this would mean falling short of the 7,500 extra jobs by 749. This risk further rationalises the importance of economic stimuli like the Proposed Development to Meath's employment in the coming years.

Within the projected 774 persons living in Meath and working in Ratoath in 2026, it is estimated that there will be 438 persons both living and working in the settlement in that year (based on taking 57% of the 774, which reflects the trend in the proportion between 2011 and 2016, namely 54% and 55% respectively or 0.3% CAGR) and that there will be 336 persons living elsewhere in Meath and working in Ratoath in 2026 (based on taking the remaining 43% of the 774, figures subject to rounding). In turn, the estimated total 1,050 persons at work in the settlement in 2026 due to general economic growth, within which the 774 persons living in Meath and working in Ratoath, implies that there will be 276 inbound commuters (living outside of County Meath but working in the settlement) at work in the settlement in 2026 (the increase in the number of inbound commuters follows the rising trend observed during 2011-2016).

Coming next to the outbound commuters, the CAGR during 2011-2016 in the number of outbound commuters from Ratoath was 0.9% (there were 2,561 outbound commuters in 2011 and 2,678 outbound commuters in 2016). At that rate of growth (0.9% CAGR), the number of outbound commuters would increase to 2,928 in 2026 (the numbers are shown in Table 3).

The projections lead to the following key labour market rates for Ratoath in 2026 in the scenario of No Proposed Development (shown in the bottom part of Table 3 above):

- Jobs-to-population ratio of 10% (based on the projected population for the settlement of 11,033 in 2026, as given in the Draft CDP) (thus the jobs-to-population ratio for Ratoath would remain at the extremely low rate of 10% in 2026, the same as in 2011 and 2016).
- Inbound commuter rate of 26%, which continues the upward trend during 2011-2016.
- Outbound commuter rate of 79%, the same as 2011 and 2016, which is very/extremely high.

Thus, in the event of No Proposed Development, the composition of employment in Ratoath will remain highly unbalanced in 2026, with continuation of the very or extremely high outbound commuting rate (79%) and an extremely low jobs-to-population ratio persisting (10%).

Thus, relying on general economic growth will be insufficient to address the highly imbalanced composition of employment, where clearly a major uplift in jobs in Ratoath is needed.

4.2.2. Scenario of Proposed Development

MRC will have an incentive to deliver employment on the Subject Lands in Ratoath, in the event that the zoning of part of the lands (24.3 acres) is amended from E2 General Enterprise and Employment to C1 Mixed Use. The likely impact of this case – based on the additional 250 FTEs in 2026 established earlier in Table 2 (p. 9) – on the composition of employment in the settlement in 2026 is set out in Table 4 below.

On top of the estimated 1,050 FTEs in Ratoath in 2026 due to general economic growth (as outlined for the No Proposed Development scenario), the Proposed Development would add an extra 250 FTEs, bringing the projected number of persons at work in the settlement to 1,300 in 2026. Compared with the 922 persons at work in Ratoath in 2016, there would be an extra 378 persons working in the settlement in 2026, of which 250 or approximately two-thirds of the jobs growth would be due to the new economic buildings.

Within the projected total of 1,300 persons at work in Ratoath in 2026, there would be 958 persons living in Meath and working in the settlement, within which 542 persons both living and working in Ratoath (958 times the 57% proportion in respect of those both living and working in Ratoath derived earlier) and 416 persons living elsewhere in Meath and working in the settlement (1,204 multiplied by the remaining 43%, figures subject to rounding). This in turn implies that there would 342 inbound commuters working in Ratoath in that year (1,300 minus 958).

Independently of the inbound commuters and those living in Meath and working in Ratoath, there would be 2,928 outbound commuters living in the settlement (based on the trend in the number of outbound commuters during 2011-2016). This is the same number of outbound commuters as in the scenario of No Proposed Development (Table 3) but importantly the *outbound commuter rate* would be reduced to 75% in 2026 (due to the projected 958 persons living in Meath and working in Ratoath, which would act in part as a counter-weight to the outbound commuters).

Table 4: Impact of the Proposed Development on the Composition of Employment in Ratoath in 2026

Composition of Employment in Ratoath in 2011, 2016 and 2026 (Projected)			
Key Labour Market Variables	Census Year		
	2011	2016	2026
Population	9,043	9,533	11,033
Living in Meath & Working in Settlement	683	712	958
Living in Settlement & Working in Settlement	371	392	542
Living Elsewhere in Meath & Working in Settlement	312	320	416
Living Outside Meath & Working in Settlement: Inbound Commuters	181	210	342
Living in Settlement & Working Outside Meath: Outbound Commuters	2,561	2,678	2,928
Total Jobs in Settlement	864	922	1,300
Jobs due to General Economic Growth			1,050
Jobs due to the Proposed Development			250
Key Labour Market Rates			
Jobs-to-Population Ratio	10%	10%	12%
Outbound Commuter Rate	79%	79%	75%

Source: CSO POWSCAR 2011 and 2016, PMCA Economic Consulting analysis.

Note: The 250 FTEs due to the Proposed Development is based on the earlier Table 2 (p. 9) (likely direct employment impact).

In sum, the likely 250 FTEs due to the Proposed Development (established earlier in Table 2, p. 9) would have an appreciably large and positive effect on the composition of employment in Ratoath:

- The jobs-to-population would increase from 10% in 2016 to 12% in 2026.
- The outbound commuter rate would fall from 79% in 2016 to 75% in 2026.

While the *absolute number* of outbound commuters will continue to be high (Dublin is likely to experience continued jobs growth), the stimulus of the additional 250 persons at work *in Ratoath* due to the Proposed Development will significantly reduce the *rate* of outbound commuting (to 75% in 2026).

It is possible/likely that some or many of the 250 new jobs due to the Proposed Development will be taken by outbound commuters, in which case the number of outbound commuters in 2026 will be lower than the 2,928 projected in Table 4 and accordingly the outbound commuter rate will be even lower than the 75% rate in that table (reducing the outbound commuter *rate* is an achievable goal for the new CDP).

5. Conclusions and Recommendation

This report by Dr. Pat McCloughan on behalf of MRC forms part of a submission by MRC to Meath County Council regarding the Draft Meath County Development Plan 2020-2026. MRC has ownership of certain lands at Fairyhouse Road, Ratoath, which extend to 19.2 hectares (47.5 acres), within which are lands comprising 9.8 hectares (24.3 acres) zoned as E2 General Enterprise and Employment in the Draft CDP.

However, the zoning of the latter part of the Subject Lands (9.8 hectares/24.3 acres, E2 General Enterprise and Employment) is incompatible with the need to deliver high quality jobs in the Ratoath during the lifetime of the New Plan (by 2026). A re-zoning of said lands to C1 Mixed Use would enable greater flexibility and incentivise the delivery of significant new high quality employment in a part of the County that has grown very rapidly but with very little employment relative to population.

Based on significant research and analysis undertaken by Dr. Pat McCloughan, MRC and consultants Care Solutions and Joe Quinn, the Proposed Development considered in this report would comprise (1) Ratoath Enterprise Hub (designed to support entrepreneurship and enable innovation among growing enterprises), (2) a 4-Star Hotel with 80 bedrooms, function rooms, conference centre and leisure centre (with gym and swimming pool) and (3) a Nursing Home with 120 bedrooms (all en-suite).

The rationale for the Proposed Development is multi-faceted, including harnessing the very strong skills and educational attainment of Ratoath's residents and the need to arrest the very high outbound commuter rate, which leads to social and environmental costs as well as economics costs.

It is estimated that, without the Proposed Development, the number of jobs in Ratoath will grow to 1,050 in 2026, up from the 922 jobs in 2016. This uplift in employment will be due to general economic growth likely to prevail between now and then, notwithstanding international risks (Brexit, trade issues etc.). However, the higher the number of people working in Ratoath in 2026, in the absence of the Proposed Development, will be insufficient to address the highly imbalanced composition of employment in the town. It is projected that the ratio of jobs-to-population will remain extremely low at 10% (the same rate as observed in 2011 and 2016) and that the outbound commuter rate will be very/extremely high at 79% (the same as observed in 2011 and 2016).

On the other hand, the Proposed Development will likely lead to an *additional* 250 persons at work in Ratoath, *over-and-above* the 1,050 jobs due to general economic growth expected to obtain in any event. In turn, the estimated 958 persons living in Meath and working in the settlement (that element of employment of particular importance to Meath County Council) will lead to a significant reduction in the outbound commuter rate from 79% in the absence of the Proposed Development to 75%, and the jobs-to-population ratio will increase to 12%, which while still very low is nevertheless moving in the right direction (the latter estimate reflects the projected population for Ratoath in 2026 of 11,033 persons in the Draft CDP) (the projected new jobs estimated in this study are permanent, full-time jobs and do not include the temporary jobs that would also arise in the construction of the new buildings).

It is therefore recommended that the Council considers amending the zoning of the 9.8 hectares (24.3 acres) within the Subject Lands from E2 General Enterprise and Employment to C1 Mixed Use in order to incentivise MRC to develop that part of the Subject Lands to the benefit of residents of Ratoath and the wider community as well as Meath County Council.

Annex of Supplementary Information

Table A1: Population in Ratoath, Co. Meath and the State in 2006, 2011 and 2016

Location	Population					
	Census Year			% Change		
	2006	2011	2016	2006-2011	2011-2016	2006-2016
Ratoath	7,249	9,043	9,533	24.7%	5.4%	31.5%
Meath	162,823	184,135	195,044	13.1%	5.9%	19.8%
State	4,239,318	4,588,252	4,761,865	8.2%	3.8%	12.3%

Source: CSO Census data, PMCA Economic Consulting analysis.

Table A2: Old Age Dependency Ratio in Ratoath, Co. Meath and the State in 2006, 2011 and 2016

Location	Old Age Dependency Ratio					
	Census Year			% Change		
	2006	2011	2016	2006-2011	2011-2016	2006-2016
Ratoath	5.1%	5.5%	6.9%	8.5%	25.7%	36.3%
Meath	11.7%	13.5%	16.6%	15.3%	23.3%	42.2%
State	16.1%	17.4%	20.4%	8.2%	17.4%	27.1%

Source: CSO Census data, PMCA Economic Consulting analysis.

Note: The old age dependency ratio is the population aged 65 years or more divided by the population aged 15-64 years (normal working age).

Table A3: Youth Age Dependency Ratio in Ratoath, Co. Meath and the State in 2006, 2011 and 2016

Location	Youth Dependency Ratio					
	Census Year			% Change		
	2006	2011	2016	2006-2011	2011-2016	2006-2016
Ratoath	49.4%	52.8%	48.3%	6.8%	-8.6%	-2.4%
Meath	34.2%	38.3%	39.0%	12.1%	2.0%	14.3%
State	29.7%	31.9%	32.3%	7.2%	1.3%	8.6%

Source: CSO Census data, PMCA Economic Consulting analysis.

Note: The youth dependency ratio is the population aged 0-14 years divided by the population aged 15-64 years (normal working age).

Table A4: Population Aged 5 Years and Over by Time of Leaving Home to Travel to Work, School or College in Ratoath, Co. Meath and the State in 2016

Population Aged 5 Years and Over by Time Leaving Home to Travel to Work, School or College (2016)						
Time Leaving Home	Ratoath		Co. Meath		State	
	No.	%	No.	%	No.	%
Before 06:30	462	6.4%	11,165	8.7%	170,281	5.7%
06:30-07:00	621	8.6%	12,146	9.5%	210,930	7.1%
07:01-07:30	836	11.6%	13,435	10.5%	270,733	9.1%
07:31-08:00	932	12.9%	17,471	13.7%	440,220	14.9%
08:01-08:30	1,468	20.4%	23,820	18.7%	616,905	20.8%
08:31-09:00	1,535	21.3%	25,595	20.1%	648,295	21.9%
09:01-09:30	759	10.5%	11,499	9.0%	237,247	8.0%
After 09:30	412	5.7%	7,563	5.9%	215,199	7.3%
Not stated	184	2.6%	4,929	3.9%	152,740	5.2%
Total	7,209	100.0%	127,623	100.0%	2,962,550	100.0%
Leaving Home before 07.00am	1,083	15%	23,311	18%	381,211	13%

Source: CSO Census data, PMCA Economic Consulting analysis.

Table A5: Population Aged 5 Years and Over by Journey Time to Work, School or College in Ratoath, Co. Meath and the State in 2016

Population Aged 5 Years and Over by Journey Time to Work, School or College (2016)						
Journey Time	Ratoath		Co. Meath		State	
	No.	%	No.	%	No.	%
Under 15 mins	2,206	30.6%	39,464	30.9%	956,370	32.3%
1/4 hour - under 1/2 hour	1,882	26.1%	30,434	23.8%	853,885	28.8%
1/2 hour - under 3/4 hour	1,319	18.3%	21,010	16.5%	511,843	17.3%
3/4 hour - under 1 hour	587	8.1%	10,340	8.1%	174,254	5.9%
1 hour - under 1 1/2 hours	751	10.4%	13,886	10.9%	179,233	6.0%
1 1/2 hours and over	151	2.1%	4,775	3.7%	67,066	2.3%
Not stated	313	4.3%	7,714	6.0%	219,899	7.4%
Total	7,209	100.0%	127,623	100.0%	2,962,550	100.0%
Journey Time of 1 Hour or More	902	13%	18,661	15%	246,299	8%

Source: CSO Census data, PMCA Economic Consulting analysis.

Table A6: Population at Work or Unemployed in Ratoath, Co. Meath and the State in 2016

Persons at Work or Unemployed by Occupation (2016)						
Occupation	Ratoath		Co. Meath		State	
	No.	%	No.	%	No.	%
Managers Directors and Senior Officials	549	12.1%	8,003	8.6%	169,032	7.4%
Professional Occupations	821	18.1%	14,306	15.4%	393,608	17.3%
Associate Professional and Technical Occupations	732	16.2%	10,350	11.2%	248,413	10.9%
Administrative and Secretarial Occupations	628	13.9%	10,362	11.2%	228,032	10.0%
Skilled Trades Occupations	426	9.4%	14,161	15.3%	316,313	13.9%
Caring Leisure and Other Service Occupations	285	6.3%	7,003	7.6%	166,163	7.3%
Sales and Customer Service Occupations	305	6.7%	5,964	6.4%	155,030	6.8%
Process Plant and Machine Operatives	246	5.4%	7,366	7.9%	162,641	7.2%
Elementary Occupations	302	6.7%	7,857	8.5%	200,287	8.8%
Not stated	238	5.3%	7,318	7.9%	233,084	10.3%
Total	4,532	100.0%	92,690	100.0%	2,272,603	100.0%
Senior and Professional-Related Occupations	2,102	46%	32,659	35%	811,053	36%

Source: CSO Census data, PMCA Economic Consulting analysis.

Table A7: Population at Work by Industry in Ratoath, Co. Meath and the State in 2016

Persons at Work by Industry (2016)						
Industry	Ratoath		Co. Meath		State	
	No.	%	No.	%	No.	%
Agriculture forestry and fishing	23	0.5%	3,734	4.5%	89,116	4.4%
Building and construction	237	5.6%	6,147	7.4%	101,849	5.1%
Manufacturing industries	424	9.9%	9,568	11.5%	229,548	11.4%
Commerce and trade	1,205	28.2%	20,332	24.4%	480,117	23.9%
Transport and communications	641	15.0%	7,975	9.6%	171,194	8.5%
Public administration	298	7.0%	4,776	5.7%	106,797	5.3%
Professional services	887	20.8%	17,895	21.5%	471,656	23.5%
Other	552	12.9%	12,832	15.4%	356,364	17.8%
Total	4,267	100.0%	83,259	100.0%	2,006,641	100.0%
Persons Working in Commerce/Trade/Professional Services	2,092	49%	38,227	46%	951,773	47%

Source: CSO Census data, PMCA Economic Consulting analysis.

Table A8: Population at Work by Educational Attainment in Ratoath, Co. Meath and the State in 2016

Population Aged 15 Years and Over by Highest Level of Education Completed (2016)						
Education Level	Ratoath		Co. Meath		State	
	No.	%	No.	%	No.	%
No Formal Education	34	0.7%	1,672	1.4%	52,214	1.7%
Primary Education	264	5.1%	11,622	9.6%	334,284	10.8%
Lower Secondary	574	11.0%	18,264	15.0%	449,766	14.5%
Upper Secondary	1,069	20.5%	24,214	19.9%	573,643	18.5%
Technical or Vocational qualification	505	9.7%	11,844	9.8%	271,532	8.8%
Advanced Certificate/Completed Apprenticeship	370	7.1%	8,302	6.8%	182,318	5.9%
Higher Certificate	331	6.3%	6,768	5.6%	153,351	5.0%
Ordinary Bachelor Degree or National Diploma	532	10.2%	9,770	8.0%	237,117	7.7%
Honours Bachelor Degree Professional qualification or both	711	13.6%	12,136	10.0%	331,293	10.7%
Postgraduate Diploma or Degree	557	10.7%	9,444	7.8%	284,107	9.2%
Doctorate (PhD) or higher	37	0.7%	739	0.6%	28,759	0.9%
Not stated	236	4.5%	6,604	5.4%	198,668	6.4%
Total	5,220	100.0%	121,379	100.0%	3,097,052	100.0%
Population 15+ with Third-Level	1,837	35%	32,089	26%	881,276	28%

Source: CSO Census data, PMCA Economic Consulting analysis.

Note: Third-Level is the sum of (1) Ordinary Bachelor Degree or National Diploma, (2) Honours Bachelor Degree Professional Qualification or both, (3) Postgraduate Diploma or Degree and (4) Doctorate (PhD) or higher.

Table A9: Number of Households with a Personal Commuter in Ratoath, Co. Meath and the State in 2016

Number of Households with a Personal Computer (2016)						
Personal Computer	Ratoath		Co. Meath		State	
	No.	%	No.	%	No.	%
Yes	2,266	81.2%	46,164	72.3%	1,160,603	68.4%
No	460	16.5%	15,969	25.0%	478,487	28.2%
Not stated	64	2.3%	1,728	2.7%	58,575	3.5%
Total	2,790	100.0%	63,861	100.0%	1,697,665	100.0%

Source: CSO Census data, PMCA Economic Consulting analysis.

Table A10: Number of Households with Internet Access in Ratoath, Co. Meath and the State in 2016

Number of Households with Internet Access (2016)						
Internet Access	Ratoath		Co. Meath		State	
	No.	%	No.	%	No.	%
Broadband	2,478	88.8%	46,851	73.4%	1,200,067	70.7%
Other	103	3.7%	5,495	8.6%	131,676	7.8%
No	162	5.8%	10,022	15.7%	312,982	18.4%
Not stated	47	1.7%	1,493	2.3%	52,940	3.1%
Total	2,790	100.0%	63,861	100.0%	1,697,665	100.0%

Source: CSO Census data, PMCA Economic Consulting analysis.

Table A11: Details of the Permanent Employment Contribution of the Proposed New 4-Star Hotel on the MRC Lands in Ratoath by 2026

Fairyhouse Road Lands, Ratoath, Co. Meath				
Hotel Employment by Function	Full-Time	Part-Time	Total	
			Headcount	Total FTEs
Management	3	2	5	4
Reception/Night Porter/Administration	4	5	9	7
Sales & Marketing	1	1	2	2
Maintenance/Engineering	1	1	2	2
Kitchen	4	11	15	10
Bar	6	8	14	10
Restaurant	2	9	11	7
Café/Casual Dining	2	8	10	6
Housekeeping	1	15	16	9
Leisure Centre	1	6	7	4
Total Staff	25	66	91	58

Source: MRC and Joe Quinn, PMCA Economic Consulting analysis.

Note: Total headcount is given as the sum of both the full-time and the part-time employees; total FTEs are given as the full-time plus half the part-time employees.

Table A12: Details of the Permanent Employment Contribution of the Proposed New Nursing Home on the MRC Lands in Ratoath by 2026

Fairyhouse Road Lands, Ratoath, Co. Meath		
Nursing Home Employment by Staff Category	Hours/Week	FTEs
Chief Executive		1
Director of Nursing	40	1
Assistant DON	40	1
Clinical Nurse Manager	84	2
Registered Nurse	800	23
Carer	2,030	58
Activities Co-Ordinator	70	2
Chef	112	3
Household Supervisor	70	2
Kitchen Staff	280	8
Household Staff	280	8
Laundry Staff	70	2
Maintenance	105	3
Receptionist	40	1
Secretary	40	1
Administration	70	2
Total Staff Required		118

Source: Care Solutions, PMCA Economic Consulting analysis.

Note: FTEs are based on 35 hours per week per staff category.