

Brize Norton Socio-Economic Benefits Assessment Final Report

Annington Management Limited

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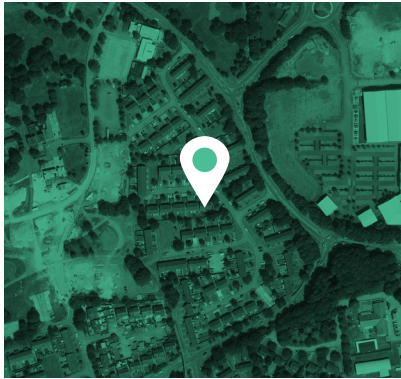
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The economic benefits of the Brize Norton development

The development at Brize Norton delivered 135 residential units, as well as green open space and play space. All of which will significantly contribute to West Oxfordshire's housing requirements, stimulate economic growth and add to the local authority's revenue.



The development



135 New residential units

10% Affordable homes

Other details:
Provision of new green open space and children's play space on site.

Construction benefits



£22m
Construction value
(total construction cost)



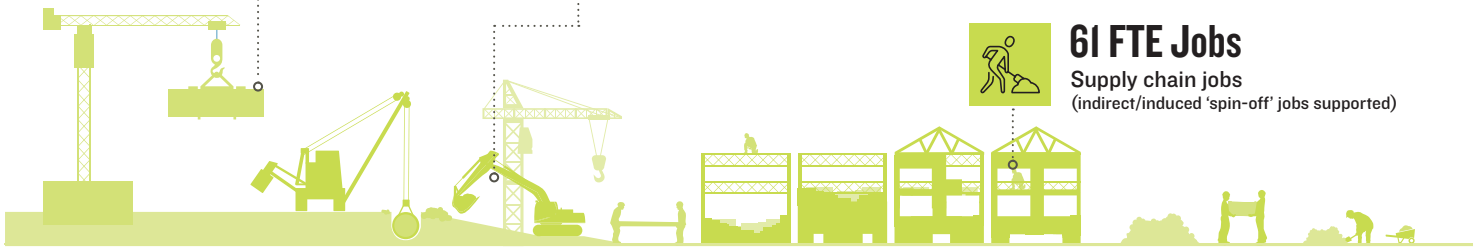
£8.8m GVA
Economic output
(additional GVA p.a.)



50 FTE Direct jobs
Construction jobs
(temporary jobs over the build period)



61 FTE Jobs
Supply chain jobs
(indirect/induced 'spin-off' jobs supported)



Operational and expenditure benefits



£742,500
First occupation expenditure
(spending to make a house 'feel like a home')



£5.2m
Resident expenditure
(within local shops and services p.a.)



23 FTE Supported jobs
(from increased expenditure in local area)



£239,000
New Homes Bonus payments
(over a 1 year period)



£279,000
Council Tax revenues
(p.a.)

Wider Economic and Social Value Benefits



Bringing key sites (Ministry of Defence facilities) back into productive use



Supporting a range of opportunities across different trades and skills within the house building industry



Supporting a third of buyers to reach the property ladder as first-time buyers



Delivering high-quality open green space and children's play space



Giving back to the community by helping the Allandale Youth Centre carry out vital refurbishment works valued at £5,000

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1.0 Introduction

1.1 This report has been prepared by Lichfields on behalf of Annington Management Ltd ('Annington') to assess the socio-economic and regeneration benefits of the new residential-led development at Brize Norton ('the development'), located within West Oxfordshire District.

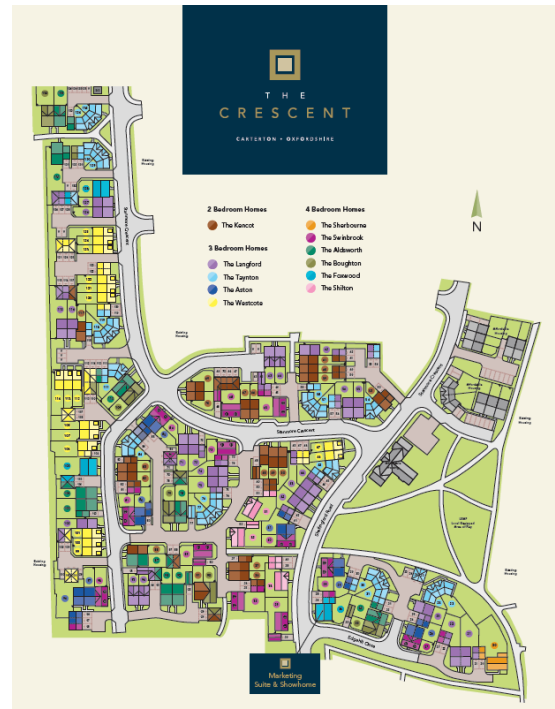
The Development

1.2 Brize Norton is a village east of Carterton in West Oxfordshire home to the largest station of the Royal Air Force (RAF). Major infrastructure redevelopment began in 2010 at the RAF station, at which point Brize Norton became the sole air point of embarkation for British Troops.

1.3 Following acquisition of the site at Brize Norton Road from the Ministry of Defence (MoD), Annington has invested approximately £22 million demolishing outdated existing MoD accommodation and redeveloping the site to provide new build housing units. The vast majority of the development has now been completed and occupied.

1.4 Figure 1.1 below shows the site and site plan of the development on Brize Norton road. The area surrounding the development is primarily residential with some neighbouring commercial uses on Upavon Way and a primary school to the West. The development consists of 135 residential units, including 13 dedicated affordable housing units, alongside the provision of new open space and children's play space.

Figure 1.1 Site Context and Site Plan

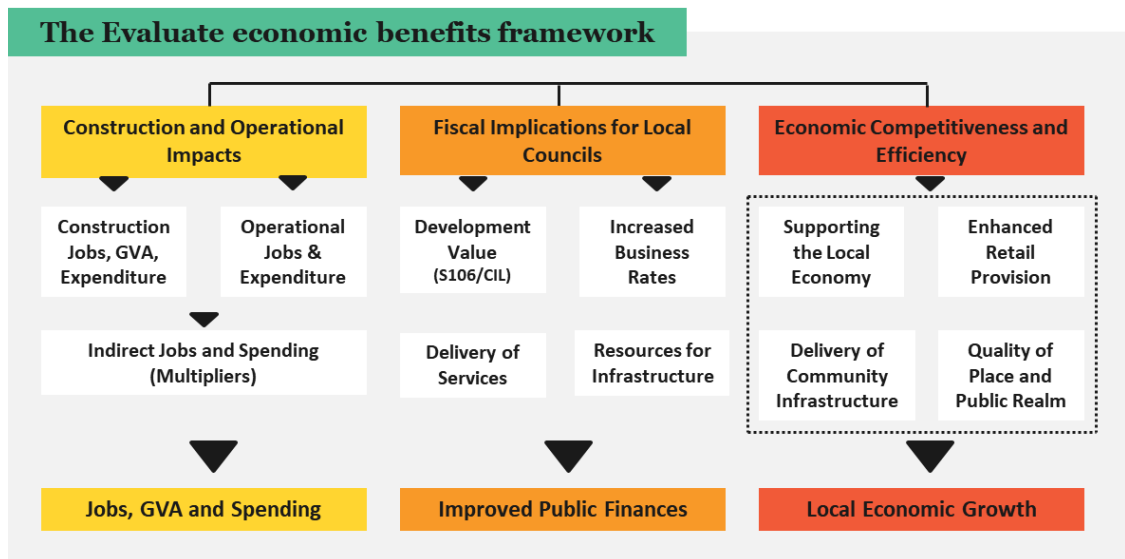


Source: Google Earth (2021), Annington (2021)

Study Framework

- 1.5 This report draws on the Evaluate methodology developed by Lichfields, which provides an analytical framework for assessing socio-economic impacts arising from new development. This framework, as it relates to the assessment of economic impacts of the Brize Norton development is shown in Figure 1.2 below.

Figure 1.2 Evaluate Economic Benefits Framework



Source: Lichfields

- 1.6 The economic impact assessment focuses first on the key quantifiable impacts of the development during the construction phase and upon completion, before considering the wider qualitative effects of the role that new development has in the context of supporting economic growth more generally.
- 1.7 For a residential-led development, the scale and type of economic impacts are typically determined by:
- The scale of capital investment in the scheme, including any significant infrastructure requirements, which generates employment and economic output during construction;
 - The number of residential units included in the development that could generate resident expenditure, thereby, supporting jobs in local shops and services; and
 - The scale of financial benefits that would be generated, e.g. from council tax receipts.
- 1.8 Economic impacts are presented in ‘gross terms’ and do not account for whether an impact is net additional or would occur in the absence of Annington’s investment activities.

Report Structure

- 1.9 The remainder of this report is structured as follows:
- **Section 2** assesses the economic impacts of the development during construction phase;
 - **Section 3** assesses the operational impacts of the development including resident expenditure impacts and fiscal implications;
 - **Section 4** assesses the wider impacts and social value benefits associated with the development; and
 - **Section 5** draws together overall conclusions.

2.0 Construction Impacts

- 2.1 This section sets out the economic impacts arising from the construction phase of the development at Brize Norton. The key impacts relate to new employment opportunities and additional economic output generated over the duration of the construction phase.

Direct Employment

- 2.2 The construction cost of the Brize Norton development is estimated to be around £22 million, excluding land value. Construction on-site started in September 2017 with demolition of the existing MoD flats, with an expected completion date of June 2021. According to Annington, approximately **50 direct FTE** construction staff were supported annually over the construction phase. As construction is made up of many discrete elements of work undertaken by specialists (e.g. bricklaying, carpentry, plumbing, electrics etc.), the number of workers on site will inevitably fluctuate during different periods of the construction phase.
- 2.3 The construction industry is a major source of national employment which offers a range of opportunities across different trades and skills. As such, the 50 direct FTE jobs generated by the scheme each year would have had a beneficial impact on the local workforce and economy of Brize Norton and West Oxfordshire.

Indirect and Induced Employment

- 2.4 Construction involves acquisitions from a number of suppliers, who in turn purchase from their suppliers through the supply chain. The relationship between the initial direct spending and total economic effects is known as the ‘multiplier effect’, which demonstrates that an initial investment can have much greater indirect effects as this spending is diffused through the economy.
- 2.5 In addition, local businesses would be expected to benefit to some extent from a temporary increase in expenditure from the direct and indirect employment effects of the construction phase. Although only a proportion of these benefits would be felt in the local area, it would be expected that the local economy would gain a sizeable temporary boost from the wage spending of workers in shops, bars and restaurants, and other services and facilities. Such effects are typically referred to as ‘induced effects.’
- 2.6 Research undertaken on behalf of the National Housing Federation indicates the construction industry has an indirect and induced employment multiplier of 2.21¹. Applying this multiplier to the 50 direct construction FTE jobs per annum indicates an **additional 61 FTE jobs** will have been supported by the development in sectors across the regional economy. This results in a total of 111 construction FTE jobs during each year of construction.

Economic Output

- 2.7 The construction phase of the development will also have contributed to local economic output, as measured by Gross Value Added (GVA). GVA is a measure of the difference between what is produced as output (goods and services) and the inputs (raw materials, semi-finished products etc.) used in the production of those outputs. It represents the additional value that is added through economic activity.

¹ Indirect and Induced employment has been calculated using an employment multiplier of 2.21 sourced from the National Housing Federation (2019). This implies that per direct job generated a further 1.21 induced jobs are supported in the supply chain across the wider South East

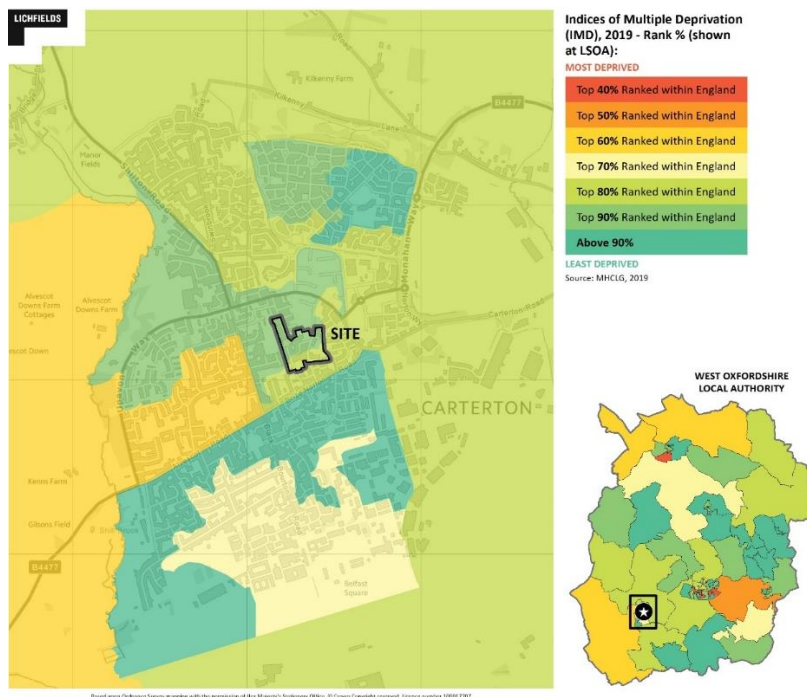
2.8 Based on Experian data, the construction sector generates an average GVA per worker of £79,731 per annum in the South East². Applying this to the direct employment impact of the scheme (as derived above), it is estimated that the direct construction activity would have generated £4.0 million of direct GVA and an additional £4.8 million of indirect and induced GVA during each year of construction³. This equates to around **£8.8⁴ million direct, indirect and induced GVA** in total per annum. It should be noted not all of this will be retained locally.

Supporting the Local Economy

2.9 The combination of these construction job opportunities, economic output and wage spending would have had a beneficial impact upon the local area surrounding the development. Figure 2.1 below shows relative levels of deprivation in West Oxfordshire measured by the Indices of Multiple Deprivation (IMD), which draws together a range of datasets to rank areas across seven sub-domains of deprivation, ranging from access to health services to income levels⁵. These categories are combined to produce an overall deprivation rank for each local authority in England. The IMD 2019 identifies that out of all 317 local authorities in England, West Oxfordshire is ranked as 300th most deprived (where 1 is most deprived), placing it just outside of the 5% least deprived authorities nationally.

2.10 Despite this overall rank, there is some variation across the 66 Lower Super Output Areas (LSOAs) within the District; for instance, four of these are ranked amongst the 40% most deprived nationally. The two LSOAs within which the site is situated are more deprived in some sub-domains of the IMD including barriers to education and housing; they fall within the top 50% most deprived areas nationally with regards to these domains. This suggests that access to affordable housing and skills may be an issue facing some local residents.

Figure 2.1 Indices of Multiple Deprivation (2019)



Source: IMD (2019) / Lichfields analysis

² Experian, Gross Value Added (2021)

³ Indirect and induced GVA calculated using a GVA multiplier of 2.22 from CEBR report for the National Housing Federation (2019)

⁴ Numbers may not sum due to rounding

⁵ Ministry of Housing, Communities and Local Government (MHCLG), Indices of Multiple Deprivation (2019)

3.0 Operational Impacts

3.1 This section assesses the resident expenditure and fiscal impacts generated by the development once complete and occupied.

'First Occupation' Expenditure

3.2 Research suggests that the average homeowner spends approximately £5,500 to make their house 'feel like home'⁶. This money is normally spent on furnishing and decorating a property, generating a range of economic benefits for the local economy, including by supporting indirect and induced jobs within local businesses.

3.3 By applying this average level of one-off spending on household products and services to the 135 new dwellings, it is estimated that the new residents would collectively generate **£742,500 of first occupation expenditure**. This injection of resident spending within the local economy would help to sustain local businesses and support **four additional FTE jobs** in the local area, thereby, increasing local employment opportunities.

Ongoing Resident Expenditure

3.4 For developments with residential units, one of the key economic impacts is the increase in local expenditure generated by new or refurbished households attracted to the area. The scale of this impact is determined by the expenditure patterns of residents, and the extent to which residents of the new housing move into the area from elsewhere.

3.5 Analysis of Output Area Classifications indicates that housing within the area surrounding the development site are largely dominated by households in the 'urbanites' socio-economic classification group⁷. It is anticipated that the new households accommodated within the market housing at Brize Norton would broadly be within the same type of household group.

3.6 The ONS Family Spending Survey 2019 (2020 edition) provides data on household spending by socio-economic classification⁸. This indicates UK average spending levels of £636.70 per week for households in the 'urbanites' group. Spending by South East households is 19.3% higher than the UK on average, resulting in an average expenditure figure for 'urbanites' households of £759.58 per week. Similarly, average expenditure levels amongst the 'Hard-pressed living' group (comprising those likely to be occupying the scheme's affordable housing) amounts to £552.80 per week in the South East. Based on these assumptions, it is estimated that residents of the development generate total gross expenditure of around **£5.2 million per annum**.

Net Additional Expenditure

3.7 It is recognised that not all residents of the development will be 'new' to the local area, as some will have moved from elsewhere within West Oxfordshire and further afield. National research provides standards on the average distance moved between a head of the household's present and previous residential address, which can be used to estimate the share of residents of the scheme that may be new to the locality.

3.8 In addition, only a proportion of the gross expenditure by new residents of the housing at Brize Norton will be retained within the District. Based on retail expenditure retention rates set out in the District's latest Retail Assessment⁹, it is estimated that 69% of comparison and convenience

⁶ Research carried out by OnePoll surveying around 2,000 UK adults in August 2014 (<http://www.barratthomes.co.uk/the-buying-process/home-buying-advice/10-Year-Warranty-Terms-andConditions/>)

⁷ ONS, 2011 Area Classification for Output Areas

⁸ ONS, Family Spending (2019)

⁹ Lichfields, West Oxfordshire Retail Assessment (2012)

goods spending will be retained within the District. This takes account of existing shopping patterns in the local area, which show a proportion of retail expenditure 'leaks' to other retail destinations outside of the District.

- 3.9 Taking these factors into account, it is estimated that the total net additional spending generated by the new residents at Brize Norton equates to **£2.5 million per annum**. This ongoing, additional spending will support the vitality and viability of local firms and could encourage other businesses to move to the local market as well as supporting the functioning of town centres. As this additional expenditure is likely to go towards a wider range of products and services than the first-occupation expenditure noted above, it is estimated that this supports a further **23 FTE jobs** in retail, leisure, hospitality, catering and other local service sectors.

New Homes Bonus

- 3.10 The New Homes Bonus was introduced in 2011 to provide an incentive for local authorities to encourage housing growth in their areas. It initially matched for a six-year period the increase in Council Tax income from new homes or homes brought back into use. Following consultation by the Government in 2017/18, changes were implemented to reduce the number of years the Bonus is paid to 5 years in 2017/18 and 4 years from 2018/19. This has subsequently reduced to a one year payment. A baseline of 0.4% growth of housing stock was also introduced, below which the Bonus would not be paid.
- 3.11 Under the New Homes Bonus scheme, West Oxfordshire District Council will have benefitted from additional funding provided by the Government for the delivery of the 135 new dwellings completed in June 2021. Using standard methods of calculation, as contained within the Ministry of Housing, Communities and Local Government (MHCLG) NHB calculator¹⁰, it is estimated that the 135 dwellings would have generated approximately **£239,000 of New Homes Bonus payments** over a one-year period.

Council Tax Payments

- 3.12 The new build housing development at Brize Norton will have generated an increase in local Council Tax receipts to provide an ongoing, additional boost to the revenue base of West Oxfordshire District Council, over and above the short-term impact of the New Homes Bonus payments noted above.
- 3.13 Based upon the levels of Council Tax levied by the local authority in the 2021/22 financial year¹¹, it is estimated that the development will generate around **£279,000 per annum** in additional Council Tax payments in perpetuity.

Planning Contributions

- 3.14 As part of the overall development package, planning contributions have been made to West Oxfordshire District Council through section 106 contributions to help fund local infrastructure and other services. The overall value of planning contributions totals £1.35 million. This is in addition to constructing a play area and the provision of up to 13 affordable units within the new development at Brize Norton.

¹⁰ MHCLG, New Homes Bonus Calculator (2018)

¹¹ West Oxfordshire, Council Tax Bands 2021/22

4.0 Wider Economic and Social Value Benefits

4.1 This section considers and assesses some of the more qualitative impacts and benefits supported by the new build development at Brize Norton and wider outcomes associated with investing in new housing and bringing under occupied sites back into productive use.

Enhancing Place Competitiveness and Local Economic Development

4.2 A well-functioning housing market is considered important for an area to remain competitive and attractive to business and economic activity, which in turn will drive the economic growth the country needs. Another indirect effect that housing can have upon the economy is through its longer-term impact on the perceived competitiveness of specific locations and the costs of mitigating the social and environmental problems associated with poor or insufficient housing.

4.3 In areas of high economic growth and high labour demand it is crucial that the supply of workers is not inhibited by a constrained supply or availability of housing. The problem of housing affordability has the potential to have a negative impact on the ability of competitive locations that provide unique productivity opportunities to the UK to remain competitive.

4.4 The West Oxfordshire Local Plan¹² sets a housing target of 600 homes per year in the period 2011-2031, equating to 13,200 homes in total. This will require a significant increase in the future rate of delivery of new housing in the District in comparison with historic long-term delivery, particularly when ‘under supply’ since 2011 is factored in. The Carterton sub area, within which Brize Norton is located, is required to deliver at least 2,680 homes within the 2011-2031 plan period. Annington’s Brize Norton development has delivered 135 new housing units to the local market, in doing so playing an important contribution to meeting the local authority’s housing needs.

Quality of Place

4.5 Open spaces provided within new housing developments generate opportunities for local residents to undertake recreational activities, contributing to improved physical health, fitness, mental health and wellbeing. A high-quality environment also provides opportunities for social interaction between people of different communities, fostering social inclusion and community development.

4.6 The West Oxfordshire Open Space Assessment¹³ states that within the Brize Norton area there is a total of 45 ha of open space, of which 2% is allotment spaces, 20% is parks and recreation grounds (public), 33% parks and recreation grounds (public and private), 43% accessible natural green space and 2% children’s play space. Most of the open space in the area is attributed to natural green space, whilst very little space is attributed to dedicated play provision (0.08ha per 1,000 population). This fails to meet the proposed standards of at least 0.25ha per 1,000 population for equipped/designated play areas. The development at Brize Norton provides a designated local equipped area for play (LEAP) on site, as well as additional open space, making a positive contribution to open space provision within the Brize Norton area.

Affordable Housing

4.7 House price and affordability data for West Oxfordshire shows the District to have a housing market that is generally reflective of the South East average. In 2020, the median house price in the District was £345,000, which was higher compared to £327,500 across the South East and

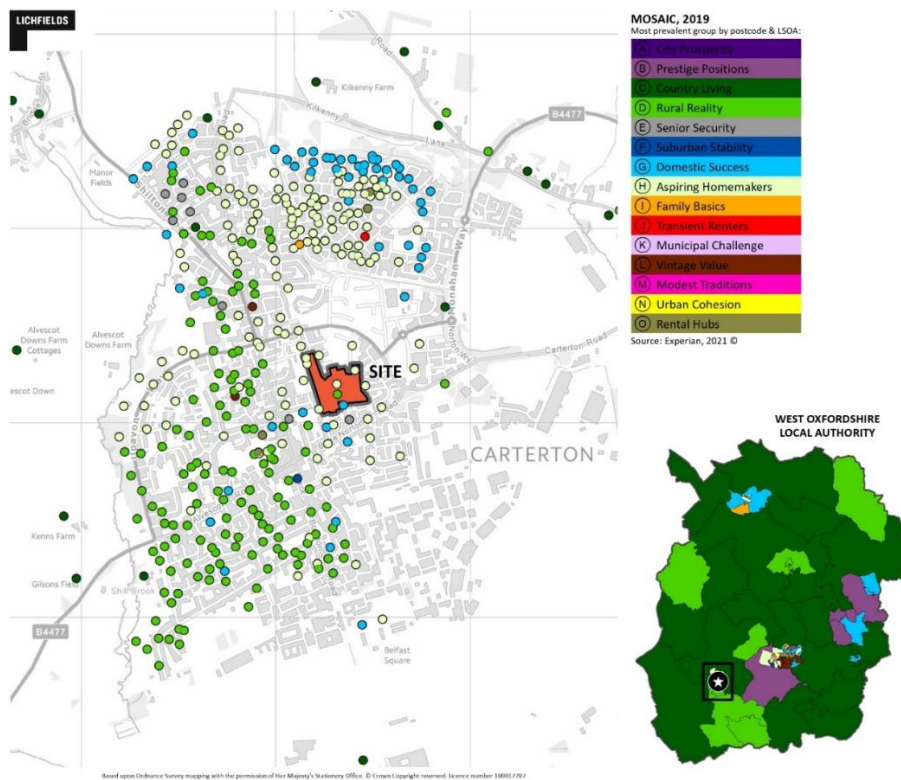
¹² West Oxfordshire District, (2018), West Oxfordshire Local Plan 2031

¹³ West Oxfordshire, Open Space Assessment (2013)

£249,000 in England. House prices in the last 10 years have increased significantly in West Oxfordshire by 53.3%, exceeding equivalent rises across the region and country.

- 4.8 Affordability ratios assess the relationship between lower quartile house prices and lower quartile earnings. Based on ONS data, the resident-based affordability ratio for the District was 10.42 in 2020, compared with 10.09 and 7.15 for the South East and England respectively¹⁴. This indicates that the issue of housing affordability is particularly acute for the District’s residents.
- 4.9 The residential-led development at Brize Norton includes dedicated provision of affordable housing, equivalent to 13 units out of the 135 new residential units on site. Of the housing units that have been sold and occupied to date, 38% have been occupied by 20-30 year olds, 56% by 30-50 year olds and 6% occupied by residents over the age of 50. This suggests that the development has provided a significant opportunity for younger local residents, as well as families, to become home owners; 54% of occupiers are families and 38% are couples. The development has also provided support to those seeking to access the housing market for the first time; 39% of buyers were first time buyers, over half (57%) of all purchasers benefited from the Government’s ‘Help to Buy’ scheme.
- 4.10 Analysis of demographic characteristics surrounding the site using Experian’s Mosaic profiling data (see Figure 4.1) highlights the prevalence of the ‘Aspiring Homemakers’ and ‘Rural Reality’ demographic groups nearby the site¹⁵. Members of the ‘Aspiring Homemakers’ group tend to be younger households who have, often, only recently set up home. They usually own their homes in private suburbs, which they have chosen to fit their budget. Members of the ‘Rural Reality’ group meanwhile tend to be people who live in rural communities and generally own their relatively low-cost homes.

Figure 4.1 Demographic profile around the site



Source: Experian 2021 / Lichfields analysis

¹⁴ ONS, The Ratio of House Prices to Residence Based Earnings (2019)

¹⁵ Experian, MOSAIC (2021)

- 4.11 As shown above, the demographic profile of residents matches with the Experian Mosaic demographic of the surrounding residents. This showcases the development’s positive impact on the area’s younger buyers, with more than a third of buyers in the development purchasing for the first time. The surrounding area of the development is primarily occupied by ‘Aspiring Homemakers’, a group which can be particularly susceptible to local issues of housing affordability.

Reusing Brownfield Land

- 4.12 Brownfield land (i.e. land that has been previously developed) has a vital role to play in meeting the country’s needs for new homes while protecting the countryside. This is particularly important in those areas of the country that face the challenge of a constrained supply of land for development. Annington’s development at Brize Norton repurposes a significant quantum of redundant MoD accommodation, investing c.£22 million in delivering 135 newly built housing units to meet the modern housing needs of civilians and local residents.

Delivering “Real” Jobs and Economic Value

- 4.13 The housing sector is a major source of national employment, with construction supporting more jobs compared with investment in many other sectors of the economy, because it supports a large amount of related activity such as concrete production, and glass and brick manufacturing.

- 4.14 It is sometimes claimed that house building does not generate ‘real’ jobs and economic value, perhaps because – at an individual site level – employment and output is perceived as relatively transient. Nevertheless, the industry does support real, permanent employment opportunities – jobs are transferred from site to site as new housing is delivered and not tied to a permanent position at one specific location.

- 4.15 The house building industry (and construction industry more widely) also provides a crucial labour market entry point for young, lower skilled workers and those moving out of unemployment. There are also significant parts of the country’s economy and employment base that benefit more indirectly from house building and the value of consumption and spending generated by residents of new homes. As new residents spend money on goods and services in the local economy, this can have a positive impact on other sectors of the economy such as retail and leisure which depend upon consumer spending to sustain and grow and generate local employment opportunities (as outlined in the previous chapter).

Supporting Labour Market Mobility

- 4.16 Housing can have a positive impact on the national and local economy through its relationship with labour market mobility. A healthy, well-functioning labour market requires a good supply of housing that is affordable for local people to enable them to move jobs freely and match up skills supply with employer demand, supporting their ability to achieve their economic potential. Whilst the relationship between labour market flexibility and housing is a complex one, in general terms a dysfunctional housing market (and shortage of housing in the right place, of the right type) can inhibit labour market mobility (particularly for lower and intermediate level skills) and in turn stifle economic and productivity growth. Housing supply issues can also have a fundamental impact on the quality of life of individuals and households, including educational attainment and health.

Sector Skills and Employability

- 4.17 New build housing projects such as this one at Brize Norton offer a range of employment and training opportunities across different trades and skills sets from bricklaying and carpentry through to plumbing and maintenance. The scheme will have had a beneficial impact on the local workforce providing a range of opportunities for a range of skill sets as part of the temporary on-site employment generated by the development.

Investing in Community Facilities

- 4.18 As part of Annington's community initiatives and wider activities at Brize Norton, refurbishment works valued at £5,000 were conducted at the Allandale Youth Centre, one of Carterton's popular Youth Organisations located in Burford Road.
- 4.19 The youth centre is home to Inclusive Care and Education (ICE), a company that helps disabled people learn independent living skills. The construction works provided by Annington helped refurbish the youth centre's new kitchen facilities for club activities and community activities within the local area. This will help ensure that the Allandale Youth Centre remains functional for the local community for future years to come. It has also provided the Youth Centre with a way to generate income, as the new space is rented out to other organisations for community activities.

5.0 Conclusions

- 5.1 The residential-led development at Brize Norton represents a large-scale investment into creating sustainable economic growth and communities in the local area. The development has successfully delivered a significant quantum of new housing stock to the local market, generating a range of economic impacts to benefit both Brize Norton and the wider West Oxfordshire area.
- 5.2 Some of the more quantifiable economic impacts of the development include:
- 1 Supporting approximately 50 direct FTE construction jobs during each year of construction at a range of skill levels;
 - 2 Supporting a further 61 jobs in services and other businesses from the wage spending of construction workers and supplier sourcing;
 - 3 Generating £4.0 million direct GVA and £4.8 million indirect and induced GVA per annum during the construction phase of the development;
 - 4 Helping to deliver a significant boost to the local economy by generating ‘first occupation expenditure’ of £742,500 on goods to make each dwelling ‘feel like a home’;
 - 5 Generating £5.2 million of resident expenditure per year in shops and services, of which £2.5 million each year is estimated to be retained in West Oxfordshire, in turn supporting 23 FTE jobs; and
 - 6 Delivering £239,000 of New Homes Bonus payments over one year; £279,000 of Council Tax receipts per annum; £1.35m of S106 planning contributions to West Oxfordshire and refurbishment works at the Allandale Youth Centre valued at £5,000.
- 5.3 As well as these quantitative impacts, the development has also generated a range of less tangible benefits by helping to meet housing supply and affordability challenges in Brize Norton and West Oxfordshire; supporting younger local residents to enter the housing market for the first time; supporting community projects and assets such as the Allandale Youth Centre; contributing to the open and play space provision of the local area and making a significant contribution to the wider economy.

Appendix 1 Glossary of Key Terms

Evaluate

Lichfields' proprietary methodological framework for assessing the economic benefits arising from new development.

Full Time Equivalent (FTE)

The number of equivalent employees working full-time. One FTE is equivalent to one employee working full-time.

Gross Impacts

An estimate of the total effect of an intervention before any consideration is given to the proportion of effects that are net additional.

Gross Value Added (GVA)

Gross Value Added is the amount of wealth created by a company, calculated as net sales less the cost of bought-in goods and services. This information can be aggregated up to provide average GVA per employee by sector.

Indirect and Induced

Impacts supported by additional spending effects in an area as contractors/suppliers and workers directly benefiting from an intervention purchase goods and services from local providers.

Multiplier Effects

Further economic activity (jobs, expenditure or income) associated with additional local income, local supplier purchases and longer-term effects.

New Homes Bonus

The New Homes Bonus is a grant paid by central government to local councils for increasing the number of homes and their use. It is based on the amount of extra Council Tax revenue raised for new-build homes, conversions and long-term empty homes brought back into use. A premium is payable on affordable units.

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