

PLANNING, REGENERATION + INFRASTRUCTURE

Economic Impact Assessment

Economic Impact Assessment of
Extra Care Village, Former Hook
Estate and Kennels, Northaw,
Hertfordshire

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This document has been prepared and checked in accordance with the Lambert Smith Hampton Quality Assurance procedures and authorised for release.

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1.0 INTRODUCTION

1.1 Overview

1.1.1 Lambert Smith Hampton have been appointed to undertake an economic assessment of a proposed 150 unit extra care village in Northaw, Hertfordshire.

1.1.2 The assessment has taken into account information available at outline planning application stage. Where information is not readily available estimates have been used using the latest data and ready reckoners in accordance with best practice guidance.

1.1.3 The assessment is split into 3 sections:

- Employment Impact Assessment – which provides an estimate of jobs to be created as a result of the proposed development during the construction and operational phases.
- Assessment of Other Economic Impacts – which provides an assessment of the benefits to local authority spending in health and social care provision, the increased expenditure of local residents, and freed-up dwellings in the local area.
- Summary and Conclusions

2.0 EMPLOYMENT IMPACT OF THE DEVELOPMENT

2.1.1 This section provides an assessment of the proposed extra care development and provides an estimate of the number of jobs that are likely to be created as a result of the development. Job creation is considered over two phases:

- Construction phase; and
- Operational phase.

2.1.2 The assessment has been undertaken at the Borough level and all outputs provided related solely to the benefits to Welwyn Hatfield Borough. There will be additional benefits to neighbouring areas and the wider regional and national economies, but these have not been calculated within this assessment.

2.1.3 Employment benefits are measured in terms of the following:

- The direct impact: Wage income and profit generated in the construction sector, plus spend on non-labour input.
- Indirect impact: The supply chain impacts of construction and their knock-on effects, i.e. an increase in output and income up and down the supply chain.
- Induced impact: An increase in household income as a result of increased employment/income in construction and other sectors leads to an increase in spending and demand/output in the overall economy.

2.1.4 Outputs are provided in terms of Full Time Equivalent (FTE) jobs which accounts for the different rates of part-time and temporary work in different sectors. Outputs are also quantified in term of Gross value added (GVA). GVA is the measure of the value of goods and services produced in an area, industry or sector of an economy.

2.1.5 Estimating the economic benefits of the development takes account of:

- Deadweight - the economic benefits which would be expected to accrue to the area regardless of the scheme, e.g. as a result of visitors who would have come to the area anyway.
- Displacement - the extent to which the investment generates economic benefits in the area at the expense of other businesses, e.g. as a result of visitors who visit a site instead of a nearby alternative venue.
- Leakage – the extent to which benefits remain in the local area (e.g. whether any jobs created at the site are taken by local people or those from outside the area).
- Multiplier effects – spill-over or ripple effects to the wider local economy as a result of purchases of inputs by businesses who benefit from the investment (e.g. those within the supply chain of the asset in question) and the expenditure of those who derive incomes as a result of the scheme (by taking up jobs which are created at the site).

2.2 Operational Phase

2.2.1 The development proposals are for an extra care facility comprising 150 residential units and a range of complimentary services for resident and guest use. This includes:

- A meeting hall / activity space
- The Pavilion which includes:
 - Bistro, Bar & Cellar
 - Private Dining
 - Activity and craft room
 - Members Lounge / Cinema
 - Hairdressing
 - Yoga / Dance Studio
 - Gym / Dance & Store
 - Treatment Room
 - Swimming Pool
 - Pool Shower / Change / WC's
 - Sauna
 - Steam room
 - Reception / consultation room / office /lobby
 - Guest suite

2.2.2 The number of direct jobs to be supported at the proposed development can be estimated using employment densities which provide an average floorspace requirement per FTE job for different use types. The HCA Employment Densities Guide¹ provides average density assumptions for different uses.

2.2.3 For older persons accommodation, the Housing Learning and Improvement Network (HousingLIN) provide a range of resources to estimate the employment benefits of new proposals. Two HousingLIN sources^{2 3} provide estimates on the employment benefits of such schemes, which estimate employment supported ranging from 0.36-0.43 jobs per unit delivered. This will differ depending on the facilities and level of care provided.

2.2.4 The table below shows the number of direct operational jobs to be supported at the site. This represents 0.38 jobs per unit – within the range provided by the HousingLIN exemplar schemes.

¹ Homes and Communities Agency (2015) Employment Density Guide

² Housing LIN (2019) Extra care housing resource pack

³ HousingLIN (2012) Housing in later life planning ahead for specialist housing for older people

Table 1: Direct Jobs to be Created by Proposed Scheme

Element of Proposed Scheme	FTE (Full-Time Equivalent) Jobs
Care and support jobs	37.5
Other jobs (leisure/maintenance/admin/etc)	19
Total	56.5

2.2.5 There above figures set out the gross employment impact from the development. In order to calculate the net impact of development, deadweight, displacement, leakage, and supply chain multipliers need to be considered:

Dead Weight

2.2.6 There is no existing activity at the site. Therefore, the dead weight position is negligible.

Leakage

2.2.7 Leakage has been considered by assessing commuting flows data at local authority level. These show that Welwyn Hatfield has a resident self-containment rate of 47% and a workplace self-containment rate of 35% - representing relatively high commuter links with neighbouring areas. These data are for workers in all sectors, however the data also shows different sectors supporting very variable commuter distances.

2.2.8 The Caring, leisure and other service occupations are shown to have a very local workforce, the lowest average commuting distances and the highest proportion of workers commuting under 5km to work. 50% of the sector's workers commute less than 5km and 66% commute less than 10km. This is notably lower than the average for all occupations of 31% and 46% respectively.

Table 2: Commuting Flows

	Welwyn Hatfield Self-Containment	Commute Less than 5km
Resident Flows – All Sectors	47%	-
Workplace Flows – All Sectors	35%	-
Workplace Flows – All Occupations	-	31%
Workplace Flows – Caring, leisure and other service occupations	-	50%

Source: 2011 Census

2.2.9 Given the nature of the employment occupations being provided, it is considered appropriate to use a commuter retention of 50% - i.e. a leakage of 50%. This represents a high level of leakage in accordance with HCA guidance⁴.

⁴ Homes and Communities Agency (2016) Additionality Guide

Displacement

- 2.2.10 The proposed development will provide care support and leisure and treatment services for its residents and their visitors. Given Welwyn Hatfield’s aging population and the current high level and increasing demand for specialist older persons accommodation within the area, it is not considered that this development will displace additional jobs at similar facilities. There may be minor displacement of jobs at leisure and other services (e.g. hairdressers) where previously external business may be lost to new on-site provision. However the impact of this is expected to be minimal.
- 2.2.11 Therefore, the proposed development is reasonably considered to provide a very low level of displacement with a ratio of 10% being used.

Economic Multipliers

- 2.2.12 As well as considering the direct benefits of the development it is necessary to consider the additional economic activity (jobs, expenditure or income) associated with additional local income and local supplier purchases resulting from the increased activity at the site. These take the form of indirect and induced spending within the local economy:
- A supply linkage multiplier (sometimes referred to as an indirect multiplier) due to purchases made as a result of the intervention and further purchases associated with linked firms along the supply chain.
 - An income multiplier (also referred to as a consumption or induced multiplier) associated with local expenditure as a result of those who derive incomes from the direct and supply linkage impacts of the intervention.
- 2.2.13 A composite economic multiplier (capturing both indirect and induced spending) of 1.25 has been used to estimate the economic multipliers within the local economy (i.e. 0.25 additional jobs created within the Welwyn Hatfield economy for each direct job created on site).
- 2.2.14 This provides the following estimated gross and net impacts of development:

Table 3: Net Employment (FTE) in Operational Phase

	Economic Benefits to Welwyn Hatfield
Direct Jobs	56.5
Leakage	50%
Displacement	10%
Multiplier	1.25
Total	31.5

2.3 Construction Phase

- 2.3.1 The proposed scheme has an estimated construction cost of £27 million and a build out period of 2 years. These figures are estimates pending finalisation of development proposals and so the analysis of employment generated derived from the figures is similarly approximate.
- 2.3.2 HCA guidelines⁵ provides labour coefficients which express the number of workers required over one year to deliver £1m of construction investment. an estimation of the number of construction jobs based on the total programme/project construction capital cost. Using the new housing coefficient of 19.9 jobs per £million, provides an overall estimate of employment created during the construction phase of around 269 FTE direct jobs per annum.
- 2.3.3 Taking account of leakage, commuting flows from the 2011 Census (the latest available) have been used. These show that Welwyn Hatfield has a worker retention of around 50%. Commuting data for the construction sector is slightly problematic as 31% of workers in the sector have no fixed place of work. Nevertheless, 38% of responders worked less than 5km from home or worked mainly from home. This is in line with the overall average for all industries (39%). Given that some of those with no fixed place of work will also work locally, a 50% construction worker commuter retention/leakage assumption is reasonable.
- 2.3.4 Displacement for the construction sector is expected to be relatively low and so a displacement rate of 25% has been assumed in line with the ready reckoners in the HCA Guide⁶. An economic multiplier associated with additional local income and local supplier purchases associated with the construction phase has been assumed at a rate of 1.33 which represents an average level of local economic linkages.
- 2.3.5 Taking the above factors into account, the construction phase of the proposed development is estimated to support an additional 134 FTE jobs direct at the site and indirect within the local economy within Welwyn Hatfield during every year of the construction phase. These additional jobs will be temporary in nature.

2.4 Productivity – Gross Value Added (GVA)

- 2.4.1 An alternative method of assessment of the proposed scheme, in addition to measuring jobs growth, is to measure the increase in productivity within the local economy in terms of Gross Value Added (GVA). GVA is the value generated by any unit engaged in the production of goods and services and is measured in pounds.
- 2.4.2 A suitable time period to assess the benefits needs to be established. This persistence period should capture the time that the benefits will meaningfully accrue and is the period over which the benefits of the

⁵ Homes and Communities Agency (2015) Calculating Cost Per Job Best Practice Note

⁶ Homes and Communities Agency (2016) Additionality Guide

development are assessed. In this instance, a ten-year time frame has been chosen based on experience of the time taken for previous facilities to bed in. This includes the construction phase.

2.4.3 A rate of benefit decay of 10% per annum has been used. This is the rate at which benefit of the development, in economic terms, will decay i.e. the proportion of annual benefits expected to be lost from one year to the next due to economic changes, other investment decisions and so forth.

2.4.4 Net present value (NPV) has been calculated in order to assess the future benefits of the development compared against its value today. Calculation of the NPV of the GVA growth over the persistence period utilises an appropriate discount rate of 3.5% per annum.

Table 4: Net Present Value (NPV) Over 10 Years (GVA)

Phase	Welwyn Hatfield
Construction	£15.5million
Operational	£4.3million
Total	£19.8million

3.0 WIDER ECONOMIC BENEFITS

3.1.1 In addition to the local employment benefits provided the proposed development, as outlined in the previous section, delivering suitable attractive specialist older persons accommodation provides multiple other economic benefits to the local economy, such as:

- Reduction in external health and care support spending
- First-time buyers and future retirement wealth
- Local Expenditure of Residents
- Freeing up family housing in the borough

3.1.2 The economic benefits of each of these aspects is set out below.

3.2 Health and social care needs

3.2.1 Specialist retirement housing has the potential to reduce the needs of its residents for health and social care services. Any such reduction in need may have economic consequences for individuals, local authority social care budgets and the NHS.

3.2.2 The economic effects relating to health and social care, can be estimated relating to:

- Prevention of need, particularly from reduced falls, and
- Reducing need for health and care services

3.2.3 Specialist retirement housing is designed to reduce the incidence of falls, through the increased presence of grab rails, fewer physical hazards that may cause falls among the visually impaired, and fewer 'trip-points' such as uneven floorboards.

3.2.4 Research⁷ has found that around one third of older people aged 65 and above will suffer a fall each year, with 2% of falls resulting in a hip fracture. Around half of those aged 80 and above will fall in a given year. The effectiveness of adaptations in averting falls varies between studies, although most of those identified suggested that adults lacking necessary adaptations were between 1.5 and 2.8 times more likely to suffer a fall than those where interventions were in place.

3.2.5 Specialist retirement housing resulting in a reduction in falls may reduce NHS expenditure, when such accommodation reduces the incidence of falls among residents.

3.2.6 The Strategic Society Centre⁸ estimates that over a ten-year period an older person moving to specialist accommodation will reduce the average expected cost of falls from around £7,000 for residents in mainstream housing to £3,200 for residents in specialist retirement housing – **a saving of £3,800 per person.**

⁷ Snell T et al. (2012) Building a business case for investing in adaptive technologies in England, PSSRU Discussion Paper 2831

⁸ The Strategic Society Centre (2016) Valuing Retirement Housing Exploring the economic effects of specialist housing for older people

- 3.2.7 Specialist retirement housing may reduce people’s need for personal care and support while living at home resulting in further public savings. Retirement housing that better enables the usage of telecare and remote monitoring devices than mainstream housing may reduce the number of carer visits a person requires. suggests **a saving of around £900 per person.**
- 3.2.8 In addition to care in their own home, specialist retirement housing may enable older people with a disability to carry on living at home for longer, reducing the amount of time they spend living in a care home. Research has found that extra care housing residents aged 80 years and older are approximately half as likely to enter residential care compared with older people in the community in receipt of domiciliary care⁹. The Strategic Society estimates this results in **a saving to local authorities of around £5,000 per person** over a ten-year period.
- 3.2.9 Adding together these potential savings resulting from the construction of one new unit of specialist retirement housing results in **a reduction in health and social care costs of around £9,700 for each person** that occupies it over a ten-year period.

3.3 Local Authority Adult Social Care

- 3.3.1 The construction of new specialist retirement housing may also reduce entitlement to local authority funded social care:
- By moving into specialist retirement housing, older people may release equity, reducing their entitlement to means-tested support for care costs.
 - Reduced demand for local authorities to install adaptations and equipment in homes.
- 3.3.2 Older homeowners who downsize into specialist retirement housing and release equity in doing so may increase their levels of cash savings and wealth. At the point of requiring domiciliary care, such savings increase their ability to pay for their own care, and by extension, may reduce their entitlement to means-tested local authority support.
- 3.3.3 The Strategic Society Centre¹⁰ have estimated the savings to local authority social care on the basis of reduced entitlement to means tested support for home care. This analysis suggests that the development of one new unit of retirement housing will reduce entitlement to local authority funded home care by around **£18,500 per person.**
- 3.3.4 As an alternative or complement to home care, local authorities may provide older people with equipment and adaptations. However, specialist retirement housing for older people often includes equipment and adaptations ‘built-in’, either as features of the housing or optional additional services. As such, someone

⁹ Kneale D and Smith L (2013) “Extra Care Housing in the UK: Can it be a Home for Life?” in Journal of Housing for the Elderly, Vol. 27, Issue 3

¹⁰ The Strategic Society Centre (2016) Valuing Retirement Housing Exploring the economic effects of specialist housing for older people

living in specialist retirement housing may have effectively ‘pre-purchased’ equipment and adaptations they may need in future, reducing demand for local authority support. This suggests that a new specialist retirement housing unit will reduce demand for local authority funded equipment and adaptations by around **£100 per person** over 10 years.

3.4 First-time Buyers and Retirement Wealth

3.4.1 The development of new retirement housing may enable younger people to get on the housing ladder, increasing their ability to fund their housing and care costs during retirement. The Strategic Society Centre estimate that each new unit of specialist retirement housing may in the long-term over the full lifetime of a first-time buyer reduce expenditure on Housing Benefit and means tested social care costs by around £54,800.

3.4.2 However, these benefits can be expected over a long time-frame – much longer than the 10 year period considered by this assessment. As such these figures are not included within the analysis.

3.5 Local Expenditure of Residents

3.5.1 The new population at the proposed development will support additional retail and services expenditure within the local economy. The proposed development includes a range of leisure facilities for use by local residents (as set out previously) therefore the expenditure benefits are calculated using only retail expenditure figures. However, in addition to this we would expect some further uplifts to expenditure on local leisure services where these are not provided on site.

3.5.2 The Council’s latest Retail Needs Assessment¹¹ provides data on retail expenditure per capita and the proportion of this expenditure which is retained within the borough. The local¹² per capita retail spend is £5,885 per annum. For the proposed development this results in annual expenditure of residents of £1.24 million per year.

3.5.3 The local retail retention (i.e., how much is spent within the borough) is low at just 8.3% for convenience spend, and 20.7% for comparison spend. These figures are for the general population and research by McCarthy and Stone¹³ highlights that the spending habits of private retirement housing residents disproportionately benefit the local area. The report concluded that:

- One in three retirement housing residents walked to the local shops each day;
- 45% of retirement housing residents bought the bulk of their shopping within one mile of their private retirement housing scheme, with 65% travelling no further than two miles;

¹¹ Carter Jonas (2016) Welwyn Hatfield Borough Council: Retail and Town Centre Needs Assessment Update 2016

¹² Zone 5

¹³ ORB (2004), ‘A Better Life’, McCarthy and Stone

- 62% of private retirement housing residents preferred to shop in local centres rather than major town centres;

3.5.4 Therefore it is important to note that local expenditure of residents at the proposed development is likely to be higher. However, as this is unquantified, for the purposes of the assessment the general population figures have been used. This results in an additional £200,000 per annum of retail expenditure within the local economy.

Table 5: Retail Expenditure Per Annum in the Local Economy

	Expenditure per Capita	Total Expenditure	Retained Expenditure
Convenience	£2,263	£475,999	£39,508
Comparison	£3,622	£761,851	£157,703
Total	£5,885	£1,237,851	£197,211

3.5.5 Estimating the economic benefit of retail expenditure over a ten-year period has been calculated using a Net Present Value (NPV) of the benefit stream over the appropriate persistence time period by discounting back utilising an appropriate discount rate. This results in **a ten-year benefit of £770,000 to the local economy.**

3.6 Freeing up Market Housing

3.6.1 The development of new specialist retirement housing has an effect on wider housing supply for all age groups.

3.6.2 The latest Census data shows the number of households in Welwyn Hatfield by number of bedrooms, household size and life stage. This data can be used to derive the average household size for different dwelling sizes in the 66+ age group compared to the population as a whole. This is shown in the table below.

3.6.3 This shows that occupancy rates from the 66+ households is considerably lower than for the average across all ages. This trend is seen across all dwelling sizes. This means that on average an older persons household supports 1.60 people, compared to the average for all ages of 2.37. The data also shows that around a quarter of all households in the Borough comprise older persons households.

Table 6: Average Household Size per Number of Bedrooms by Age, Welwyn Hatfield

	Average household size – All ages	average household size – Aged 66+	% of households aged 66+
1 bedroom	1.31	1.13	22%
2 bedrooms	2.00	1.41	26%
3 bedrooms	2.58	1.67	26%
4 or more bedrooms	2.92	1.91	24%
All	2.37	1.60	25%

Source: Derived from 2021 Census data

- 3.6.4 The table below shows that older households typically occupy larger dwellings. Within the 66+ age group 65% occupy dwellings with 3 or more bedrooms.

Table 7: House Size by Age

	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms
34 and under	23%	35%	26%	16%
35-54	11%	20%	43%	26%
55-65	12%	17%	42%	29%
66+	12%	24%	42%	23%

Source: Derived from 2021 Census data

- 3.6.5 Furthermore, the Census data shows that single person households aged 66+ also typically occupy larger dwellings – 50% occupy dwellings of 3 or more bedrooms. This compares to just 14% for people aged 34 and under.

Table 8: Single Person Households by Age and House Size

	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms
34 and under	62%	24%	9%	5%
35-54	47%	28%	19%	6%
55-65	35%	27%	30%	9%
66+	21%	30%	37%	13%

Source: Derived from 2021 Census data

- 3.6.6 Using the Census data above we can calculate that once the proposed development is at full occupancy, this can be **expected to free up 131 homes**, previously occupied by new residents. This is calculated below using the expected number of residents at the proposed development (as calculated previously) as 210 people 66+ years old. The profile of dwelling sizes for 66+ from the Census is used to derive the number of each size of dwelling which would have been previously occupied by new residents of the proposed scheme.

Then the occupancy rate for 66+ households (derived from the Census) is used to estimate the number previously occupied dwellings which would be freed-up by residents moving into the proposed scheme.

- 3.6.7 In accordance with the occupancy ratios above, **84 of the of freed-up dwellings would constitute family homes** (3+ bedrooms).

Table 9: Dwellings to be Freed-Up Due to Proposed Development

Size of Dwelling	Population Profile for Aged 66+	Population Aged 66+ Previously Occupying Housing	Occupancy rate Aged 66+	Number of Freed-Up Dwellings
1 Bedroom	8%	17	1.13	15
2 Bedroom	21%	44	1.41	31
3 Bedroom	43%	91	1.67	54
4 Bedroom	28%	58	1.91	30
Total	100%	210	1.60	131

- 3.6.8 Given the average occupancy rate of younger cohorts is considerably higher, the freed-up housing would be expected to provide a greater contribution to meeting the borough's population growth and family housing needs. It would be expected to **support a population of around 310** – an additional 47% on current under-occupancy levels.
- 3.6.9 Further to this, previous analysis from the New Policy Institute¹⁴ found that among working-age owners of homes with 3+ bedrooms, 20% were previously living in private rented accommodation – i.e. they were likely first-time buyers - suggesting that when older homeowners vacate larger homes, at least one-in-five may potentially be bought by first-time buyers.
- 3.6.10 The vast majority of these would be expected to be within the local area. Using the latest available migration flows data (2011 Census) this suggests that around 50% of movers into Welwyn Hatfield aged 65+ and 75+ came from within the borough. These are figures for all residents rather than those entering Extra Care facilities. Evidence from HousingLIN shows that the majority of such residents seek to move within the local area to stay close to existing support networks. This means the proportion of housing which would be freed-up locally is likely higher. However, given the location of the proposed development and proximity to settlements outside the borough this 50% leakage is considered reasonable. Therefore a reasonable estimate is that the proposed development would **free-up 65 existing dwellings in Welwyn Hatfield**, the majority of which are currently under-occupied.
- 3.6.11 This will be an immediate benefit upon completion of the development, but will also persist over its operational lifespan as vacancy arise and are filled by residents from within the local housing stock.

¹⁴ 1 Pannell J et al. (2012) Market Assessment of Housing Options for Older People, New Policy Institute, London

3.7 Summary

3.7.1 The table below provides a summary of the economic benefits estimated in this section. All benefits pertain to Welwyn Hatfield borough and do not include additional benefits to neighbouring areas or the wider region which would be additional to those calculated in this section. All benefits are calculated for a ten-year time period.

Table 10: Summary of Non-Employment Economic Benefits (10 Years)

Type of Saving	Economic Benefits to Welwyn Hatfield Borough
Health and care needs	£2,037,000
Local authority social care entitlement	£3,906,000
Local Retail Expenditure	£769,500
Freed-Up Dwellings	65
Total	£6.7 million

4.0 SUMMARY

4.1 Summary of Economic Benefits of the Development

- 4.1.1 This report provides an assessment of the economic benefits of the proposed extra care village at Northaw, Hertfordshire. The proposed scheme comprises 150 extra care units along with a range of services and leisure facilities for residents and guests.
- 4.1.2 The net economic benefits of the development to Welwyn Hatfield Borough have been estimated and are summarised in the tables below. The proposed development will have further benefits to neighbouring areas which will be additional to the figures for the borough set out below. Benefits have been estimated in terms of GVA and have been calculated over a 10-year assessment period.
- 4.1.3 In total the proposed development will create 31.5 permanent operational jobs, 134 temporary construction jobs per annum, will provide a £19.8million increase to GVA over ten years, and will free-up 65 dwellings within Welwyn Hatfield.

Table 11: Employment Benefits of the Proposed Development

Phase	Measure	Benefit to Welwyn Hatfield
Construction	FTE jobs per annum	134
Operational	FTE jobs	31.5
NPV	GVA	£19.8million

Table 12: Summary of Non-Employment Economic Benefits

Phase	Measure	Benefit to Welwyn Hatfield
Health and care needs	GVA	£2million
Local authority social care entitlement	GVA	£3.9million
Local Retail Expenditure	GVA	£0.77million
Freed-Up Dwellings	Dwellings	65