



Meath County Council Commuter Survey



Nov '19

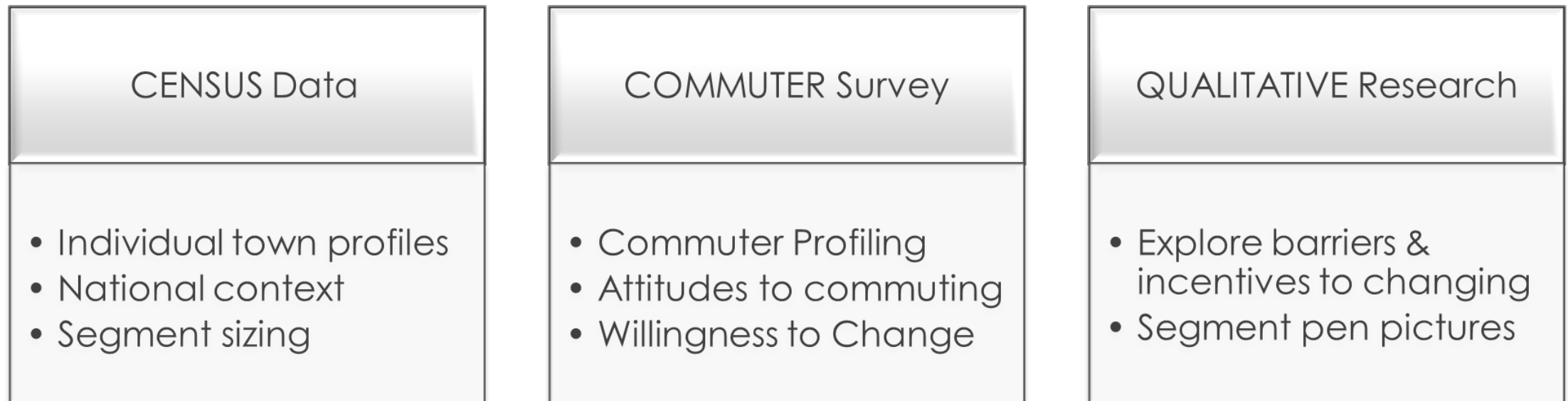
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A. Background

- Meath County Council are keen to develop initiatives to reverse the trend of outbound commuting from County Meath.
- Research was commissioned in three parts as follows:



- The project objectives, and specific objectives for each project part, are outlined in the following slides.

B. Overall Objectives

- The overall project objective is to reverse the trend of outbound commuting from County Meath through:
 - Greater insight of the skills base available within the county.
 - Develop a network of co-working spaces.
 - Attract investment into the county by employers.



- The research objectives were outlined as follows:
 1. Analyse commuter profiles and assess desire to live and work Meath
 2. Test attitudes to remote working/teleworking & perceptions of employers' willingness.
 3. Test the reaction to hubs and willingness/intentions to use them.
 4. Identify key segments willing to use hubs.

B. Objectives: Census Data

- Census data was examined so as to gather insights into the skills base available within the county.
 - The project team is most grateful to the CSO for permission and access to the POWSCAR (Place of Work School or College) data.
- The overall objective of the POWSCAR analysis was to build a comprehensive understanding of commuting profiles in Meath.
 - To chart the commuting patterns associated with towns and regions.
 - To assess the demographics of commuters in Meath.
 - To correlate commuting behaviours with other demographic factors (age, family structure, education etc.)
 - To pinpoint skills and talents bases across the county.



B. Objectives: Commuter Survey

- An online survey of commuters leaving the county for work was promoted widely online, through social media, on national and local print media, radio and via VMS signs on key commuter routes.
- The overall objective of the online survey was to assess attitudes to outbound commuting in Meath:
 - Expand on POWSCAR mobility data.
 - Detailed profiles of occupation and skills.
 - Measure attitudes and satisfaction with commuting.
 - Explore attitudes to remote working, including hubs.
 - Identify key segments willing to use hubs.
 - Quantify the segments in the county by weighting the data using POWSCAR weights.
- In order to correlate variables, and to allow accurate market sizing, the commuter survey included a range of census mobility questions.



B. Objectives: Qualitative Focus Groups

- Four focus groups discussed in-depth commuting, work/life balance, attitudes to remote working & reaction to hub specifics.
- The primary objective from the qualitative research was to sense check & grow understanding of the segments identified.
 - Explore contexts of travel, residence & workplace decision-making.
 - Expand on drawbacks and benefits to working within the county.
 - Devise Segment pen pictures and key hooks/barriers



C. Methodology

- The Commuter Survey was promoted widely on social media, in local and national press, and on radio under the slogan “Shape your next Journey”.
- A prize draw with 5 x €50 All for One vouchers was organised within each county with winners selected at random each week.
- Survey participants were asked if they wished to be contacted for further research on the topic, and the focus groups were recruited from this sample.
- POWSCAR analysis was conducted by Interactions in-house with the kind permission of the Central Statistics Office



The poster features a light blue background with a dark blue header. The title 'County Meath Commuter Survey' is in large, bold, dark blue font. Below it, a dark blue banner contains the slogan 'Shape your next journey' in white. To the right, the Meath County Council logo is displayed, including the text 'comhairle chontae na mí' and 'meath county council', and the tagline 'meath Europe's Business Ready Region'. A central list of benefits is presented with orange bullet points. A prominent orange seal on the right side of the poster contains the text 'Take part to win one of five €50 vouchers'. The lower half of the poster shows an illustration of a bus stop with three people waiting: a man in a suit reading a newspaper, a man in a white shirt with a red bag, and a woman in a red top reading a book. A blue bus is partially visible on the left. At the bottom, a dark blue banner contains the text 'We want to hear from you!' and the website 'www.meath.ie/commutersurvey'.

County Meath Commuter Survey

Shape your next journey

comhairle chontae na mí
meath county council

meath
Europe's Business Ready Region

Meath County Council are developing co-working spaces in your county that can:

- Create job opportunities in Meath
- Reduce travel time for commuters
- Contribute to carbon reduction
- Facilitate a better work/life balance

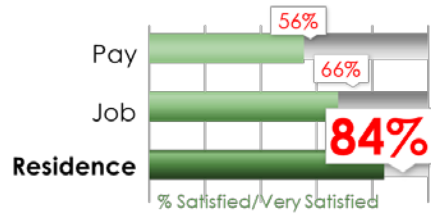
Take part to win one of five €50 vouchers

We want to hear from you!

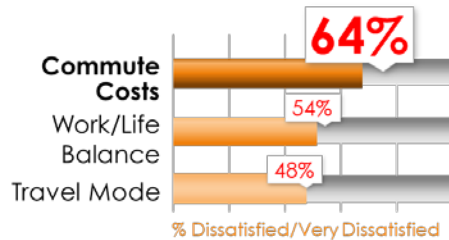
Take part at: www.meath.ie/commutersurvey

D. Snap Summary: Top 5 Findings in Meath

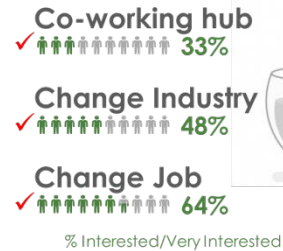
Satisfaction



Dissatisfaction



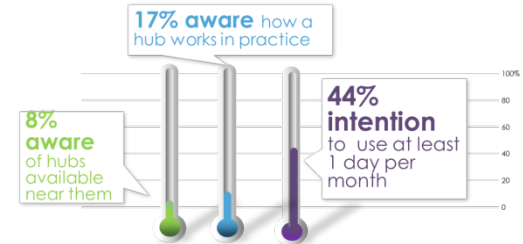
Interest



Current Remote Working



Hub Attitudes



1. Commuters are **largely satisfied** with where they work & live.

2. But many are **dissatisfied with travel** between home & work.

3. High desire registered to work **closer to home**.

3. Two in five (39%) are **already working from home** either occasionally or regularly.

5. Despite interest in hubs, **awareness is low**.

Significant public education will be required to bring hubs mainstream.

D. MEATH KEY FINDINGS

59% of commuters travel outside the county to work, with 4 in 5 (80%) travelling by car, and 13% by train or bus.

Only 1 in 3 (34%) commuters outside the county is satisfied with their mode of travel.

62% of those commuting outside have third level qualifications compared with 43% of those commuting inside the county.

39% currently work from home occasionally with a higher incidence in banking and tourism & hospitality.

1. While Navan has the largest number of worker residents, **Ratoath/Ashbourne** has the highest number commuting outside of the county to work at 74%, compared with 59% for all Meath.
 - Ratoath/Ashbourne residents are significantly more satisfied with residence area, travel mode, work/life balance and commuting costs.
 - Only 58% of Ratoath/Ashbourne commuters are interested in changing jobs to work closer to home – this is significantly lower than the whole sample for Meath (64%).
2. Similarly, **Dunshaughlin** residents are more satisfied with their current job, work/life balance and commuting costs.
 - 59% are interested in changing jobs to work closer to home
3. On the other hand, **Trim, Navan** and **Kells** residents tend to be significantly less satisfied (1 in 3) with work life balance (36%).
 - Trim (68%), Navan (68%) and Kells (64%) are interested in changing jobs to work closer to home.
4. **Navan** residents are also significantly less satisfied than the whole sample with:
 - residence area (81%)
 - travel mode (28%)
 - work-life balance (24%)
 - commuting costs (12%).
 - Those leaving Navan tend to spend significantly longer travelling versus people travelling out of other towns in the county.



1. Census Data: POWSCAR 2016



MEATH COUNTY Workers and Commuters

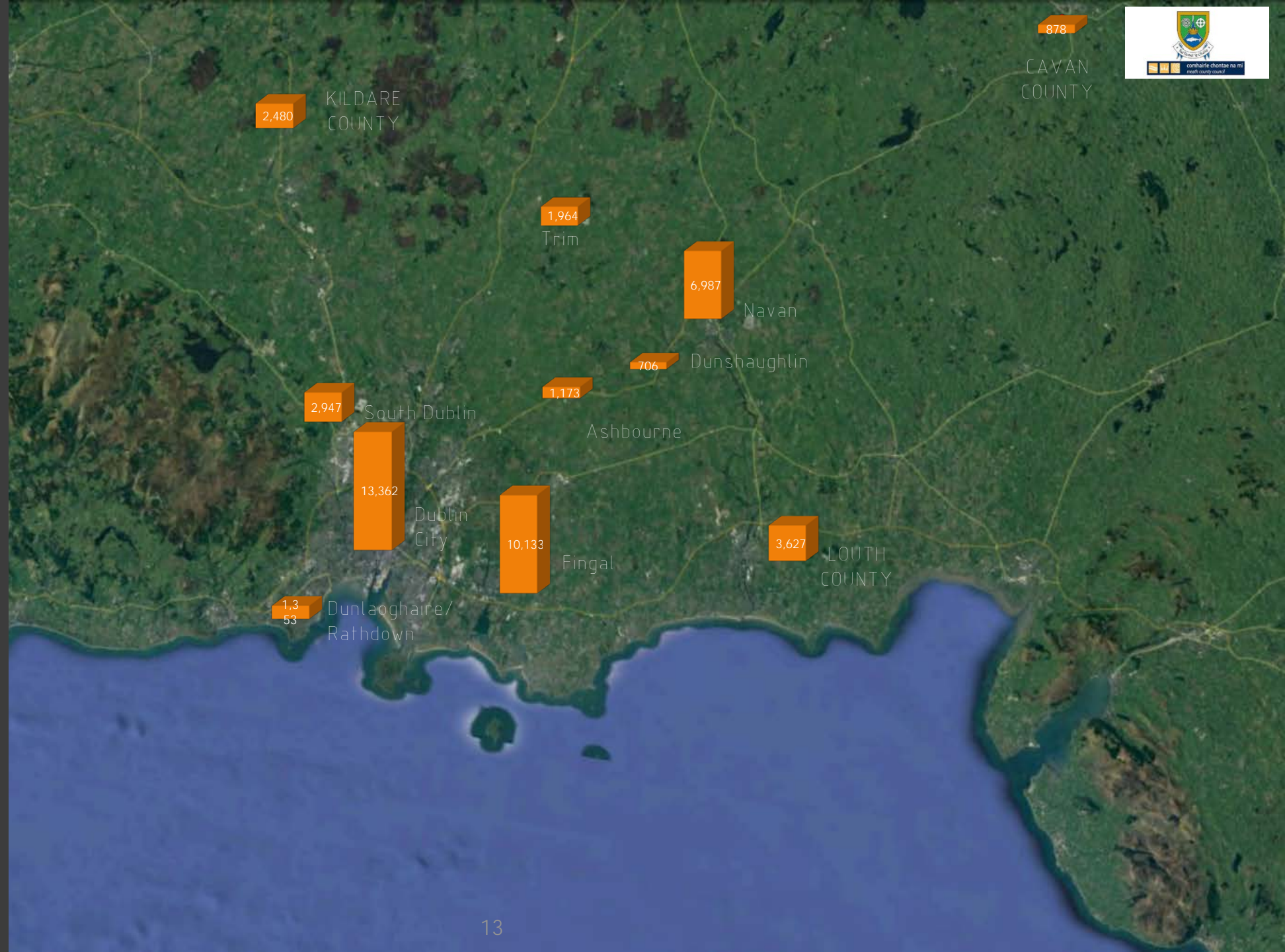
| TOWN | ALL WORKERS | COMMUTING WITHIN MEATH | COMMUTING OUTSIDE MEATH |
|----------------------|---------------|------------------------|-------------------------|
| COUNTY MEATH | 82,607 | 25,377 | 36,460 |
| • Navan | 12,849 | 5,989 | 3,867 |
| • Ratoath/Ashbourne | 10,404 | 2,080 | 6,012 |
| • Laytown/Bettystown | 4,712 | 596 | 2,996 |
| • Trim | 4,174 | 1,764 | 1,412 |
| • Dunshaughlin | 2,621 | 613 | 1,380 |
| • Kells | 2,555 | 1,320 | 627 |
| • Enfield | 1,423 | 200 | 916 |

- ❖ *The total working population in County Meath is 82,607.*
- ❖ *25,377 workers travel to work within the county and 36,460 commute to work outside the county. Those working from home, outside the country, and without a fixed place of work are excluded.*
- ❖ *Navan has the largest number of worker residents, and Ratoath/Ashbourne has the highest number commuting outside of the county to work.*

MEATH COUNTY COMMUTER FLOWS

Dublin City registered the highest number of commuters out of County Meath at 13,362 while 10,133 Meath residents travel to Fingal for work.

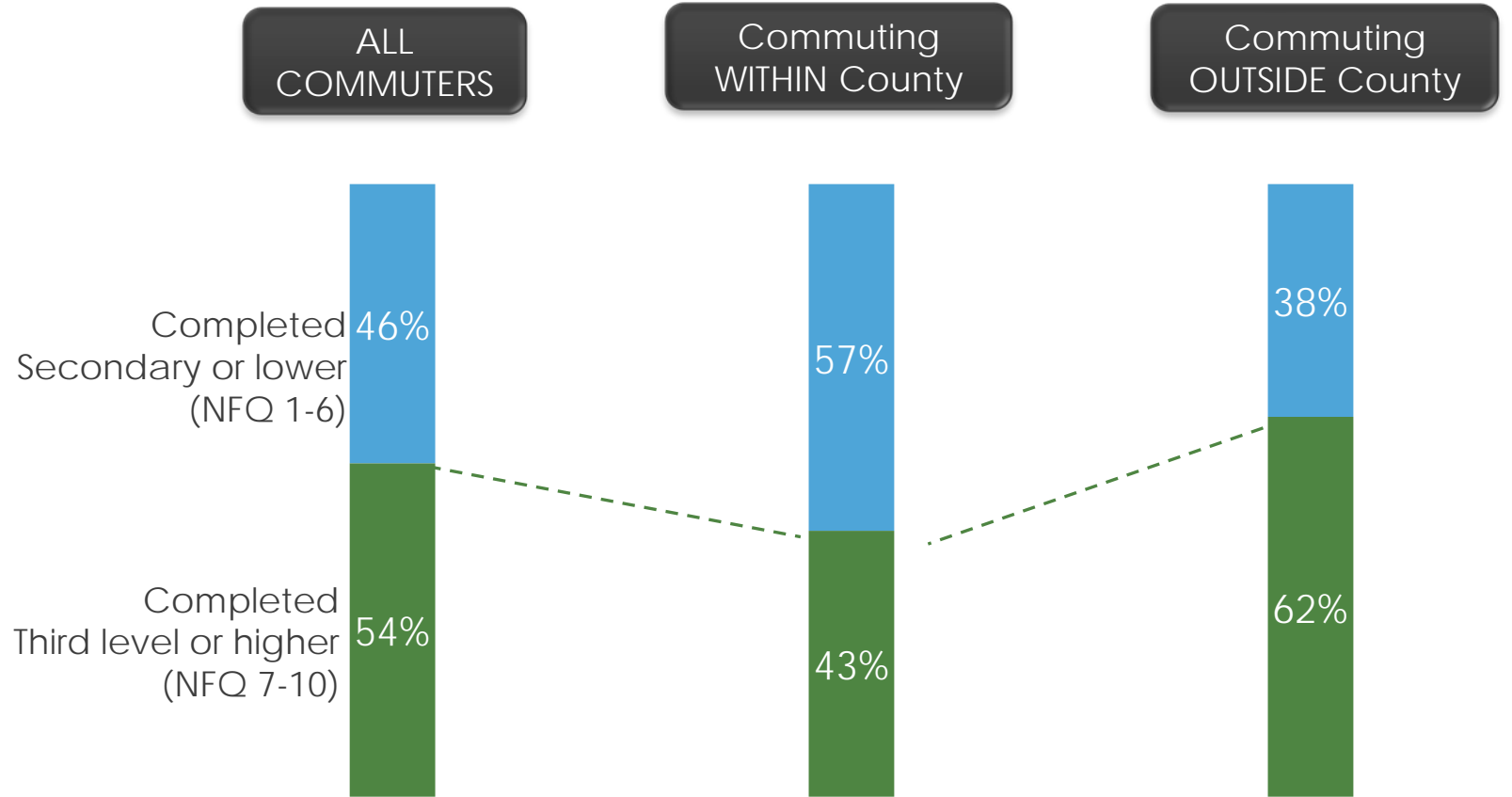
Within the county, Navan is the most commuted to destination for work (n = 6,987), followed by Trim (n = 1,964).



MEATH COUNTY EDUCATION LEVELS



- Those who are educated to third level tend to travel further for work.

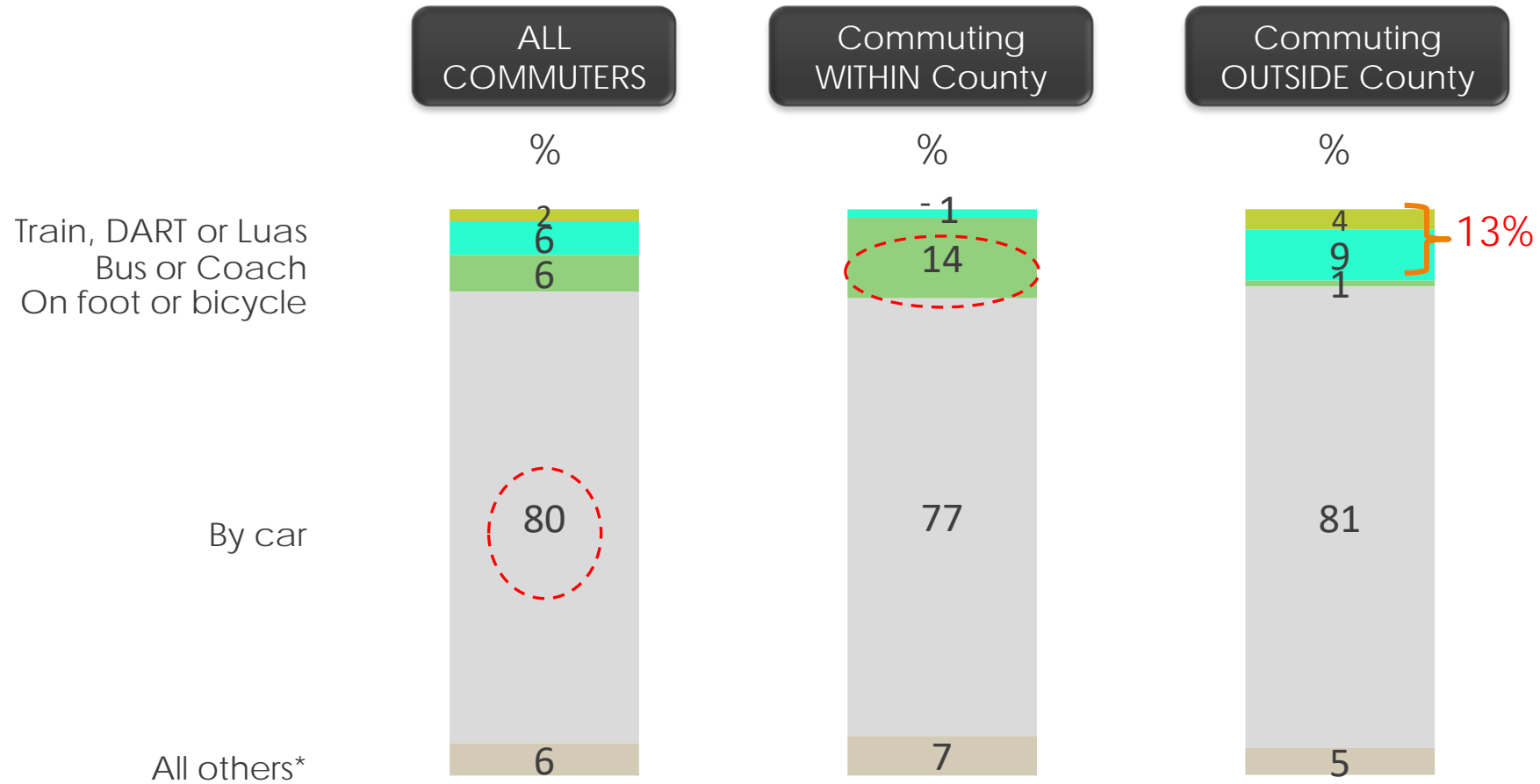


MEATH COUNTY

Transport Modal Split



- 4 in 5 (80%) commuters in County Meath travel to work by car.
- 13% of commuters out of the county travel by train or bus.
- Unsurprisingly, walking & cycling tend to be within county journeys at 14% of travel mode.



*Others includes motorbike, scooter, van, & lorry



MEATH COUNTY JOURNEY TIMES

- Half of all commutes in Meath take under half an hour.
- However 2 in 3 commutes outside the county take longer.

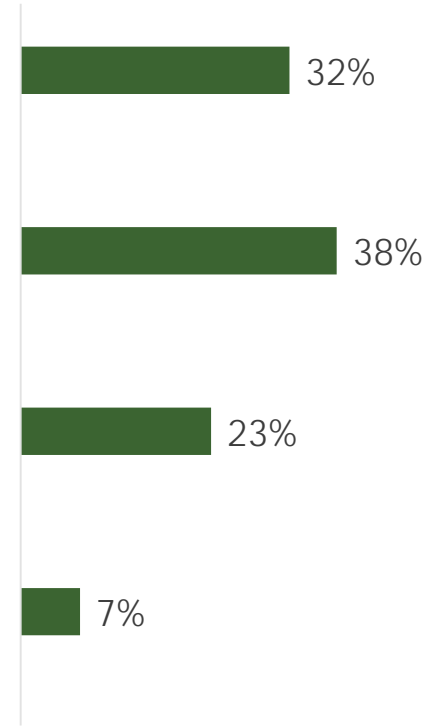
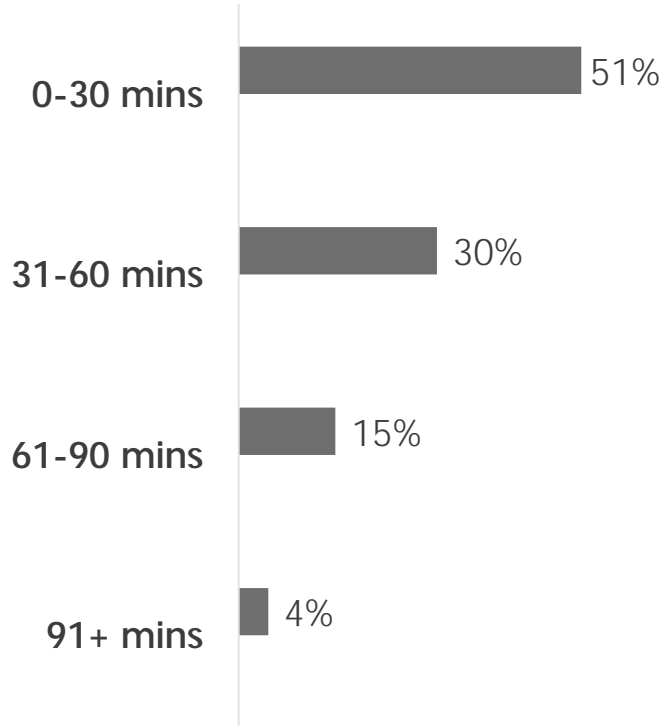
JOURNEY DEPARTURE TIMES

| ALL MEATH | |
|-------------|-----|
| Before 6:30 | 14% |
| 6:30-7:00 | 14% |
| 7:01-7:30 | 14% |
| 7:31-8:00 | 16% |
| 8:01-8:30 | 16% |
| 8:31-9:00 | 12% |
| 9:01-9:30 | 5% |
| After 9:30 | 9% |

ALL Journeys

Commuting OUTSIDE County

Journey Time ↓



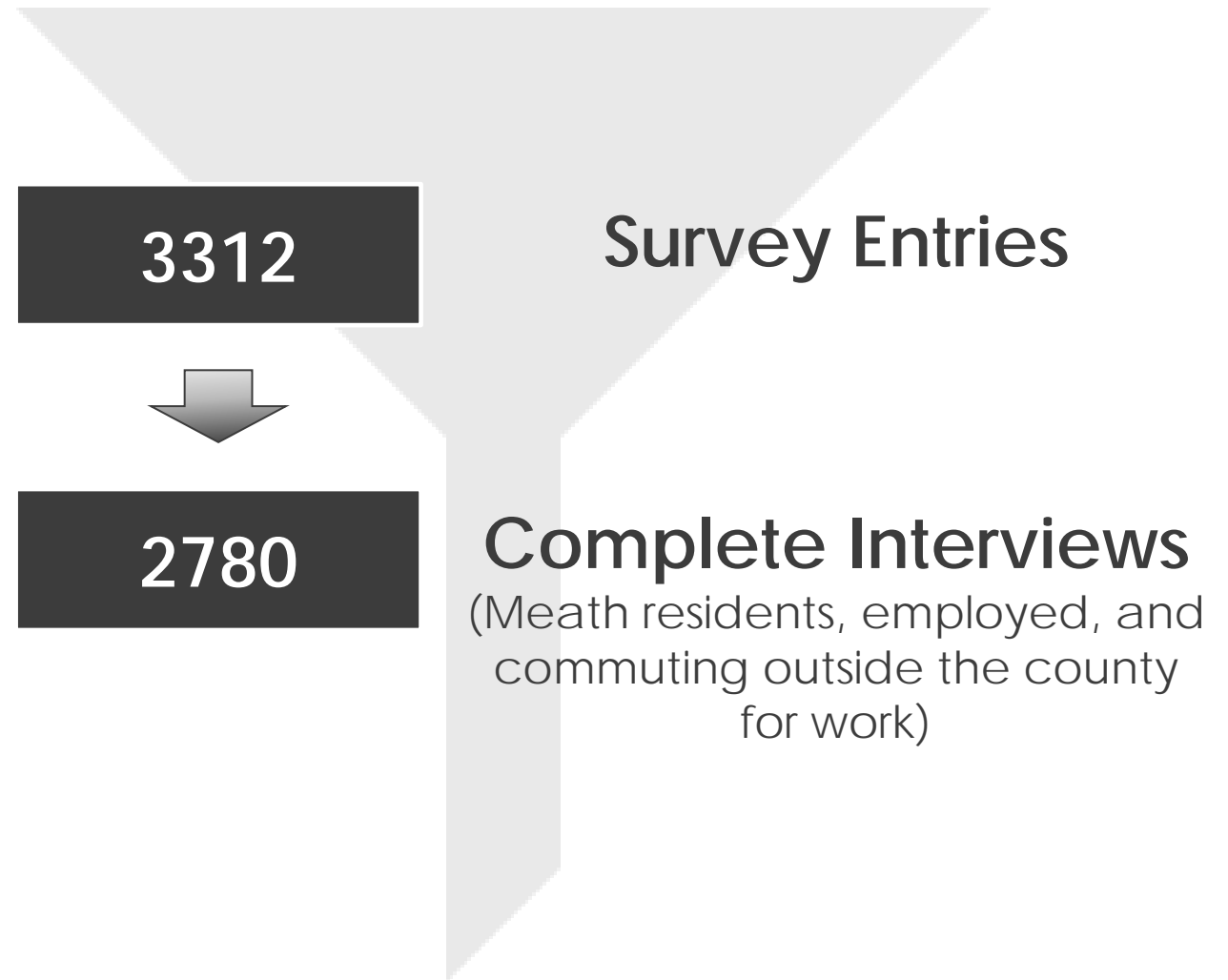


2. MEATH COUNTY COMMUTER SURVEY



MEATH COUNTY COMMUTER SURVEY

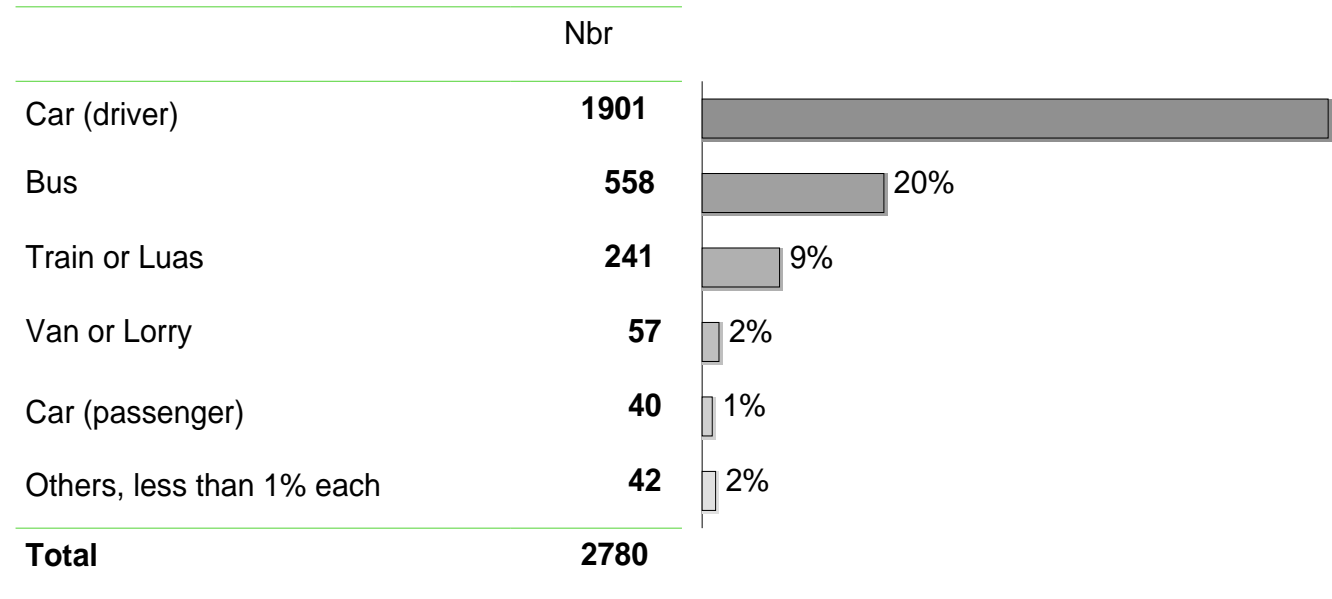
- 3,312 individual respondents entered the survey
- resulting in 2,780 completed interviews with the key target – in employment outside the county.



MEATH COUNTY COMMUTER SURVEY

- Travellers by train and bus were over-represented in the survey versus the POWSCAR data.

Travel Mode



Census 2016:

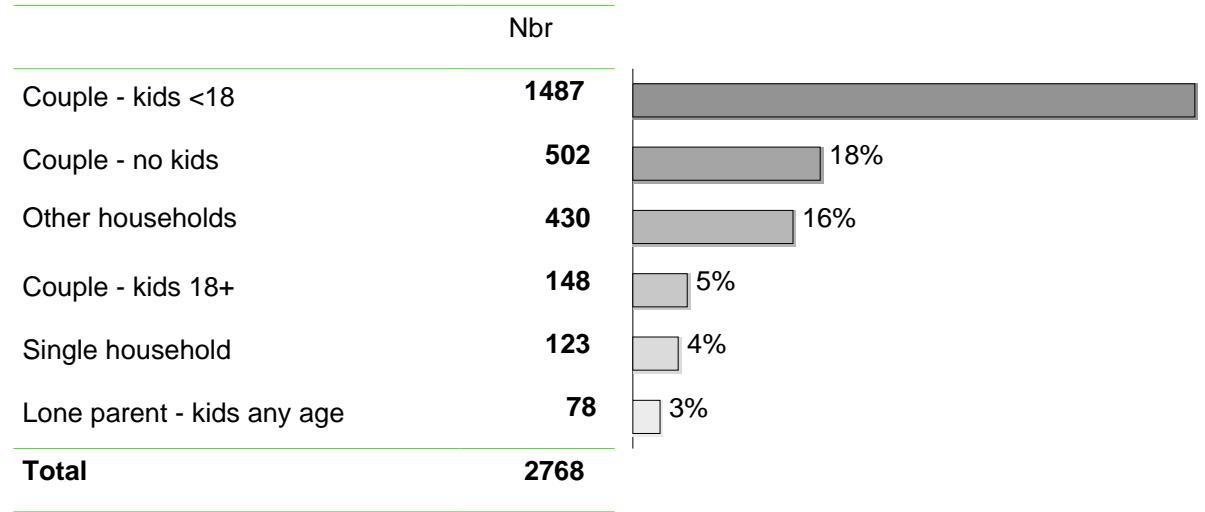
78%
9%
4%
4%
3%
1%



MEATH COUNTY COMMUTER SURVEY

- Household profile fell out broadly in line with Census 2016.

Household Profiles



Census 2016

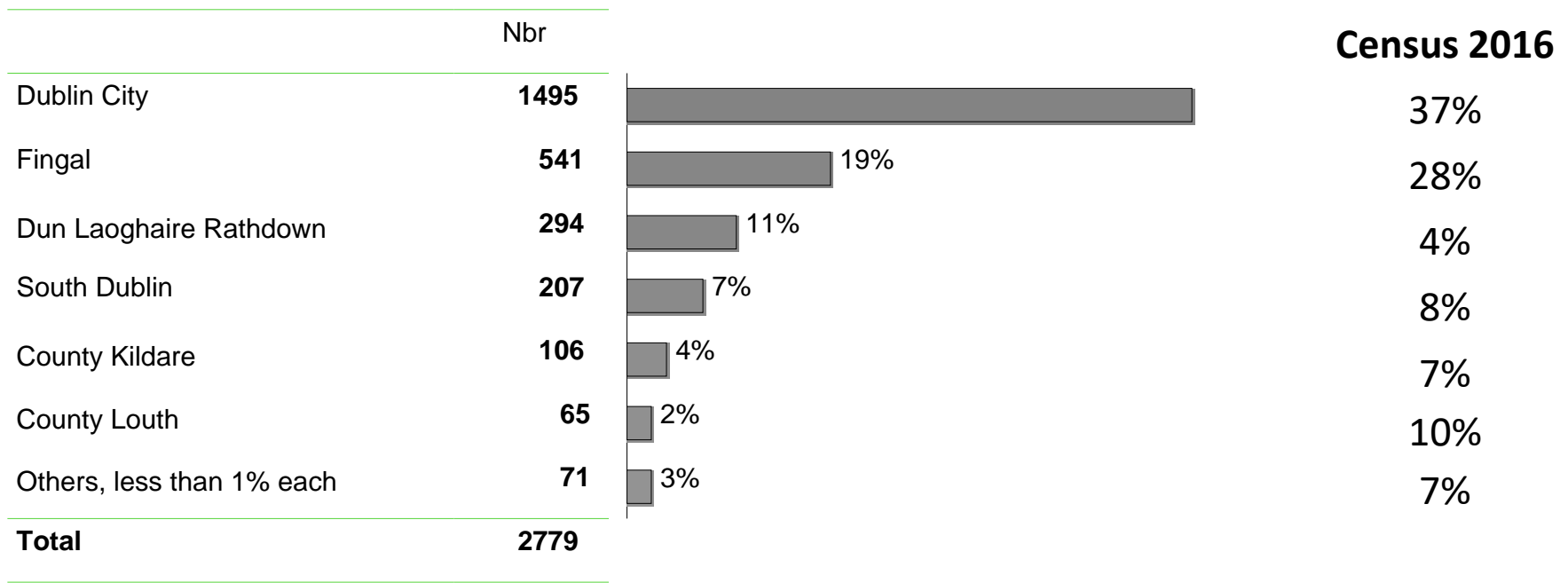
- 56%
- 15%
- 6%
- 11%
- 6%
- 7%



MEATH COUNTY COMMUTER SURVEY

- The vast majority of responses came from those working in Dublin.

Area of Work



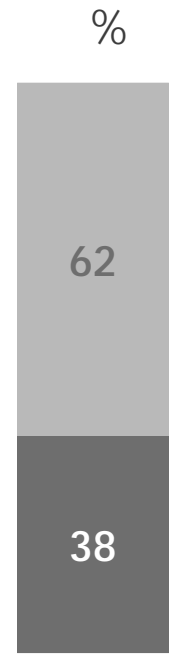
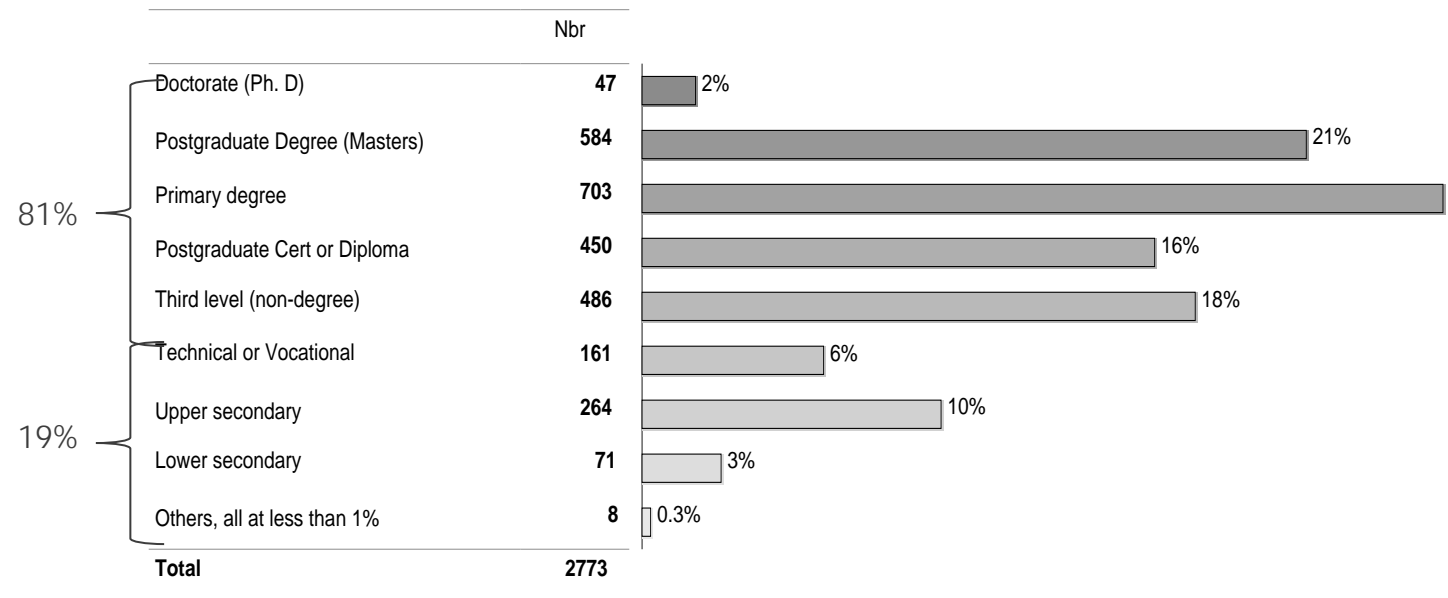
MEATH COUNTY COMMUTER SURVEY

- Survey respondents were very highly educated.

Education Levels



Census 2016





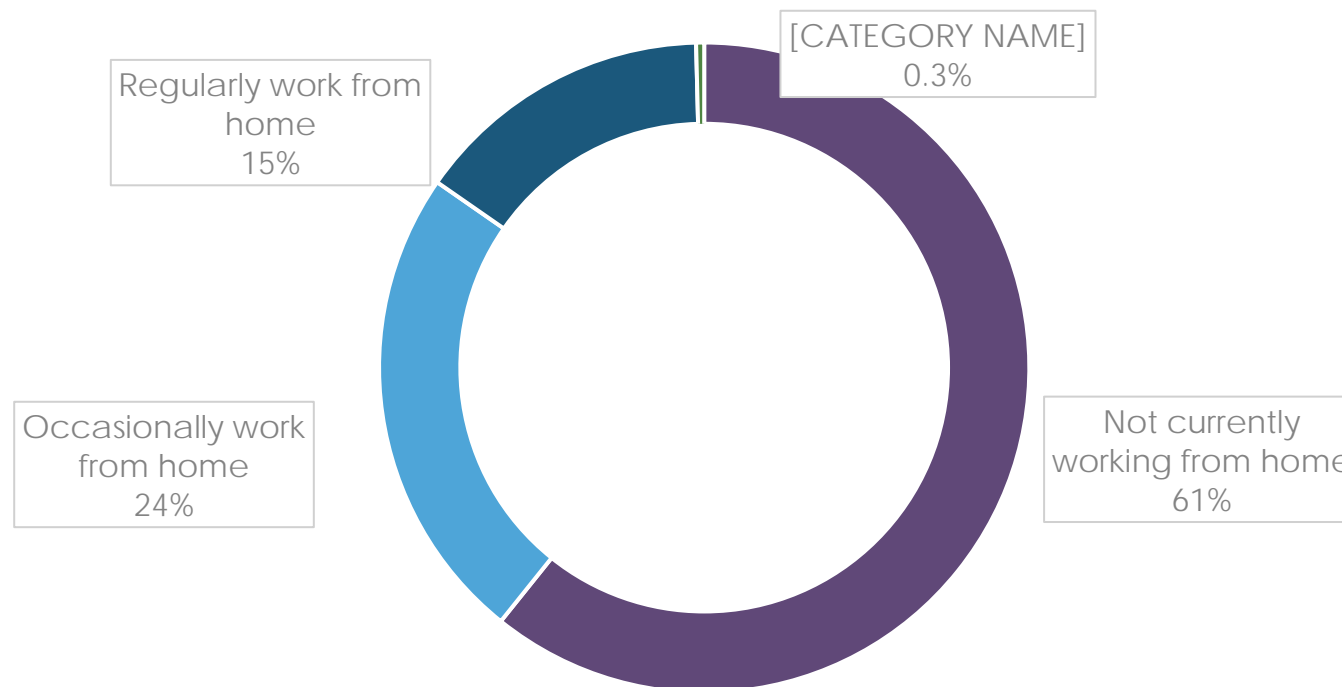
2.1 Commuter Survey

Skills Base & Remote Working

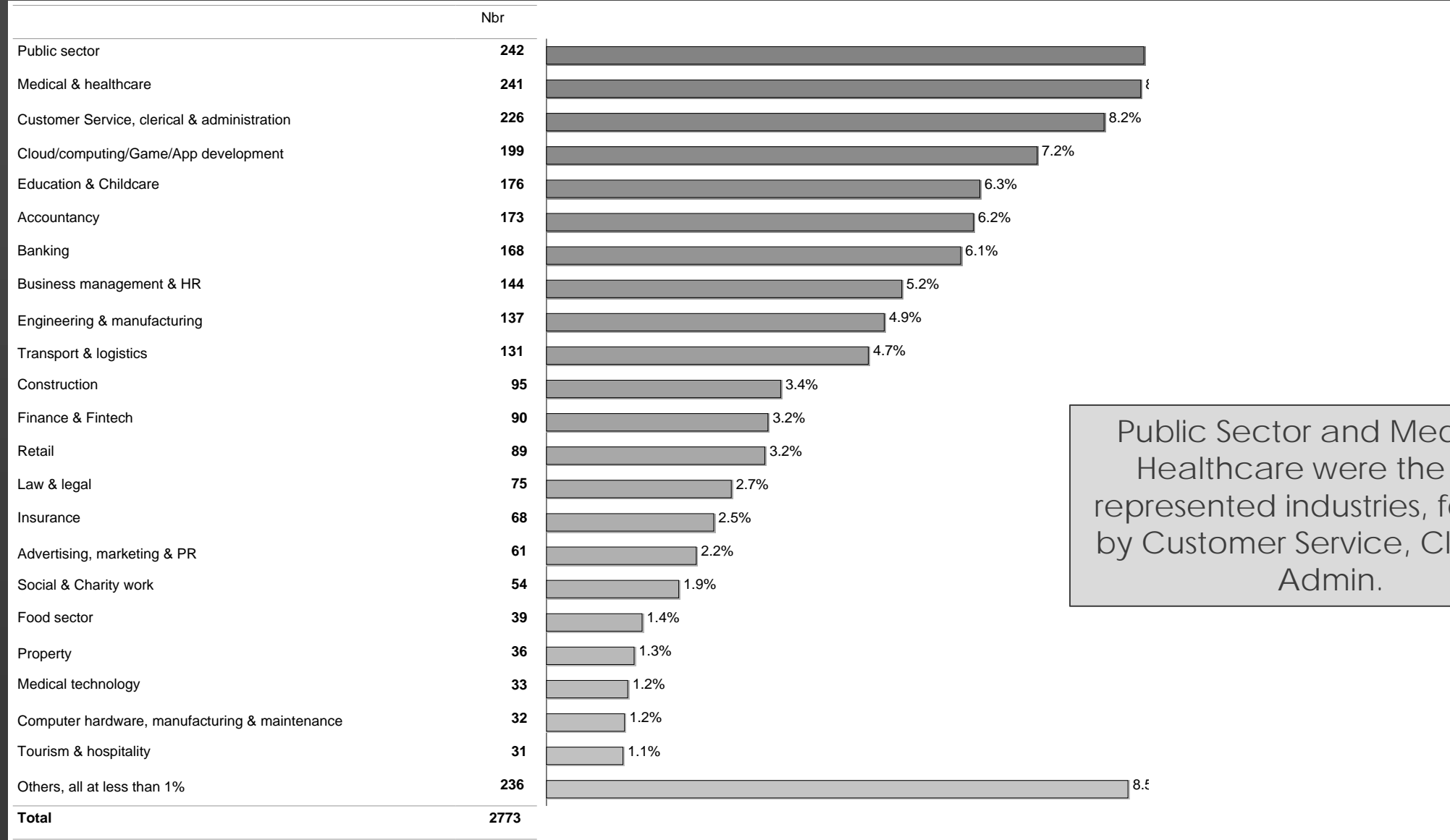
MEATH COUNTY REMOTE WORKING

2 in 5 respondents currently work from home either occasionally or regularly.

Use of co-working hubs is very niche at present within the county.



- Not currently working from home
- Occasionally work from home
- Regularly work from home
- Co-working hub



Public Sector and Medical & Healthcare were the most represented industries, followed by Customer Service, Clerical & Admin.

Table 2.2 Incidence of Remote Working X Employment Area

| | Not currently working remotely | Occasionally work from home | Regularly work from home | Co-working hub |
|--|--------------------------------|-----------------------------|--------------------------|----------------|
| Public sector | 79% | 14% | 7% | 0% |
| Medical & healthcare | 83% | 10% | 8% | 0% |
| All others, less than 1% | 56% | 26% | 18% | 0.8% |
| Customer Service, clerical & administration | 82% | 12% | 6% | 0.4% |
| Cloud/computing/Game/App development | 25% | 46% | 29% | 0% |
| Accountancy | 44% | 29% | 26% | 1% |
| Education & Childcare | 80% | 13% | 6% | 0% |
| Banking | 45% | 33% | 21% | 2% |
| Business management & HR | 42% | 33% | 24% | 0% |
| Engineering & manufacturing | 64% | 28% | 8% | 0% |
| Transport & logistics | 70% | 20% | 10% | 0% |
| Construction | 77% | 16% | 6% | 1% |
| Finance & Fintech | 24% | 43% | 32% | 0% |
| Retail | 80% | 13% | 7% | 1% |
| Law & legal | 65% | 24% | 11% | 0% |
| Insurance | 46% | 35% | 18% | 1% |
| Advertising, marketing & PR | 38% | 39% | 23% | 0% |
| Social & Charity work | 69% | 26% | 6% | 0% |
| Food sector | 67% | 23% | 10% | 0% |
| Property | 53% | 31% | 17% | 0% |
| Computer hardware, manufacturing & maintenance | 56% | 19% | 25% | 0% |
| Medical technology | 38% | 41% | 22% | 0% |
| Tourism & hospitality | 58% | 26% | 13% | 3% |
| Total | 61% | 24% | 15% | 0.4% |

Remote working varies widely by industry with a higher incidence in banking and tourism & hospitality.

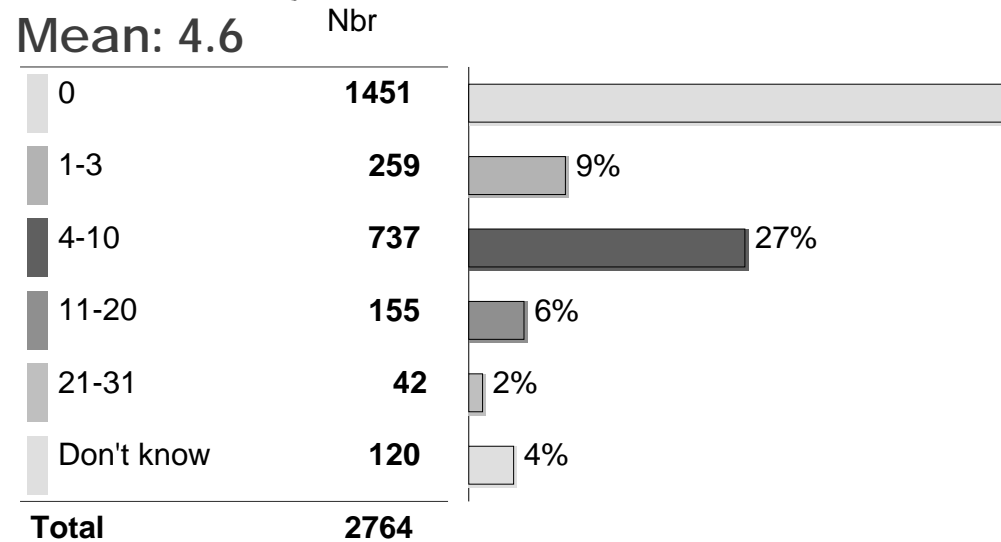


MEATH COUNTY REMOTE WORKING

At present, just under half say they would use a hub if it was available.

Of those who would use a hub, the average expected use was about 1 day per week.

Q. If available, how many days per month would you use a co-working hub?





2.2 Commuter Survey

(1) SATISFACTION LEVELS

(11) ATTITUDES TO FLEXIBLE WORKING

MEATH COUNTY SATISFACTION LEVELS

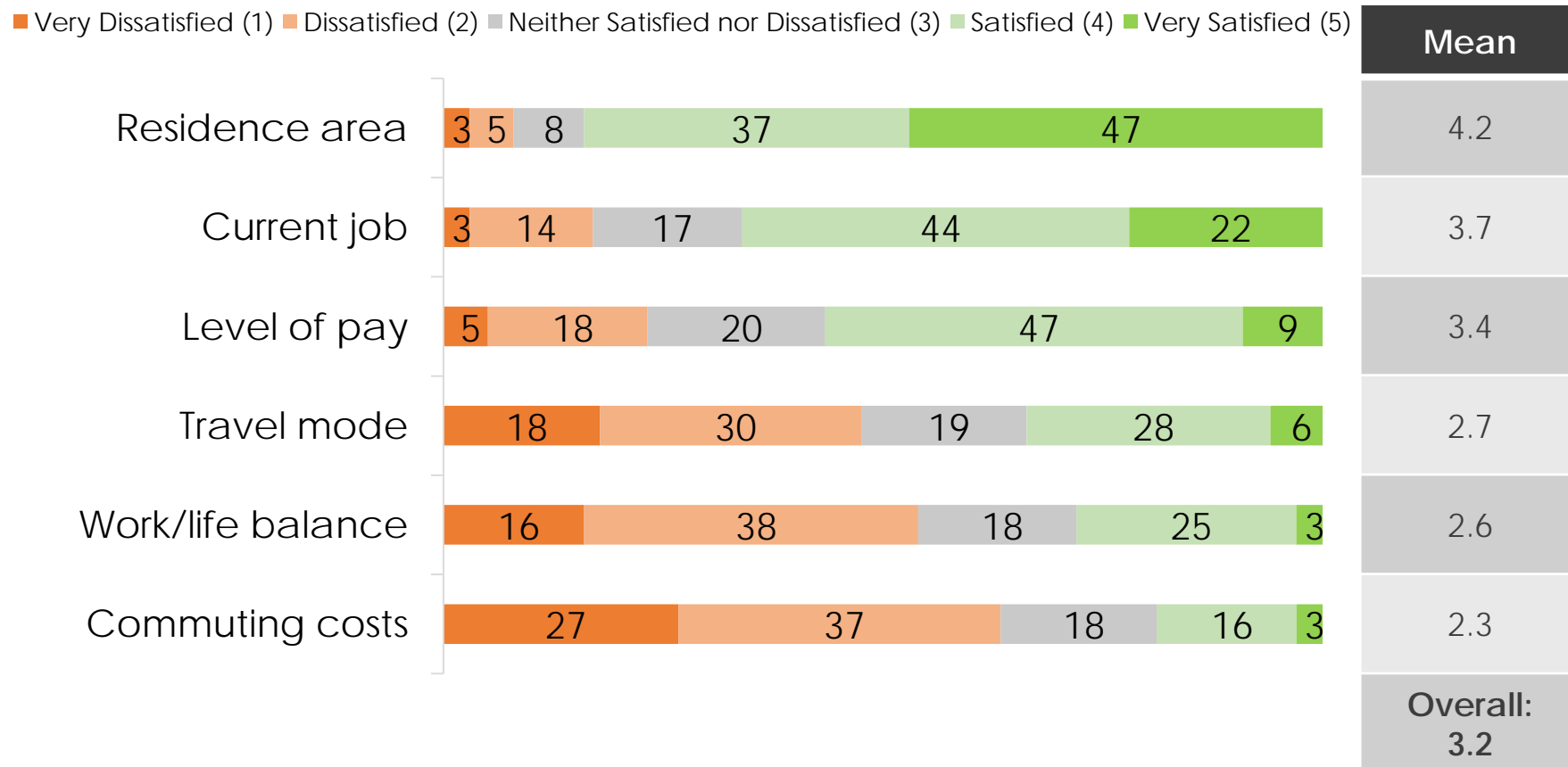
- Ratoath, Trim and Athboy residents registered highest satisfaction with where they live.
- Travel Mode attracted higher ratings in Ashbourne and Drogheda.
- Ashbourne and Dunshaughlin are most satisfied with their work/life balance.
- Ratoath, Dunshaughlin and Enfield registered the highest satisfaction with commuting costs.
- Navan residents registered lower satisfaction with their residence area and travel mode.
- Kells registered lowest satisfaction with the costs of their commute.

Satisfaction X Town

| | Residence area | Current job | Level of pay | Travel mode | Work/life balance | Commuting costs |
|--|----------------|-------------|--------------|-------------|-------------------|-----------------|
| Trim | 4.3 | 3.6 | 3.3 | 2.6 | 2.4 | 2.2 |
| Ratoath/Ashbourne | 4.3 | 3.7 | 3.4 | 2.9 | 2.8 | 2.5 |
| Kells (Ceannanus Mór) | 4.2 | 3.6 | 3.2 | 2.6 | 2.3 | 1.9 |
| Drogheda | 4.2 | 3.6 | 3.4 | 3.0 | 2.7 | 2.3 |
| Laytown - Bettystown - Mornington - Donacarney | 4.2 | 3.6 | 3.5 | 2.7 | 2.5 | 2.2 |
| Dunshaughlin | 4.2 | 3.9 | 3.5 | 2.7 | 2.9 | 2.5 |
| Enfield | 4.1 | 3.8 | 3.4 | 2.9 | 2.7 | 2.6 |
| Navan (An Uaimh) | 4.1 | 3.6 | 3.4 | 2.6 | 2.5 | 2.1 |

MEATH COUNTY SATISFACTION LEVELS

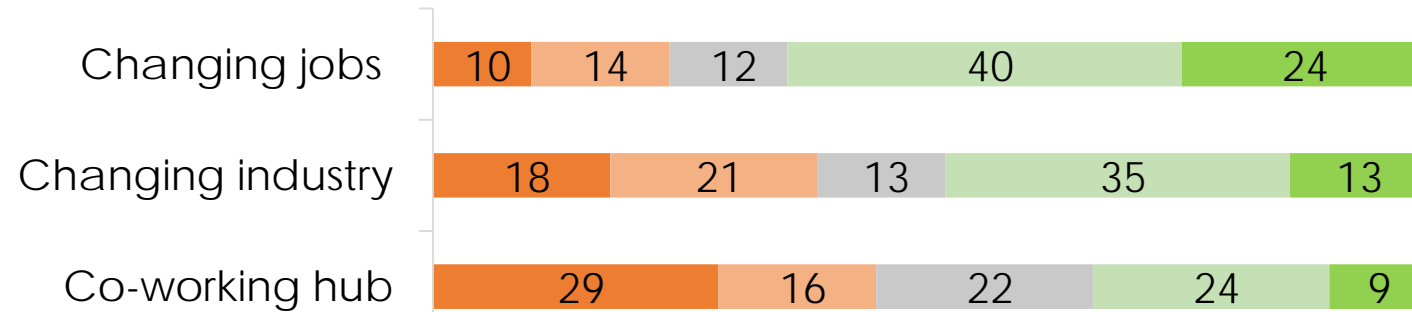
- Over 4 in 5 (84%) of Meath commuters are satisfied/very satisfied with where they live.
- Over 2 in 3 (66%) are satisfied or very satisfied with their current job.
- Only 1 in 3 commuters outside the county is satisfied with their mode of travel however.



MEATH COUNTY ATTITUDES TO FLEXIBLE WORKING SOLUTIONS

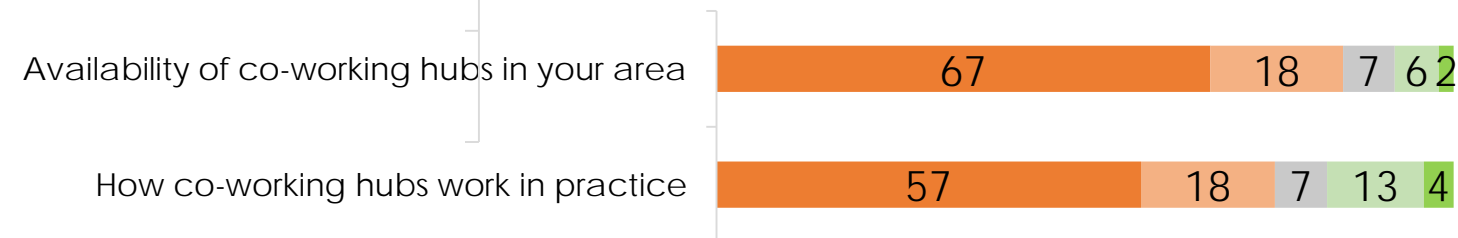
INTEREST IN WORKING CLOSER TO HOME:

■ Not at all interested
 ■ Not very interested
 ■ Neither/nor
 ■ Somewhat interested
 ■ Very interested



| Mean |
|------------------------|
| 3.5 |
| 3.0 |
| 2.7 |
| Overall: 3.1 |

AWARENESS OF HUBS



| Mean |
|------------------------|
| 1.9 |
| 1.6 |
| Overall: 1.7 |



- Highest interest in changing jobs to work closer to home (64% somewhat or very interested).

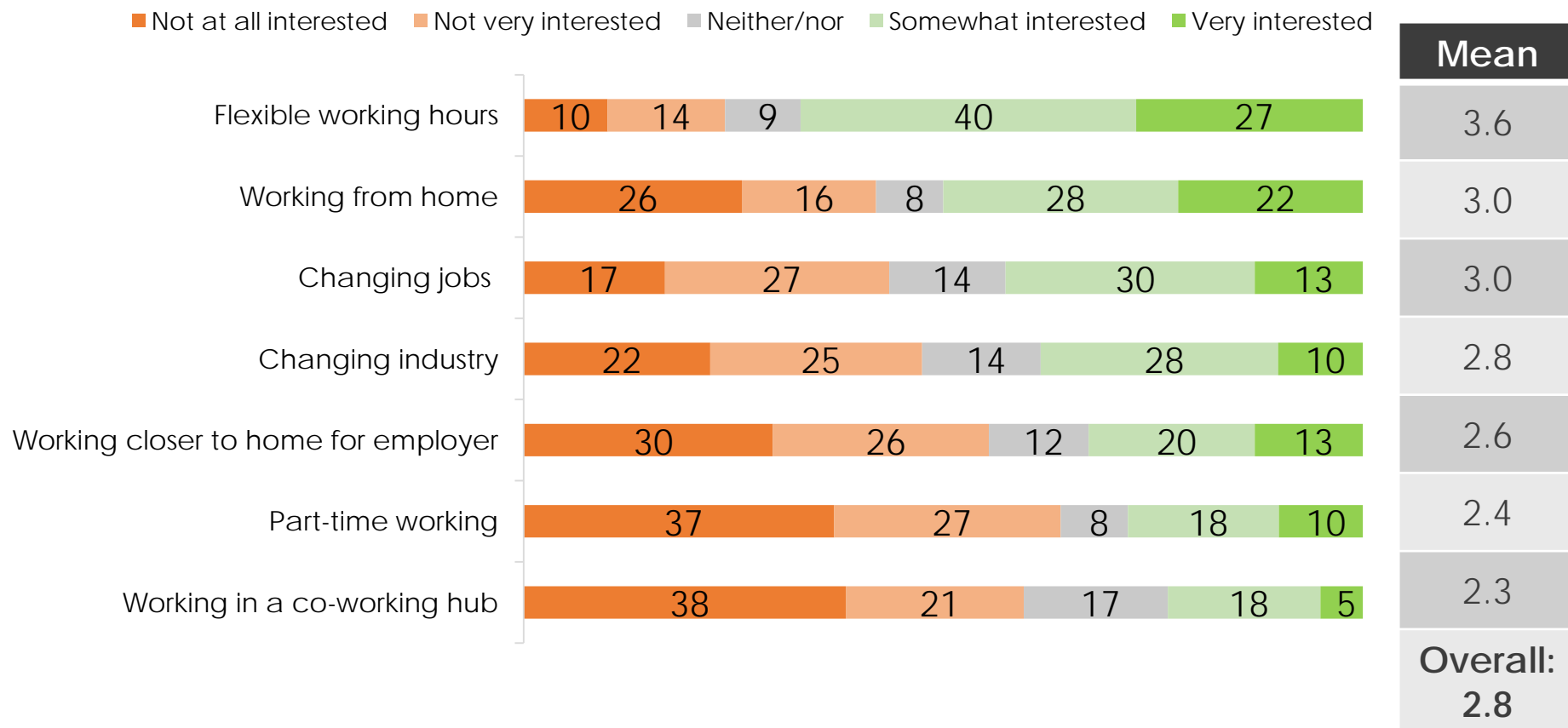
- However, almost half (48%) said they were interested in working closer to home in a different industry.

- Only 1 in 5 (19%) felt they were somewhat or very familiar with how hubs work.

MEATH COUNTY ATTITUDES TO FLEXIBLE WORKING SOLUTIONS

- Highest FEASIBILITY (67%) in flexible working hours followed by working from home (50%).
- 2 in 5 (43%) said that changing jobs to work closer to home was feasible while working closer to home in a different industry was feasible for 38%.
- Working closer to home for current employer was feasible for 1 in 3 (33%) and part time working for 28%.
- 1 in 4 (23%) felt that working in a co-working hub was feasible.

FEASIBILITY:



MEATH COUNTY ATTITUDES TO FLEXIBLE WORKING SOLUTIONS

FEASIBILITY x TOWN: Table of Means

- Working closer to home in different job or industry is least feasible in Dunshaughlin and Ratoath/Ashbourne and most feasible in Navan.
- There were no other significant differences between the towns.

| | Ratoath/Ashbourne | Dunshaughlin | Enfield | Kells (Ceannanus Mór) | Laytown - Bettystown - Mornington - Donacorney | Navan (An Uaimh) | Trim |
|--|-------------------|--------------|---------|-----------------------|--|------------------|------|
| Working in a co-working hub | 2.4 | 2.4 | 2.2 | 2.3 | 2.4 | 2.3 | 2.4 |
| Flexible working hours | 3.6 | 3.7 | 3.6 | 3.5 | 3.7 | 3.6 | 3.7 |
| Part-time working | 2.4 | 2.4 | 2.4 | 2.3 | 2.4 | 2.3 | 2.5 |
| Working from home | 3.0 | 3.2 | 3.0 | 2.8 | 3.2 | 3.0 | 3.1 |
| Changing jobs to work closer to home | 2.8 | 2.8 | 2.9 | 3.0 | 2.9 | 3.1 | 3.0 |
| Working closer to home in a different industry | 2.7 | 2.6 | 2.7 | 3.0 | 2.7 | 2.9 | 2.8 |
| Working closer to home for your current employer | 2.5 | 2.6 | 2.6 | 2.7 | 2.5 | 2.7 | 2.5 |

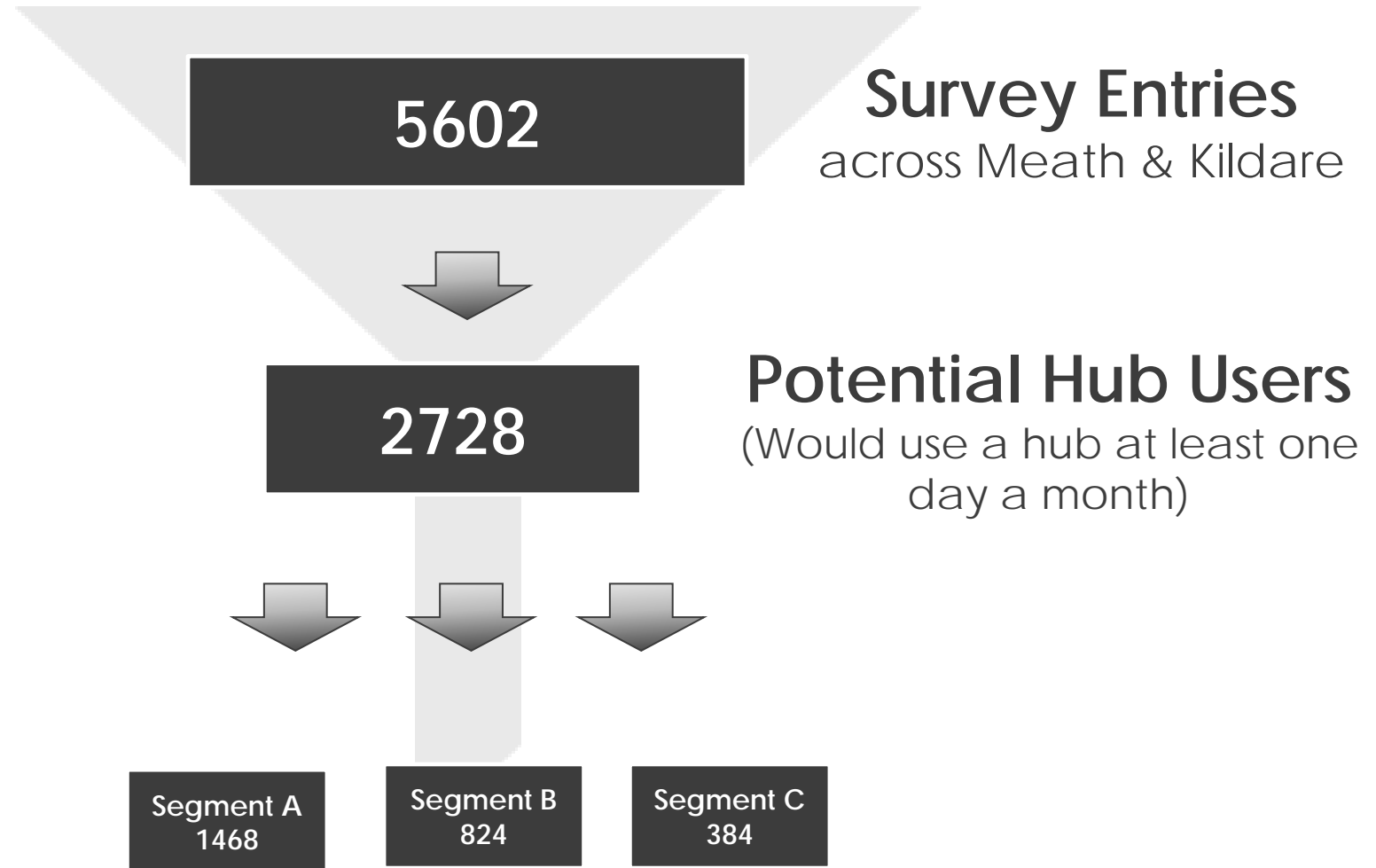


3. Hub Commuter Segments Identified



SEGMENTATION

- To identify a number of different SEGMENTS who indicate they are willing to change behaviour
- K-means classification gathers individuals into homogenous classes in terms of the variables under consideration:
 - Satisfaction with current situation,
 - Interest in and feasibility of hubs
- Three segments were identified amongst those who said they would use a hub at least 1 day a month.



SEGMENTS OVERVIEW

Class A (25%)

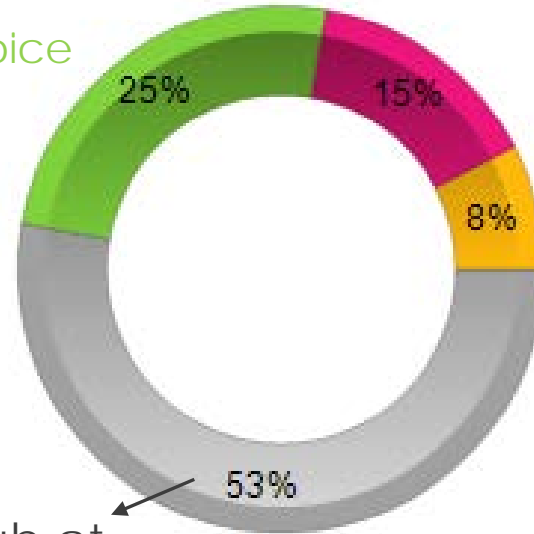
- Lowest interest
- High agency/ choice
- Lowest change
- Employers less amenable

Class B (15%)

- High interest
- Highest agency /choice
- Employers more amenable

Class C (8%)

- High interest
- Lowest agency/ choice
- Highest change
- Employers not amenable



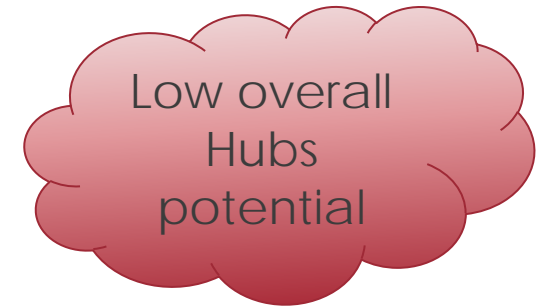
Would not use a hub at least one day a month

| Q.15 If available, how many days per month would you use a co-working hub? | |
|--|------|
| ClassA | 3.6 |
| ClassB | 10.4 |
| ClassC | 28.0 |

Size of the Prize (Unweighted):

| Total Commuters Outside Meath | 36,460 |
|-------------------------------|--------|
| Class A (25%) | 9,115 |
| Class B (15%) | 5,469 |
| Class C (8%) | 2,916 |

SEGMENT A (25%)



- Higher education
 - Professional/Managerial
 - Work in Business/HR/Advertising/Design/Healthcare
 - Fewer children
 - Home owners
 - More likely to be female
- Most satisfied with current situation
 - Shortest journeys
 - Leave home later in the morning
 - Most likely to already work from home also
 - Least likely to want to change current jobs or industry to work closer to home
 - less feasible for them
 - Least interest in hubs
 - Average expected use of 1 to 7 days a month

Qualitative analysis amongst Segment A confirmed that this group has low overall hub appetite. This was in the most part due to practical considerations e.g. happy already, short commute to work, or inappropriate job type (postman, teacher, MD).

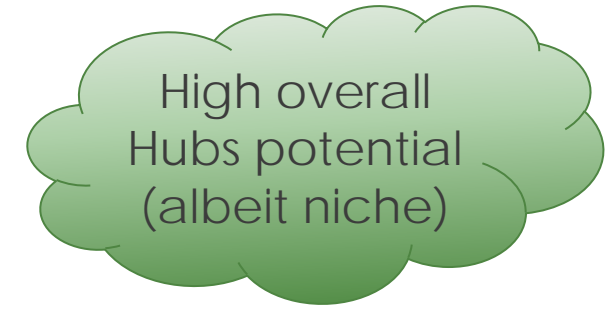
SEGMENT B (15%)

- Higher education
 - Professional/Managerial/Technical
 - Work in banking/engineering/manufacture/networks/design
 - More likely to rent
- Less satisfied with current situation vs Segment A.
 - Longest journeys
 - Leave home earlier in the morning
 - More likely to already work from home
 - More likely to change current job/industry to work closer to home
 - Or work for current employer
 - Highest interest in hubs
 - More knowledgeable
 - Would be more feasible for them
 - Would use 7 to 16 days a month
 - Part-time or Flexi-time also more feasible for them



This segment was validated and refined in the qualitative stage. Segment B emerges as the Professional Segments (Early Professionals & Established Professionals).

SEGMENT C (8%)



- Less highly educated
- Administrative/ Secretarial/ Skilled/Manual
- Work in public sector/retail/ media/transport/ construction/IoT
- More likely to live in shared accommodation
- Least satisfied with current situation
 - Longer journeys
 - Leave home earliest in the morning
- Least likely to already work from home
 - Less feasible for them
- Most likely to change current job/industry to work closer to home
 - Most feasible for them too but not for current employer
- Higher interest in hubs
 - Would use 20+ days a month
 - But see them as less feasible
 - And are less aware of how they work

This segment was validated and refined in the qualitative stage.
Segment C emerges as the “9-5 worker” segment.



4. SEGMENT PROFILES



FOCUS GROUPS

Group 1

High interest in hubs, children under 12, aged 25-44

Group 2

High interest in hubs, no children, aged under 34

Group 3

High interest in hubs, older children, aged 45+

Group 4

Less interested in hubs but interested in remote/flexible/ working from home/reduced salary /change job/industry.

QUALITATIVE RESEARCH

- Segmentation of the commuter survey data identified approx. 48% of respondents as being potential hub users, and a series of focus groups was carried out amongst this key target group:

| Group | Hub Attitudes | Profession | Family Stage | Age | Segment |
|-------|----------------|---|--------------------------------------|-------|-----------|
| 1 | High interest | Professionals | Younger | <35 | Segment B |
| 2 | High interest | Professionals | Family life-stage | 35-45 | Segment B |
| 3 | High interest | Self-employed/ administrative/ skilled services | Mix established families and no kids | 45+ | Segment C |
| 4 | Lower interest | Professionals | Mixed life-stages | 30-50 | Segment A |

- In-depth discussion of commuting, work/life balance.
- In-depth discussion of remote working solutions.
- Reaction to hub specifics.
- Validation/refinement of segments.

3 CORE Factors Influencing Hub Appetite

1. Professional Standing



A. TYPE OF WORK



B. STATUS/
JOB ROLE



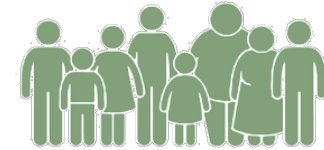
C. IF ALREADY
REMOTE WORKING

2. Residence Area



DAILY COMMUTE

3. Family Status



HOUSEHOLD
COMPOSITION

The following slides present findings from the consumer survey in the context of qualitative focus group insights.

Type of Work X Hub Appetite



TYPE OF WORK

"With a lap top and good wifi, I can basically work anywhere."

- Clear synergies can be seen between type of work and appetite for hub working.
- Most who said they would use a hub feel their type of work would be amenable with hubs:
 - Many working across **time zones**.
 - **Data** based, or **client service** offerings.

Occupation

| Occupation | Low Hub Intentions | ClassA | ClassB | ClassC |
|--|--------------------|--------|--------|--------|
| Medical & healthcare | 12% | 7% | 4% | 8% |
| Customer Service, clerical & administration | 9% | 9% | 10% | 11% |
| Cloud/computing/Game/App development | 7% | 11% | 13% | 10% |
| Public sector | 8% | 7% | 9% | 14% |
| Education & Childcare | 10% | 5% | 4% | 5% |
| Accountancy | 7% | 9% | 7% | 7% |
| Engineering & manufacturing | 7% | 6% | 6% | 4% |
| Banking | 5% | 7% | 10% | 6% |
| Business management & HR | 4% | 9% | 7% | 5% |
| Transport & logistics | 5% | 4% | 3% | 5% |
| Retail | 5% | 2% | 2% | 5% |
| Construction | 5% | 3% | 3% | 5% |
| Finance & Fintech | 3% | 4% | 5% | 3% |
| Law & legal | 3% | 3% | 3% | 3% |
| Advertising, marketing & PR | 2% | 4% | 5% | 2% |
| Insurance | 2% | 4% | 3% | 2% |
| Social & Charity work | 2% | 3% | 3% | 1% |
| Food sector | 2% | 1% | 1% | 1% |
| Tourism & hospitality | 2% | 1% | 1% | 0.6% |
| Computer hardware, manufacturing & maintenance | 1% | 2% | 1% | 1% |

Current Remote Working X Hub Appetite



CURRENT REMOTE WORKING

- A high proportion who indicated they would use hub **were already working from home.**
- Hubs are seen to offer distinct advantages for those currently working at home:
 - ✓ Facilities – wi-fi, printer, desks.
 - ✓ Appreciate clear demarcation of home vs work.

"If there was some of offices to rent for an hour. If you are meeting a client. Sometimes that is all you need."

"I'm at the kitchen table & it all falls apart once the kids come home or I need to video conference."

"I am going to hotel rooms to make calls at the moment. It would be great to be able to pop into somewhere proper."

| Current Remote Working | Low Hub Intentions | ClassA | ClassB | ClassC |
|---|--------------------|--------|--------|--------|
| No, Never | 62% | 34% | 39% | 60% |
| No, not anymore | 5% | 6% | 7% | 9% |
| Yes, regularly work remotely from home | 11% | 19% | 19% | 10% |
| Yes, occasionally work remotely from home | 22% | 41% | 35% | 22% |
| Yes, co-working hub | 0.7% | 0% | 0.2% | 0% |
| Unable due to employer decision or nature of work | <1% | <1% | 0.2% | 0% |

Job Role X Hub Appetite



STATUS/JOB ROLE

- Hubs require level of trust and investment (both tangible and cognitive) on the part of employers & co-workers.

→ Job status impacts on **personal agency** to determine hub working.

"Having that level of flexibility depends on your team and your boss."

"My company brought in flexible working about a year ago but straight away then a memo went around our department that we weren't to apply for it."

"I'm on a contract. That is only available for the permanent staff."

| Job Role | Low Hub Intentions | ClassA | ClassB | ClassC |
|---------------------------------------|--------------------|--------|--------|--------|
| Skilled services | 6% | 3% | 3% | 5% |
| Manager, director or senior official | 18% | 30% | 26% | 18% |
| Professional | 39% | 40% | 40% | 37% |
| Associate professional or technical | 8% | 9% | 11% | 9% |
| Administrative and secretarial | 15% | 14% | 17% | 21% |
| Skilled trade | 7% | 2% | 2% | 4% |
| Operatives, manual or general workers | 5% | 1% | 1% | 4% |
| Intermediate skilled | 2% | 1% | 0.9% | 2% |

| Job Tenure | Low Hub Intentions | ClassA | ClassB | ClassC |
|------------|--------------------|--------|--------|--------|
| 1 year | 16% | 18% | 19% | 22% |
| 2 years | 11% | 10% | 12% | 9% |
| 3-5 years | 22% | 25% | 27% | 23% |
| 6-10 years | 15% | 17% | 15% | 16% |
| 10+ years | 36% | 31% | 27% | 30% |

Residence X Hub Appetite



DAILY COMMUTE

- Hubs appetite can be seen to track closely with length of journey.
- All hub segments cited long and onerous daily travel arrangements.
 - Nb. Impact of household profile on departure times (see next slide).

| Journey Length | Low Hub Intentions | ClassA | ClassB | ClassC |
|-----------------------|--------------------|--------|--------|--------|
| Less than 30 minutes | 4% | 2% | 2% | 3% |
| 30 - 60 minutes | 38% | 36% | 29% | 31% |
| 61 - 90 minutes | 41% | 46% | 48% | 46% |
| 91 - 120 minutes | 13% | 13% | 16% | 14% |
| 121 - 180 minutes | 4% | 3% | 4% | 4% |
| More than 180 minutes | 1% | 0.8% | 1% | 2% |

| Departure Time | Low Hub Intentions | ClassA | ClassB | ClassC |
|----------------|--------------------|--------|--------|--------|
| Before 6.30 | 30% | 24% | 24% | 29% |
| 6.31-7.00 | 21% | 24% | 21% | 22% |
| 7.01-7.30 | 22% | 22% | 28% | 24% |
| 7.31-8.00 | 14% | 17% | 14% | 11% |
| 08.01 – 08.30 | 7% | 8% | 6% | 6% |
| 08.31 – 09.00 | 3% | 3% | 3% | 2% |
| 09.01 – 09.30 | 2% | 2% | 3% | 2% |
| After 9.30 | 2% | 1% | 1% | 3% |

"I figured out that I have spent a month already commuting this year. It's crazy. You just want to sleep then when you get home."

"I just won't get the money or the same type of job if I don't work in Dublin."

"I've been living in the town for 30 years and the roads just get worse and worse."

"I like living where I grew up but the travel is a nightmare."

Family Status X Hub Appetite



HOUSEHOLD COMPOSITION

"I am 2 hours getting home and when I get there my daughter is just going to bed."

"I go in early and my wife works late so we are almost working in shifts, just to collect the kids from creche."

"When I do have kids, it would be nice to be able to spend time with them"

- Need to be in place at certain times is simply not congruent with long journeys on public transport.
- Hubs interest & appeal is heightened amongst those with responsibility for family members.
 - Mainly those with children, but also niche incidence of those caring for elderly parents.

| Household Profile | Low Hub Intentions | ClassA | ClassB | ClassC |
|----------------------------|--------------------|--------|--------|--------|
| Couple - kids <18 | 49% | 51% | 54% | 54% |
| Couple - no kids | 20% | 21% | 19% | 17% |
| Other households | 18% | 15% | 13% | 17% |
| Couple - kids 18+ | 5% | 6% | 6% | 5% |
| Single household | 5% | 5% | 4% | 4% |
| Lone parent - kids any age | 2% | 2% | 4% | 3% |

| Living Arrangements | Low Hub Intentions | ClassA | ClassB | ClassC |
|---------------------------------|--------------------|--------|--------|--------|
| Living with partner/spouse | 75% | 78% | 79% | 77% |
| Living with parents | 10% | 9% | 7% | 10% |
| Not sharing with other adults | 8% | 7% | 8% | 7% |
| Living with other family | 5% | 4% | 4% | 3% |
| Sharing with adults, non-family | 3% | 2% | 2% | 4% |

SEGMENTS REFINED

Refinement of the quantitative segments from the commuter survey – 2 segments become 3.

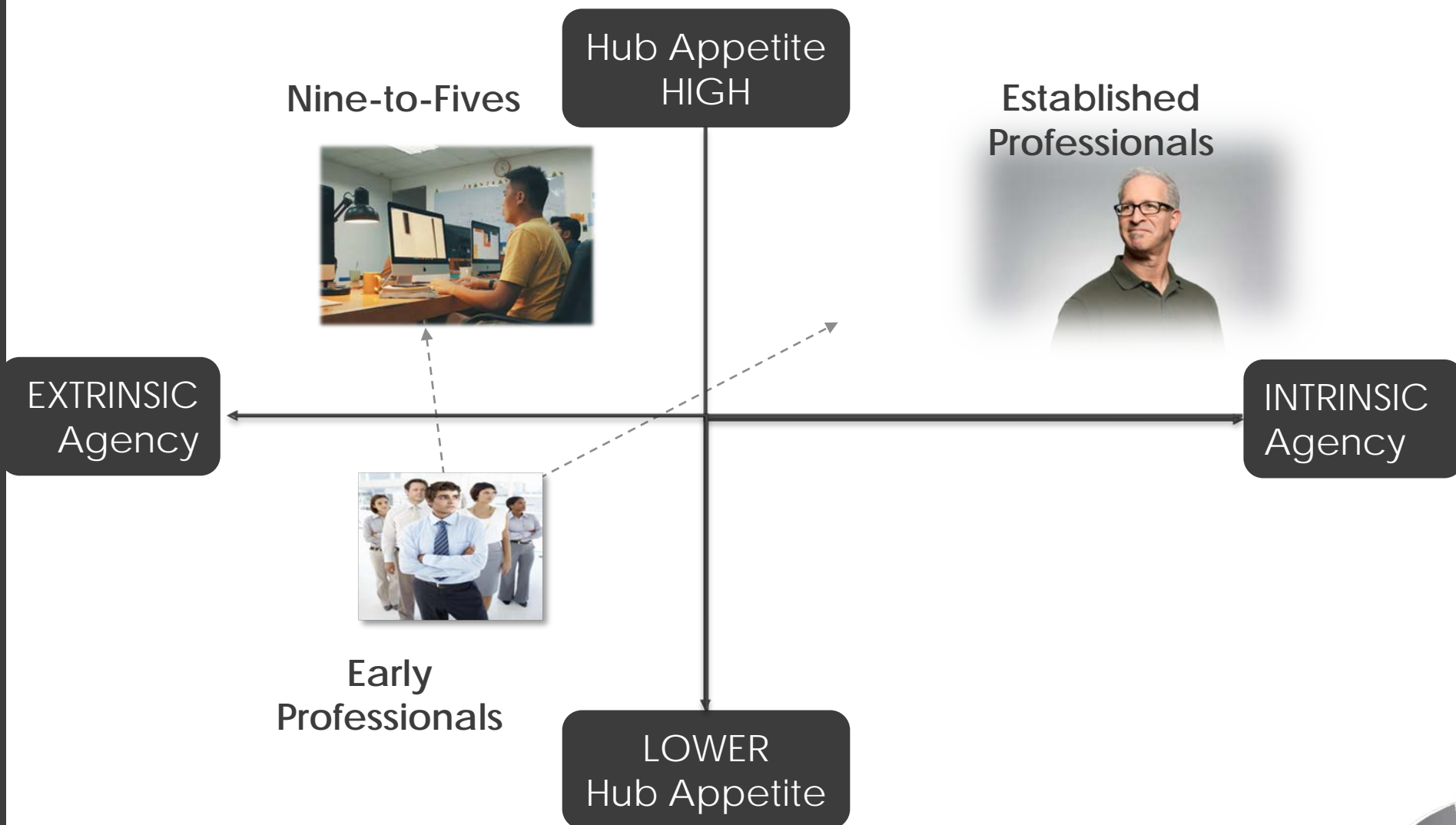
Possible to plot the segments on two key dimensions:

- Agency – capacity to act
- Hub appetite

Segment personas identified:

- Nine-to-Fives
- Established Professionals
- Early Professionals

SEGMENT PEN PICTURES



Pen Picture: Established Professional



Demographics

- Broad mix of early and established family structures.
- Mortgaged home owners with children attending local creches, schools.

Professional Standing

- Range of roles that lend themselves to remote working - IT professionals, online sales and service, consultancy.
- Already working from home to some extent, with relevant kit in place (encrypted laptops, screens, printers...).

"We are completely set up for remote working. I work from home but I have direct reports so that's not feasible all the time. It's outcome based, the company doesn't care where you are once outcomes are achieved." Est. Prof.

"Convenience for me is the big thing. I wouldn't dream of driving into town except off-peak. I'm on flexi-time, core hours are 10 to 4. I wouldn't dream of sitting in traffic." Est. Prof.

"Working with US companies is very handy because they are behind us. Come into work for 10 and rush hour traffic gone from roads then." Est. Prof.

Attitudes

- Appreciate quality of life that comes with greater commuter belt area.
- Established careers and sense of comfort with own professional worth.
- Aspire towards more family time and work-life balance, and have negotiated and sought out roles with this in mind.

Pen Picture: 9-5 Worker



Demographics

- Home owners, some with high mortgages/negative equity.
- Split between early and later family stages.

Professional Standing

- Some contract employees, other working in services, technicians, accounts.
- Also traditionally conservative organisations – civil service, public sector, pharma, insurance.
- Less autonomy - flexibility granted at the discretion of team lead or manager.

"My company brought in remote working but straight away there was a memo sent around our department that it wouldn't be sanctioned for us." 9-5 Worker.

"Most of my job could be done from home sitting in front of a computer. You can take a laptop home but they just would worry that you are out having lunch with friends or whatever. Even 1 day a week would make a huge difference." 9-5 Worker.

"Work from home is only for permanent staff in our office. Normally contractors do longer days so you are forced into 4 hours commuting to do your work. It's a trust issue." 9-5 Worker

Attitudes

- Commute registers as a significant bugbear.
- Strong desire to pare back commuting hours for more home & family time.
- Envious of friends/family/colleagues in different departments or permanent contracts working from home.

Pen Picture: Early Professional



Demographics

- Pre-family singles and couples.
- Split between those who recently purchased first home, or living with parents and saving hard for deposit.

Professional Standing

- Very focussed on earning, proving selves and building career.
- First/second real job.

"I can come in a bit late if I like, but I feel I have to be seen to work later and longer then to make up for it."
Early Prof

"Its the best way to save up for a house. My friends are spending a fortune on rent each month" Early Prof

"I leave at 6 in morning. When I come home I have just time to plop on the couch for an hour before it is bedtime. Most of the time I force myself to make my lunch for the next day because you save a fortune that way but sometimes I am too tired to even do that." Early Prof

Attitudes

- Lives are entirely dominated by work and getting to/from work.
- Little sense of decision making agency in job role.
- At mercy of manager's discretion and systems in place.
- Ambitions justify current sacrifices; accepting of status quo for now.

Segment Daily Commutes

All segments have above average long and arduous commutes



Pre-family life-stage

- 2-3 hours daily commute.
- Minority avail of flexi-times.
- Public transport overwhelming modal choice.
→ Cheaper, less stress.

"I recently found out I am pregnant so I suppose that will change things and I am looking into flexi-time options now."

Family life-stage

- Many cite 3+ hours daily commute, often including drop-offs for kids.
- Almost all drive at least partway.
→ Frustration with unreliable and infrequent public transport.

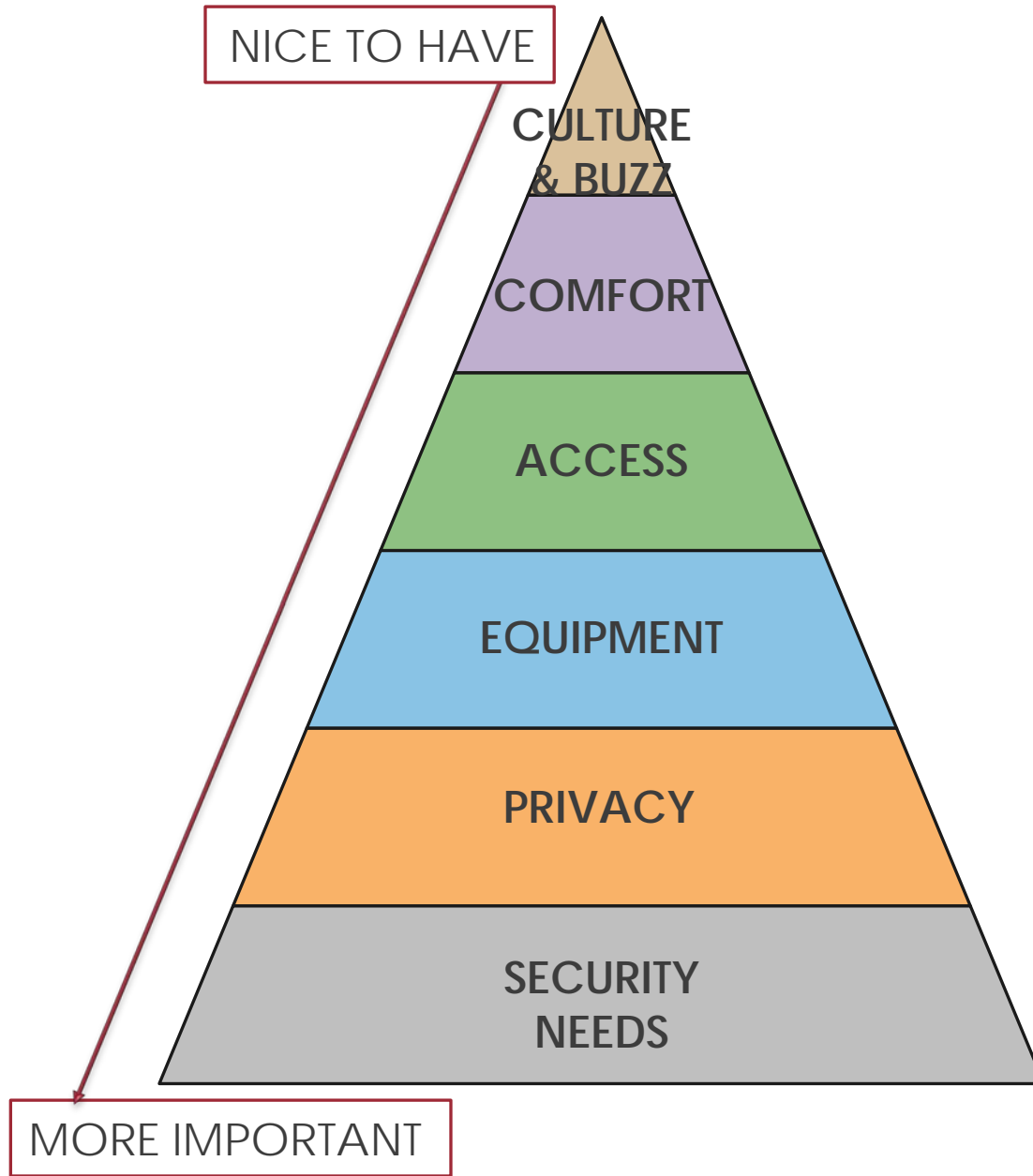
"I do the morning run and work late, while my partner starts early to be home to pick the kids up."

No kids/Empty nests

- Desire to cut back on very long commutes at present.
- Mix car, bus, train.

"I'm in the car so much longer than I used to be, even without all the school runs."

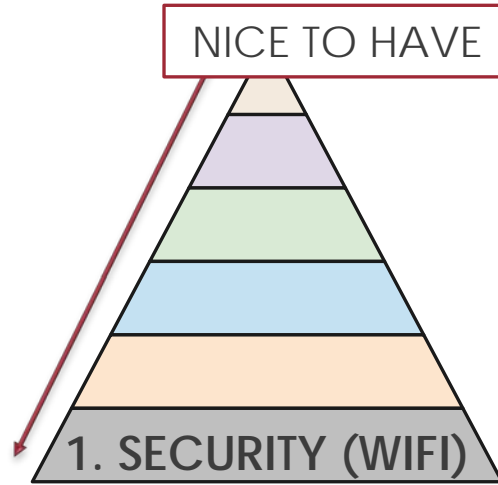
Hub Evaluation & Ideal Features - Overview



Ideal hub features fell out across 6 areas, each of which is examined in the following slides.

Priority needs can be found at the base of the pyramid, with more higher order concerns being expressed towards the peak.

Ideal Hub Features – WIFI Security



“Wifi wouldn’t be enough. It would need secure LAN connections, maybe one for each company.” *Est. Prof.*

“They would have to have data security sorted before you could even try talk to your boss about it.” *Early Prof.*

“If I had a desk with secure high speed connection, a phone, somewhere to eat and make a cup of tea.” *9-5 Worker*

“It would have to be really, really secure. I am sure there are ways of doing it. I don’t know what they are.” *Early Prof.*

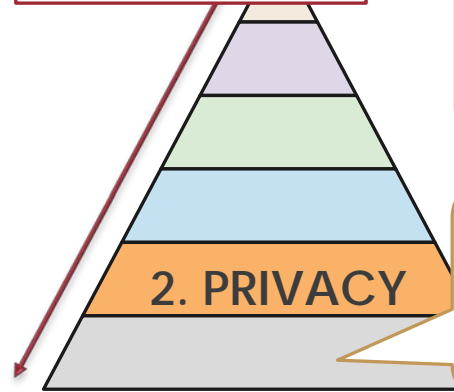
- **Data and wifi security is a key concern that evoked lengthy discussions.**
 - Seen as essential to employer buy in.
 - Internet access needs to be secure, reliable and fast.
- **Expect wifi concerns to be addressed upfront by hub providers, to encourage consideration.**

“The first question anyone would ask is would they manage the wifi security. You would imagine it wouldn’t be at all secure with so many different people logging in.” *Est. Prof*

“There is GDPR and you are accessing your company files over the internet and dealing with clients’ personal data. I just don’t know how they could guarantee the security.” *Early. Prof.*

Ideal Hub Features – Privacy

NICE TO HAVE



MORE IMPORTANT

“You would need a private screen so people wouldn’t see walking by. That would have to be a standard in a hub, that all the screens would have security screens. Or where the seats were.” Est. Prof.

“Open plan would lead to a lot of GDPR issues.” Early Prof.

“I would probably look for my own office but at an absolute minimum you would need good partitions between the desks.” Est. Prof.

“There should be an enclosed phone booth”
Early Prof

“I think my company would be more into it if I had a big screen and it was private.” 9-5 Worker

- **Physical privacy (being overheard or overseen) raises significant data protection concerns.**

“I would expect soundproof booths, privacy zones where you can sit on your laptop”. Est. Prof.

- **Essential to protect intellectual property.**

→ Ethical & legal obligations.

→ Also considered essential comfort .

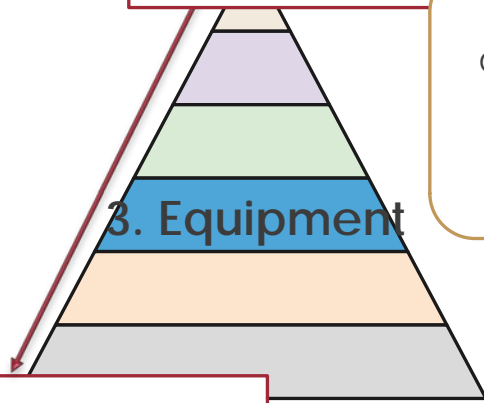
“I would expect to see meeting booth that just fit a few people, or a small private room” 9-5 Worker.

“If you were having meetings on the screen, there would have to be a legal document between everybody working around you like an NDA” Est. Prof

- **Expect frosted glass, sound proofed booths, screen protectors, desk dividers, soft floors, etc.**

Ideal Hub Features – Equipment

NICE TO HAVE



MORE IMPORTANT

“Stand up desks are the only way to go” 9-5 Worker

“Mail collection would be great so you could have papers wired to the there” Early Prof

“You are looking for something fit for purpose and tech oriented. Up to speed.” Early Prof

“I would need to bring half my desk with me. You need 2 monitors, as a standard set up on each desk. You want more than what you have at work or home to make that a selling point.” Est. Prof.

“The plug-in points should be on the table. I wouldn't expect to crawl around on the floor looking for a plug.” Est. Prof.

- Design must facilitate easy connection of personal devices to network and power.
- Expect a range of desk, seating and suite options, including standing desks and quality furniture.
- Sufficient video conference equipment for everyone, with high quality monitors and the ability to work on multiple screens.
- Expect someone to be on site to assist with equipment/maintenance.

“I would miss my 2 screens.” Est. Prof.

“There would have to be a caretaker onsite, someone you can call if the AV breaks down” Est. Prof.

“Somebody who is in the city and wants to get out of the city needs a level of technology. You really need dual monitors” 9-5 Worker

“If you compare Wework I would look for a monitor you could plug into. If it is just somewhere to plug in your laptop, why would I do that when I can do it at home.” Est. Prof.

Ideal Hub Features – Access

NICE TO HAVE

4. Flexible Access

MORE IMPORTANT

Widespread sense that hubs would include flexible access arrangements:

- Pay-as-you-go and arrive on the day
- Anytime fob entry (Nb. some had security concerns around this)
- App for meeting room bookings
- Access to associated hubs.

"I'd use a hub that was close to me that I could book on the day. I just want to decide in the morning" Est. Prof.

"In terms of flexibility, a card that you can go in and out and it counts the time that you go in. So you could clock in and out of each room." Est. Prof.

"How would you book the rooms you wanted?" 9-5 Worker.

"It would need a lot more meeting rooms, and plenty of smaller ones" 9-5 Worker.

"I wouldn't want to compete for rooms" Early Prof

"I think at night you would need security if it was 24 hours. As a woman security would be top of my list to be perfectly honest with you. Even in the dark evenings walking down to your car." Early Prof

"Is there an option to rent small offices by the hour?" Early Prof

"Parking with charge points. The cost of parking should be included in your desk fee. And dry bike parking, you don't want a wet saddle." Est. Prof.

"I was up in Cavan for a meeting last week and I had a couple of hours to kill. If there was an associated hub that I could just pop into that would be ideal for my needs." Est. Prof.

Ideal Hub Features – Comfort

NICE TO HAVE

5. Comfort

MORE IMPORTANT

"I like the smaller office. It would really be the only option for me" Est. Prof.

I am going to hotels and doing this and it is so uncomfortable so I would like to do this as an improvement on that. It has to be comfortable." Est. Prof.

"There is a real difference between a cheap start up and an established professional who needs certain environments." 9-5 Worker

"I'm not mad about sitting so close to everyone else" Early Prof

"If you can go into a booth and do a live conference webex that is a selling feature because you are getting advanced technology and comfort so it ticks all the boxes" Est. Prof.

"You don't want cheap Ikea furniture that is not comfortable or nice." Early Prof

- Pleasant and modern aesthetic.
- The hub should be more comfortable than home or the office and have better technology.
- Good quality, clean kitchen facilities, tea and coffee stations.

There would have to be someone managing the kitchen. And lots of microwaves." Early Prof

"If you are going to be there all day. You need somewhere to have your lunch. You don't want people eating next to you while you are trying to work." 9-5 Worker.

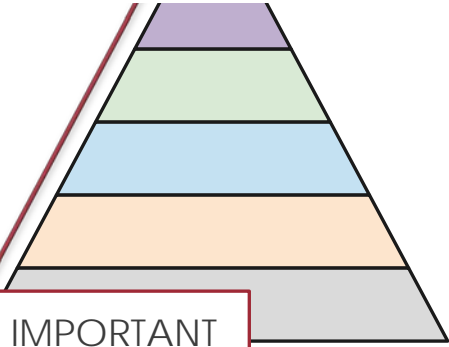
"I would look for nice chairs, and big monitors or things for health like higher laptop stands or foot stands" Est. Prof.

Ideal Hub Features – Culture & Buzz

NICE TO HAVE

6. Culture & Buzz

MORE IMPORTANT



"I worked exclusively from home when the kids were younger and I was very, very lonely, The isolation, even just people moving around you. If a co-working space had been available it is definitely something I would be interested in." Est. Prof.

"You are building communities in the place. If you want to work you go to the place you want to work, there is space for chatting and there is a space to work privately, something for everyone." Early Prof

"I definitely could work 2 days, or even 3 days away from the office. Being honest I wouldn't have the discipline to work from home. I would love a hub and I would never be late or anything." 9-5 Worker

- Appreciate atmosphere of working alongside others.
- Discipline provided from being in a 'place of work' (versus at home).
- Ability to bounce off and support others is a bonus.
→ However, broadscale sense culture and supportiveness needs to be carefully managed to promote a professional environment.

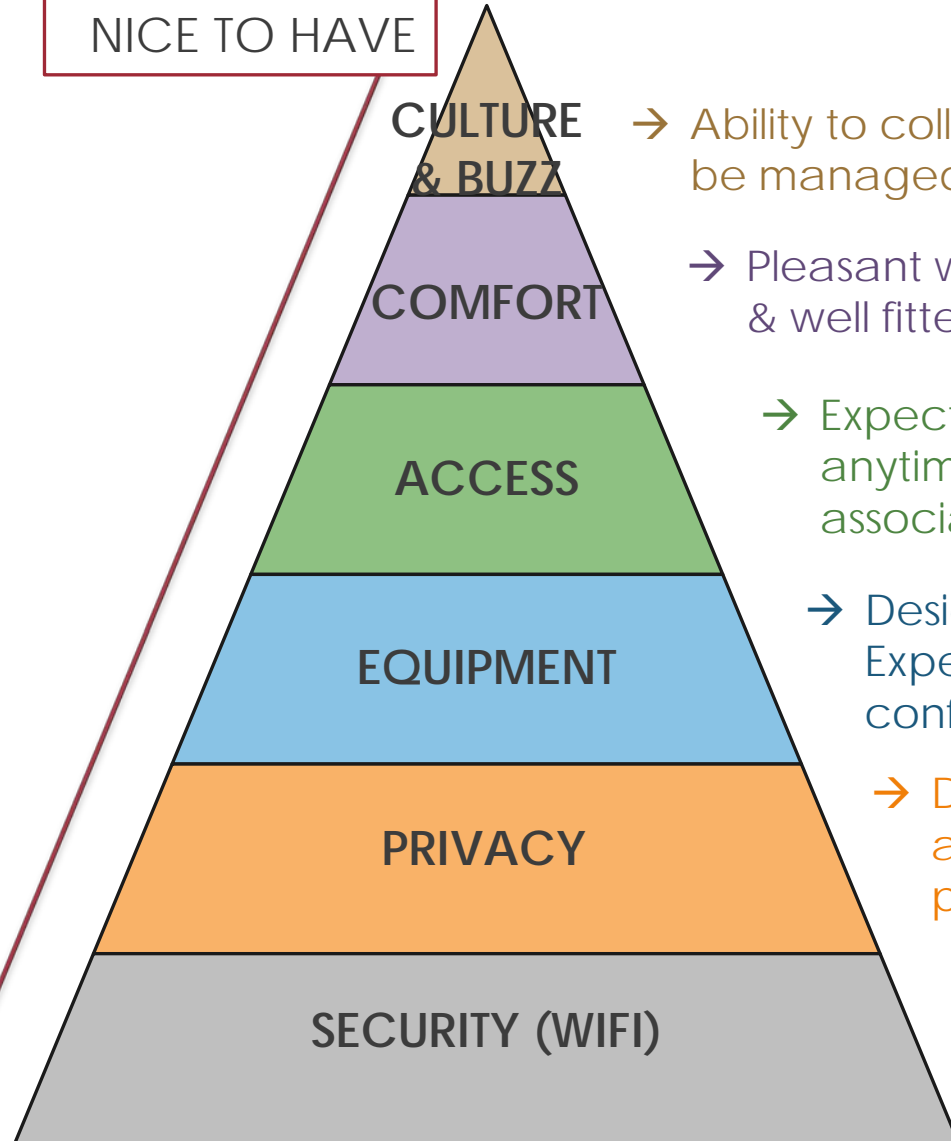
"I work across time zones. A hub would be very easy to go to and it would get me off my family kitchen table at all hours." Est. Prof.

"You could have local suppliers bringing in the food. That kind of joined up thinking about supporting local communities. That is what it's about."

"How would they manage it? I would be happy to help someone out, and I hope that there would be that kind of environment but my employer is paying me to go there and work. It would have to be limited to only approach at the canteen or something." Early. Prof

SUMMARY OF IDEAL HUB NEEDS

NICE TO HAVE



MORE IMPORTANT

→ Ability to collaborate and support others is a bonus, but this needs to be managed to avoid encroaching.

→ Pleasant working environment – quality fit out with access to adequate & well fitted kitchen facilities. High quality chairs.

→ Expect flexible access including pay-as-you-go and day only rates, anytime fob entry, apps for meeting room bookings and access to associated hubs. Security is paramount however.

→ Design must facilitate ease of “drop in & plug in” with accessible jacks. Expect range of standing and seated desks and suites. Sufficient video conference equipment & room sizes. Screen hire.

→ Don't want to be interrupted, overlooked or overheard in any work areas. Expect frosted glass, sound proofed booths, screen protectors, desk dividers and soft, sound dampening interiors.

→ Data security of wifi was the No. 1 concern and was debated at length in all groups. Par-excellence systems with upfront reassurance is prerequisite for considering hub working.

Segments Potential



Large Segment Group



Niche Cohort



Sizeable & Actively Interested Segment

OVERALL POTENTIAL



Hubs Appetite



Easy to Please



Agency/Choice



Low → High

Low → High

Low → High

Lack of agency/choice/means that move to hubs will be more driven by senior colleagues & employer policy.

This bullseye target is easy to please but needs employer consent & facilitation.

High hubs appetite however matched by high expectations around fitout.



APPENDIX

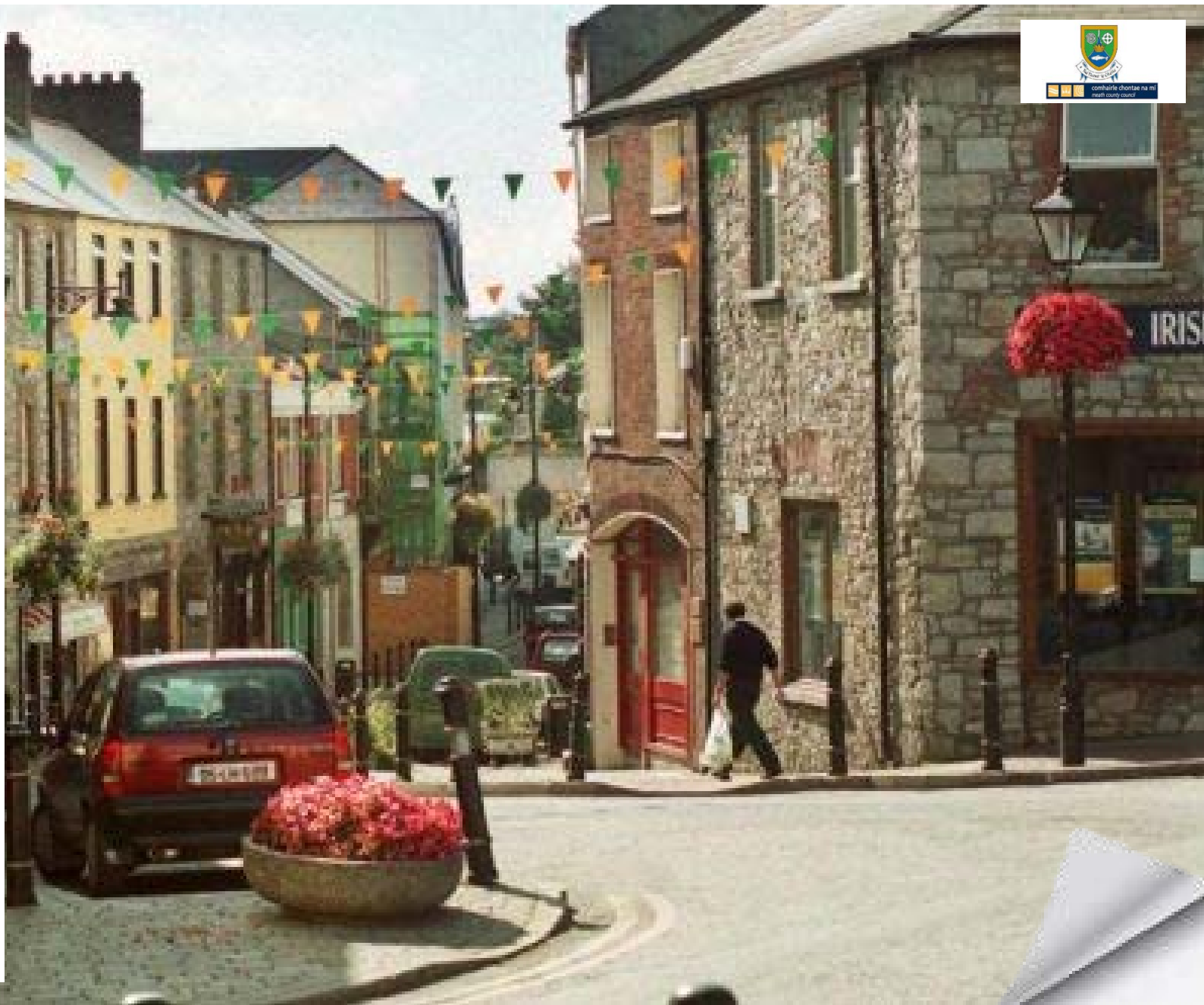
INDIVIDUAL TOWN DEEP DIVES



NAVAN

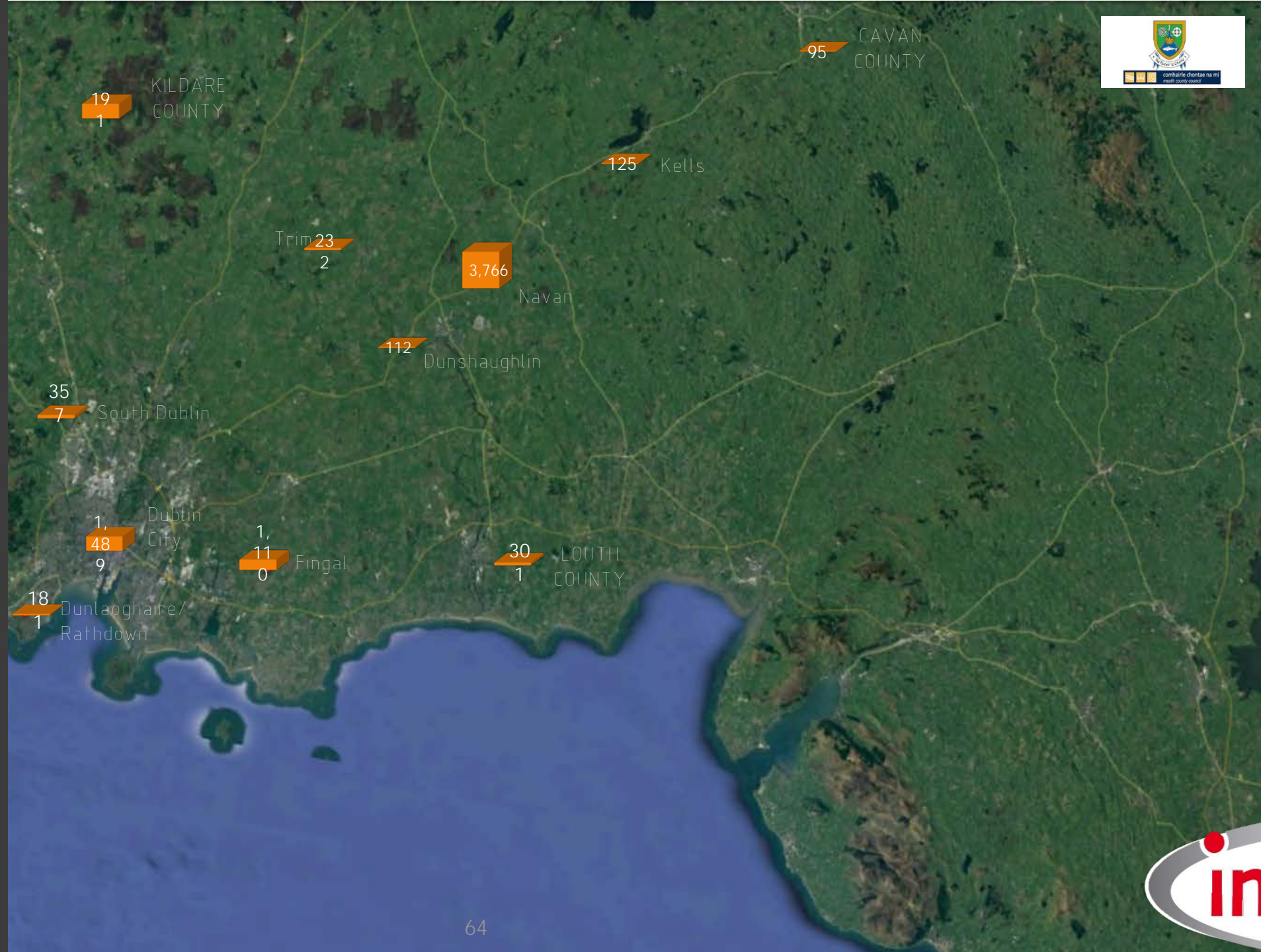


comhairle chontae na mí
meath county council



NAVAN COMMUTER FLOWS

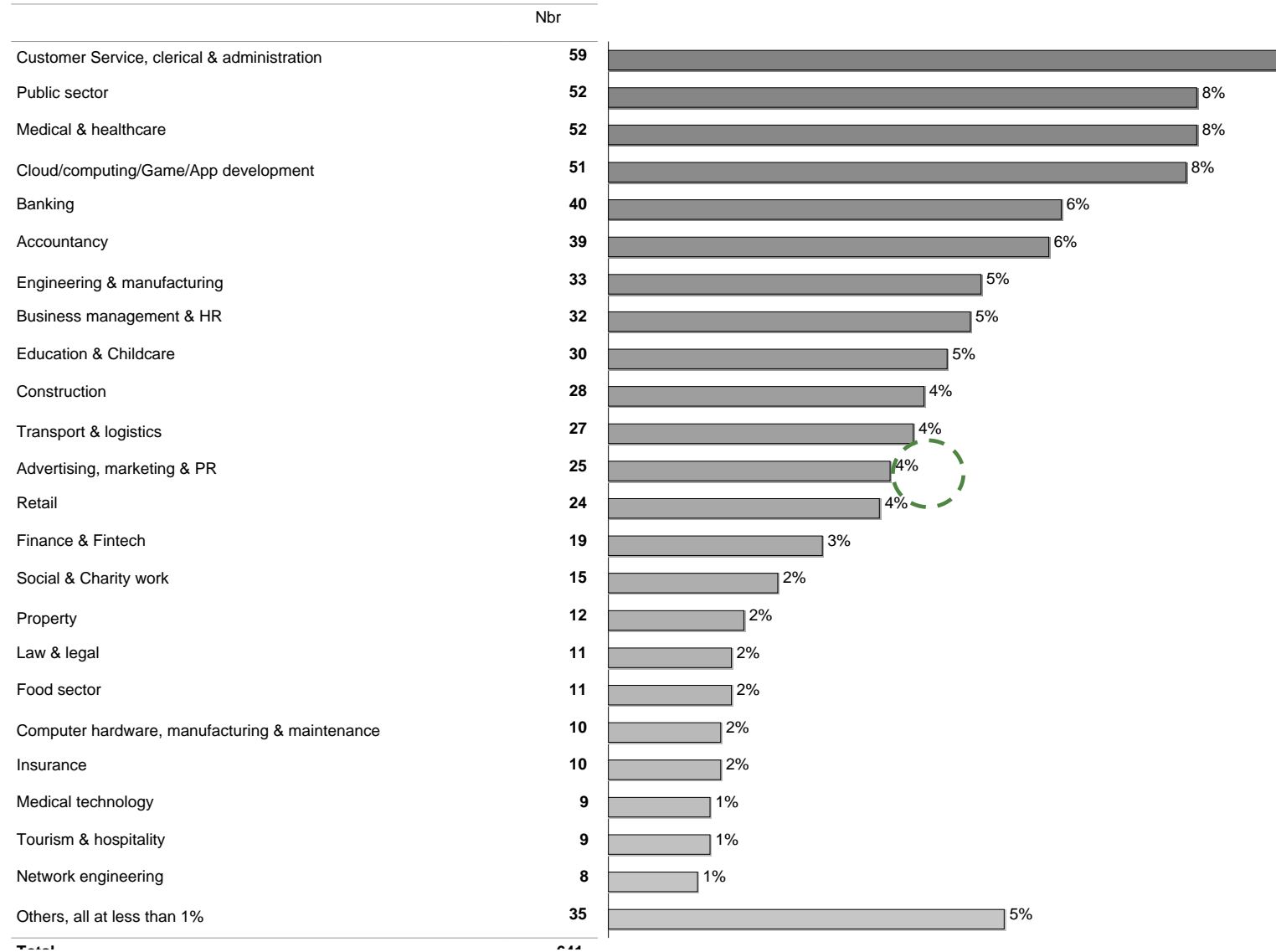
| | |
|---|-------------|
| Total commuting OUTSIDE the county | 3899 |
| DUBLIN | 3137 |
| • Dublin City | 1489 |
| • South Dublin | 357 |
| • Fingal & Dunlaoghaire/Rathdown | 1291 |
| Louth | 301 |
| Kildare | 191 |
| Cavan | 95 |
| Westmeath | 42 |
| Other counties (@ <1%) | 133 |
| Total commuting INSIDE the county | 6099 |
| Navan | 3,766 |
| Meath rural | 1,450 |
| Trim | 232 |
| Kells | 125 |
| Dunshaughlin | 112 |
| Ashbourne | 92 |
| Other <1% | 322 |



NAVAN SKILLS BASE



- 1 in 10 (9%) respondents from Navan was employed in customer service, clerical & admin.
- 8% said they worked in public sector, medical & healthcare and cloud/computing/app development.
- A further 1 in 8 (12%) of Navan respondents works in banking or accountancy.
- Analysis identified that responses from Navan were over-represented versus the county total for advertising, marketing & PR.



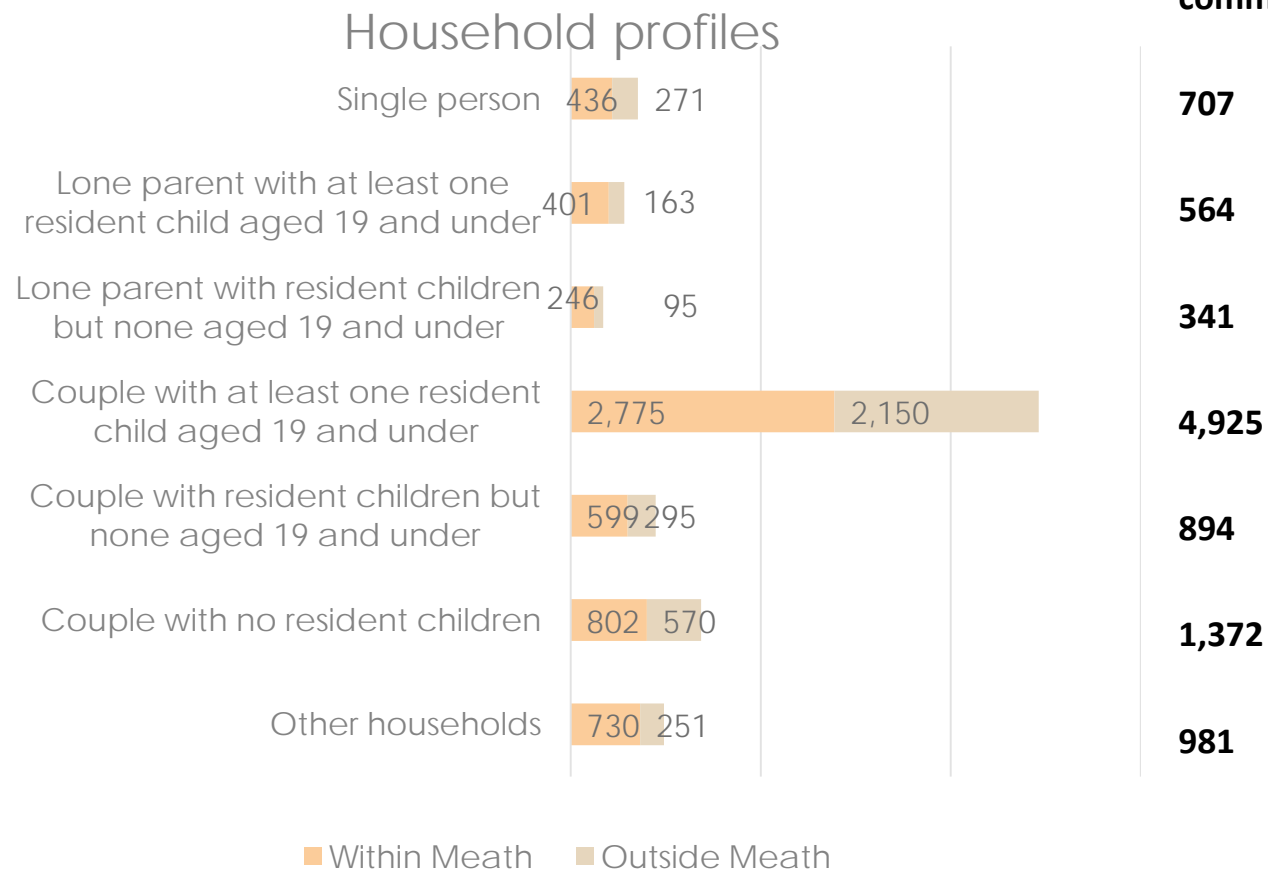
NAVAN HOUSEHOLD PROFILES*

Parents travel further for work:

- The most prevalent household profile is couples with at least one resident child aged 19 and under, followed by couples with no resident children.

| | Meath | Navan |
|---|-------|-------|
| Single person | 6% | 7% |
| Lone parent with children aged 19 and under | 5% | 6% |
| Lone parent with children but none aged <19 | 3% | 3% |
| Couple with children aged 19 and under | 52% | 50% |
| Couple with children but none aged <19 | 12% | 9% |
| Couple with no resident children | 15% | 14% |
| Other households | 7% | 10% |

Total commuters



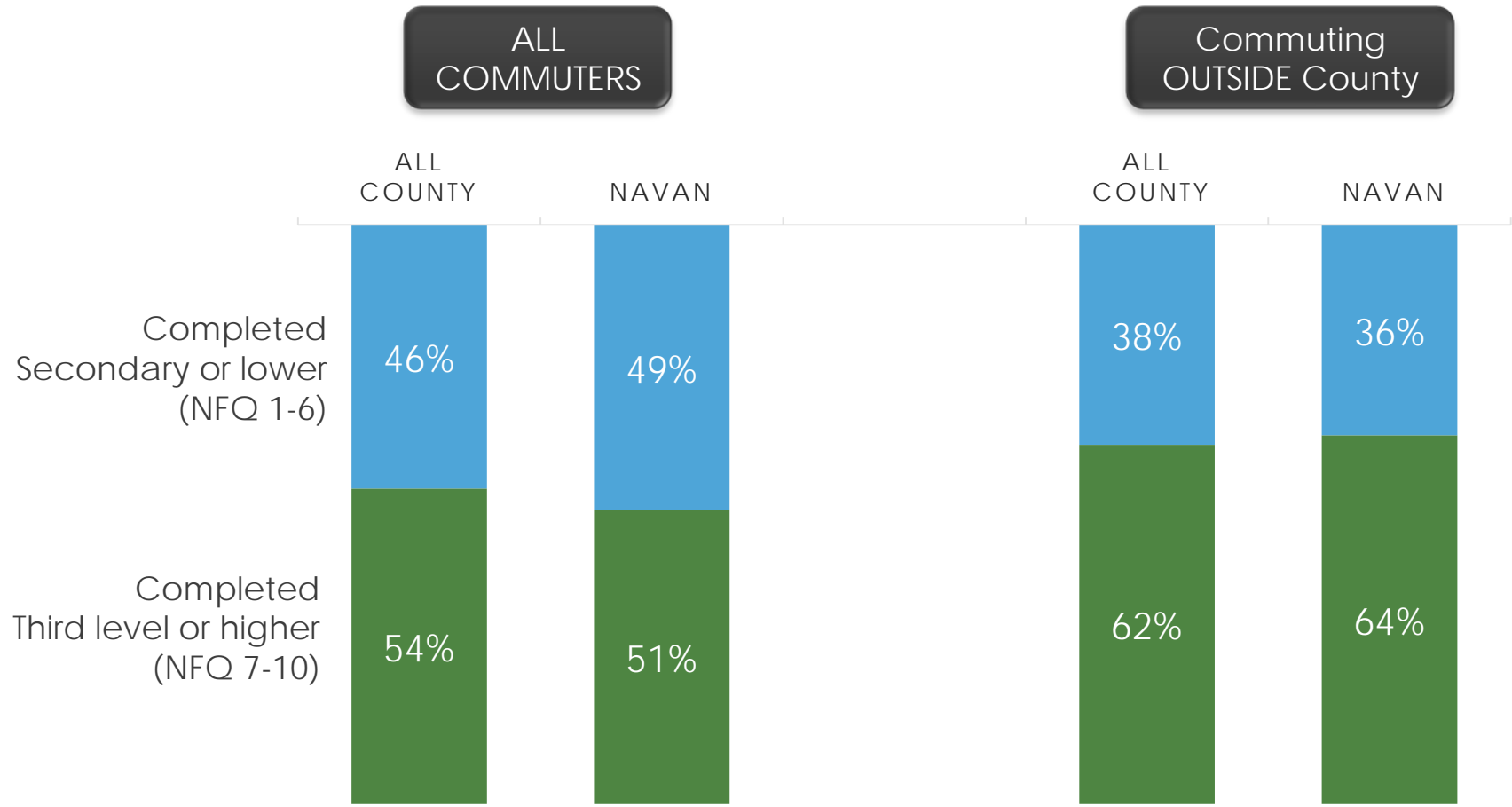
NAVAN

Highest Educational Achievement Level

- The total Navan commuter population are split almost 50:50 between those with 2nd level versus 3rd level qualifications.
- However, 2 in 3 of those leaving the county have a 3rd level qualification.



Source: Census '16 (POWSCAR)

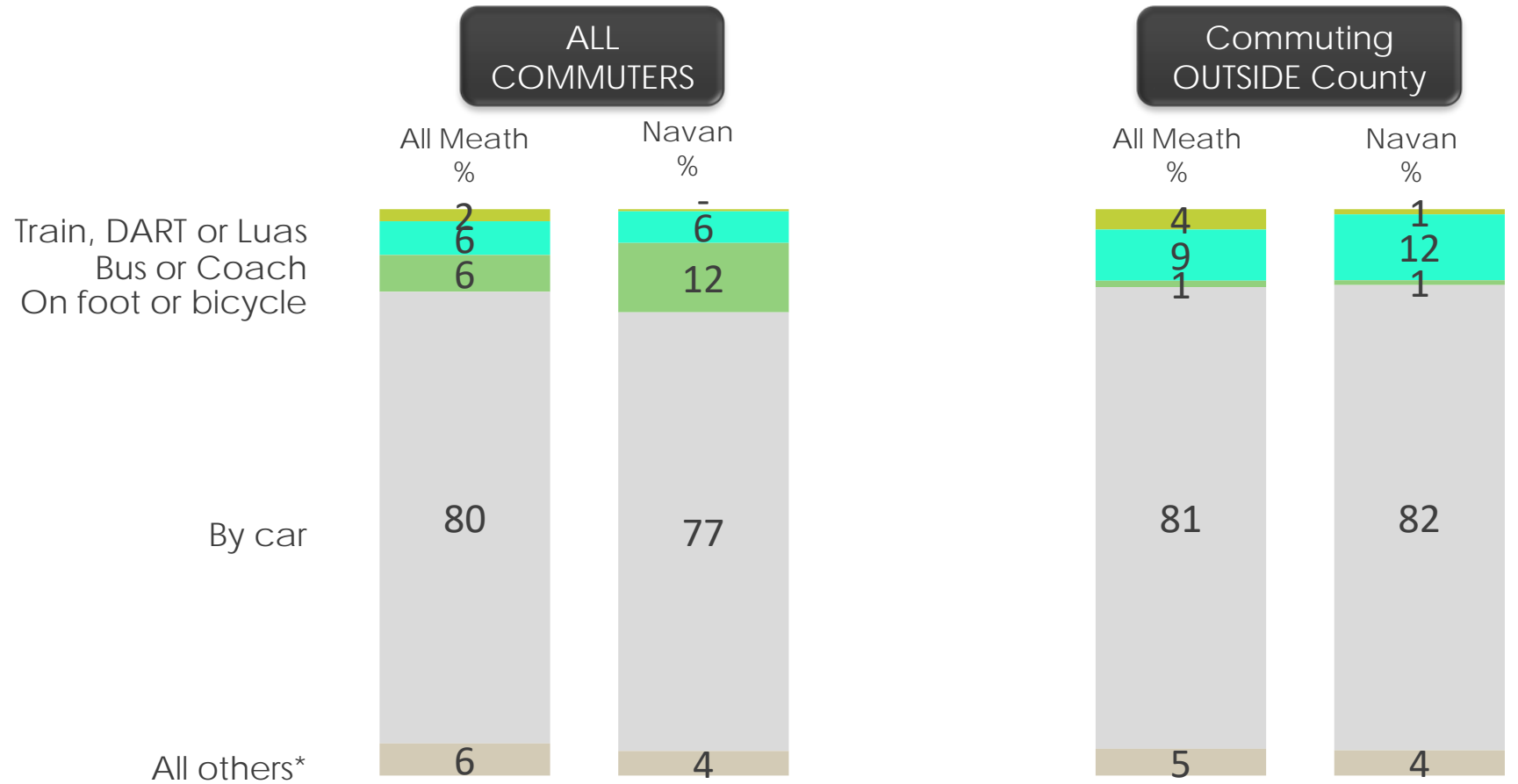


NAVAN

Transport Modal Split



- 4 in 5 commuters out of the county from Navan travel by car.
- 1 in 8 go by bus.



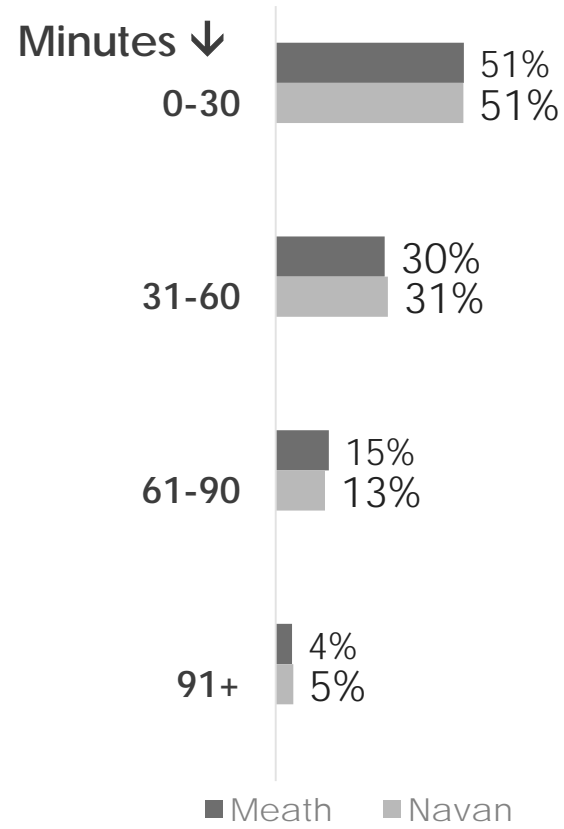
*Others includes motorbike, scooter, van, & lorry)



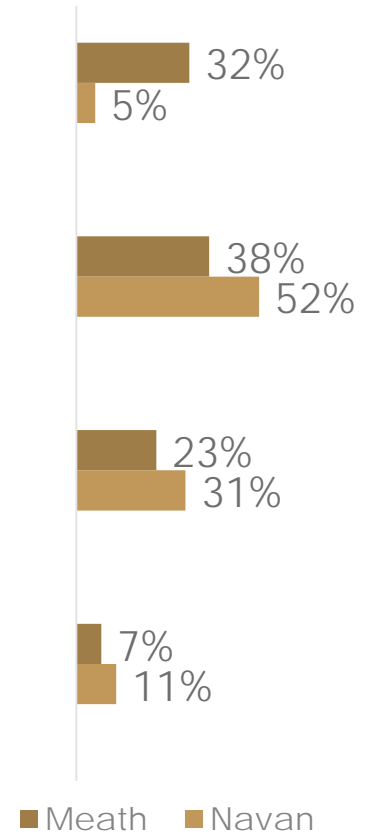
NAVAN JOURNEY TIMES

- Navan commutes are broadly in line with the county average.
- Those leaving Meath from Navan tend to spend significantly longer travelling versus people travelling out of other towns in the county.

ALL Journeys



Commuting OUTSIDE County



JOURNEY DEPARTURE TIMES

| | ALL MEATH | NAVAN |
|-------------|-----------|-------|
| Before 6:30 | 14% | 16% |
| 6:30-7:00 | 14% | 13% |
| 7:01-7:30 | 14% | 13% |
| 7:31-8:00 | 16% | 14% |
| 8:01-8:30 | 16% | 16% |
| 8:31-9:00 | 12% | 12% |
| 9:01-9:30 | 5% | 4% |
| After 9:30 | 9% | 12% |



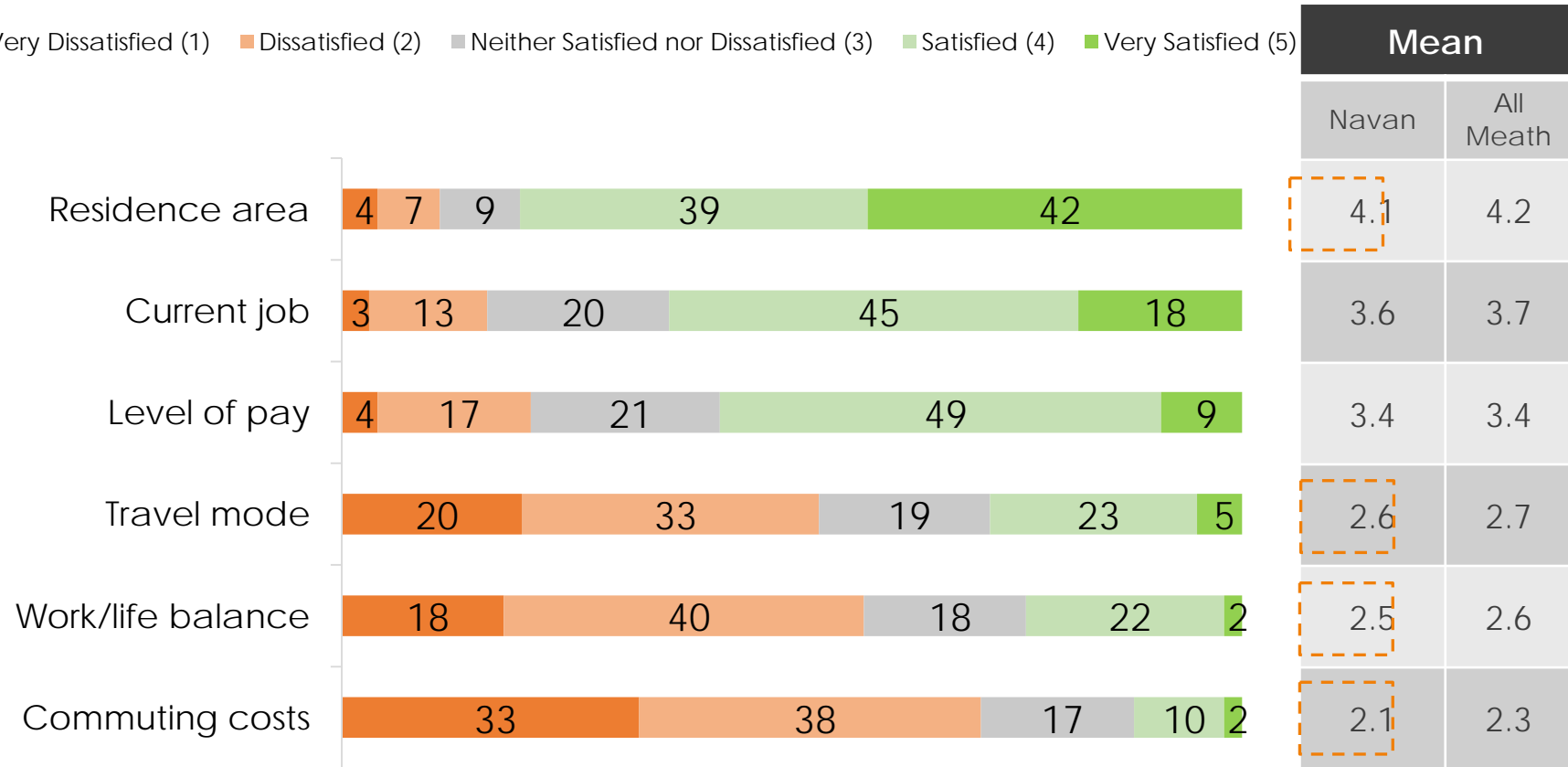
NAVAN

SATISFACTION LEVELS

• Navan residents are significantly less satisfied than the whole sample with:

- residence area (81%)
- travel mode (28%)
- work-life balance (24%)
- commuting costs (12%).

■ Very Dissatisfied (1)
 ■ Dissatisfied (2)
 ■ Neither Satisfied nor Dissatisfied (3)
 ■ Satisfied (4)
 ■ Very Satisfied (5)



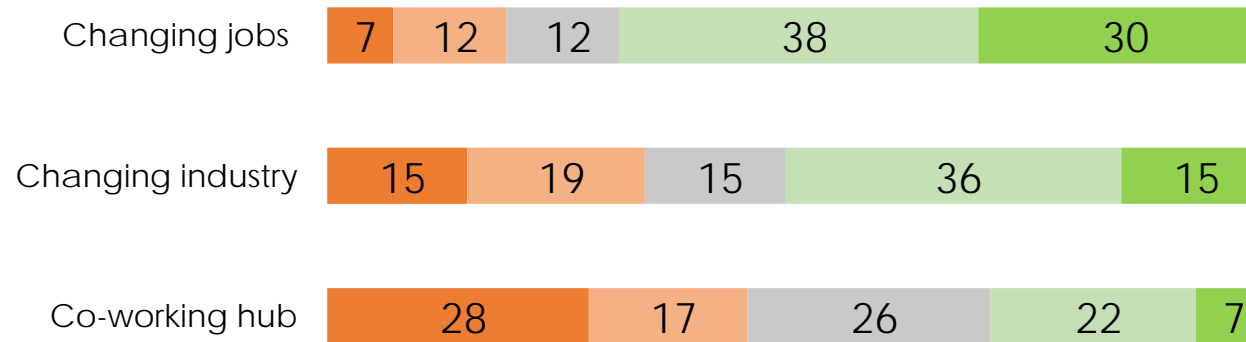
NAVAN ATTITUDES TO FLEXIBLE WORKING SOLUTIONS

- Highest interest in changing jobs to work closer to home (68% somewhat or very interested).
- Almost half (49%) said they were interested in working closer to home in a different industry.
- Only 15% felt they were somewhat or very familiar with how hubs work.
- Navan over-indexes on interest in changing jobs and changing industry



INTEREST IN WORKING CLOSER TO HOME:

■ Not at all interested
 ■ Not very interested
 ■ Neither/nor
 ■ Somewhat interested
 ■ Very interested



| Mean | |
|-------|-----------|
| Navan | All Meath |
| 3.7 | 3.5 |
| 3.2 | 3.0 |
| 2.6 | 2.7 |

AWARENESS OF HUBS

■ Not at all familiar
 ■ Not very familiar
 ■ Neither /nor
 ■ Somewhat familiar
 ■ Very familiar



| | |
|-----|-----|
| 1.9 | 1.9 |
| 1.6 | 1.6 |





Ratoath/ Ashbourne

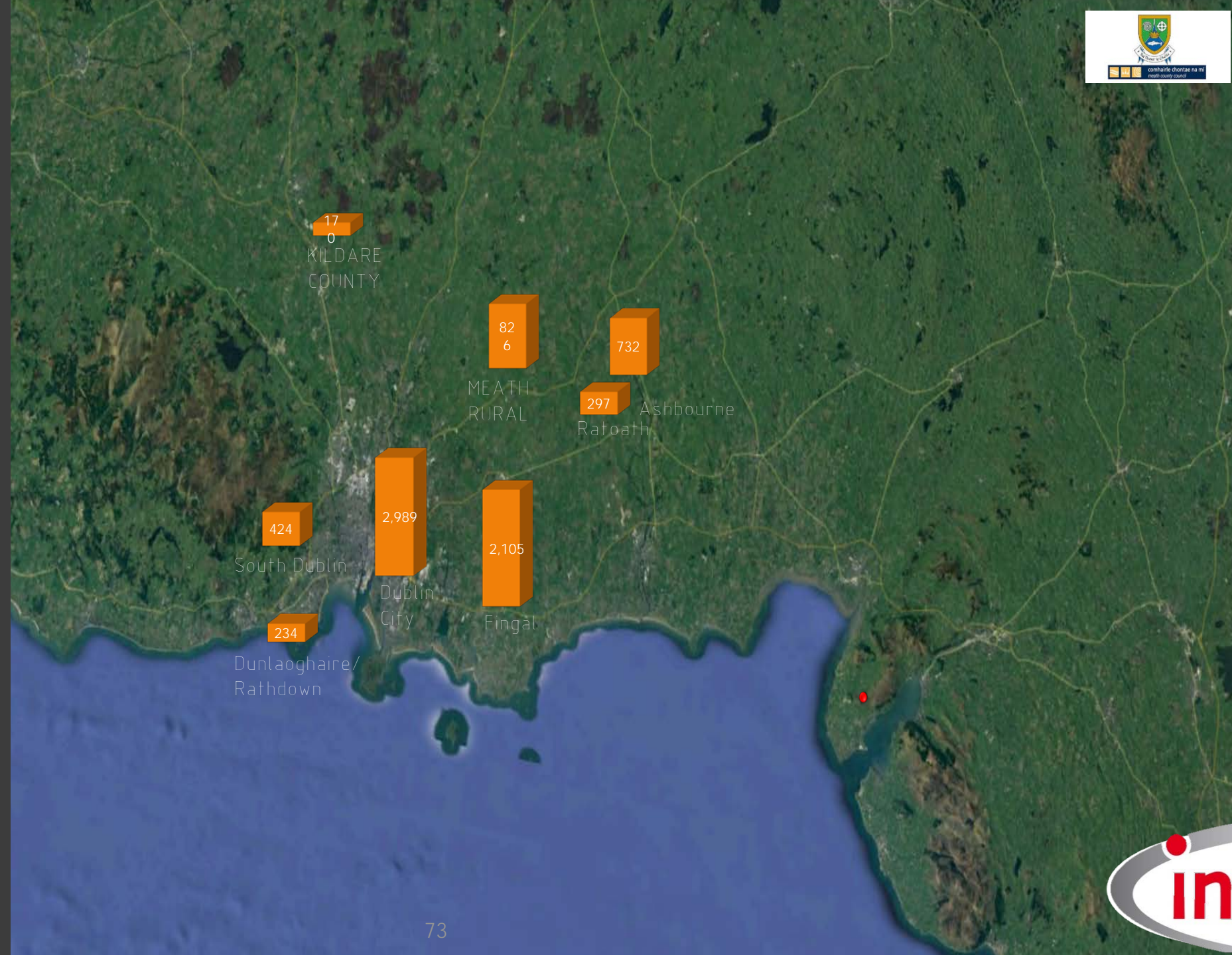


 comhairle chontae na mí
meath county council



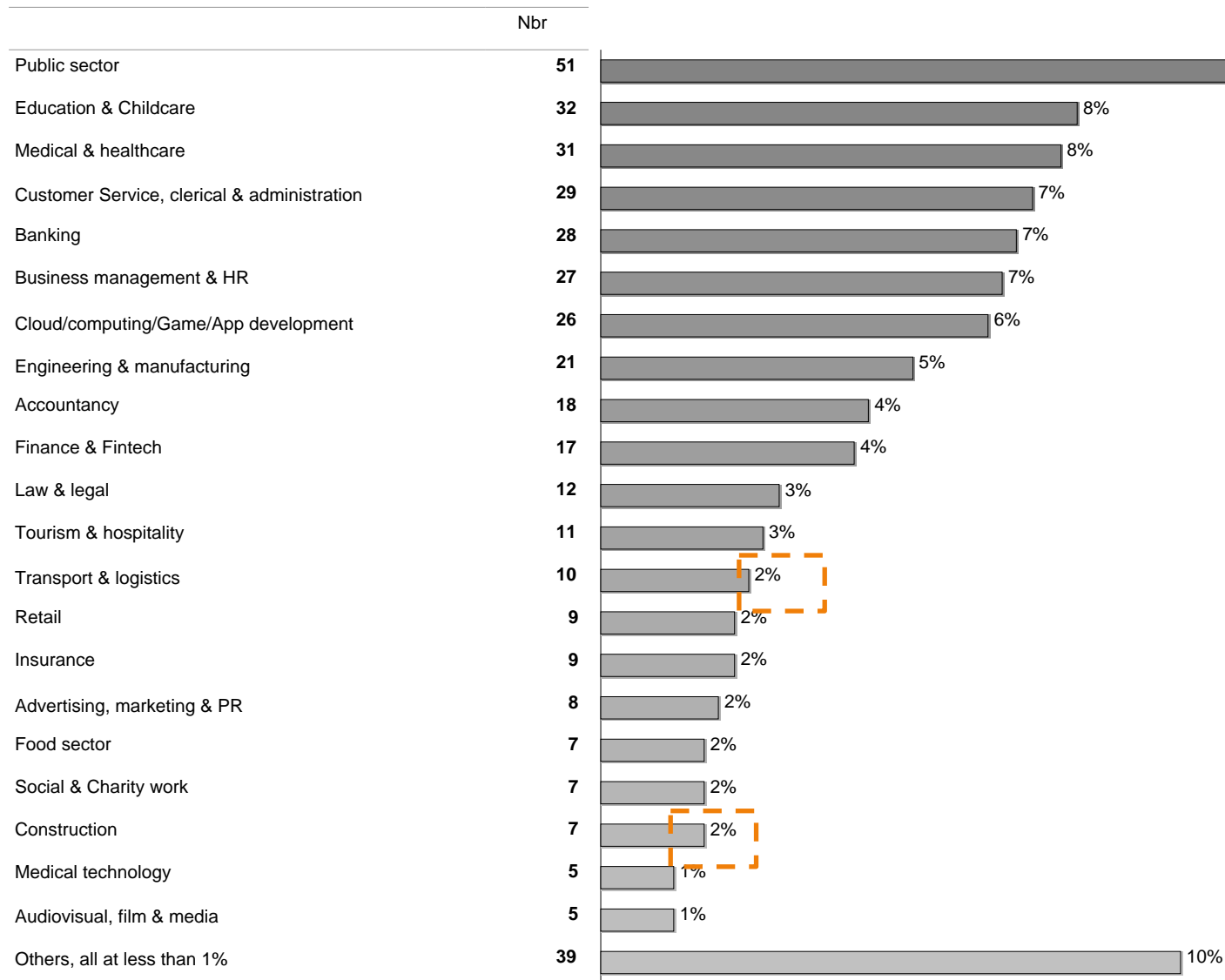
RATOATH- ASHBOURNE COMMUTER FLOWS

| | |
|---|-------------|
| Total commuting OUTSIDE the county | 6081 |
| DUBLIN | 5752 |
| • Dublin City | 2989 |
| • South Dublin | 424 |
| • Fingal & Dunlaoghaire/Rathdown | 2339 |
| Kildare | 170 |
| Louth | 81 |
| Other counties (@ <1%) | 78 |
| Total commuting INSIDE the county | 2122 |
| Meath rural | 826 |
| Ashbourne | 732 |
| Ratoath | 297 |
| Navan | 90 |
| Dunshaughlin | 56 |
| Other <1% | 121 |



RATOATH/ASHBOURNE SKILLS BASE

- Over 1 in 10 (13%) respondents was employed in the public sector.
- 8% said they worked in education childcare and a further 8% in medical & healthcare.
- Analysis identified that Public Sector was over-represented and Transport & Logistics and Construction were under-represented versus the county total.



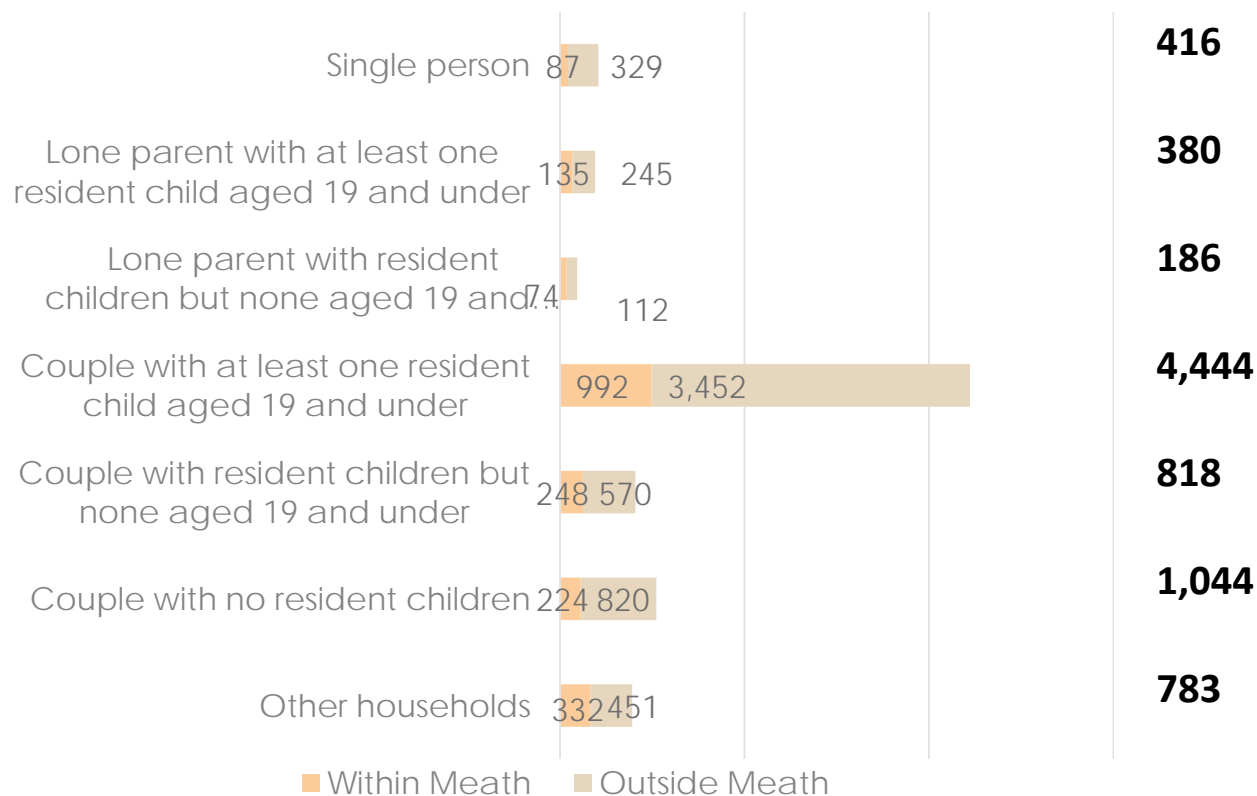
RATOATH/ASHBOURNE HOUSEHOLD PROFILES*

Parents travel further for work:

- The most prevalent household profile is couples with at least one resident child aged 19 and under, followed by couples with no resident children.

| | Meath | Ratoath/ Ashbourne |
|---|-------|-----------------------|
| Single person | 6% | 5% |
| Lone parent with children aged 19 and under | 5% | 5% |
| Lone parent with children but none aged <19 | 3% | 2% |
| Couple with children aged 19 and under | 52% | 55% |
| Couple with children but none aged <19 | 12% | 10% |
| Couple with no resident children | 15% | 13% |
| Other households | 7% | 10% |

Household profiles



**Total
commuters**

416

380

186

4,444

818

1,044

783

■ Within Meath ■ Outside Meath

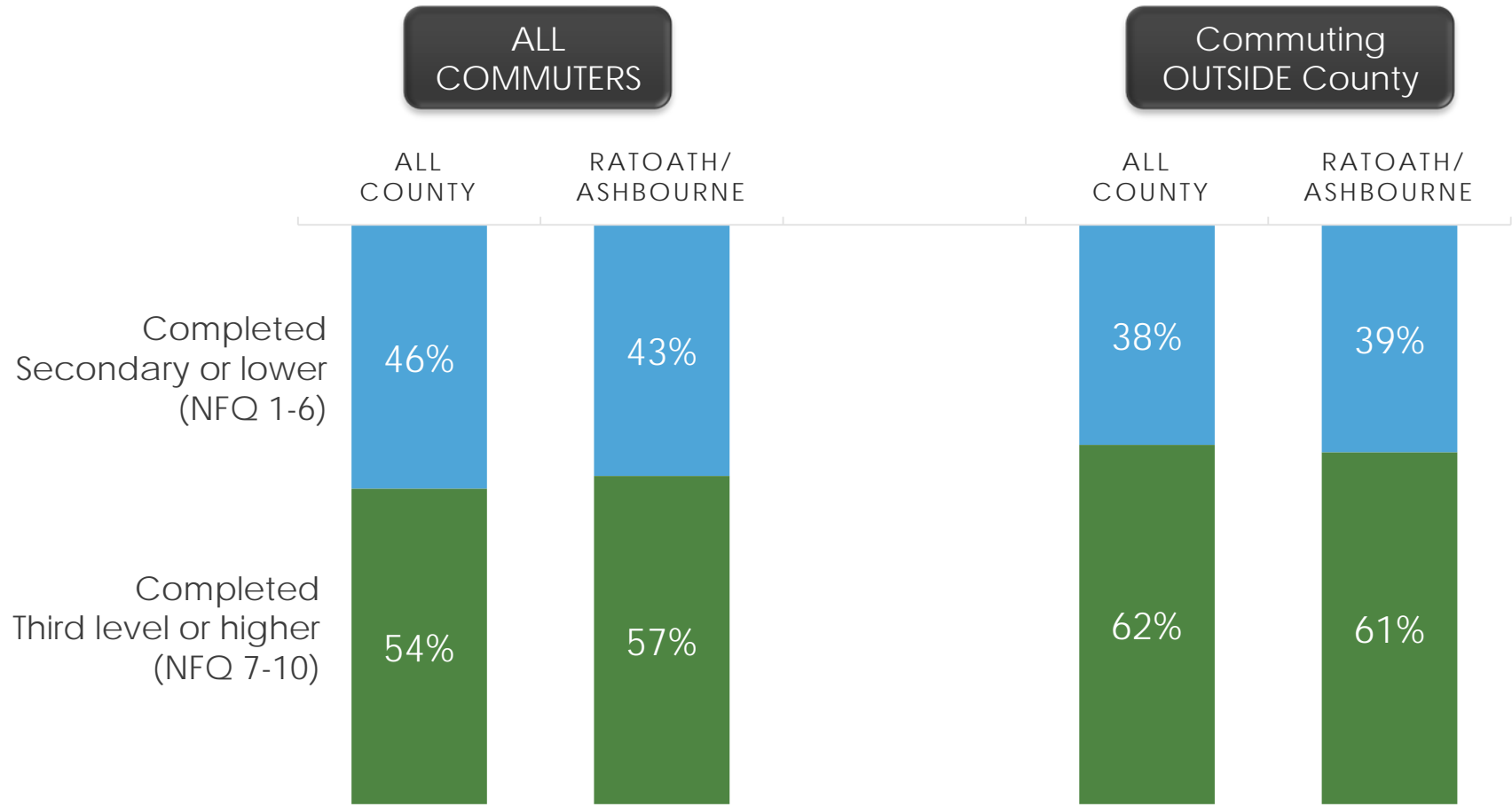


RATOATH/ASHBOURNE Highest Educational Achievement Level

- Ratoath/Ashbourne population is on a par with the county average – just slightly higher proportion have 3rd level qualifications versus the rest of the county.

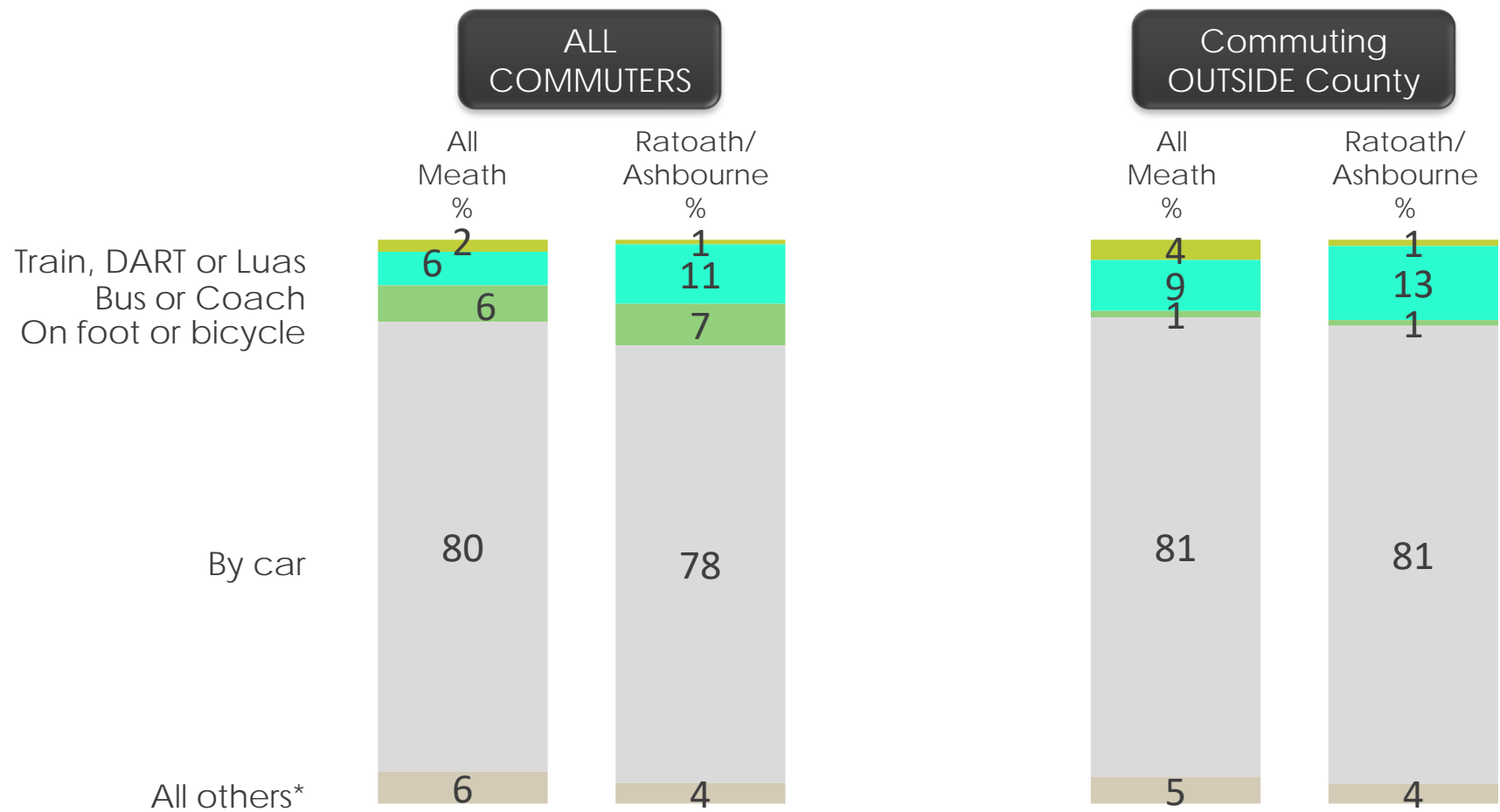


Source: Census '16 (POWSCAR)



Ratoath/Ashbourne Transport Modal Split

- Relatively lower use of cars in Ratoath/Ashbourne at 78% versus the average for Meath (90%).
- 1 in 8 (13%) commuters out of the county travel by bus but the large majority (81%) travel by car.



*Others includes motorbike, scooter, van, & lorry)



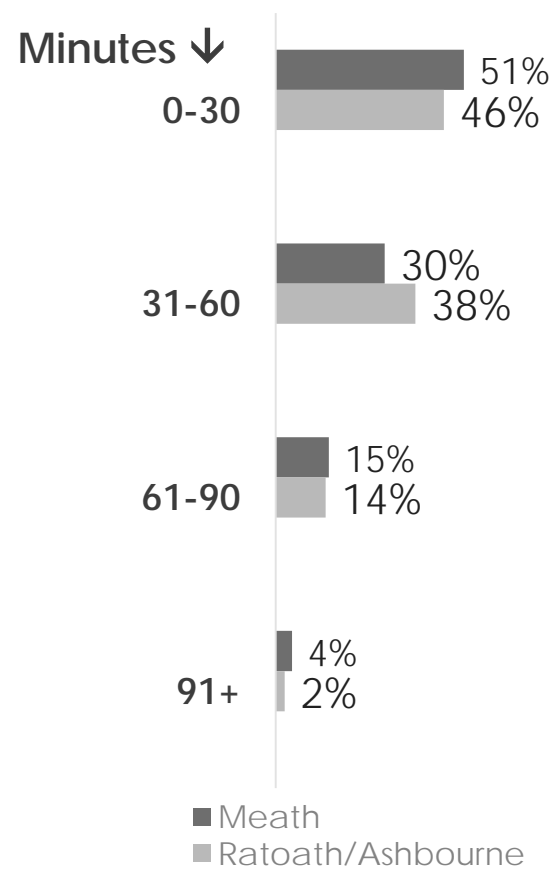
RATOATH/ASHBOURNE JOURNEY TIMES

- Just under 4 in 5 journeys out of Meath from Ratoath/Ashbourne take less than 1 hour.

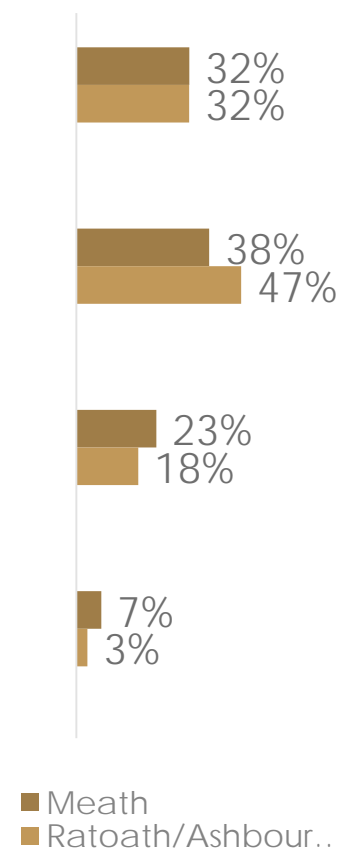
JOURNEY DEPARTURE TIMES

| | ALL MEATH | RATOATH/ASHBOURNE |
|-------------|-----------|-------------------|
| Before 6:30 | 14% | 13% |
| 6:30-7:00 | 14% | 15% |
| 7:01-7:30 | 14% | 16% |
| 7:31-8:00 | 16% | 17% |
| 8:01-8:30 | 16% | 14% |
| 8:31-9:00 | 12% | 11% |
| 9:01-9:30 | 5% | 5% |
| After 9:30 | 9% | 10% |

ALL Journeys

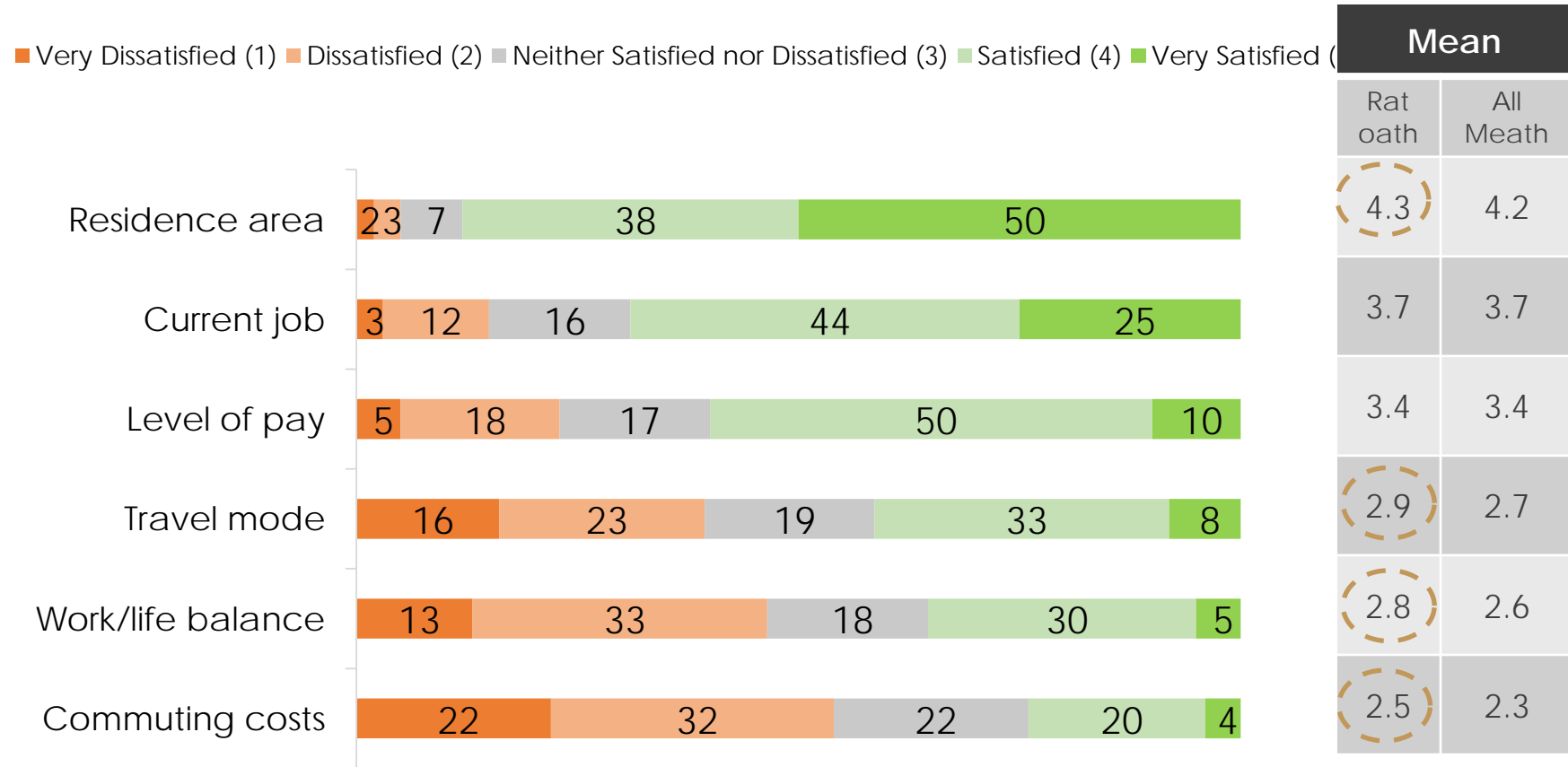


Commuting OUTSIDE County



RATOATH-ASHBOURNE SATISFACTION LEVELS

- Ratoath/Ashbourne residents are significantly more satisfied than the whole sample
- 9 in 10 (88%) Ratoath commuters claimed to be satisfied/very satisfied with where they live.
- 2 in 5 (41%) commuters outside the county are satisfied with their mode of travel.
- 1 in 3 (35%) said they were satisfied or very satisfied with their work/life balance
- 1 in 4 (24%) were satisfied or very satisfied with commuting costs.

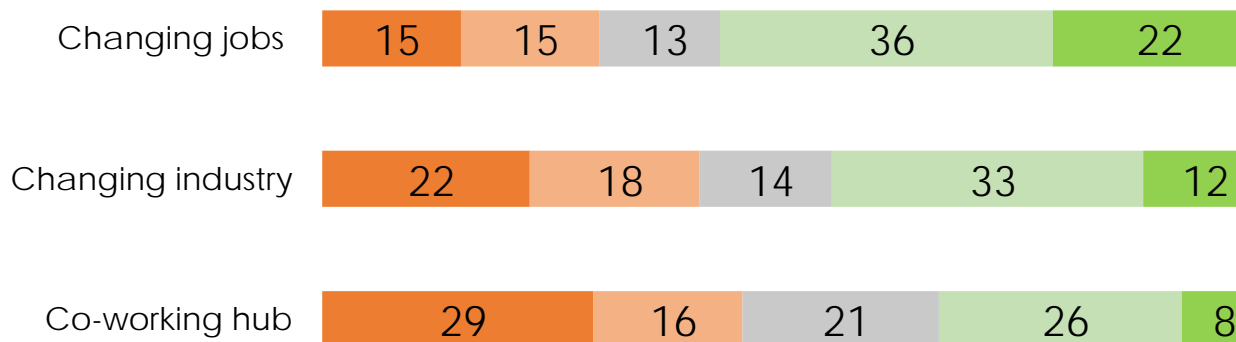


RATOATH/ASHBOURNE ATTITUDES TO FLEXIBLE WORKING SOLUTIONS

- Over half (58%) somewhat or very interested in changing jobs to work closer to home – this is significantly lower than the whole sample for Meath.
- Almost half (45%) said they were interested in working closer to home in a different industry.
- Only 15% felt they were somewhat or very familiar with how hubs work.

INTEREST IN WORKING CLOSER TO HOME:

■ Not at all interested
 ■ Not very interested
 ■ Neither/nor
 ■ Somewhat interested
 ■ Very interested



| Mean | |
|---------|-----------|
| Rat/Ash | All Meath |
| 3.3 | 3.5 |
| 2.9 | 3.0 |
| 2.7 | 2.7 |

AWARENESS OF HUBS

■ Not at all familiar
 ■ Not very familiar
 ■ Neither /nor
 ■ Somewhat familiar
 ■ Very familiar



| | |
|-----|-----|
| 1.8 | 1.9 |
| 1.5 | 1.6 |



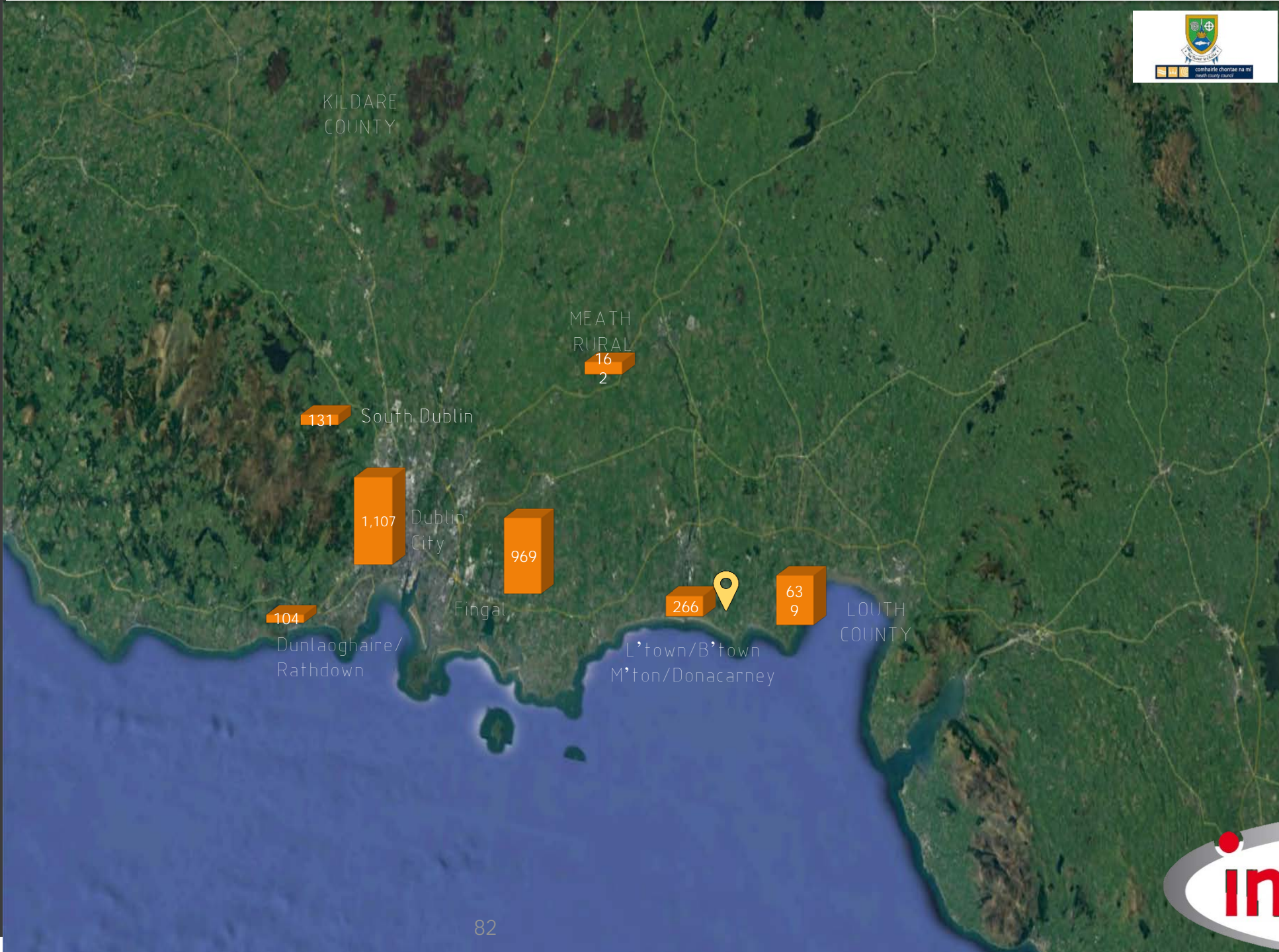


Laytown/ Bettystown



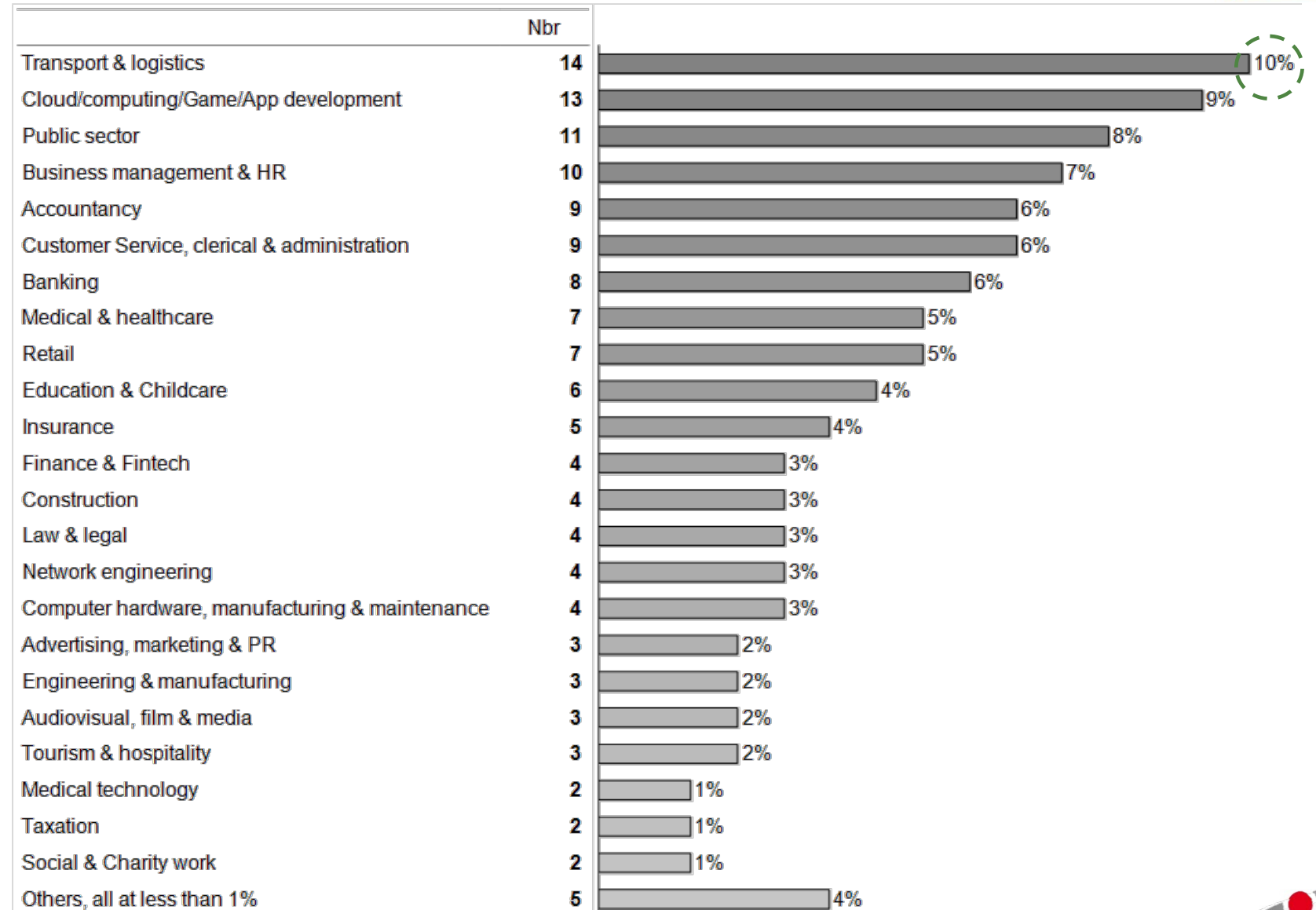
LAYTOWN COMMUTER FLOWS

| | |
|---|-------------|
| Total commuting OUTSIDE the county | 3017 |
| DUBLIN | 2311 |
| • Dublin City | 1107 |
| • South Dublin | 131 |
| • Fingal & Dunlaoghaire/Rathdown | 1073 |
| Louth | 639 |
| Other counties (@ <1%) | 67 |
| Total commuting INSIDE the county | 611 |
| Laytown/Bettystown/Mornington/Donacarney | 266 |
| Meath rural | 162 |
| Drogheda (part in Co Meath) | 56 |
| Other towns @<1% | 127 |



LAYTOWN/BETTYSTOWN SKILLS BASE

- 1 in 10 (9%) respondents was employed in transport & logistics.
- 9% said they worked in cloud/computing/app development.
- A further 8% worked in the public sector.
- Analysis identified that Transport & Logistics were over-represented versus the county total.

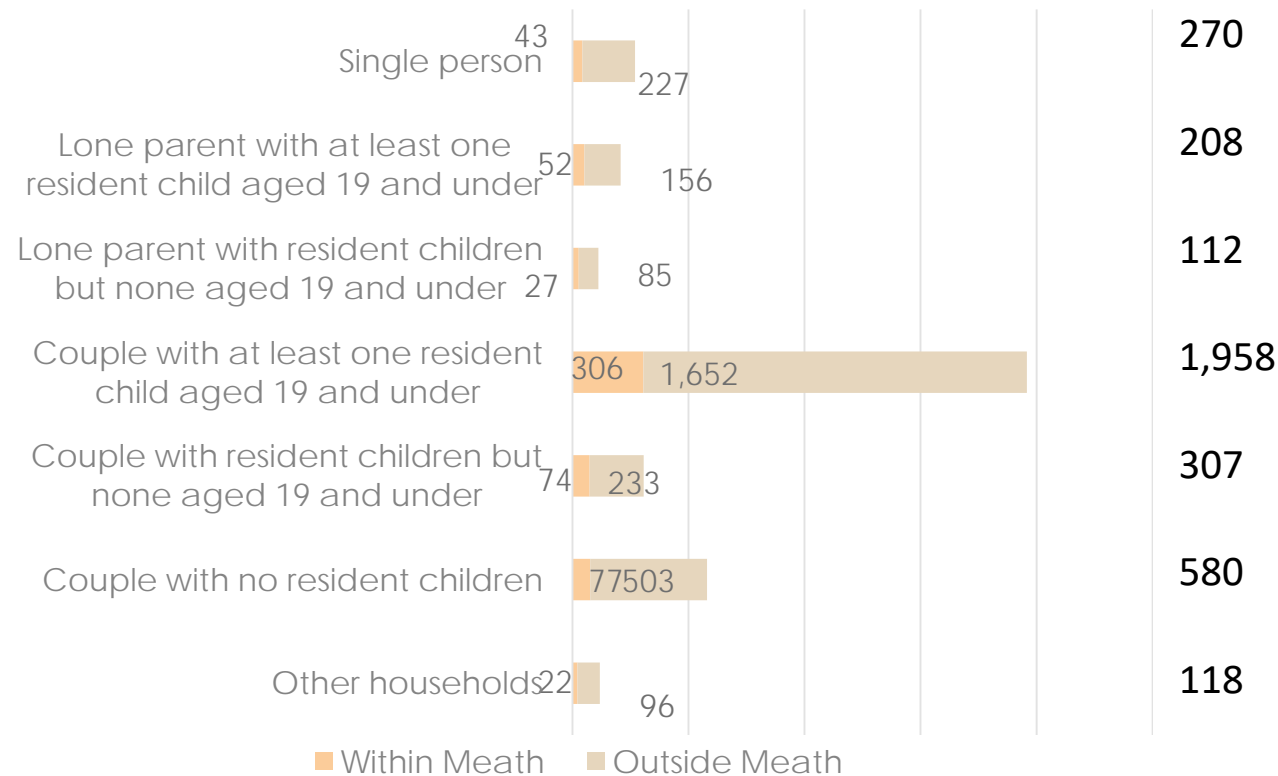


LAYTOWN/BETTYSTOWN HOUSEHOLD PROFILES*

Parents travel further for work:

- The most prevalent household profile is couples with at least one resident child aged 19 and under, followed by couples with no resident children.

Household profiles



Total commuters

270

208

112

1,958

307

580

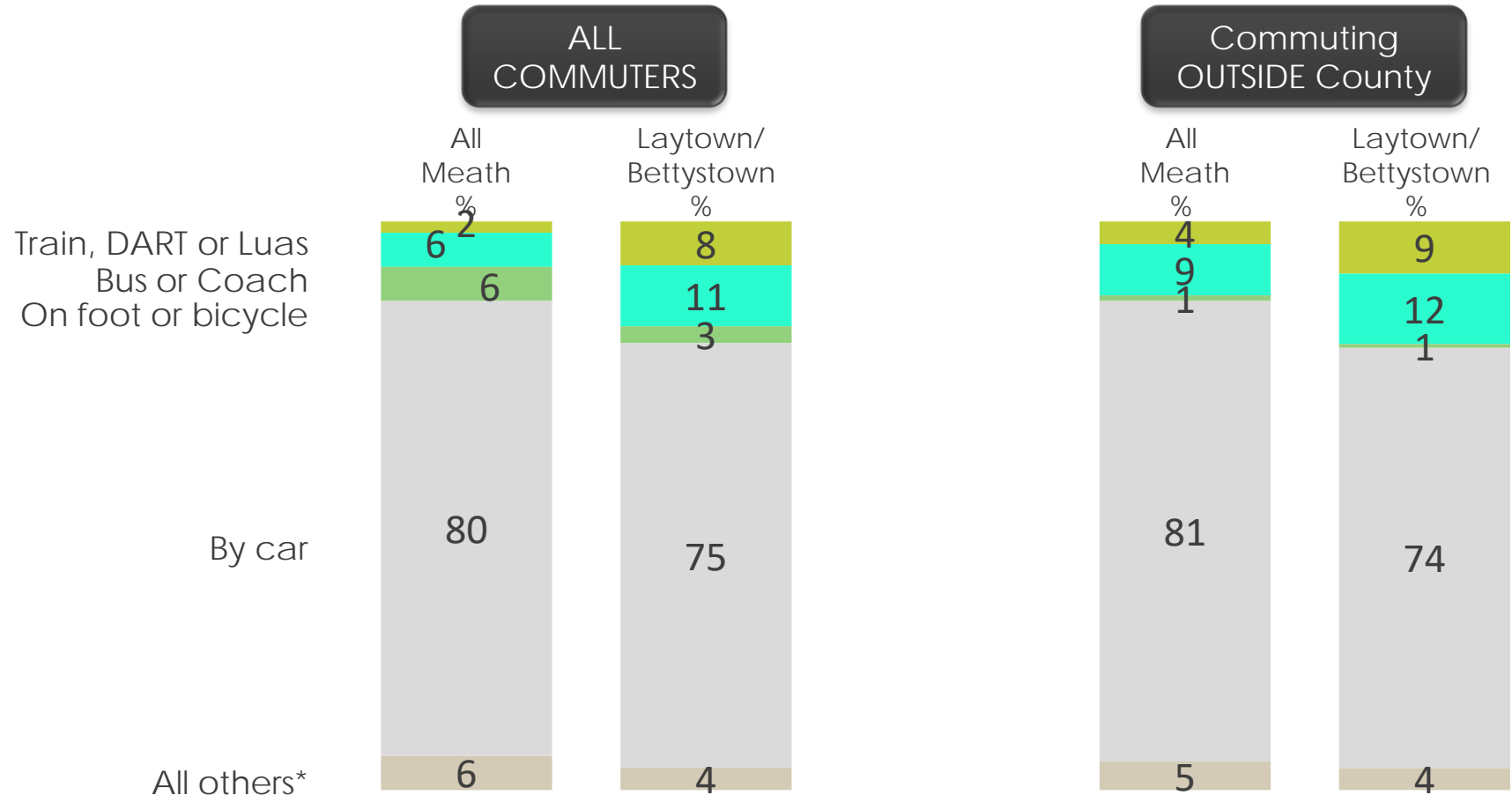
118

Within Meath Outside Meath

| | Meath | Laytown/ Bettystown |
|---|-------|------------------------|
| Single person | 6% | 8% |
| Lone parent with children aged 19 and under | 5% | 6% |
| Lone parent with children but none aged <19 | 3% | 3% |
| Couple with children aged 19 and under | 52% | 55% |
| Couple with children but none aged <19 | 12% | 9% |
| Couple with no resident children | 15% | 16% |
| Other households | 7% | 3% |

Laytown/Bettystown Transport Modal Split

- Below average car use in Laytown/Bettystown versus the rest of the county.
- Just under 1 in 10 (9%) commuters out of Meath from Laytown/Bettystown travel by train.
- 1 in 8 (12%) go to work by bus.



*Others includes motorbike, scooter, van, & lorry)



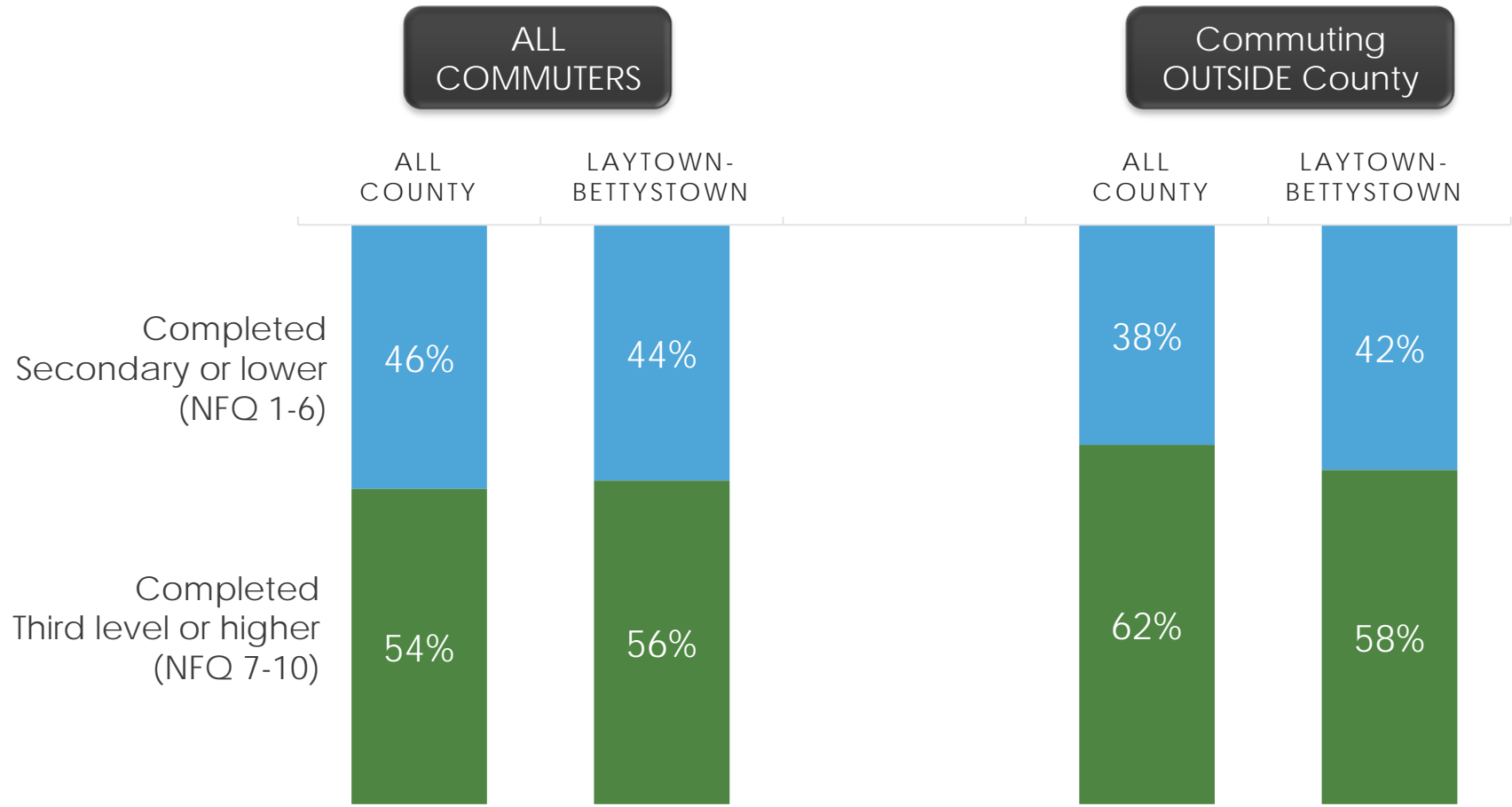
LAYTOWN BETTYSTOWN

Highest Educational Achievement Level

- Laytown Bettystown area education is on a par with the county total with slightly more of those leaving the county having second level qualifications versus the county average.



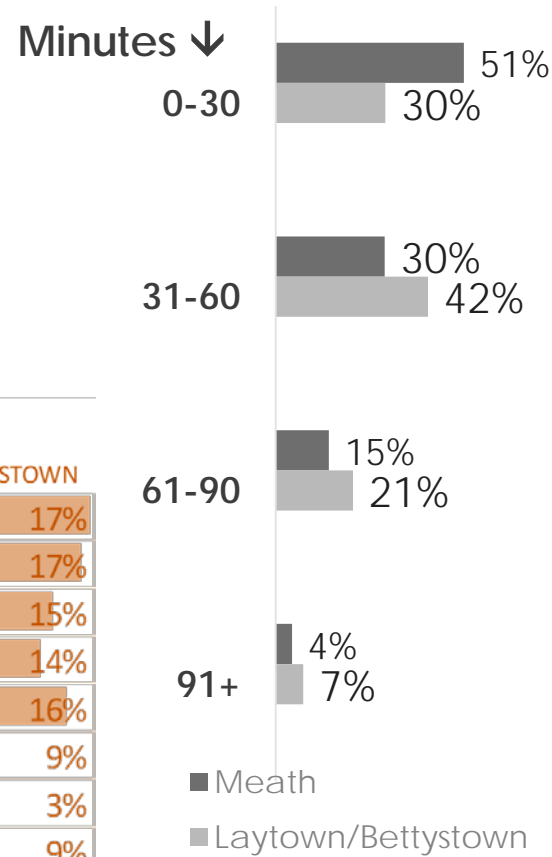
Source: Census '16 (POWSCAR)



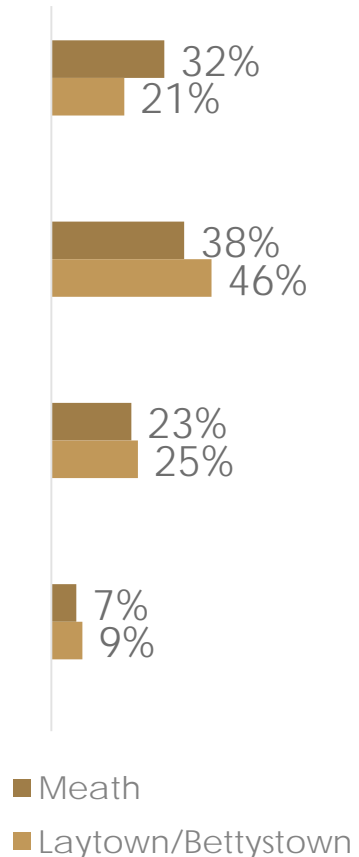
LAYTOWN-BETTYSTOWN JOURNEY TIMES

- Slightly longer journey times for Laytown Bettystown versus the total.

ALL Journeys



Commuting OUTSIDE County



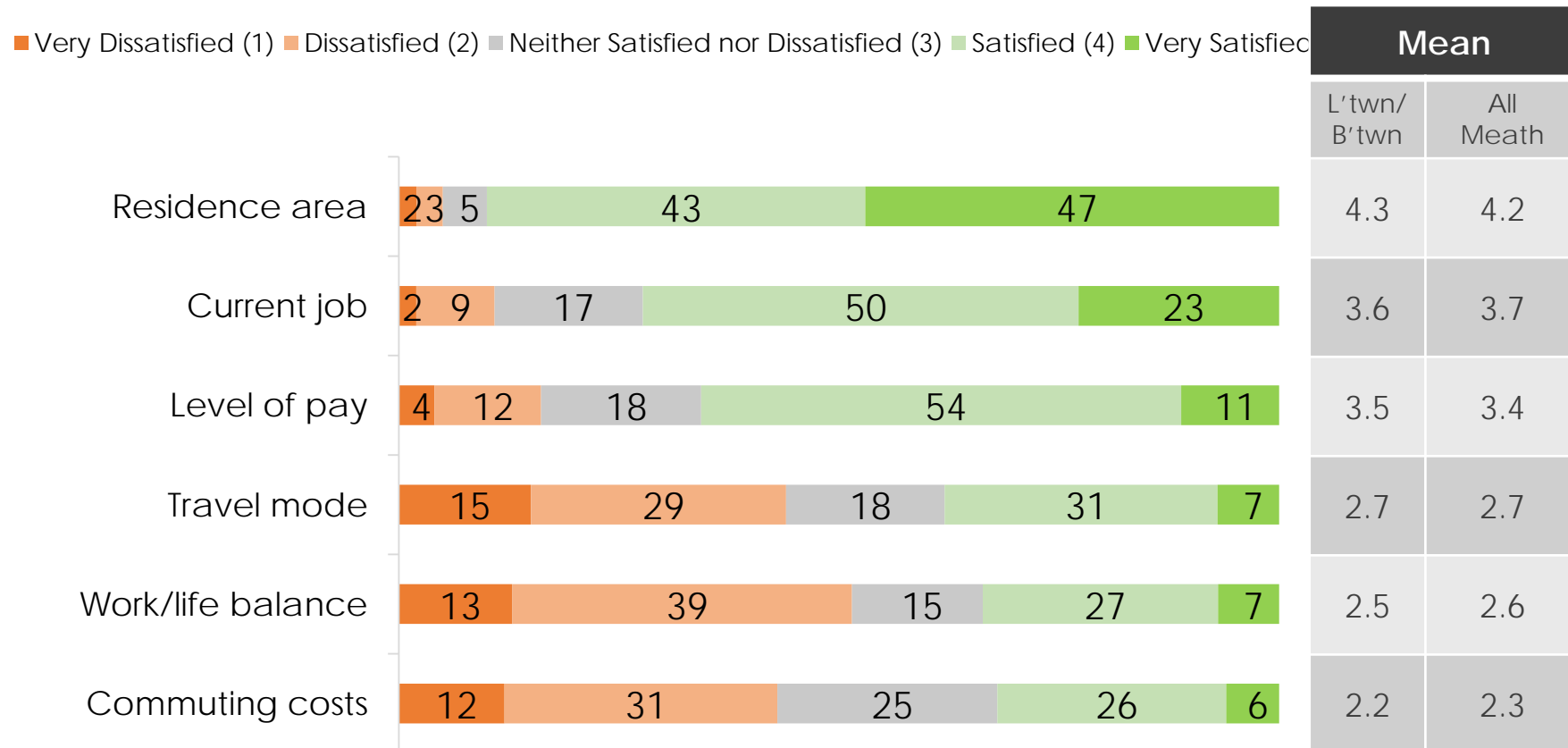
JOURNEY DEPARTURE TIMES

| | ALL MEATH | LAYTOWN/BETTYSTOWN |
|-------------|-----------|--------------------|
| Before 6:30 | 14% | 17% |
| 6:30-7:00 | 14% | 17% |
| 7:01-7:30 | 14% | 15% |
| 7:31-8:00 | 16% | 14% |
| 8:01-8:30 | 16% | 16% |
| 8:31-9:00 | 12% | 9% |
| 9:01-9:30 | 5% | 3% |
| After 9:30 | 9% | 9% |



LAYTOWN/BETTYSTOWN SATISFACTION LEVELS

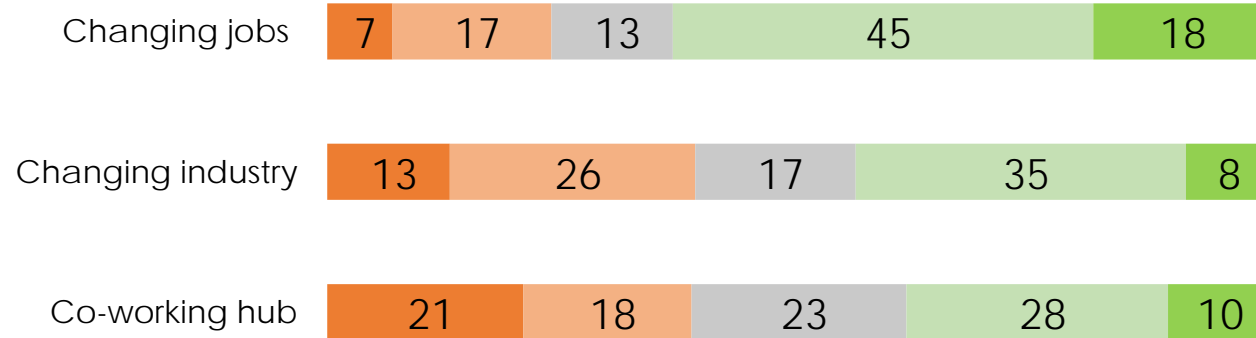
- Laytown/Bettystown residents are not significantly different than the whole sample.
- 90% are satisfied or very satisfied with where they live.
- 2 in 5 (38%) are satisfied with their travel mode
- 1 in 3 are satisfied with their work/life balance and commuting costs (34% and 32% respectively).



LAYTOWN/BETTYSTOWN ATTITUDES TO FLEXIBLE WORKING SOLUTIONS

INTEREST IN WORKING CLOSER TO HOME:

■ Not at all interested
 ■ Not very interested
 ■ Neither/nor
 ■ Somewhat interested
 ■ Very interested



| Mean | |
|--------|-----------|
| L'town | All Meath |
| 3.5 | 3.5 |
| 3.0 | 3.0 |
| 2.9 | 2.7 |

AWARENESS OF HUBS

■ Not at all familiar
 ■ Not very familiar
 ■ Neither /nor
 ■ Somewhat familiar
 ■ Very familiar



| | |
|-----|-----|
| 2.0 | 1.9 |
| 1.6 | 1.6 |

- Over 2 in 3 interested in changing jobs to work closer to home (63% somewhat or very interested).
- 2 in 5 (43%) said they were interested in working closer to home in a different industry.
- 1 in 5 (19%) felt they were somewhat or very familiar with how hubs work.





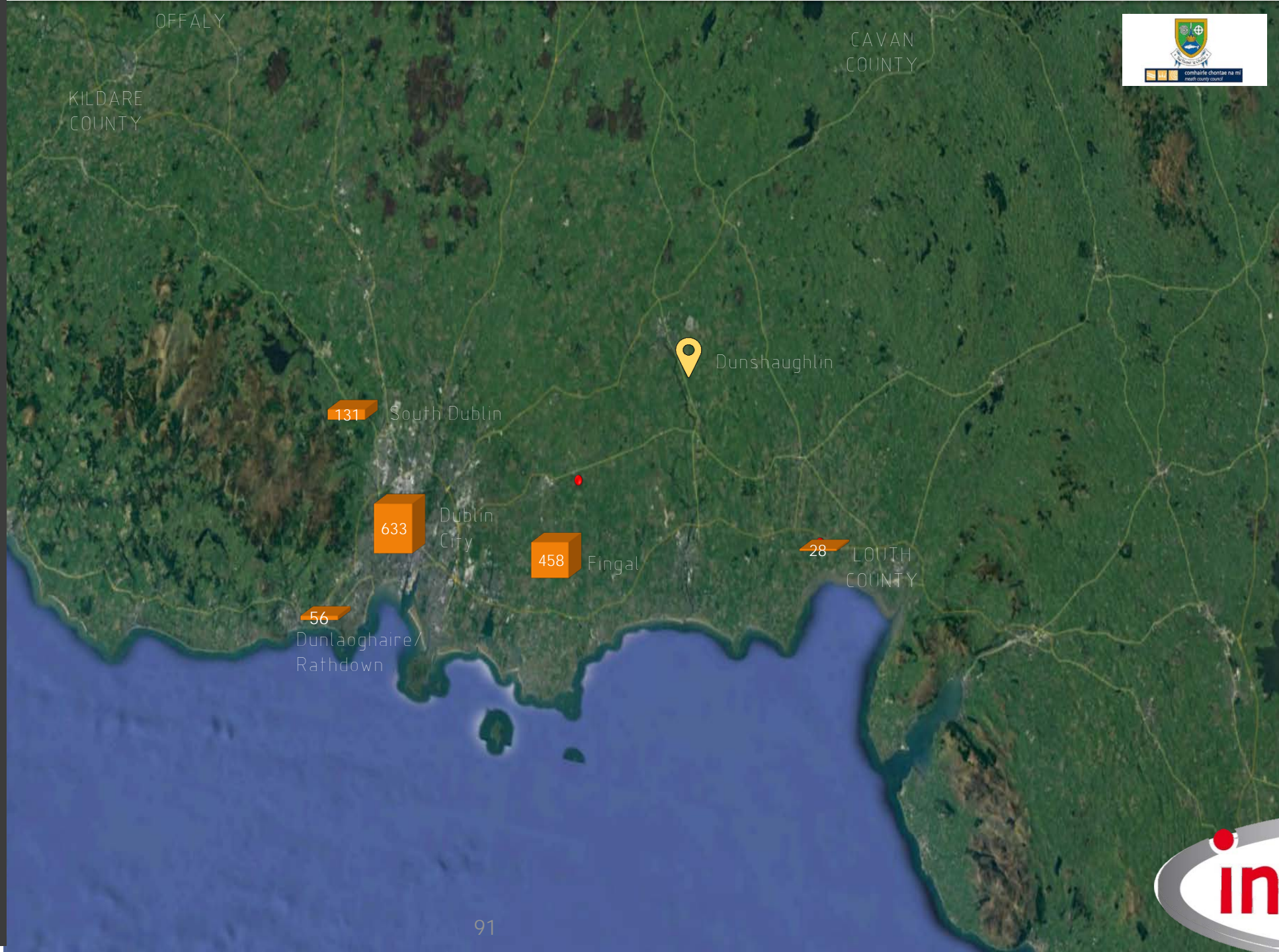
Dunshaughlin



DUNSHAUGHLIN COMMUTER FLOWS

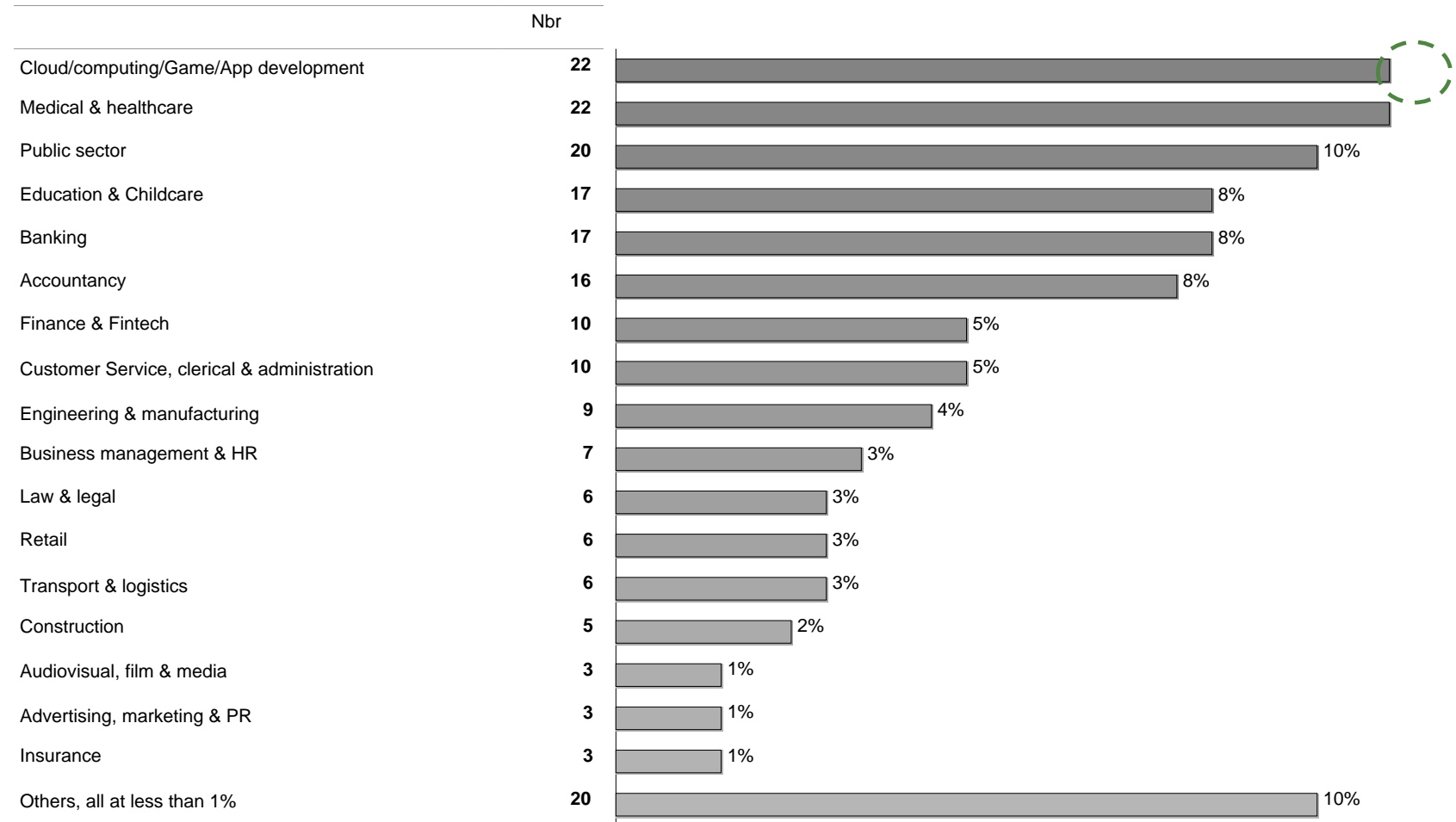


| | |
|---|-------------|
| Total commuting OUTSIDE the county | 1396 |
| DUBLIN | 1278 |
| • Dublin City | 633 |
| • South Dublin | 131 |
| • Fingal & Dunlaoghaire/Rathdown | 514 |
| Kildare | 64 |
| Other counties (@ <1%) | 54 |
| Total commuting INSIDE the county | 629 |
| Meath rural | 210 |
| Dunshaughlin | 207 |
| Navan | 67 |
| Other towns @<1% | 145 |



DUNSHAUGHLIN SKILLS BASE

- Just over 1 in 10 (11%) respondents was employed cloud/computing/app development.
- A similar number was employed in medical & healthcare
- 10% said they worked in public sector.
- Analysis identified that Cloud/computing/game/app development were over-represented versus the county total.



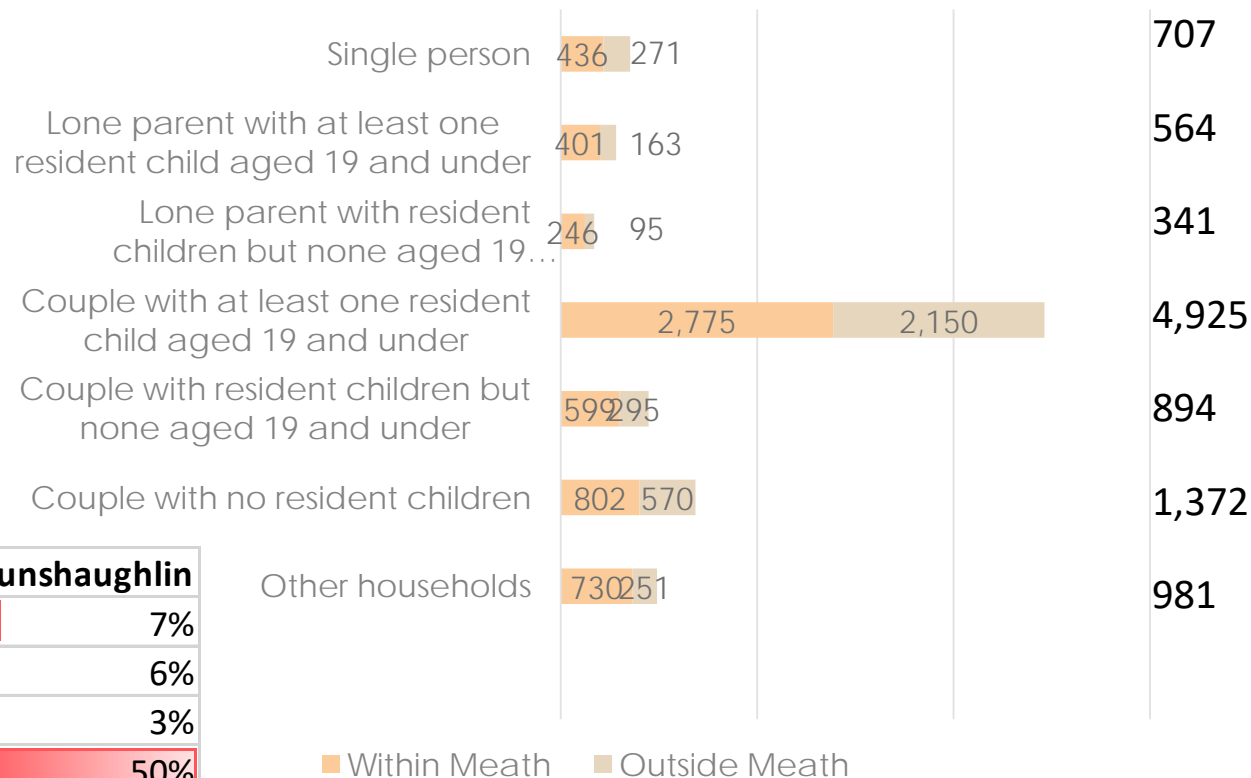
DUNSHAUGHLIN HOUSEHOLD PROFILES*

Parents travel further for work:

- The most prevalent household profile is couples with at least one resident child aged 19 and under, followed by couples with no resident children.

| | Meath | Dunshaughlin |
|---|-------|--------------|
| Single person | 6% | 7% |
| Lone parent with children aged 19 and under | 5% | 6% |
| Lone parent with children but none aged <19 | 3% | 3% |
| Couple with children aged 19 and under | 52% | 50% |
| Couple with children but none aged <19 | 12% | 9% |
| Couple with no resident children | 15% | 14% |
| Other households | 7% | 10% |

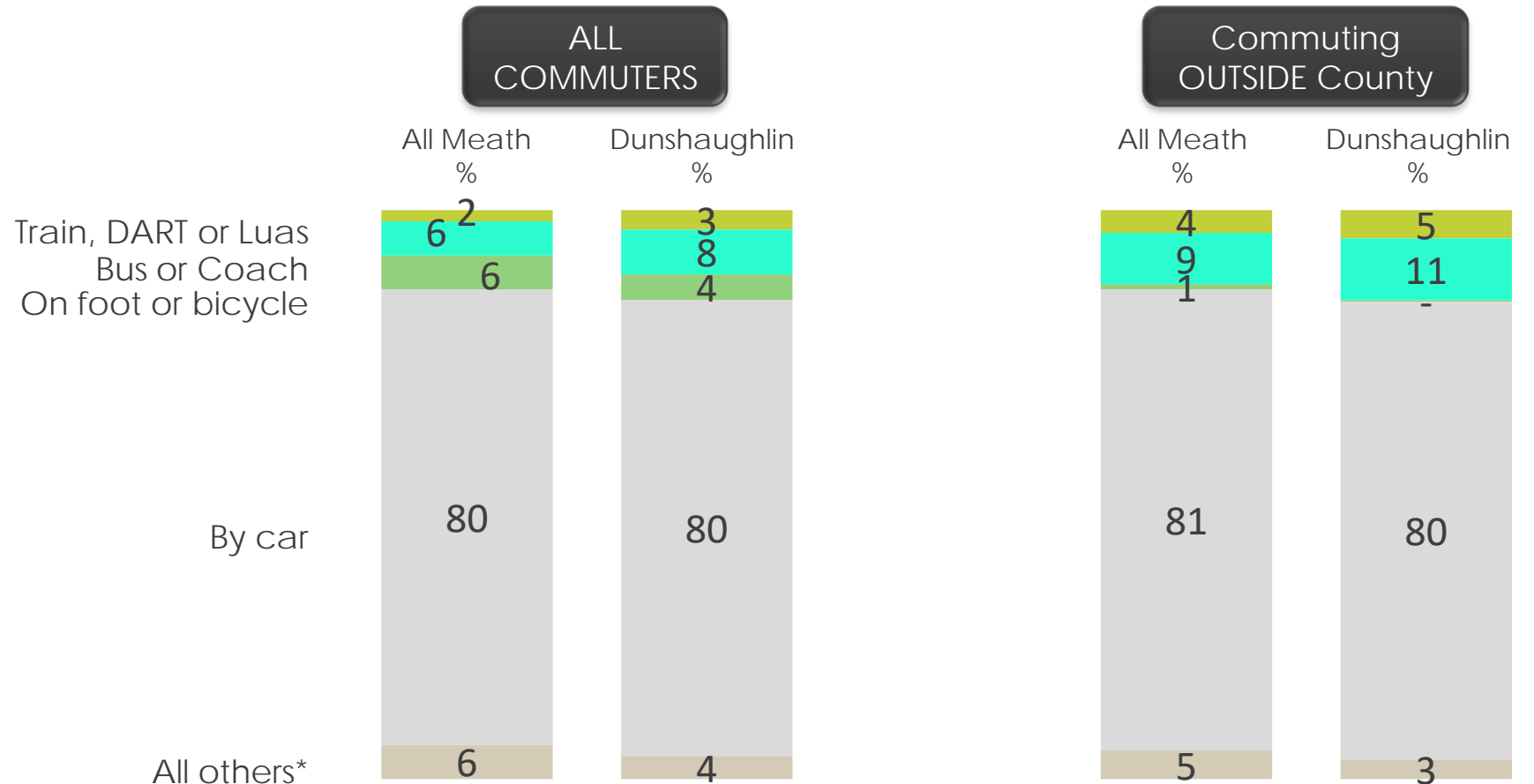
Household profile



Dunshaughlin

Transport Modal Split

- In common with most towns in Meath, 4 in 5 Dunshaughlin commuters travel by road.
- 1 in 10 goes to work by bus and 1 in 20 travels by train.



*Others includes motorbike, scooter, van, & lorry

DUNSHAUGHLIN

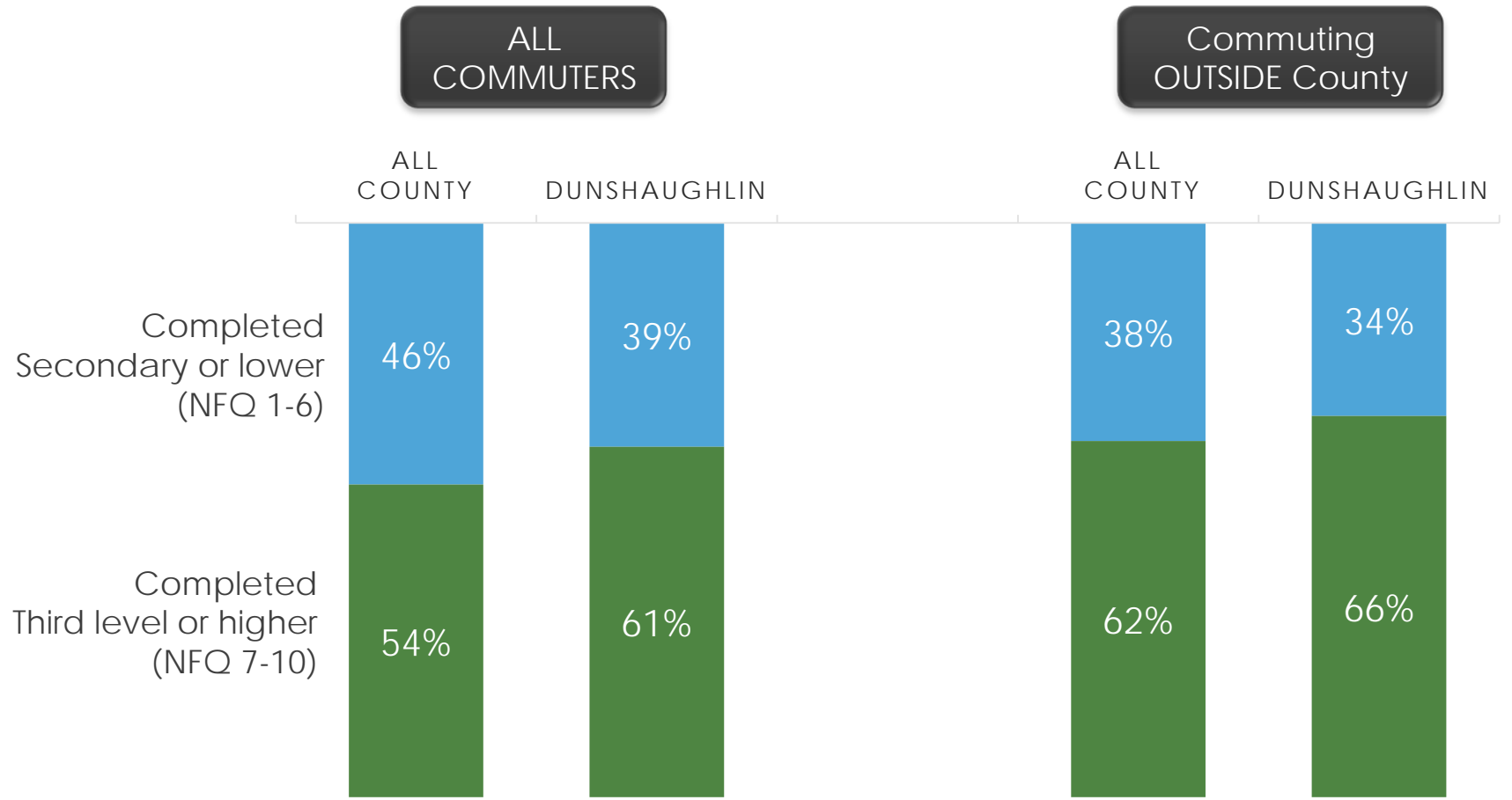
Highest Educational Achievement Level



- 2 in 3 Dunshaughlin commuters out of the county have a third level qualification. This is slightly higher than the county average.



Source: Census '16 (POWSCAR)

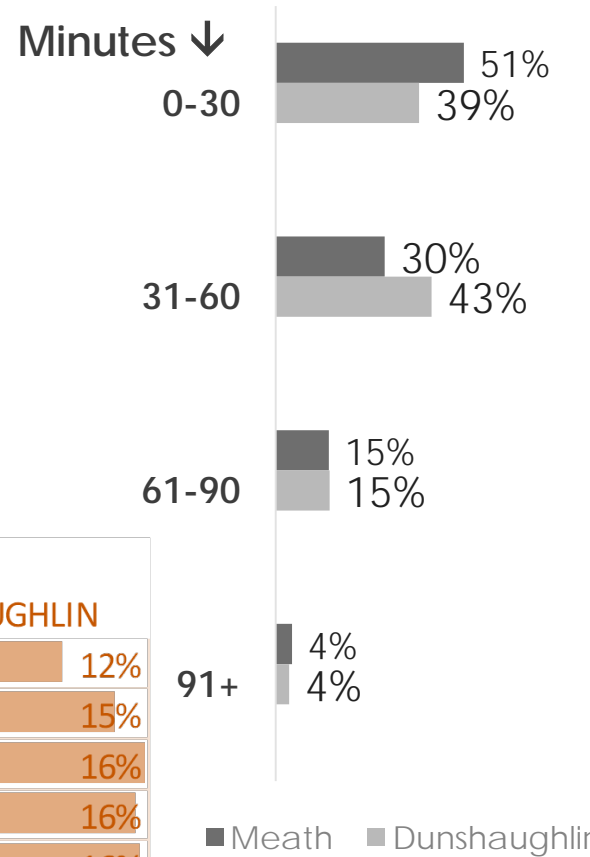


DUNSHAUGHLIN JOURNEY TIMES

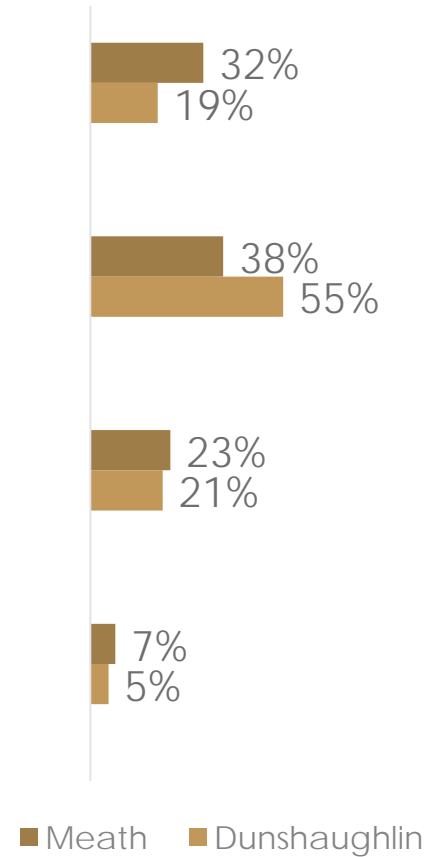


- 30-60 minutes accounts for over half the commutes out of the county from Dunshaughlin.

ALL Journeys



Commuting OUTSIDE County



| | JOURNEY DEPARTURE TIMES | |
|-------------|-------------------------|--------------|
| | ALL MEATH | DUNSHAUGHLIN |
| Before 6:30 | 14% | 12% |
| 6:30-7:00 | 14% | 15% |
| 7:01-7:30 | 14% | 16% |
| 7:31-8:00 | 16% | 16% |
| 8:01-8:30 | 16% | 16% |
| 8:31-9:00 | 12% | 12% |
| 9:01-9:30 | 5% | 6% |
| After 9:30 | 9% | 8% |

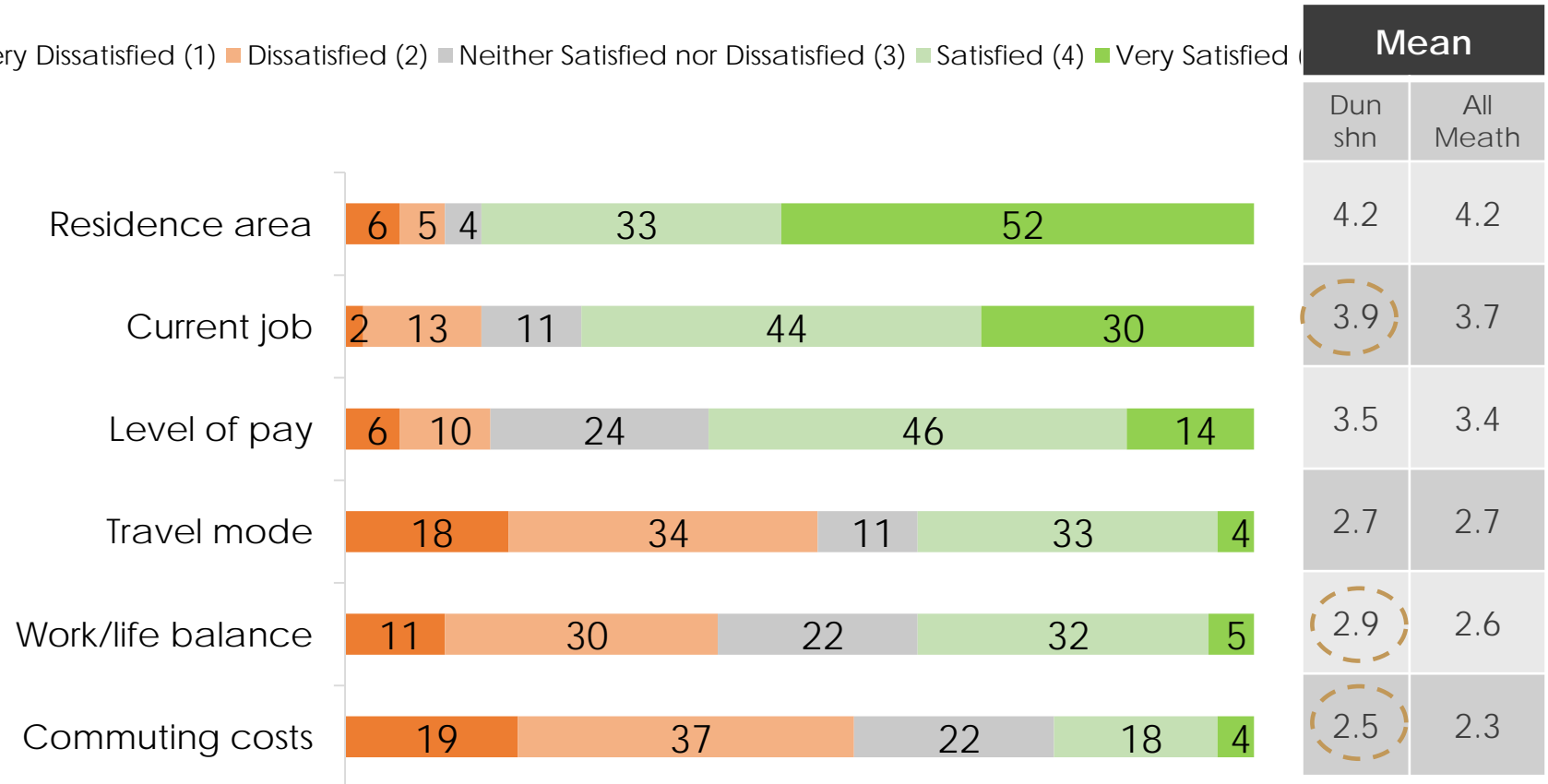
Source: Census '16 (POWSCAR)



DUNSHAUGHLIN SATISFACTION LEVELS

- Dunshaughlin residents are significantly more satisfied with their current job, work/life balance and commuting costs (74%, 37% and 22% respectively).
- Over 4 in 5 (85%) are satisfied with where they live.
- Over 1 in 3 (37%) are satisfied with their travel mode.

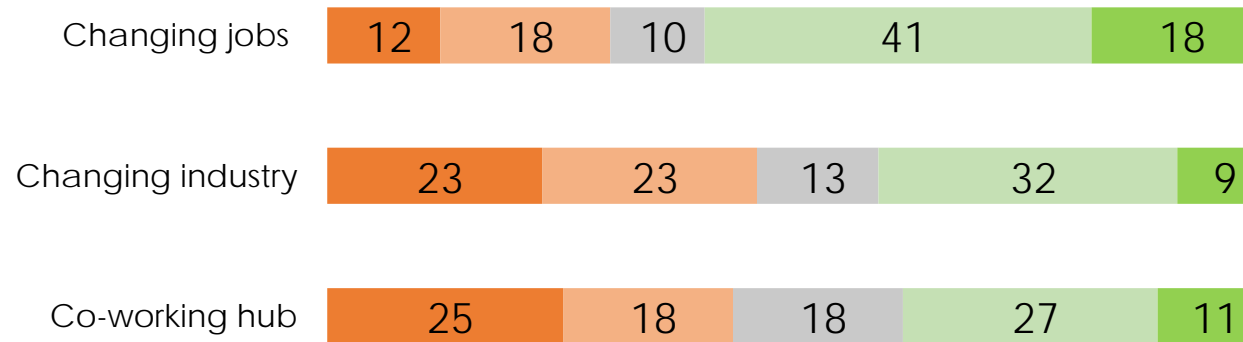
Very Dissatisfied (1) Dissatisfied (2) Neither Satisfied nor Dissatisfied (3) Satisfied (4) Very Satisfied (5)



DUNSHAUGHLIN ATTITUDES TO FLEXIBLE WORKING SOLUTIONS

INTEREST IN WORKING CLOSER TO HOME:

■ Not at all interested
 ■ Not very interested
 ■ Neither/nor
 ■ Somewhat interested
 ■ Very interested



| Mean | |
|-------------|-----------|
| D'shaughlin | All Meath |
| 3.4 | 3.5 |
| 2.8 | 3.0 |
| 2.8 | 2.7 |

AWARENESS OF HUBS

■ Not at all familiar
 ■ Not very familiar
 ■ Neither /nor
 ■ Somewhat familiar
 ■ Very familiar



| | |
|-----|-----|
| 1.9 | 1.9 |
| 1.5 | 1.6 |

- Over half (59%) are interested in changing jobs to work closer to home – this is significantly lower than the whole sample for Meath.
- 2 in 5 (41%) said they were interested in working closer to home in a different industry – this is significantly lower than the whole sample.
- 18% felt they were somewhat or very familiar with how hubs work.





Kells



KELLS COMMUTER FLOWS

82
CAVAN
COUNTY

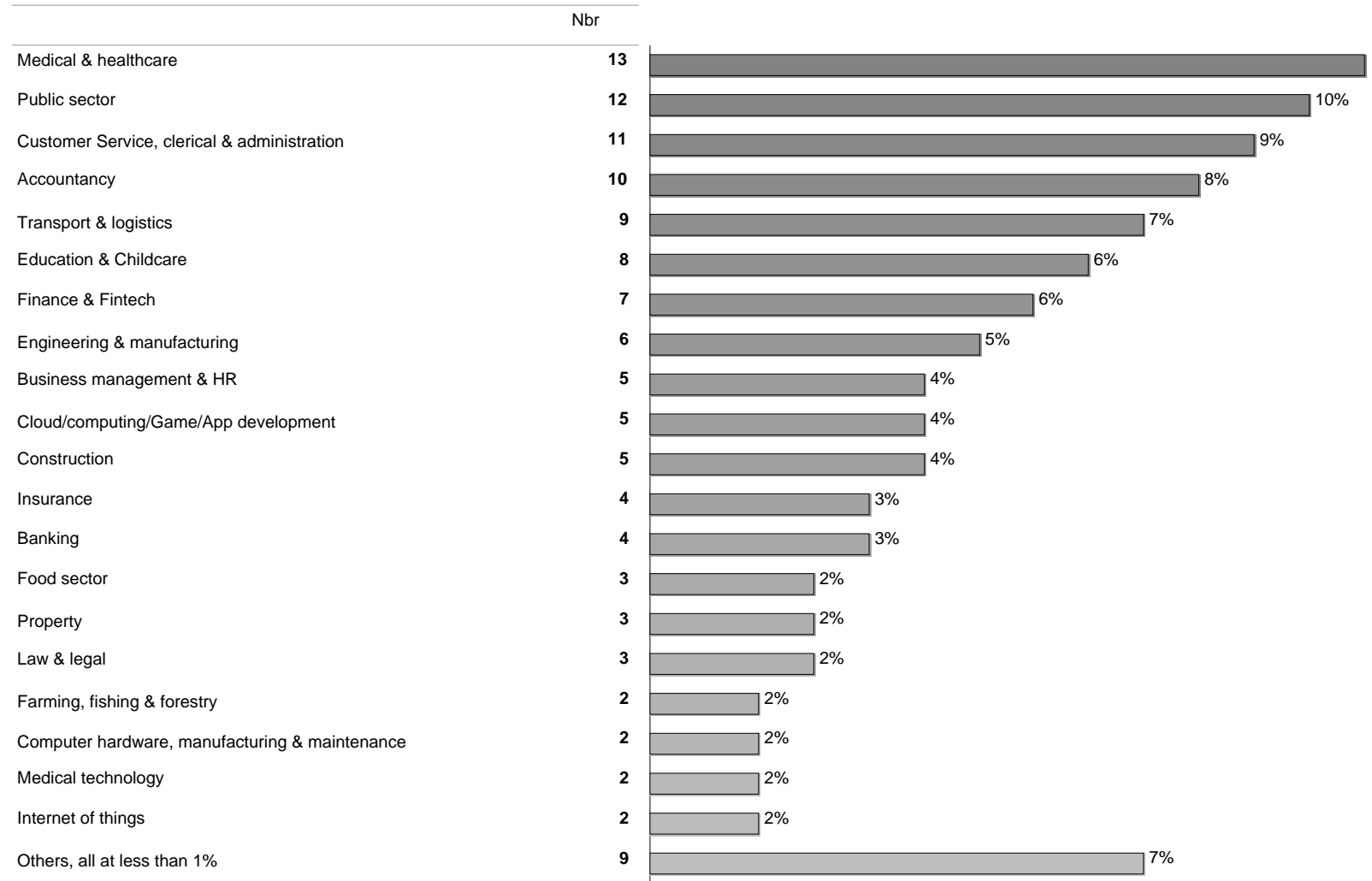


| | |
|---|-------------|
| Total commuting OUTSIDE the county | 637 |
| DUBLIN | 441 |
| • Dublin City | 217 |
| • South Dublin | 46 |
| • Fingal & Dunlaoghaire/Rathdown | 178 |
| Cavan | 82 |
| Other counties (@ <1%) | 114 |
| Total commuting INSIDE the county | 1344 |
| Meath rural | 507 |
| Kells | 423 |
| Navan | 290 |
| Other towns @<1% | 124 |



KELLS SKILLS BASE

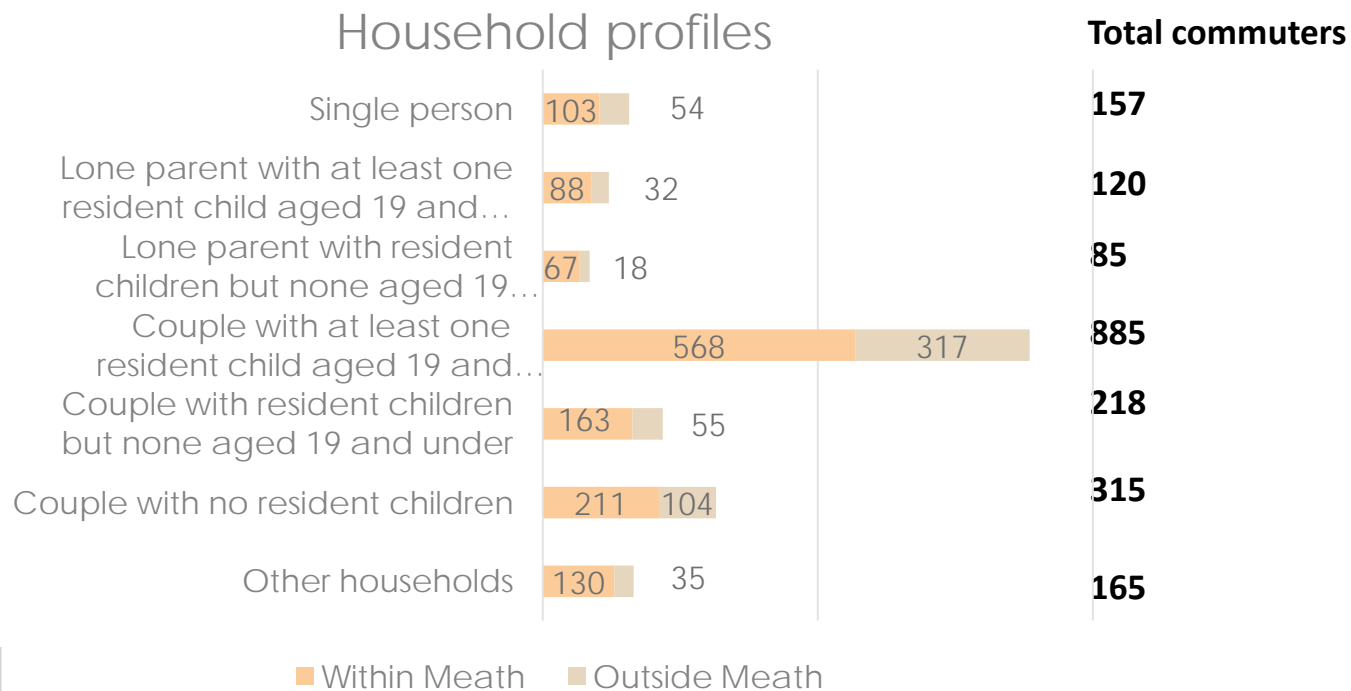
- 1 in 10 (10%) of respondents from Kells was employed in medical & healthcare.
- Another 10% worked in the public sector
- 9% worked in customer service, clerical & admin.



KELLS HOUSEHOLD PROFILES*

Parents travel further for work:

- The most prevalent household profile is couples with at least one resident child aged 19 and under, followed by couples with no resident children.



| | Meath | Kells |
|---|-------|-------|
| Single person | 6% | 8% |
| Lone parent with children aged 19 and under | 5% | 6% |
| Lone parent with children but none aged <19 | 3% | 4% |
| Couple with children aged 19 and under | 52% | 46% |
| Couple with children but none aged <19 | 12% | 11% |
| Couple with no resident children | 15% | 16% |
| Other households | 7% | 8% |

KELLS

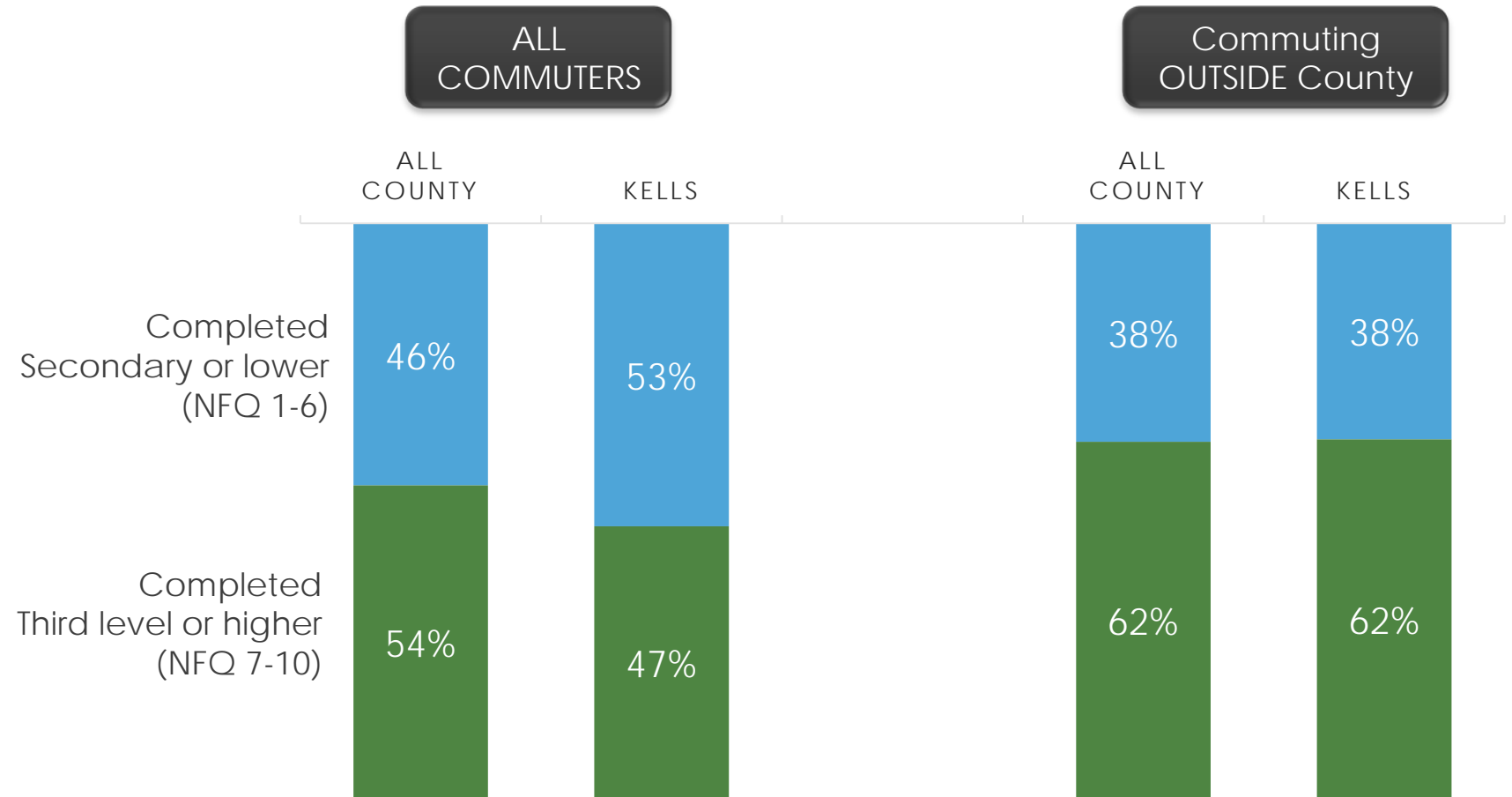
Highest Educational Achievement Level



- Just under half the total commuter population of Kells have completed qualifications at third level or higher.
- This rises to 2 in 3 of those leaving the county for work.



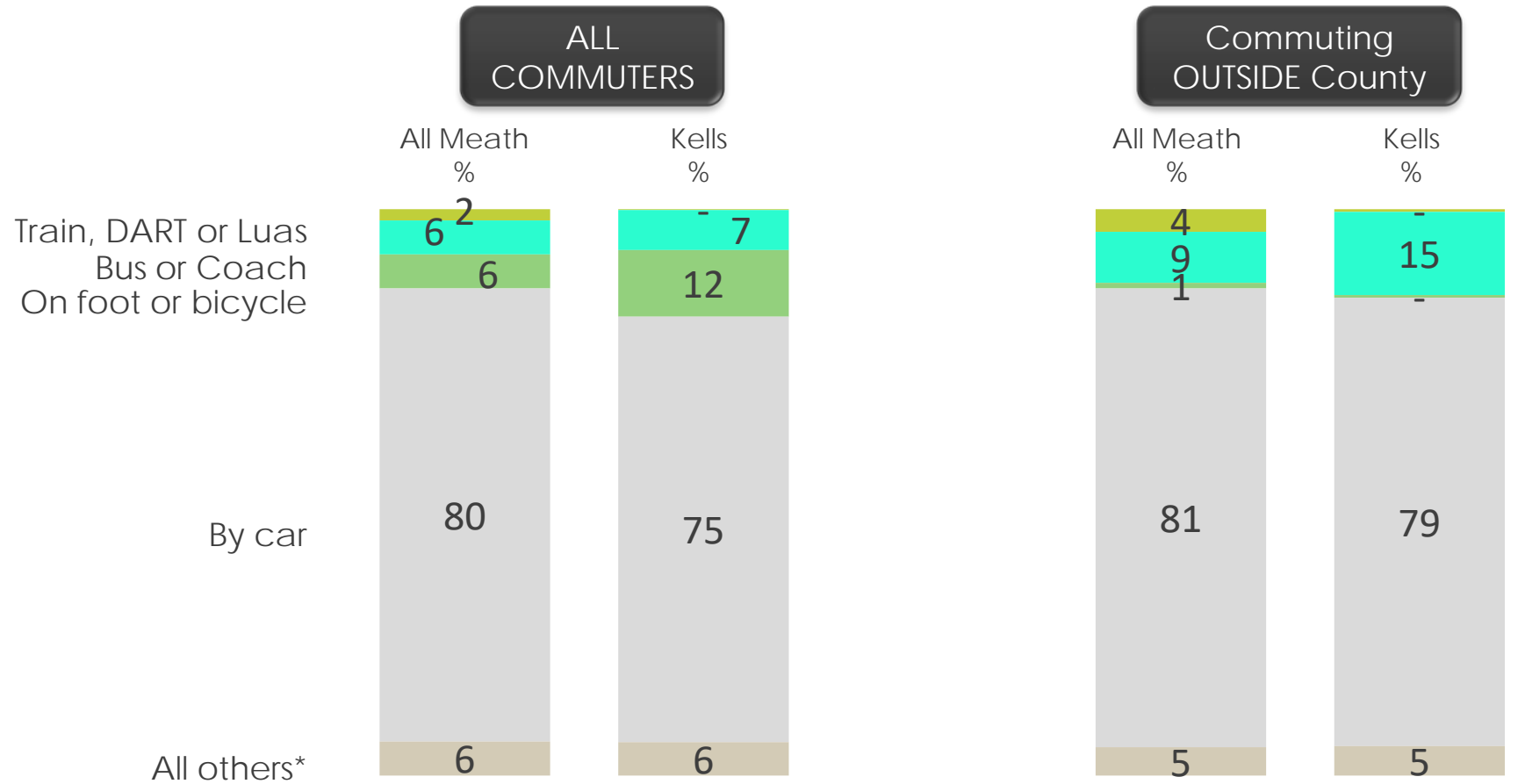
Source: Census '16 (POWSCAR)



Kells

Transport Modal Split

- 4 in 5 (79%) Kells commuters out of Meath go by car.
- 1 in 7 (15%) Kells commuters out of Meath go by bus.



*Others includes motorbike, scooter, van, & lorry

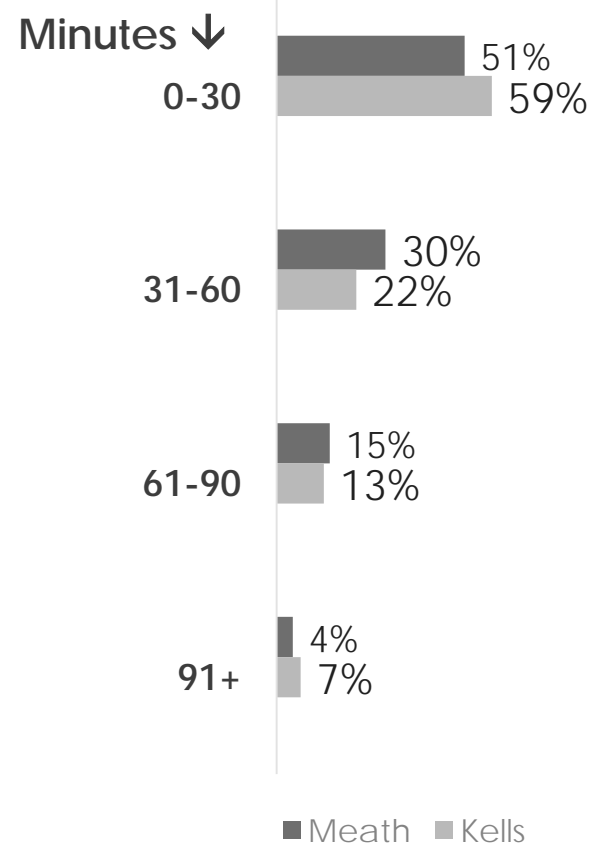


KELLS TOWN JOURNEY TIMES

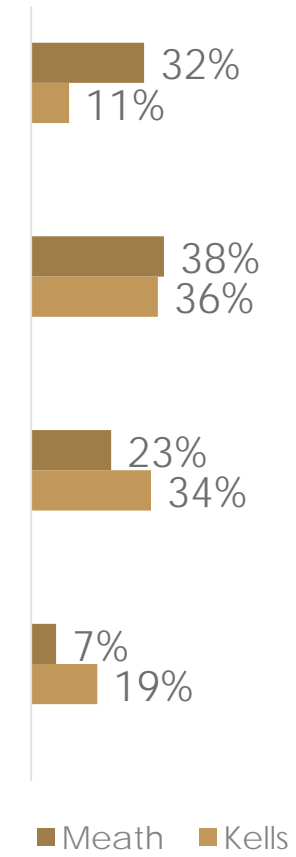


- Over half those commuting out of Meath from Kells spend above 60 mins on the journey to and from.
- 1 in 5 spend over 90 mins each way.

ALL Journeys



Commuting OUTSIDE County



JOURNEY DEPARTURE TIMES

| | ALL MEATH | KELLS |
|-------------|-----------|-------|
| Before 6:30 | 14% | 8% |
| 6:30-7:00 | 14% | 6% |
| 7:01-7:30 | 14% | 4% |
| 7:31-8:00 | 16% | 43% |
| 8:01-8:30 | 16% | 10% |
| 8:31-9:00 | 12% | 15% |
| 9:01-9:30 | 5% | 8% |
| After 9:30 | 9% | 6% |

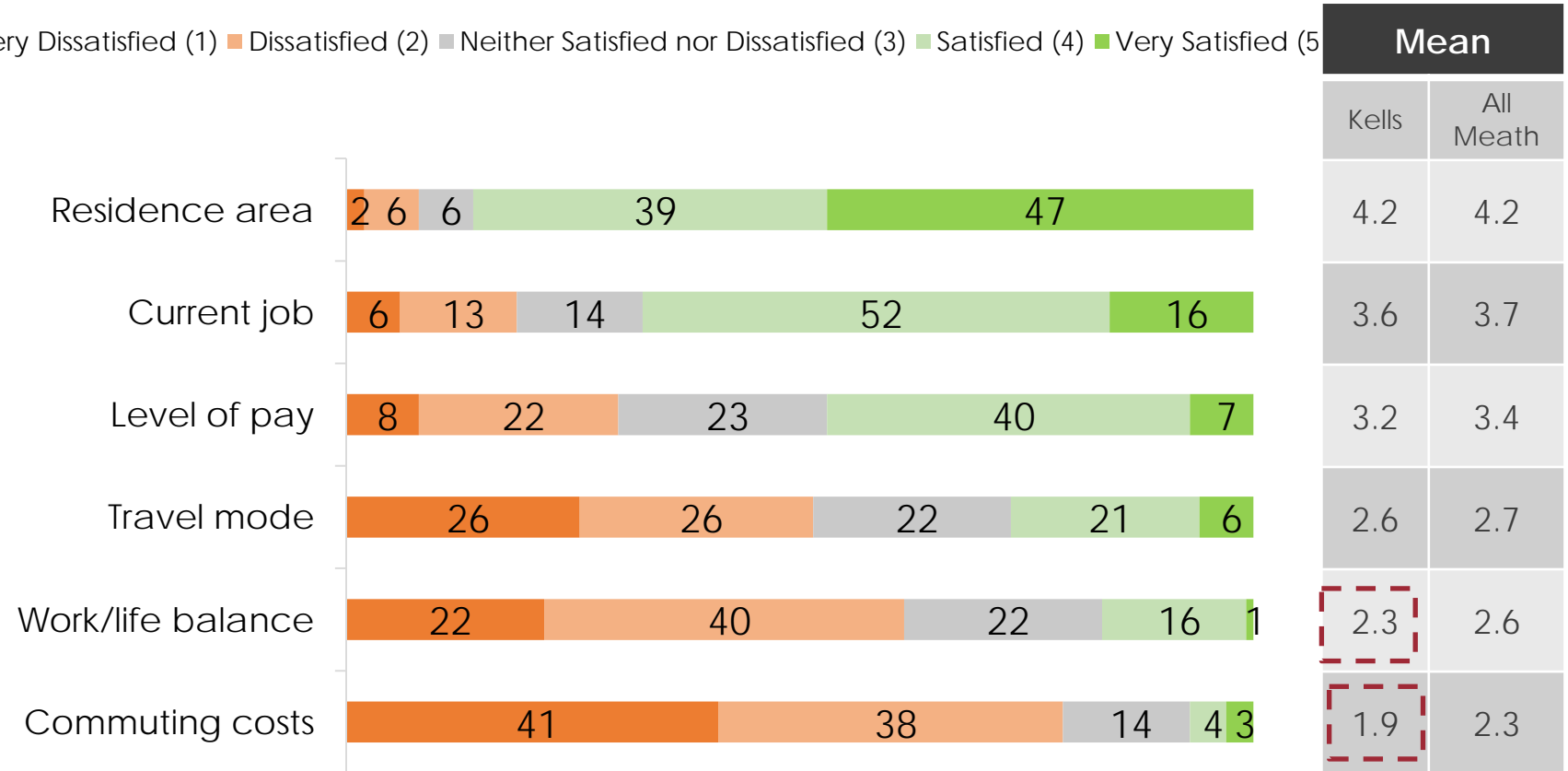
Source: Census '16 (POWSCAR)



KELLS SATISFACTION LEVELS

- In line with the total sample, 4 in 5 (86%) Kells residents are satisfied with where they live and just under 7 in 10 (68%) are satisfied in their current job.
- 4 in 5 (79%) Kells residents said they were dissatisfied or very dissatisfied with the costs of their commute to work, significantly lower than the rest of the sample.
- 2 in 3 are dissatisfied or very dissatisfied with work/life balance, significantly lower than the rest of the sample.

Very Dissatisfied (1) Dissatisfied (2) Neither Satisfied nor Dissatisfied (3) Satisfied (4) Very Satisfied (5)



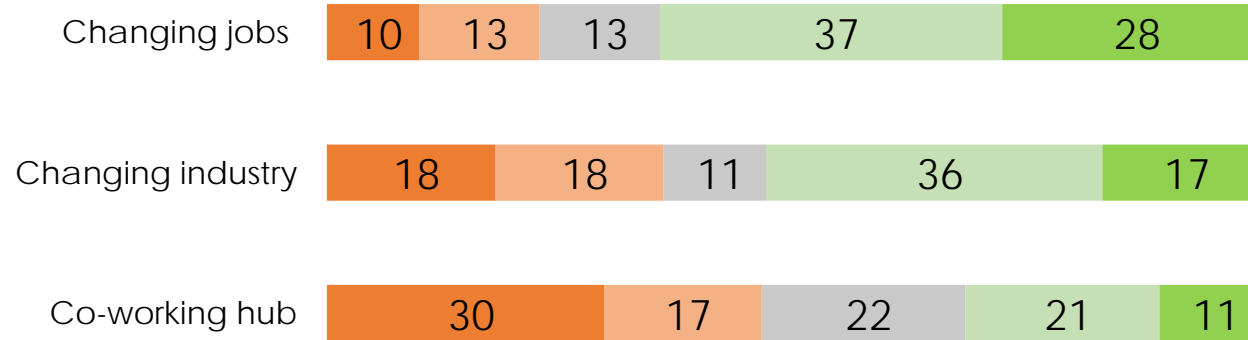
KELLS ATTITUDES TO FLEXIBLE WORKING SOLUTIONS

- Over 2 in 3 (65%) somewhat or very interested in changing jobs to work closer to home .
- Over half (53%) said they were interested in working closer to home in a different industry.
- 1 in 5 (22%) felt they were somewhat or very familiar with how hubs work.



INTEREST IN WORKING CLOSER TO HOME:

■ Not at all interested
 ■ Not very interested
 ■ Neither/nor
 ■ Somewhat interested
 ■ Very interested



| Mean | |
|-------|-----------|
| Navan | All Meath |
| 3.6 | 3.5 |
| 3.2 | 3.0 |
| 2.7 | 2.7 |

AWARENESS OF HUBS

■ Not at all familiar
 ■ Not very familiar
 ■ Neither /nor
 ■ Somewhat familiar
 ■ Very familiar



| Mean | |
|-------|-----------|
| Navan | All Meath |
| 2.0 | 1.9 |
| 1.6 | 1.6 |





Trim





TRIM COMMUTER FLOWS

Total commuting OUTSIDE the county 1422

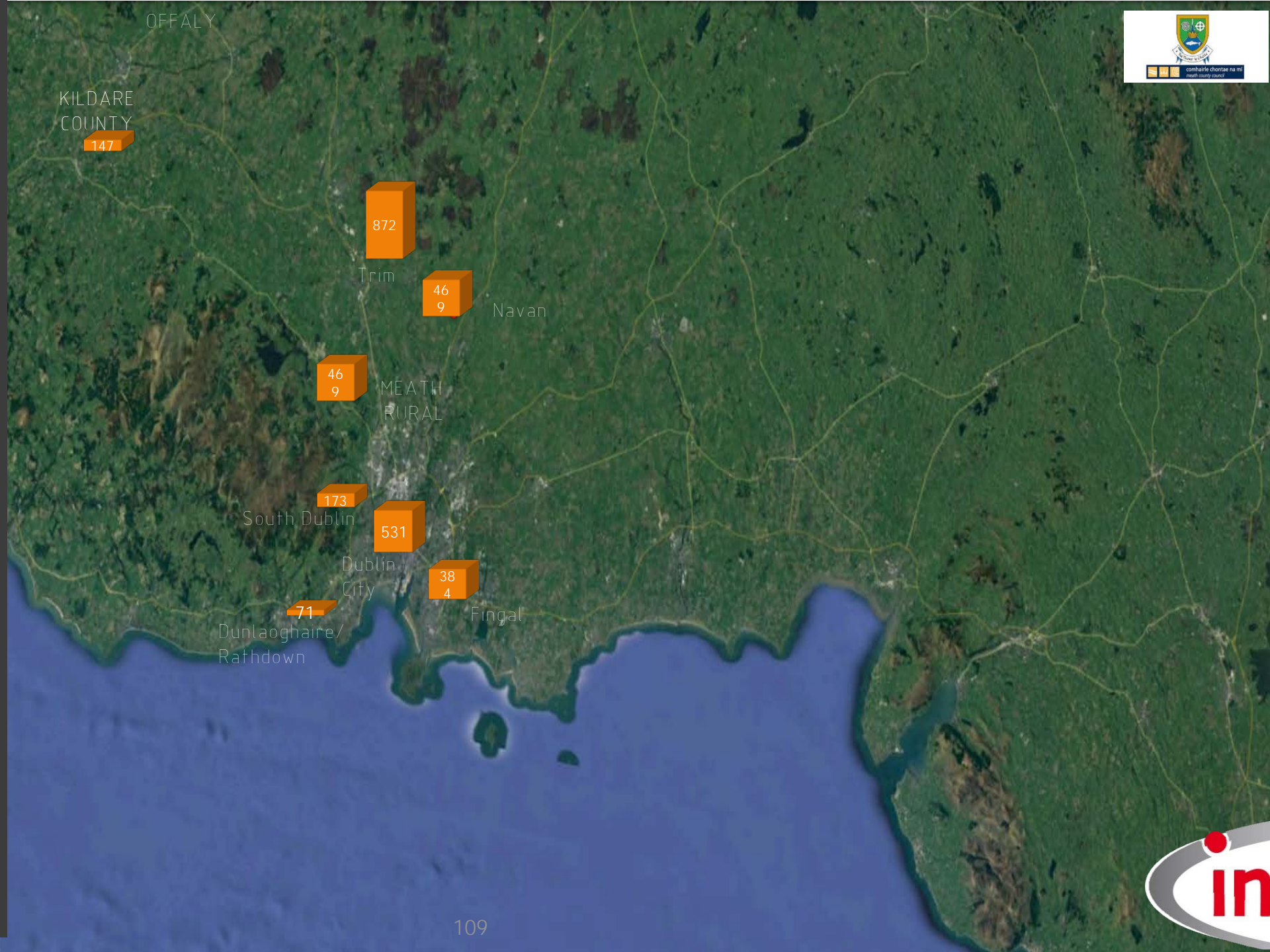
DUBLIN 1159

- Dublin City 531
- South Dublin 173
- Fingal & Dunlaoghaire/Rathdown 455

Kildare 147
Other counties (@ <1%) 116

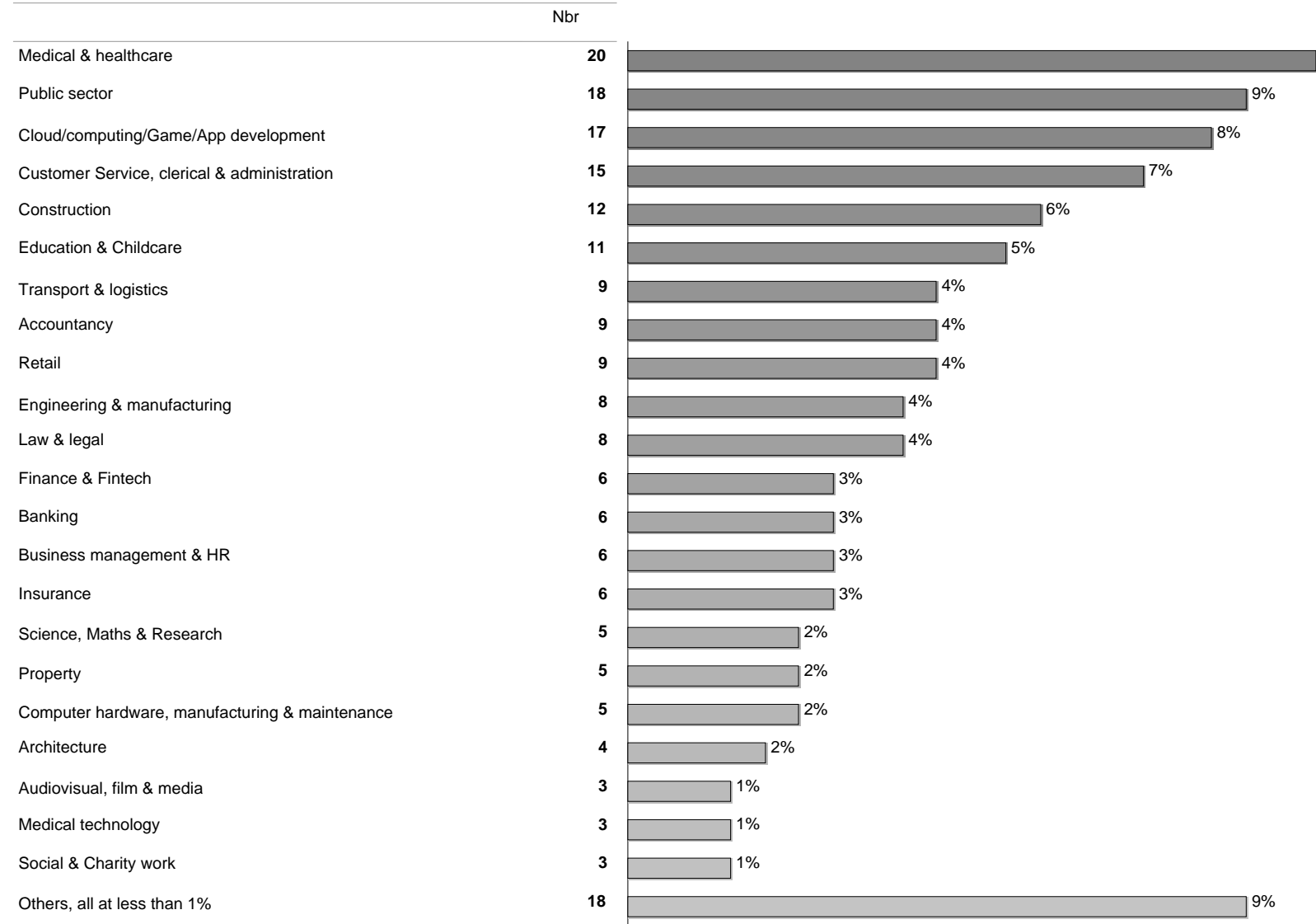
Total commuting INSIDE the county 1788

Trim 872
Meath rural 469
Navan 259
Other towns @<1% 188



TRIM SKILLS BASE

- 1 in 10 (9%) of respondents from Navan was employed in medical & healthcare.
- 9% said they worked in public sector.
- A further 8% worked in cloud/computing/app development.



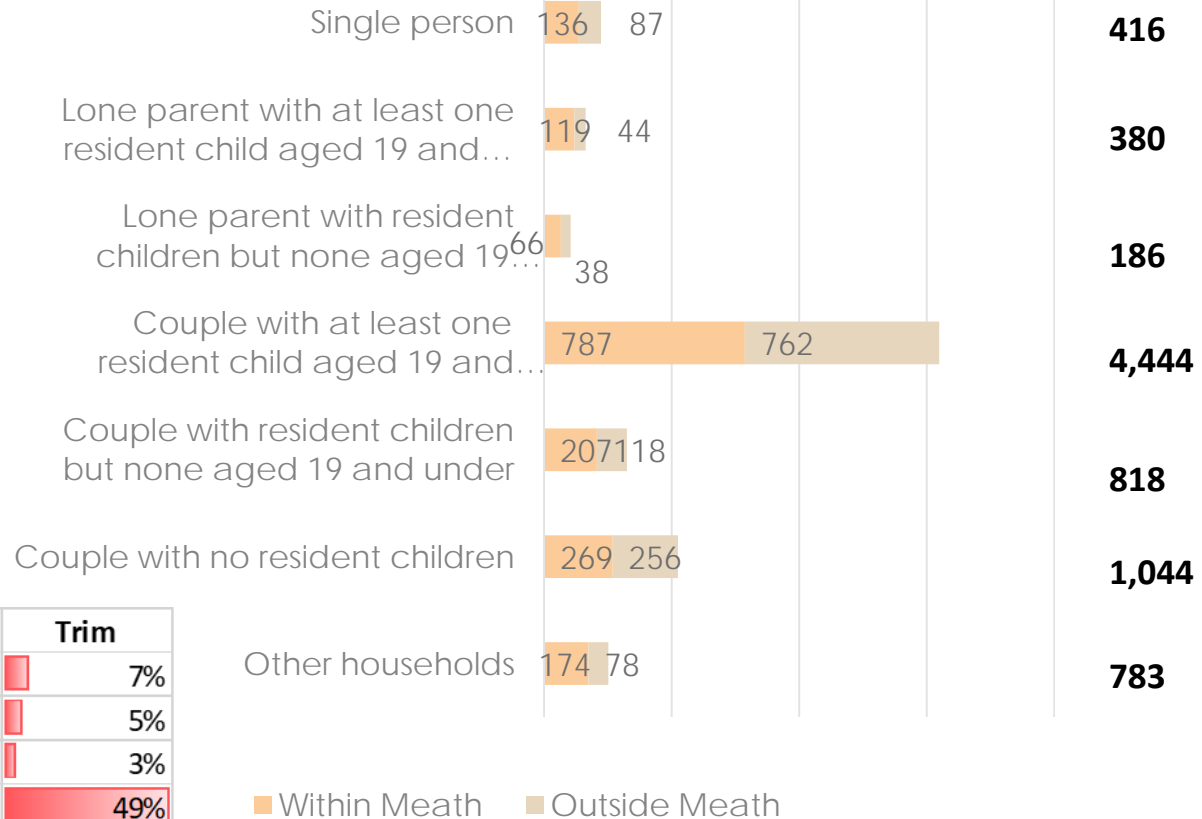
TRIM HOUSEHOLD PROFILES*

Parents travel further for work:

- The most prevalent household profile is couples with at least one resident child aged 19 and under, followed by couples with no resident children.

| | Meath | Trim |
|---|-------|------|
| Single person | 6% | 7% |
| Lone parent with children aged 19 and under | 5% | 5% |
| Lone parent with children but none aged <19 | 3% | 3% |
| Couple with children aged 19 and under | 52% | 49% |
| Couple with children but none aged <19 | 12% | 10% |
| Couple with no resident children | 15% | 17% |
| Other households | 7% | 8% |

Household profiles



Total commuters



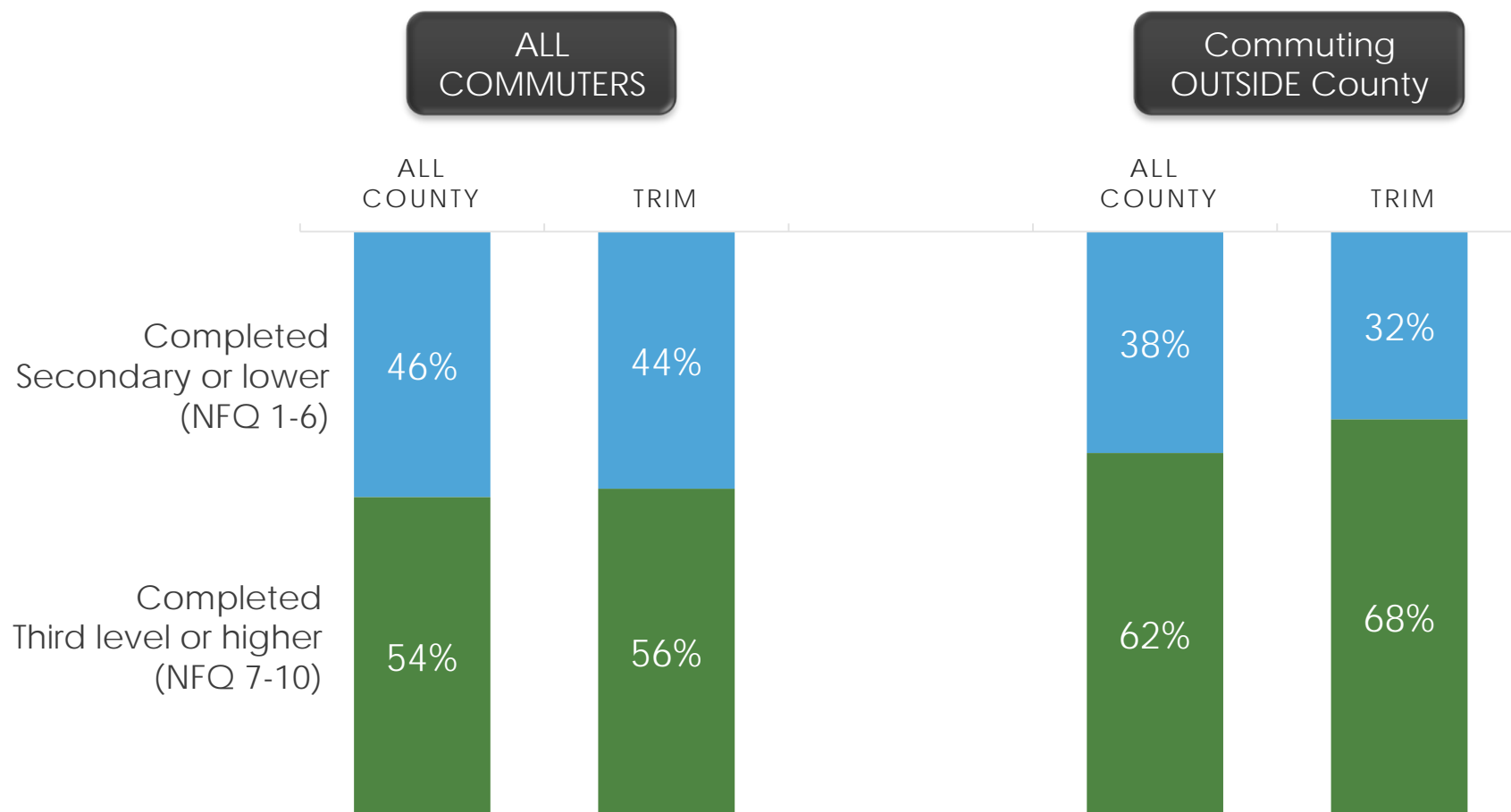
TRIM

Highest Educational Achievement Level

- Trim registered the highest percentage of 3rd level qualified commuters who leave the county for work each day (68%).



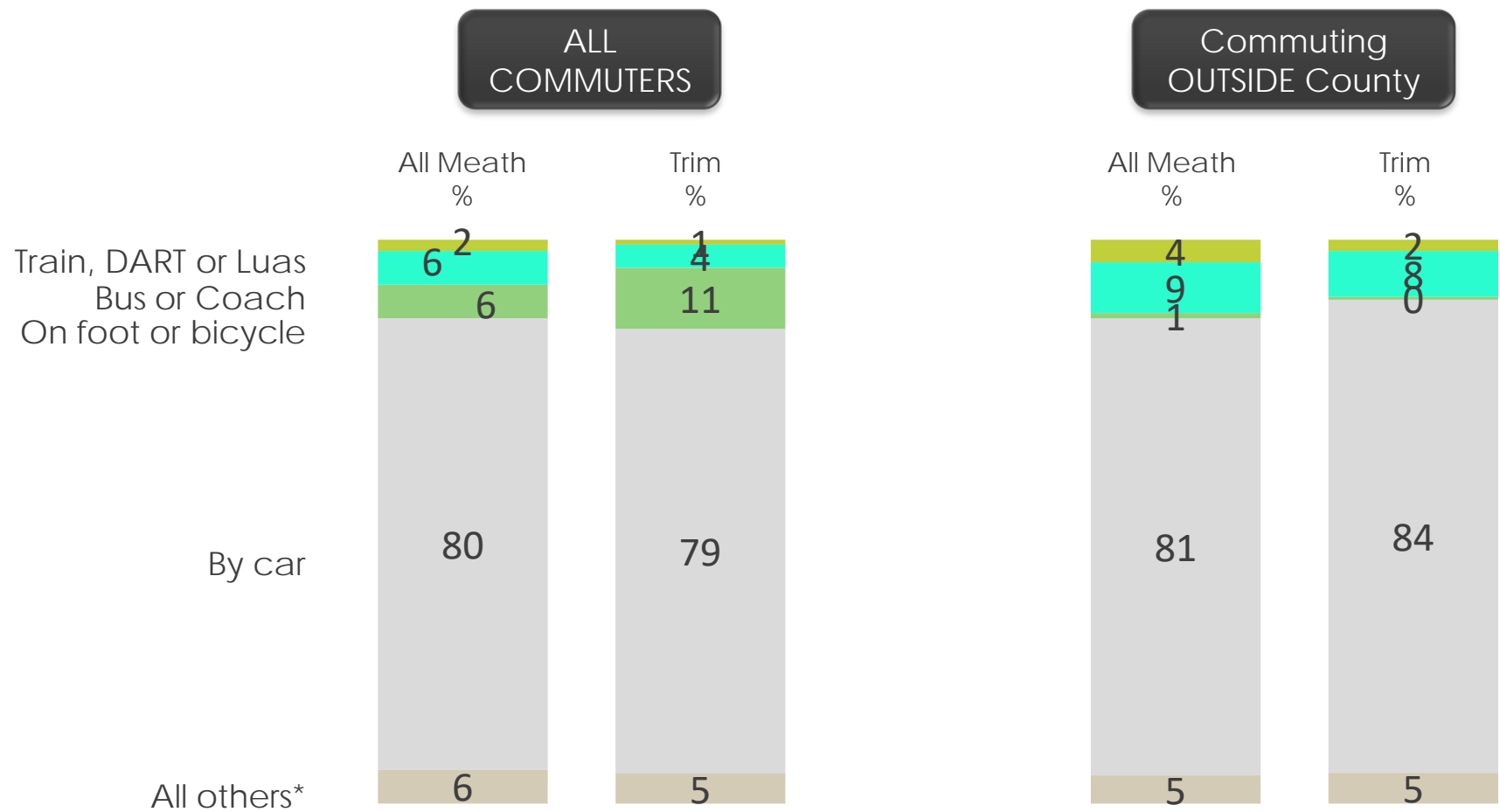
Source: Census '16 (POWSCAR)



Trim

Transport Modal Split

- 1 in 10 commuters in Trim travels by foot or bike, however none of those leaving the county do so.
- The majority of commuters out of Dublin go by car.
 - 1 in 12 travels by bus, and a niche number by train.



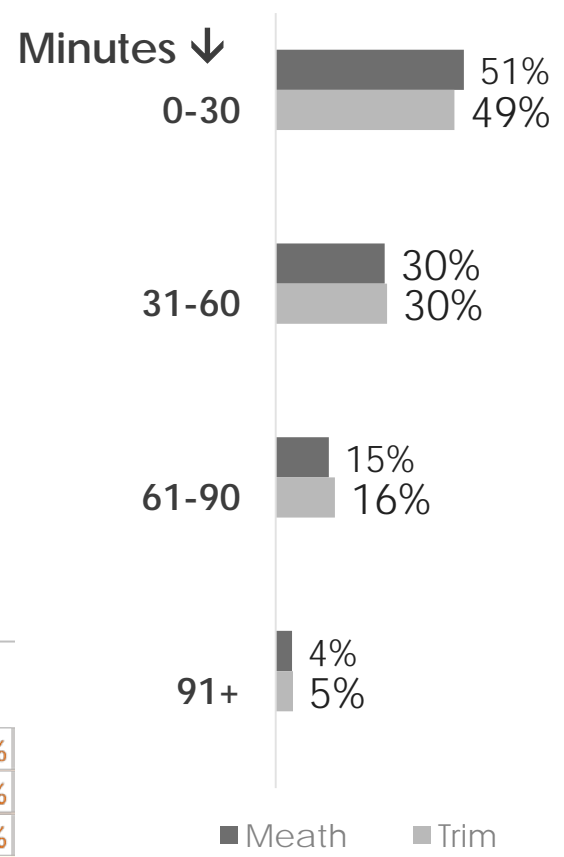
*Others includes motorbike, scooter, van, & lorry



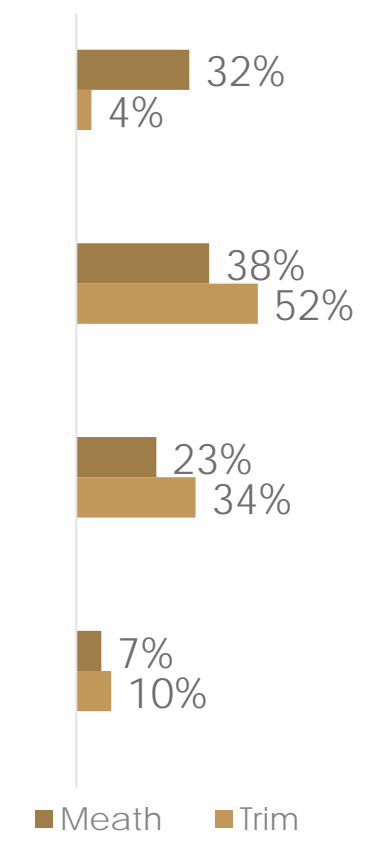
TRIM JOURNEY TIMES

- Trim residents leaving the county for work tend to spend longer on the commute.
 - A third spend 61-90 mins travelling to or from work.
 - 1 in 10 spend over 90 mins travelling each way.

ALL Journeys



Commuting OUTSIDE County



JOURNEY DEPARTURE TIMES

| | ALL MEATH | TRIM |
|-------------|-----------|------|
| Before 6:30 | 14% | 14% |
| 6:30-7:00 | 14% | 13% |
| 7:01-7:30 | 14% | 14% |
| 7:31-8:00 | 16% | 15% |
| 8:01-8:30 | 16% | 14% |
| 8:31-9:00 | 12% | 14% |
| 9:01-9:30 | 5% | 6% |
| After 9:30 | 9% | 11% |

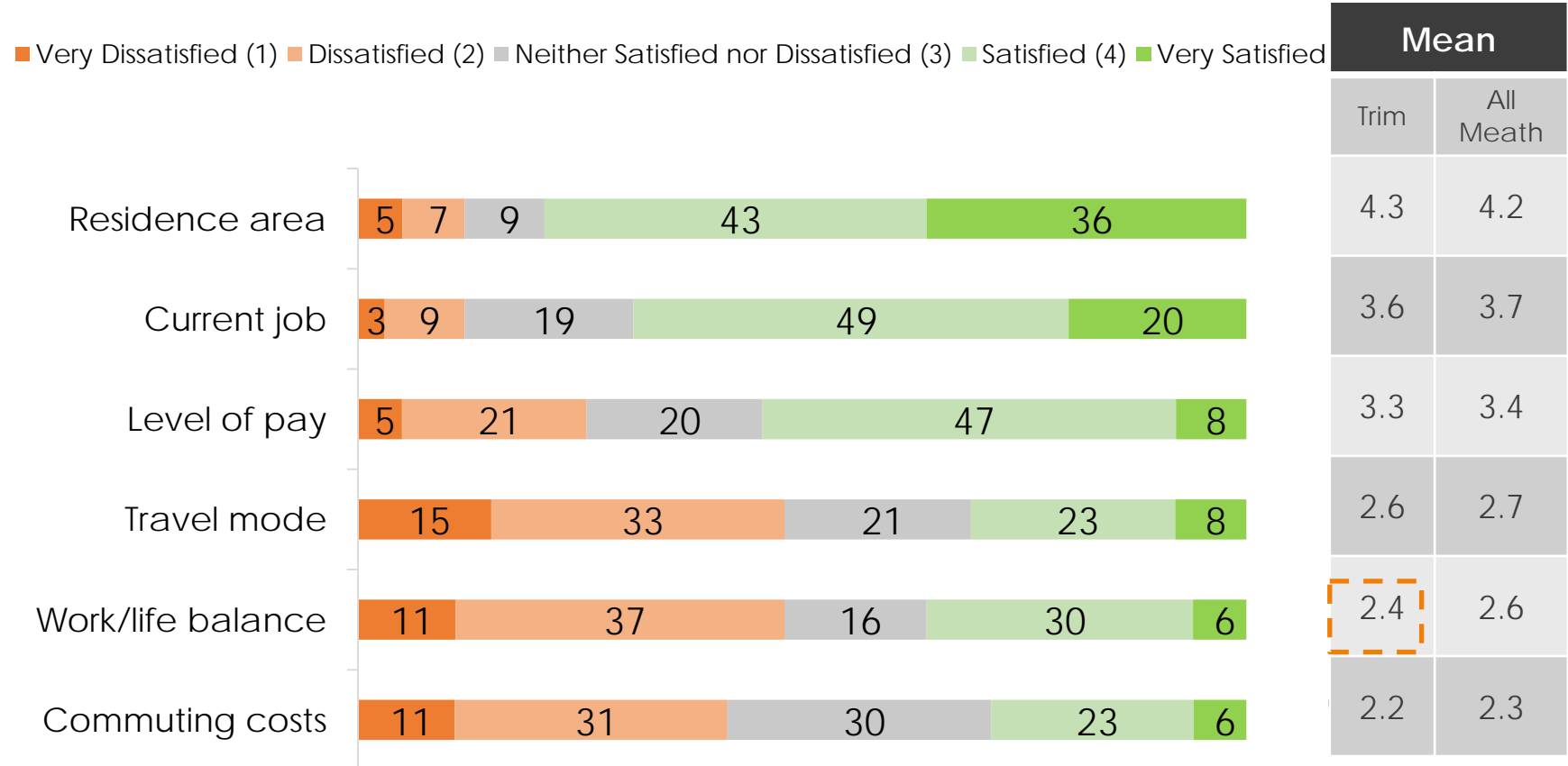
Source: Census '16 (POWSCAR)



TRIM

SATISFACTION LEVELS

- Just under 4 in 5 (79%) of the Trim commuters who took part in the survey registered satisfied/very satisfied with where they live.
 - Slightly higher satisfaction versus the total Meath county sample.
- Over 1 in 3 (31%) are satisfied with travel mode.
- They are significantly less satisfied (1 in 3) with work life balance (36%)
- Trim residents expressed their lowest satisfaction with commuting costs.

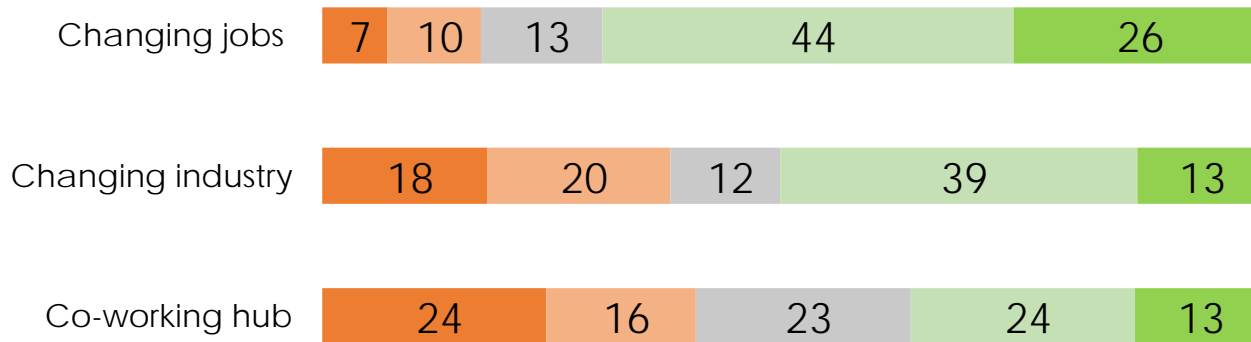


TRIM ATTITUDES TO FLEXIBLE WORKING SOLUTIONS

- 68% somewhat or very interested in changing jobs to work closer to home – this is significantly higher than the whole sample for Meath
- Over half (52%) said they were interested in working closer to home in a different industry.
- 1 in 5 (19%) felt they were somewhat or very familiar with how hubs work.

INTEREST IN WORKING CLOSER TO HOME:

■ Not at all interested
 ■ Not very interested
 ■ Neither/nor
 ■ Somewhat interested
 ■ Very interested



| Mean | |
|------|-----------|
| Trim | All Meath |
| 3.7 | 3.5 |
| 3.1 | 3.0 |
| 2.9 | 2.7 |

AWARENESS OF HUBS

■ Not at all familiar
 ■ Not very familiar
 ■ Neither /nor
 ■ Somewhat familiar
 ■ Very familiar



| | |
|-----|-----|
| 2.0 | 1.9 |
| 1.5 | 1.6 |





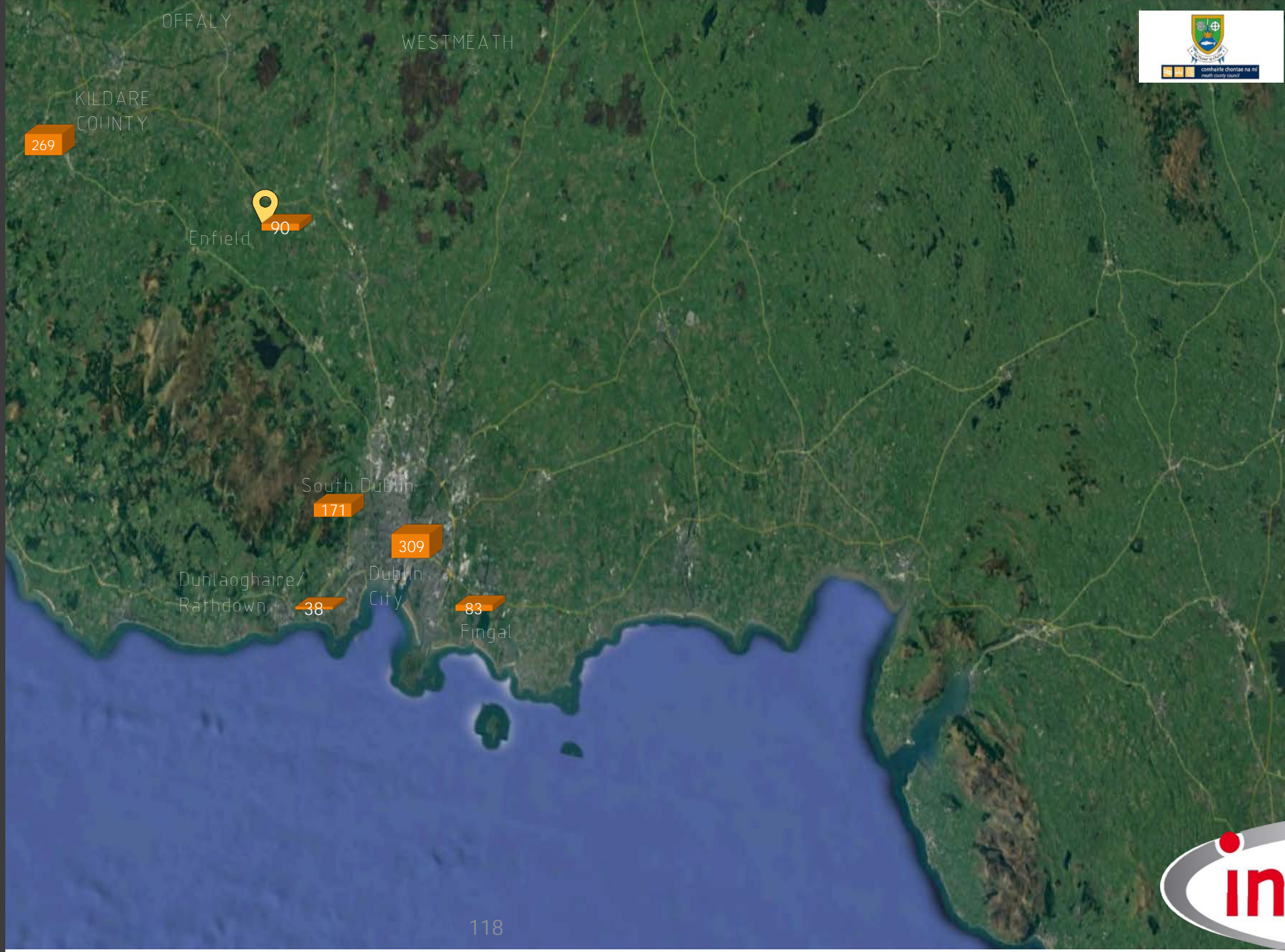
Enfield





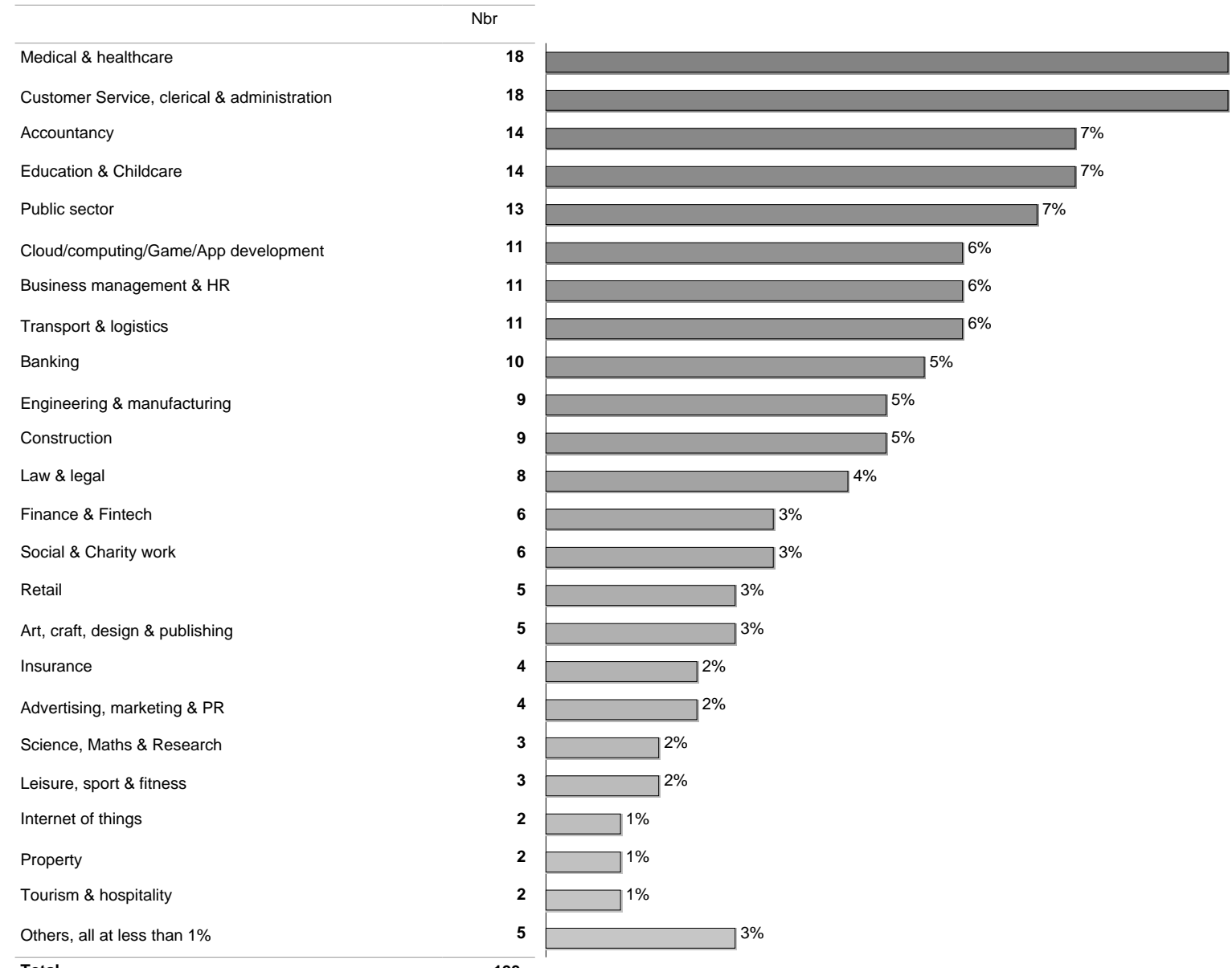
ENFIELD COMMUTER FLOWS

| | |
|---|------------|
| Total commuting OUTSIDE the county | 924 |
| DUBLIN | 601 |
| • Dublin City | 309 |
| • South Dublin | 171 |
| • Fingal & Dunlaoghaire/Rathdown | 121 |
| Kildare | 269 |
| Other counties (@ <1%) | 54 |
| Total commuting INSIDE the county | 201 |
| Enfield | 90 |
| Meath rural | 64 |
| Other towns @<1% | 47 |



ENFIELD SKILLS BASE

- 1 in 10 (9%) respondents from Enfield was employed in medical & healthcare.
- A similar number worked in customer service, clerical & admin.

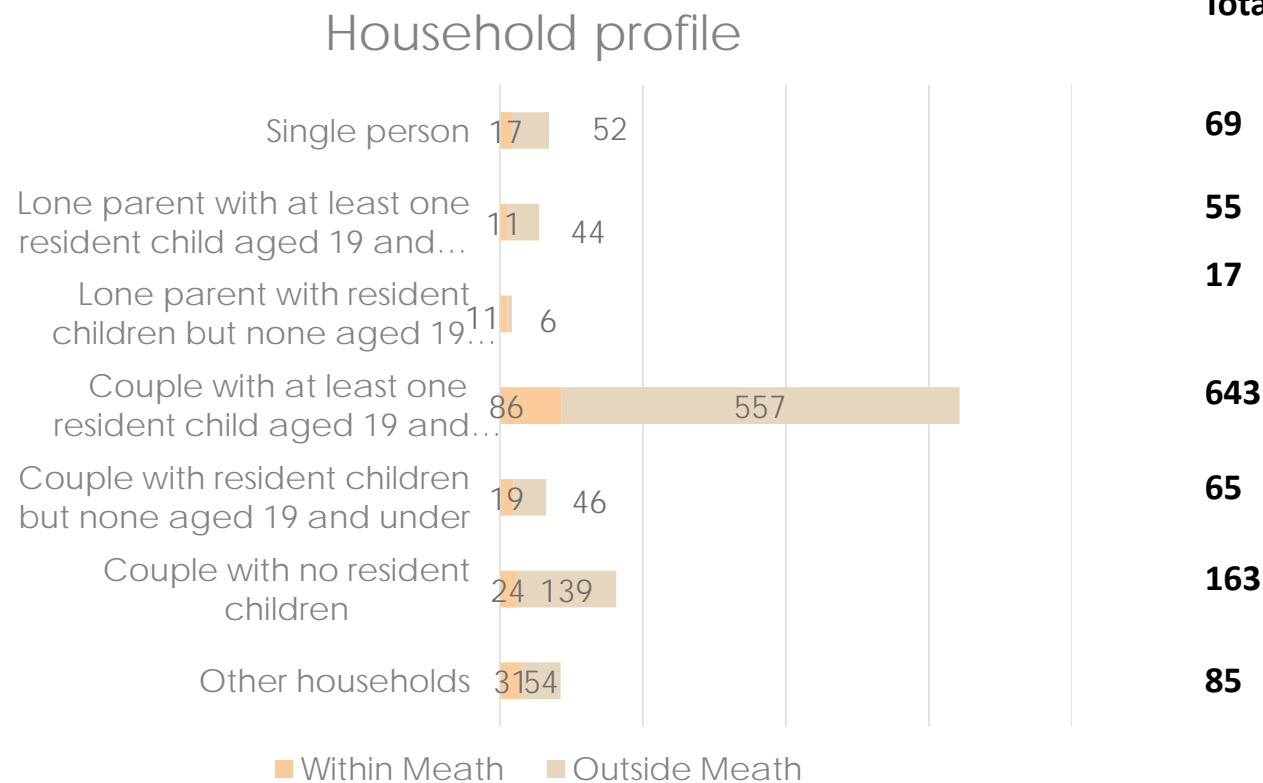


ENFIELD

HOUSEHOLD PROFILES*

Parents travel further for work:

- The most prevalent household profile is couples with at least one resident child aged 19 and under, followed by couples with no resident children.



Total commuters

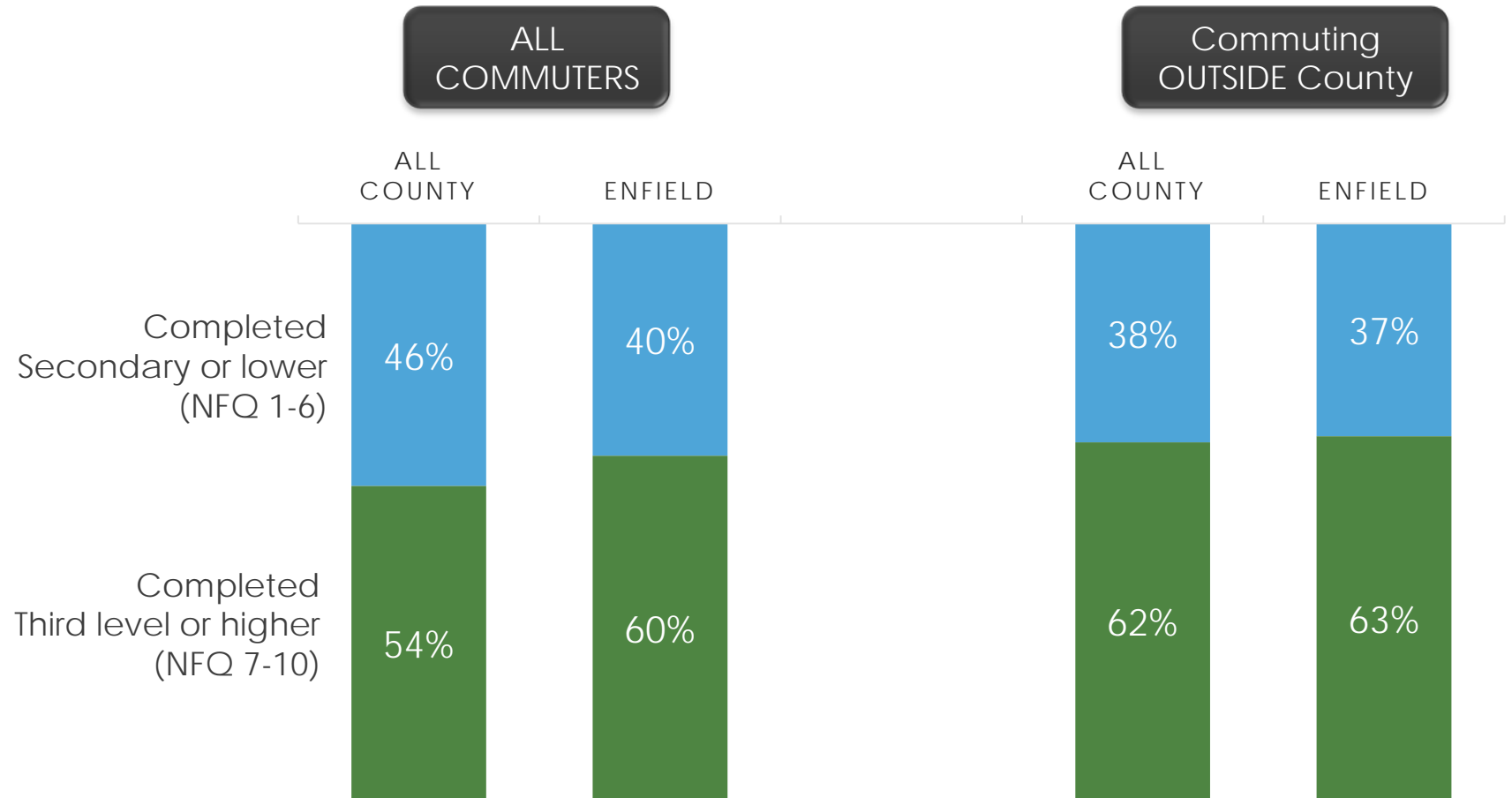
| | Meath | Enfield |
|---|-------|---------|
| Single person | 6% | 6% |
| Lone parent with children aged 19 and under | 5% | 5% |
| Lone parent with children but none aged <19 | 3% | 2% |
| Couple with children aged 19 and under | 52% | 59% |
| Couple with children but none aged <19 | 12% | 6% |
| Couple with no resident children | 15% | 15% |
| Other households | 7% | 8% |

ENFIELD

Highest Educational Achievement Level



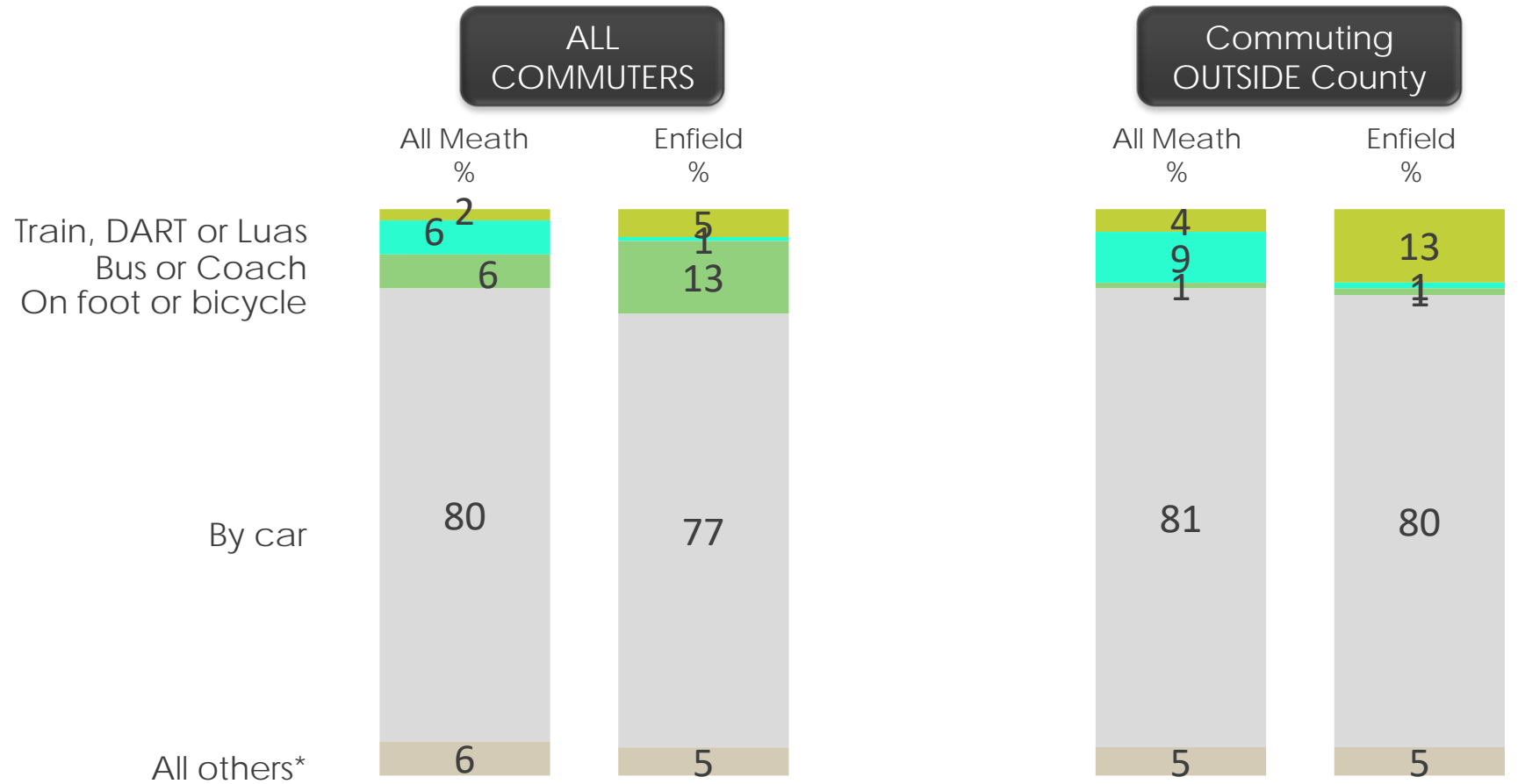
- Enfield commuters are a well educated bunch; 3 in 5 have completed qualifications at third level or above.



Enfield

Transport Modal Split

- Train accounts for over 1 in 8 (13%) of commuters out of Enfield.
- However, the remainder, 4 in 5 (80%) travel to work by road.



*Others includes motorbike, scooter, van, & lorry



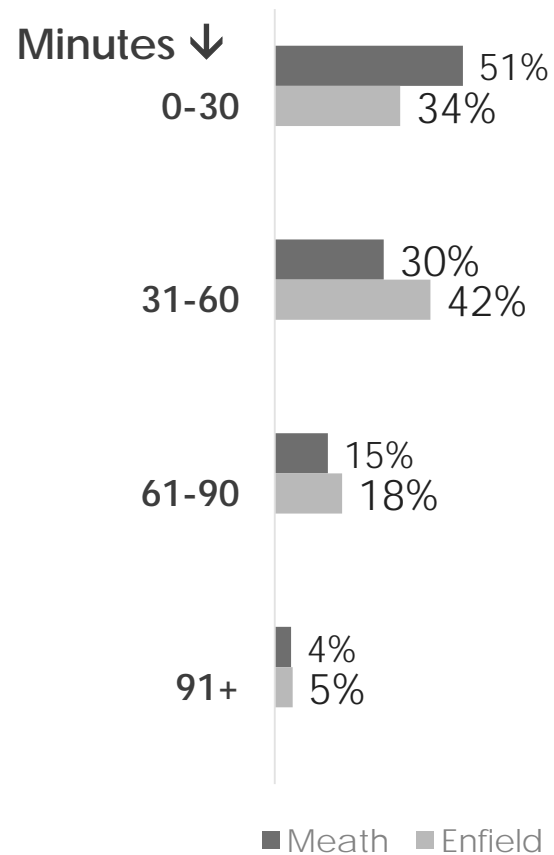
ENFIELD TOWN JOURNEY TIMES

- Enfield commuters have longer commutes in general versus the total county.

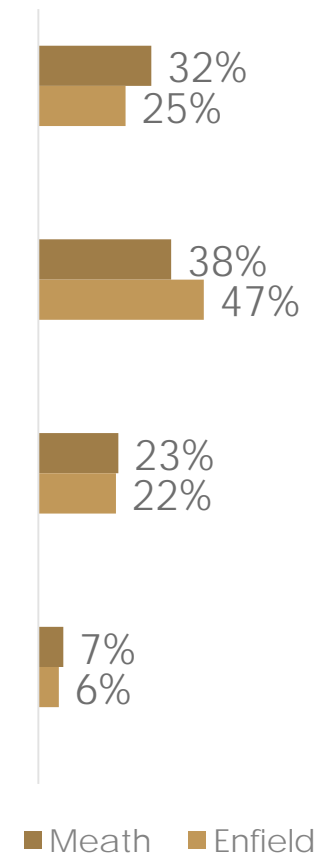
JOURNEY DEPARTURE TIMES

| | ALL MEATH | ENFIELD |
|-------------|-----------|---------|
| Before 6:30 | 14% | 18% |
| 6:30-7:00 | 14% | 16% |
| 7:01-7:30 | 14% | 16% |
| 7:31-8:00 | 16% | 15% |
| 8:01-8:30 | 16% | 12% |
| 8:31-9:00 | 12% | 8% |
| 9:01-9:30 | 5% | 4% |
| After 9:30 | 9% | 12% |

ALL Journeys



Commuting OUTSIDE County

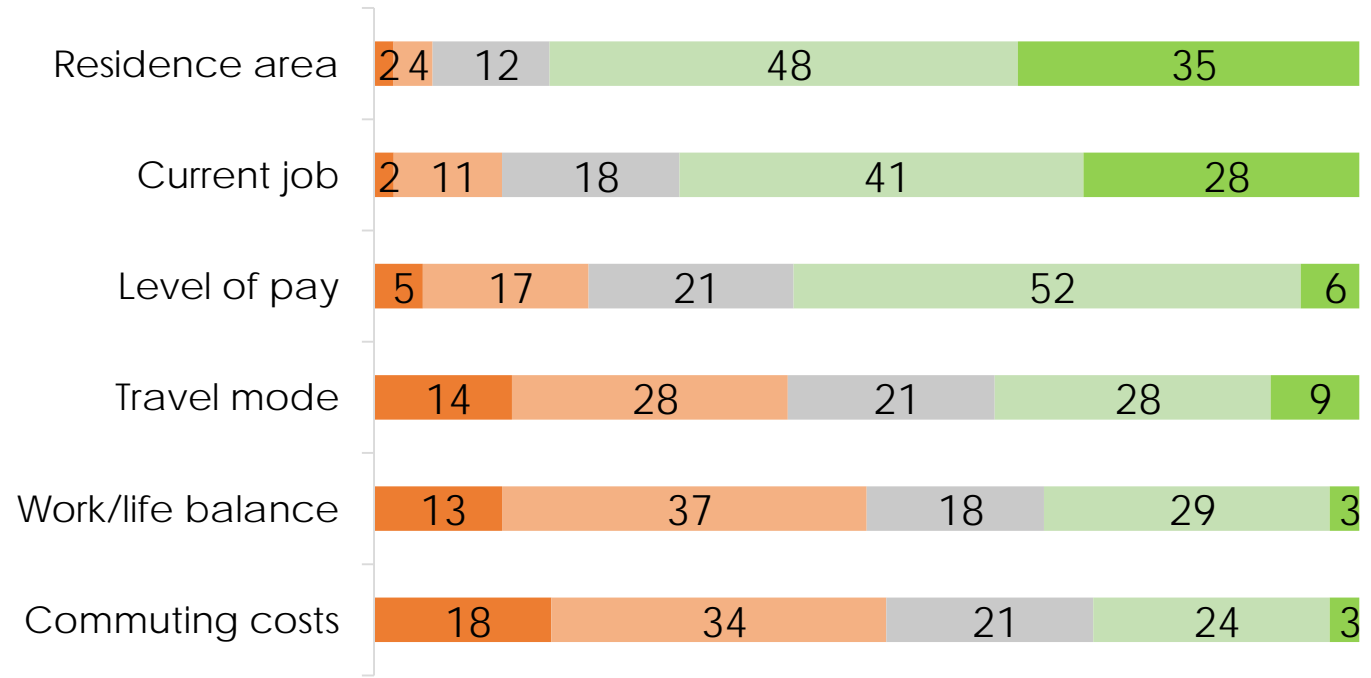


ENFIELD

SATISFACTION LEVELS

- Over 1 in 3 (37%) are satisfied or very satisfied with their travel mode.
- In in 3 (32%) are satisfied with work/life balance.
- Enfield residents are significantly more satisfied (27%) with commuting costs.

■ Very Dissatisfied (1)
 ■ Dissatisfied (2)
 ■ Neither Satisfied nor Dissatisfied (3)
 ■ Satisfied (4)
 ■ Very Satisfied



| Mean | |
|----------|-----------|
| En field | All Meath |
| 4.1 | 4.2 |
| 3.8 | 3.7 |
| 3.4 | 3.4 |
| 2.9 | 2.7 |
| 2.7 | 2.6 |
| 2.6 | 2.3 |

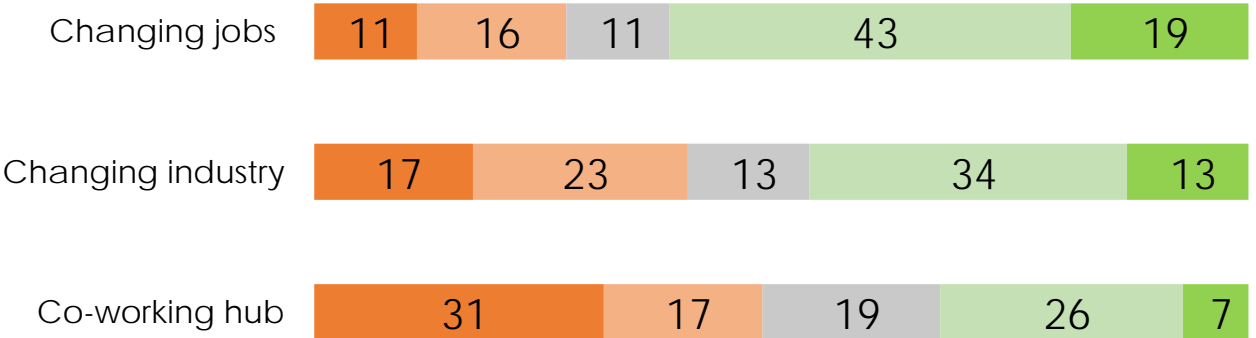


ENFIELD ATTITUDES TO FLEXIBLE WORKING SOLUTIONS

- 2 in 3 (62%) somewhat or very interested in changing jobs to work closer to home
- Almost half (47%) said they were interested in working closer to home in a different industry.
- Only 15% felt they were somewhat or very familiar with how hubs work.

INTEREST IN WORKING CLOSER TO HOME:

■ Not at all interested ■ Not very interested ■ Neither/nor ■ Somewhat interested ■ Very interested



| Mean | |
|-------|-----------|
| Navan | All Meath |
| 3.4 | 3.5 |
| 3.0 | 3.0 |
| 2.6 | 2.7 |

AWARENESS OF HUBS

■ Not at all familiar ■ Not very familiar ■ Neither /nor ■ Somewhat familiar ■ Very familiar



| | |
|-----|-----|
| 1.8 | 1.9 |
| 1.5 | 1.6 |



interactions

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