West Yorkshire Combined Authority

Housing Delivery in the Leeds City Region: Annual Monitoring Report

Published December 2022

Covers the period 1 April 2021 to 31 March 2022

Leeds City Region Enterprise Partnership

Working in partnership with the West Yorkshire Combined Authority

1. Introduction

1.1 This annual report provides housing delivery monitoring for the financial year 2021/22 across all Leeds City Region local authorities (LAs). Where suitable, information for previous monitoring years is included to provide context and scope for analysis. Contextual information on housing market trends also features.

1.2 The report was written by the West Yorkshire Combined Authority using information provided by partner councils. It is timed to align with the preparation of Local Authority Annual Monitoring Reports (AMRs).

1.3 Data is presented for West Yorkshire (five partner councils) and the wider Leeds City Region area (ten partner councils).

1.4 The geographic scope of the report includes the following council areas:

- Bradford
- Calderdale
- Kirklees
- Leeds
- Wakefield
- Barnsley
- Craven
- Harrogate
- Selby
- York

Figure 1. The Leeds City Region

2. Market outcomes

2.1 This section briefly considers a number of key housing market outcomes, including the latest performance in 2021/22 and how these compare to long-term trends, alongside setting a wider market context for the housing monitoring indicators section below. The housing analysis below includes flats, maisonettes, terraced, detached and semi-detached housing, as well as new builds and existing properties.

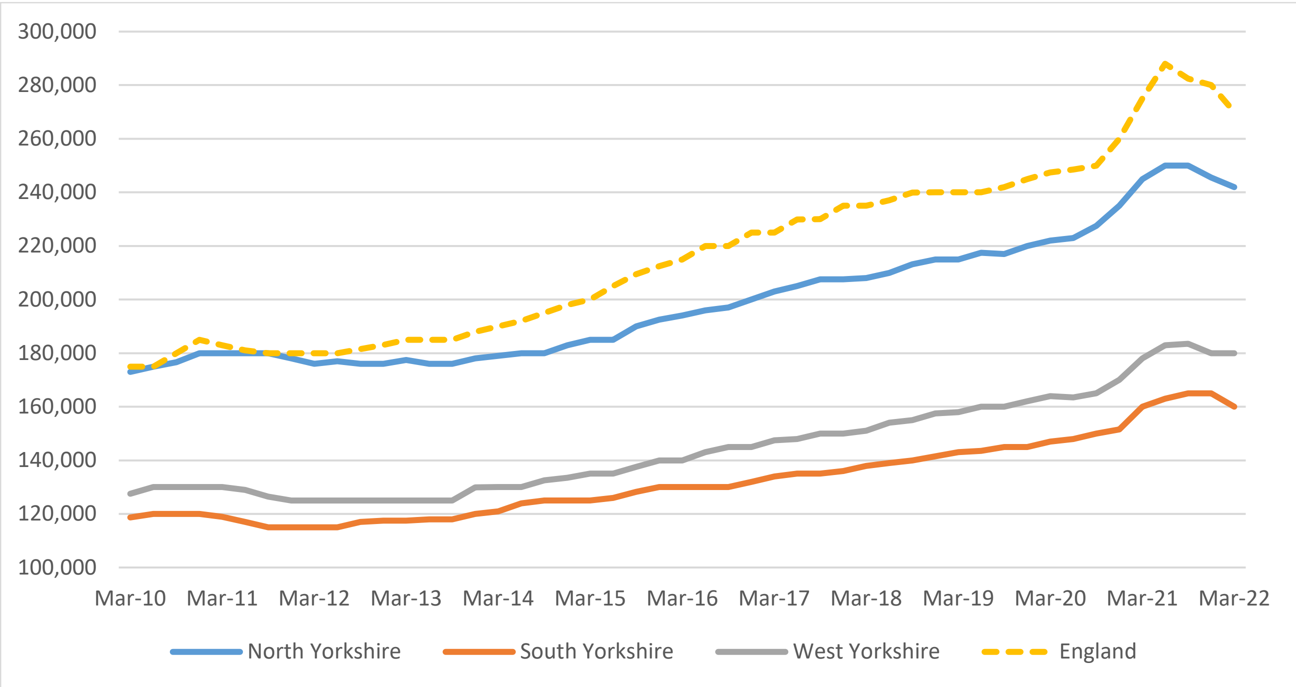
2.2 It reports on:

- House prices, rents and affordability
- Residential sales
- Vacancy trends
- Demographic change

House prices

2.3 The latest data shows that average house prices in West Yorkshire are £221,201 and median house prices in the region are £179,995 for the year ending March 2022. Between March 2021 and 2022, the median house price in England fell by 1.8% while the median house price in West Yorkshire rose by 1.1%. This largely reflects a return to pre-pandemic house price trends, following a short period of rapid house price growth.

Figure 2. Median house prices (£) – West Yorkshire compared with North Yorkshire, South Yorkshire and England figures from March 2010 to March 2022



Source: ONS House Price Statistics for Small Areas

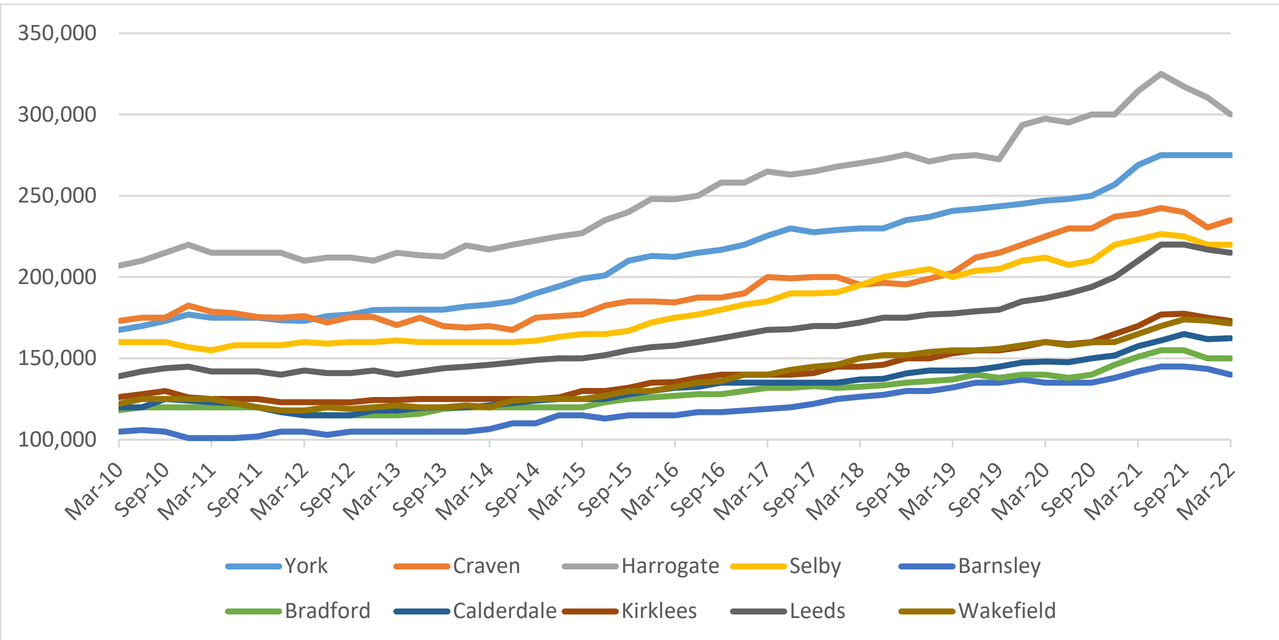
2.4 Across the Leeds City Region, median house prices are generally higher in the North Yorkshire local authorities, with Harrogate (£300,000) and York (£275,000) having the highest median house prices. Over the past year, prices have grown quickest in Wakefield (+3.9%), followed by Calderdale (+3.2%). Prices fell in the region's most expensive district, Harrogate (-4.6%).

2.5 Median prices across West Yorkshire range from £150,000 in Bradford to £215,000 in Leeds. The median house price is £173,000 in Kirklees, £171,500 in Wakefield and £162,500 in Calderdale. Across West Yorkshire districts, only Bradford (-0.7%) saw a decrease in median house prices between March 2021 and 2022.

Table 2.1. Median house price growth (%) of local authorities in the Leeds City Region 2015-2022

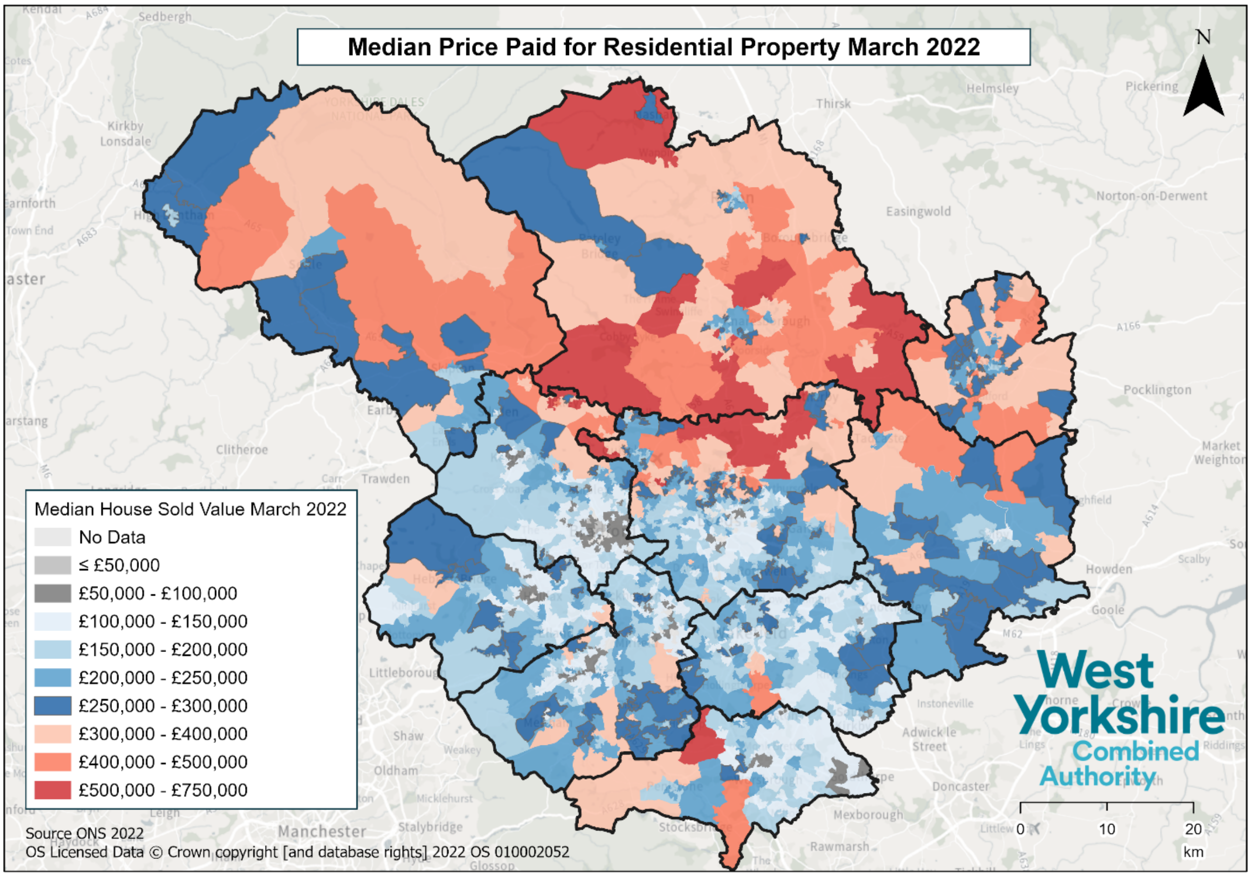
West Yorkshire	2015 Price	2022 Price	% Change
Bradford	£120,000	£150,000	25%
Calderdale	£125,000	£162,500	30%
Kirklees	£130,000	£173,000	33%
Leeds	£150,000	£215,000	43%
Wakefield	£125,000	£171,500	37%
Leeds City Region			
Barnsley	£115,000	£140,000	22%
Craven	£177,000	£235,000	33%
Harrogate	£227,000	£300,000	32%
Selby	£165,000	£220,000	33%
York	£199,000	£275,000	38%

Figure 3. Median house price (£) of local authorities in the Leeds City Region 2010-2022



Source: ONS House Price Statistics for Small Areas

Figure 4. Median house prices March 2022 at lower super output area (LSOA) level for the Leeds City Region. The regions with the highest median house price are in the darkest red. The lowest median prices are in grey.

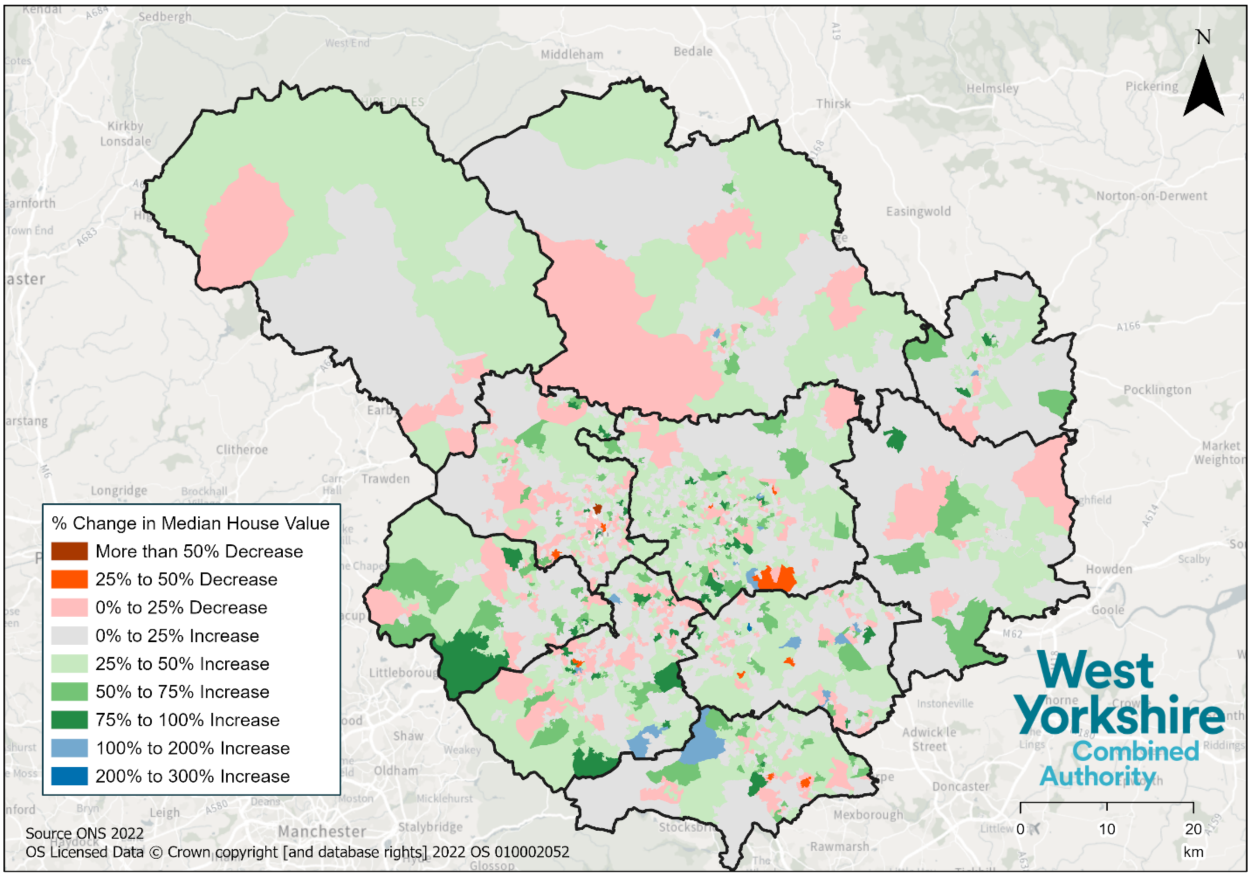


Source: ONS House Price Statistics for Small Areas

2.6 Areas with the highest median house prices tend to be in more rural wards of North Yorkshire, while the areas with the lowest median house prices are largely in the urban areas of West Yorkshire.

2.7 The map above illustrates a large variation in median house prices across Leeds City Region and West Yorkshire, indicating the need for a well thought out housing strategy, as suggested by [The Leeds City Region Housing Affordability and Need Study (May 2020).] Please see Appendix 1 for detailed maps of median prices by local authority.

Figure 5. Median house price percentage growth at LSOA level for the Leeds City Region, 2016 – 2022



Source: ONS House Price Statistics for Small Areas

2.8 The figure above shows where house prices within the City Region and West Yorkshire have changed in the past five years. Areas marked in red have seen a decrease in median house price. The green and blue areas have seen an increase in median house price.

2.9 The data shows that the vast majority of places within the Leeds City Region have seen median house prices rise since 2016. When comparing this with last year's Housing Delivery Monitoring Report, much of the recent house price growth has come in the urban areas.

About the data
House price data in the UK is robust with the ONS collating and presenting data on sales, volumes and prices broken down to LSOA level. Because of this we can give a detailed picture of the real estate market in the local area.

Rents

2.10 Private sector rental prices follow house prices closely, with the highest prices and rents in York and Harrogate. Between 2021 and 2022, rents across England went up by 5%. Only Bradford (+10%) and Leeds (+7%) experienced higher growth. Since 2016, rents in Leeds grew the quickest (+25%) and faster than rents in England, with Calderdale and Kirklees experiencing the slowest growth in West Yorkshire (+11%).

Table 2.2. Median private sector rents (£), 2016-2022

West Yorkshire	2016	2017	2018	2019	2020	2021	2022
Bradford	475	495	495	500	500	525	575
Calderdale	475	495	495	495	495	500	525
Kirklees	475	495	495	500	500	525	525
Leeds	600	650	671	675	725	700	750
Wakefield	500	520	525	525	550	550	575
Leeds City Region							
Barnsley	433	450	520	450	475	475	475
Craven	550	560	550	575	575	580	595
Harrogate	700	720	725	725	745	750	750
Selby	550	550	550	570	595	595	600
York	700	745	795	775	750	780	800
England	650	675	695	700	725	755	795

Source: ONS Private Rental Market Statistics

2.11 The LCR Housing Affordability and Need Study (2020) showed that 29% of households in the private rented sector could not afford rent at £500 per month. In the social rented sector, this increases to 50%.

2.12 Growth in housing association rents has increased in all areas over the past year, though again they remain highest in North Yorkshire areas.

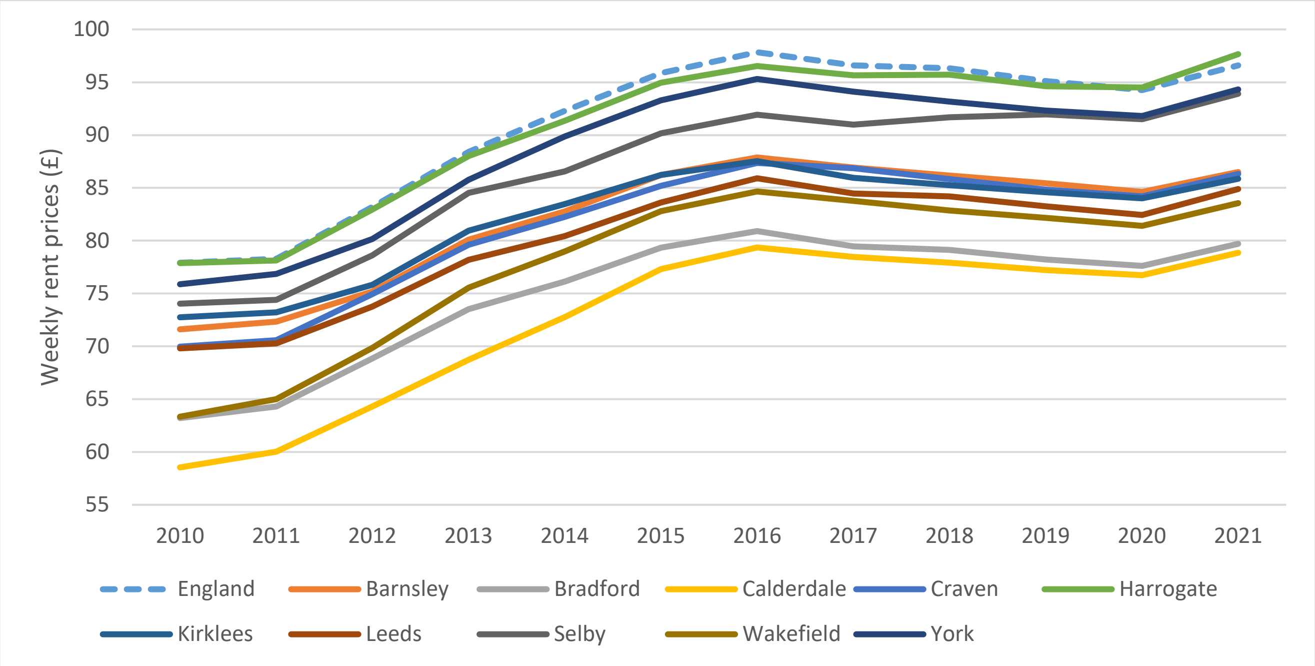
Table 2.3. Median social sector rents (£), 2016-2022

West Yorkshire	2016	2017	2018	2019	2020	2021
Bradford	*	*	*	*	£434	£449
Calderdale	*	*	*	*	*	*
Kirklees	£309	£306	£302	£299	£296	£304
Leeds	£330	£315	£315	£312	£312	£321
Wakefield	*	*	*	*	*	*

Leeds City Region						
Barnsley	£324	£321	£319	£316	£314	£322
Craven	*	*	*	*	£719	*
Harrogate	£358	£355	£351	£350	£344	£354
Selby	£341	£338	£336	£334	£325	£340
York	£350	£346	£343	£339	£333	£349
England	£382	£379	£376	£372	£371	£383

* Data not available due to Large Scale Voluntary Transfer of social housing stock to the Private Registered Provider sector

Figure 7. Housing association rents (£), 2010 - 2021



Source: DLUHC: Regulator of Social Housing Statistical data return

About the data

House price data in the UK is robust with the ONS collating and presenting data on sales, volumes and prices broken down to LSOA level. Because of this we can give a detailed picture of the real estate market in the local area.

Private house rent data is collected by the Department for Levelling Up, Housing & Communities (DLUHC) and presented by ONS broken down to the local authority level. Where possible, the data also comes with the lower and upper quartile of rents, which can give good insight as to the range of different rents available in a local authority.

Affordability

2.13 Affordability is measured by the ratio of median house price to median income of the area. The higher the ratio figure, the less affordable the houses are. It is worth noting that most mortgage lenders use an income multiple of 4-4.5 times salary to assess affordability. Therefore, the higher the affordability ratio below, the higher the deposit requirement will be to purchase the median house.

2.14 It should be noted that the issue of housing affordability is more complex than that demonstrated by a simple house price to income/earnings ratio and that there are significant problems of affordability in West Yorkshire, particularly for households in poverty and newly-forming households. In addition, the affordability ratio used here does not factor in housing quality and condition. Lower house prices may simply reflect lower quality of housing stock. Housing quality is a key evidence gap that the Combined Authority will seek to address in the near future.

2.15 Figure 8 shows the housing affordability ratio, which is a ratio of median house price to median annual wage (residence-based). The median house price of England is 9.1 times the median wage of England in 2021. This has increased over the last 10 years; it was 6.84 in 2010, meaning houses are now less affordable on average. Please note: the way these statistics are measured has changed as of this year, with the figures being provided directly from ONS.

2.16 By contrast, the districts in West Yorkshire have a lower median house price affordability ratio than the England Average. In 2021, West Yorkshire's median house price affordability ratio was 6.1, compared with the wider Leeds City Region's higher affordability ratio of 7.0. While most local authority areas have seen an increase in the affordability ratio over the last 10 years, Bradford's affordability ratio has decreased slightly, driven by strong annual wage growth. Bradford as such remains the most affordable local authority area in West Yorkshire using the house price to income affordability ratio, with house prices five times average earnings.

2.17 House prices are more affordable in every area of the Leeds City Region than England, with the exception of Harrogate, where median house prices are 10.9 times median earnings.

Figure 8. Affordability of house prices 2010 and 2021 – ratio of median house price to median annual wage (residence-based) at local authority level

2.18 The ratio between lower quartile house price and lower quartile annual wage follows largely the same pattern as that of the median ratio. However, the key difference is that nationally the house price ratio is slightly lower at the 25th percentile at 8.0 than it is at the median (9.1), meaning properties at this level are slightly more affordable. The 25th percentile affordability ratio has only seen a slight increase from 2010 of 6.86. Locally, both Bradford and Craven have become slightly more affordable over the last 11 years, though Craven is still the 3rd most expensive place in the Leeds City Region for lower quartile house prices.

2.19 York and Harrogate's lower quartile houses are considerably less affordable than the national average (8.04), at 9.67- and 10.56-times lower quartile earnings respectively.

Figure 1. Lower quartile house price ratio to lower quartile annual wage ratio for West Yorkshire

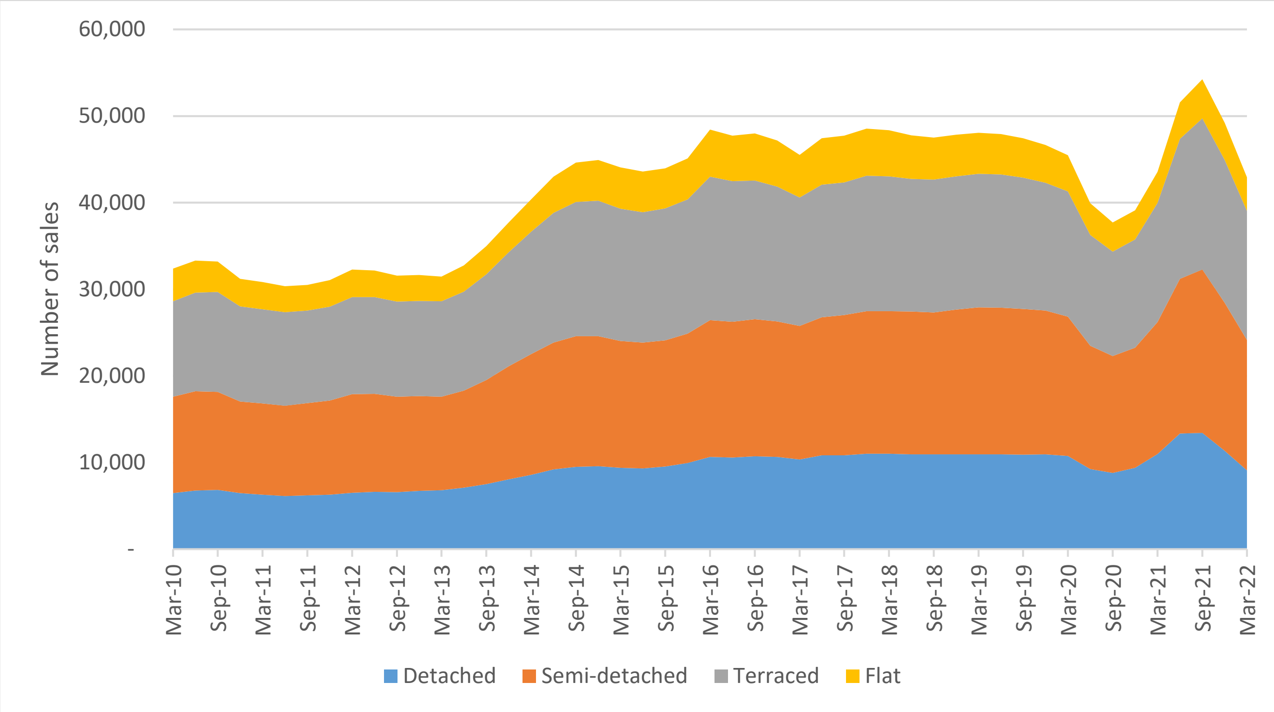
About the data
Housing affordability is taken as a ratio between median house price and the median annual wage of the same area. This measure does not provide a complete picture on how accessible the housing market is to individuals, and the Combined Authority has undertaken more detailed analysis to explore these issues. But the measure used here does give an indication of how easily people in the local area could afford to buy there. Data for housing affordability is broken down to local authority level while house price data is broken down to LSOA level.

Residential sales and vacant housing

2.20 Figure 10 shows the numbers of residential house sales. From the Financial Crisis to 2013, sales were fairly flat across Leeds City Region. In 2014, sales began to pick up pace across all types of housing. The most common transaction during this time was semi-detached housing (34%), followed by terraced (33%), detached (22%) and flats (10%).

2.21 There is increased volatility in house sales due to the Covid pandemic and government interventions to support the housing market. There was a sharp fall in March 2020, which recovered, but then fell again by September 2021, and this trend continued into 2022.

Figure 10. Leeds City Region house sales by type March 2010 to March 2022



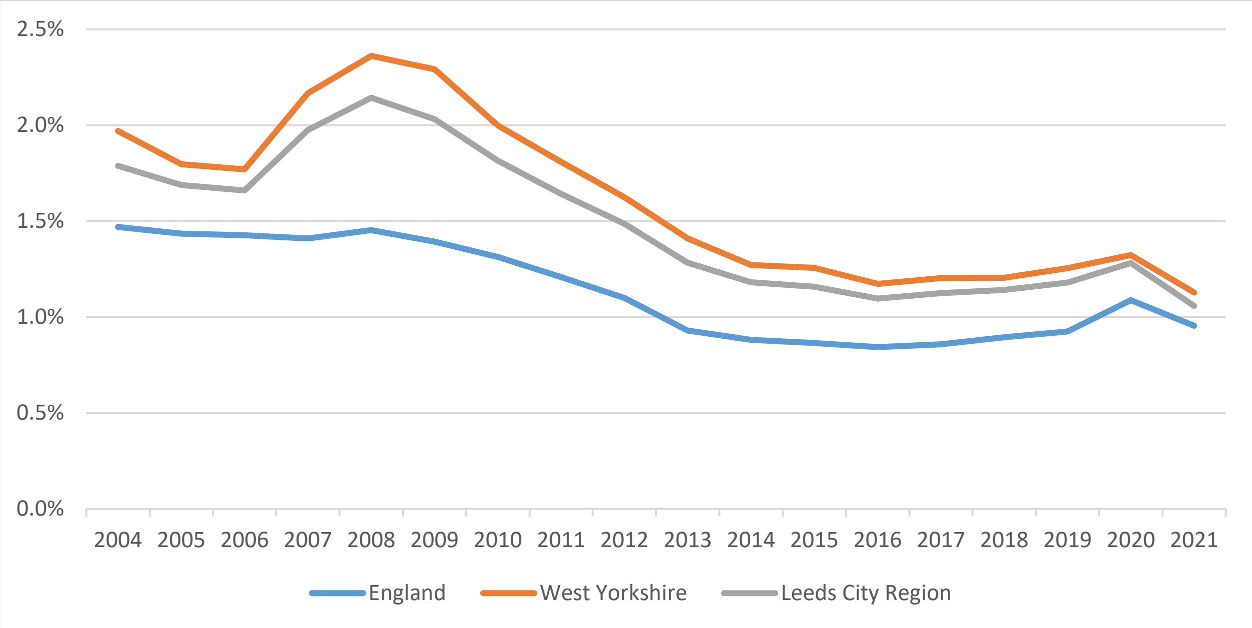
Source: ONS housing statistics for small areas

Table 2.4. House sales by Local Authority District (12 months to March 2022)

West Yorkshire	**Detached**	**Semi-detached**	**Terraced**	**Flats**	**Total**
Bradford	1,066	2,514	2,867	598	7,045
Calderdale	456	797	1,662	249	3,164
Kirklees	1,317	1,827	2,219	322	5,685
Leeds	1,841	4,124	3,088	1,273	10,326
Wakefield	1,259	2,037	1,489	212	4,997
Leeds City Region					
Barnsley	831	1,291	1,137	119	3,378
Craven	206	236	414	85	941
Harrogate	898	814	777	452	2,941
Selby	598	468	341	72	1,479
York	639	921	923	497	2,980

Source: ONS housing statistics for small areas

Figure 11. Percentage long-term voids



Source: DLUHC Housing statistics

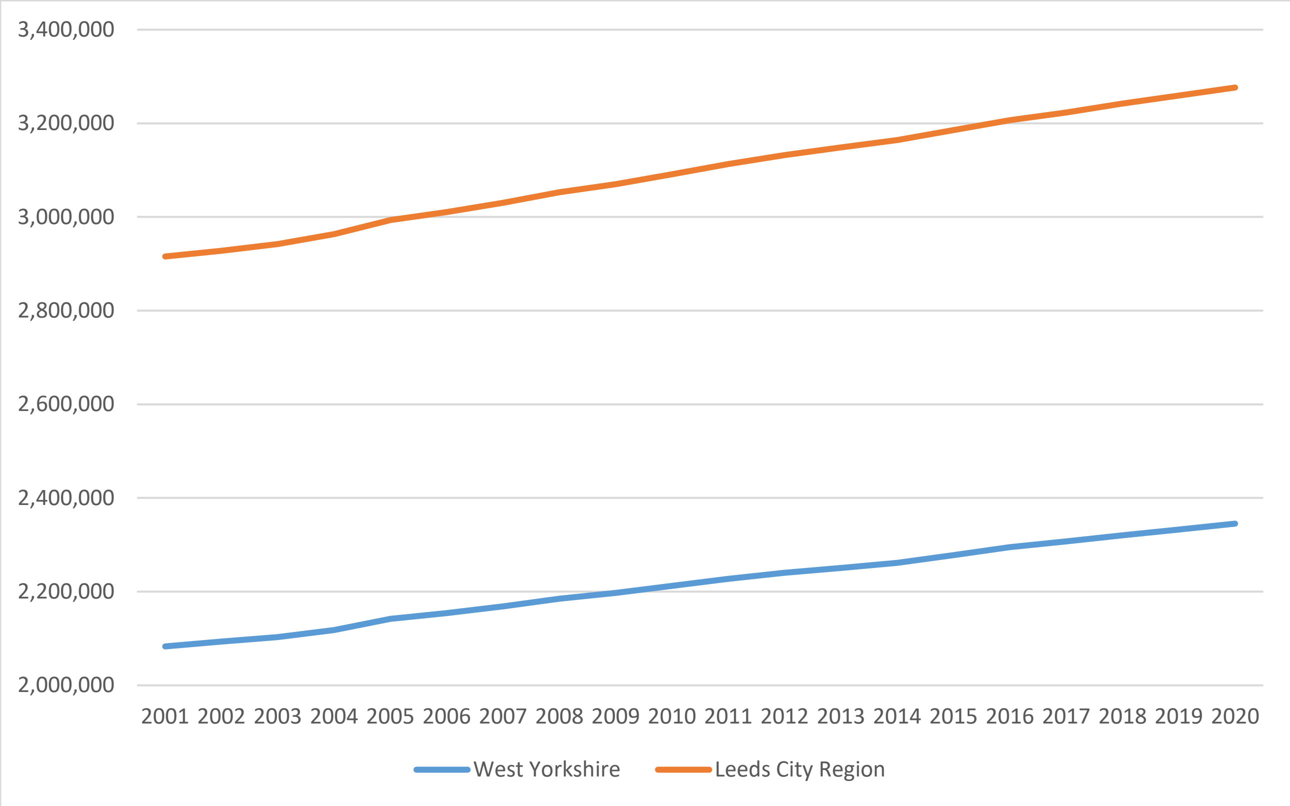
2.22 Positively, numbers of vacant and long-term vacant housing have reduced across the City Region and West Yorkshire in the past decade, though levels remain higher than the national average. Both locally and nationally, the percentage of long-term voids started to increase in 2017, but returned to their downward trajectory in 2021. Both West Yorkshire and the wider Leeds City Region are enjoying their lowest level of long-term vacancies in over 20 years.

Demographic change

2.23 The latest ONS population estimates demonstrate that the population of the City Region has continued to grow. The principal components of this change in the last decade have been increases through natural change (including an aging population) and international migration. Census 2021 data is expected to become available over the next 12 months, which should give a clearer idea of the population across Leeds City Region.

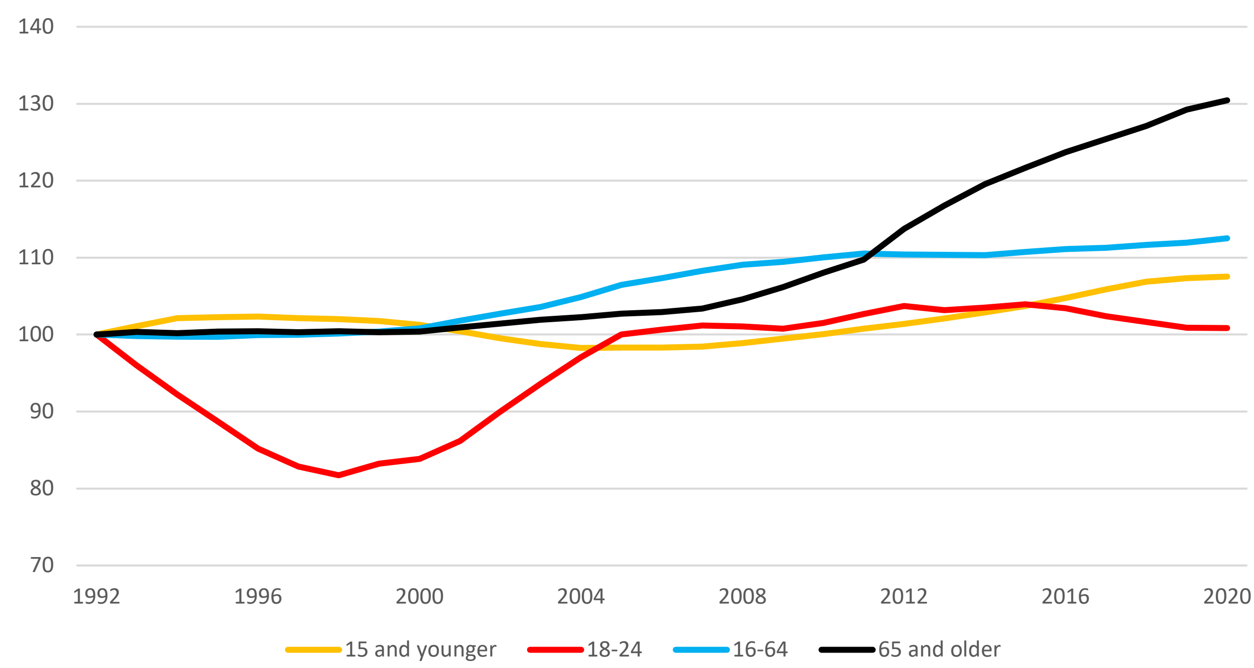
2.24 The latest household estimates project that the population of the Leeds City Region will continue to increase over the longer-term.

Figure 12. Total population change, West Yorkshire and Leeds City Region 2001-2020



Source: ONS Annual Population Estimate

Figure 13. Population change broken down by ages (indexed to 1992)



Source: ONS Annual Population Estimate

3. Monitoring indicators

3.1 This section of the report outlines information relating to a range of agreed monitoring indicators for West Yorkshire and the wider Leeds City Region. These include:

- Net additional dwellings
- Gross new build housing completions
- Housing completions by windfall
- Net additional gypsy and traveller pitches
- Gross affordable dwellings delivered
- Dwelling capacity with planning permission

3.2 Please note that some data from years preceding 2021/22 may have changed from figures previously reported. This is due to updates provided by partner councils.

3.3 Please note that the following data for the delivery of housing completions will be affected by the Covid-19 pandemic, which had a significant impact on the period 2020/21 on all businesses across the region, including the construction sector. On new build housing, Homes England reported a 38% decrease in starts on site in 2020, along with a 25% decrease in completions of new homes in comparison to 2019.[1] Data for 2021/22 has shown an increase in the housing delivered through Homes England programmes compared to 2020/21, as the sector begins to recover from the Covid-19 pandemic.[2] This has also been reflected locally in the housing delivered within the Leeds City Region.

Housing delivery

3.4 Monitoring information for 2021/22 indicates that a total of 10,199 net additional dwellings were delivered across the City Region. This represents an increase on last year's 8,761 total, but it remains slightly below the 10,943 total in 2019/20. Cumulative losses to the housing stock across the City Region have decreased to 328 from 391 in 2020/21 and 929 in 2019/20. The 2021/22 net additional dwellings delivered is approximately 16% above the net housing delivered in in 2020/21.

3.5 Over the previous ten years, net housing completions reached a low of 5,851 in 2012/13. Subsequently, net housing completions increased year-on-year up to 12,254 in 2018/19, followed by a fall of 1,311 to 10,943 in 2019/20, and a fall of 1,182 to 8,761 in 2020/21, as a result of the Covid 19 pandemic's impact on the construction sector. In 2021/22 completions rose to 10,199.

Table 3.1. Net housing additions 2021/22

Local Authority	Gross Losses	Net Total
Bradford	86	1,325
Calderdale	17	443
Kirklees	71	704
Leeds	26	3,238

[1] Data is for England but excludes London. Source: New Homes England statistics show overall housing starts down, reflecting the impact of Covid-19 on housebuilding - GOV.UK (www.gov.uk)
[2] https://www.gov.uk/government/news/new-homes-england-2021-22-housebuilding-statistics-revealed

Wakefield	69	1,497
West Yorkshire Total	**269**	**7,207**
WY 2020/21 Total	**327**	**5,982**
WY 2019/20 Total	**837**	**7,575**
Barnsley	4	594*
Craven	1	305
Harrogate	28	1,235
Selby	9	456
York	17	402
Leeds City Region Total	**328**	**10,199**
LCR 2020/21 Total	**391**	**8,761**
LCR 2019/20 Total	**929**	**10,943**

Source: Leeds City Region LA Annual Monitoring Reports (Various)
*Please note that this figure differs from nationally reported data due to reporting inconsistencies

3.6 Table 3.2 illustrates net additional dwellings delivered across City Region authorities between 2012/13 and 2021/22. The data shows that over this ten-year period delivery of net dwellings across the City Region peaked in 2018/19 (12,254 units). The 2012/13 period represents the weakest year of delivery at 5,851 units.

Table 3.2. Net additional dwellings (2012/13 – 2021/22)

Local Authority	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Bradford	721	874	1,134	1,338	1,489	1,621	1,614	1,010	522	1,325
Calderdale	517	357	319	340	301	301	557	348	269	443
Kirklees	753	1,036	666	1,142	983	1,330	1,550	1,131	1,021	704
Leeds	1,623	2,229	1,979	2,474	2,824	2,283	3,427	3,328	2,943	3,238
Wakefield	534	806	1,132	1,921	1,816	1,759	2,114	1,758	1,227	1,497
WY Total	**4,148**	**5,302**	**5,230**	**7,215**	**7,413**	**7,294**	**9,262**	**7,575**	**5,982**	**7,207**
Barnsley	657	747	623	705	853	1,012	988	1,055	588	594*
Craven	116	38	131	187	230	227	238	281	166	305
Harrogate	200	183	415	306	366	598	693	980	880	1,235
Selby	248	268	435	438	561	610	624	492	523	456
York	482	345	501	1,121	977	1,296	449	560	622	402
LCR Total	**5,851**	**6,883**	**7,335**	**9,972**	**10,400**	**11,037**	**12,254**	**10,943**	**8,761**	**10,199**

Source: Leeds City Region LA Annual Monitoring Report (Various)
*Please note that this figure differs from nationally reported data due to reporting inconsistencies

Gross new build completions

3.7 Table 3.3 shows that gross new build completions across the City Region stood at 9,901 dwellings in 2021/22. This represents an increase from 7,682 in 2020/21, but remains below 10,269 reported in 2019/20. This 29% increase in new build completions from 2020 to 2021 is in line with the national Homes England programme increase in completions noted above.

3.8 For 2021/22, 5,255 (53%) new build dwellings were on wholly greenfield sites in the City Region, while 4,646 (47%) were on wholly brownfield sites. For 2020/21, 3,723 (48%) were on wholly greenfield sites and 3,959 (52%) were on wholly brownfield sites. For 2019/20, 4,966 (48%) were on wholly greenfield sites and 4,981 (48%) were on wholly brownfield sites and 322 (4%) were on mixed sites.

3.9 For 2021/22, the highest proportion of greenfield building took place in Selby, accounting for 92% of new build completions. In the same period, the lowest proportion of greenfield building (22%) took place in Leeds. For 2020/21, York had the lowest proportion of greenfield building (24%), while in 2019/20 Leeds accounted for the lowest proportional figure (24%). The lowest level of absolute new build completions among City Region authorities across 2021/22 was Craven (215 dwellings). Calderdale has the lowest figure for this in 2020/21 (154 dwellings) and Craven had the lowest figure in 2019/20 (300 dwellings), which is not unexpected as a largely rural authority with a relatively low housing target.

Table 3.3. Gross new build completions 2021/22

Local Authority	Greenfield	Brownfield	Mixed	Total
Bradford	1,159	252	0	1,411
Calderdale	80	201	0	281
Kirklees	414	232	0	646
Leeds	702	2,562	0	3,264
Wakefield	873	616	0	1,489
West Yorkshire Total	**3,228**	**3,863**	**0**	**7,091**
WY 2020/21 Total	**2,180***	**2,952***	**0**	**5,132**
WY 2019/20 Total	**3,280**	**4,036**	**0**	**7,316**
Barnsley	421	177	0	598
Craven	62	153	0	215
Harrogate	953	230	0	1,183
Selby	428	36	0	464
York	163	187	0	350
Leeds City Region Total	**5,255**	**4,646**	**0**	**9,901**
LCR 2020/21 Total	**3,723***	**3,959***	**0**	**7,682**
LCR 2019/20 Total	**4,966**	**4,981**	**322**	**10,269**

Source: Leeds City Region LA Annual Monitoring Report (Various)
*Please note that these figures have been revised from those previously reported

3.10 The Combined Authority undertook an assessment of the past delivery of housing (and employment) on brownfield land, covering the period 2007 to 2019 and the current supply of brownfield land available throughout the Leeds City Region. In 2020, the Combined Authority also completed an in-depth examination of the West Yorkshire brownfield housing land supply and delivery between 2010 and 2019. The West Yorkshire Regional Brownfield Analysis Report presents analysis on the past delivery and current supply, including the use of a sites constraints analysis using data sets covering the following four primary themes: Ground Conditions, Heritage, Environment and Flooding.

3.11 The report presents several recommendations and actions, specifically tailored to address barriers preventing the successful delivery of brownfield sites in West Yorkshire. The recommendations are large scale interventions, likely to involve the use of additional funding streams, resources and officer time, and would require longer timescales to implement.

Completions by windfall

3.12 Windfall sites are defined in the National Planning Policy Framework Annex 2 as *sites not specifically identified in the development plan*, i.e. outside of allocated sites. Monitoring for the years 2021/22, 2020/21 and 2019/20 illustrates that a total of 3,451, 4,147 and 4,223 dwellings respectively were windfall completions in the City Region. This shows a decrease in windfall completions between 2019/20 and 2021/22, which may be due to the Covid-19 pandemic within this period. However, several authorities showed an increase in 2021/22 compared to previous years, such as Bradford, Calderdale and Craven.

Table 3.4. Completions by windfall 2019/20, 2020/21 and 2021/22

Local Authority	2019/20	2020/21	2021/22
Bradford	589	400	690
Calderdale	350	233	286
Kirklees	438	460	357
Leeds	404	1,373	856
Wakefield	636	464	450
West Yorkshire Total	**2,417**	**2,930**	**2,639**
Barnsley	1,070	162	119
Craven	164	112	174
Harrogate	No Data	No Data	No Data
Selby	385	453	396
York	187	490	123
Leeds City Region Total	**4,223**	**4,147**	**3,451**

Source: Leeds City Region LA Annual Monitoring Report (Various)

Net additional gypsies and travellers' pitches

3.13 Monitoring information presented in Table 3.5 shows that zero net gypsy and traveller pitches were delivered across the City Region in 2021/22. Twenty-three gypsy and traveller pitches were delivered in 2020/21, while 12 were delivered in 2019/20.

Table 3.5. Net additional gypsies and travellers' pitches delivered 2019/20, 2020/21 and 2021/22

Local Authority	2019/20	2020/21	2021/22
Bradford	0	0	0
Calderdale	0	0	0
Kirklees	0	0	0
Leeds	0	0	0

Wakefield	12	0	0
West Yorkshire Total	**12**	**0**	**0**
Barnsley	0	0	0
Craven	0	0	0
Harrogate	0	3	0
Selby	0	20*	0
York	0	0	0
Leeds City Region Total	**12**	**23**	**0**

Source: LCR LA Annual Monitoring Reports (Various)
*Please note the 2020/21 data from Selby includes 12 retrospective & built, 8 not yet implemented

Gross affordable dwellings delivered

3.14 Gross affordable housing[3] delivered in 2021/22 is recorded as 2,077, which shows an increase of 487 compared to 2020/21. When comparing to the most recent reporting periods, 1,590 gross affordable dwellings were delivered in 2020/21 and 2,067 in 2019/20. Table 3.6 illustrates that the City Region's gross affordable housing delivery over the last 10 years has fluctuated between a high of 2,067 dwellings (2019/20) and a low of 1,399 dwellings (2017/18).

3.15 As a proportion of net housing additions in the City Region, gross affordable dwellings constituted 20% in 2021/22, 18% in 2020/21 and 19% in 2019/20.

3.16 Over the last 10-year period, 2019/20 saw a peak of 2,067 gross affordable dwellings delivered, constituting 19% of net housing additions.

3.17 The level of affordable housing completions varies each year in response to changing market conditions (e.g. for dwellings completed as a result of S106), changes to national housing policy, availability of Homes England funding support and other economic factors. Generally, delivery of affordable housing is greater in periods of housing market downturn. In periods of housing market buoyancy, the delivery of affordable housing tends to fall as housing associations are more likely to be outbid for development land.

Table 3.6. Gross affordable dwellings delivered (2012/13 – 2021/22)

Local Authority	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Bradford	196	279	258	92	194	274	267	309	58	149
Calderdale	195	126	53	13	64	22	55	79	29	103
Kirklees	268	320	180	155	121	100	118	155	89	120
Leeds	205	329	455	456	557	239	433	439	596	556
Wakefield	118	232	298	488	335	205	322	309	163	274
WY Total	**982**	**1,286**	**1,244**	**1,204**	**1,271**	**840**	**1,195**	**1,291**	**935**	**1,202**
Barnsley	152	183	144	479	126	152	111	203	128	25*

[3] As defined in the National Planning Policy Framework. This includes housing for sale or rent, such as shared ownership, for those whose needs are not met by the market.

Craven	31	0	79	56	80	99	41	19	8	169
Harrogate	36	58	64	39	42	111	148	305	219	362
Selby	89	39	71	69	76	123	177	125	170	139*
York	127	50	139	109	91	74	60	124	130	180
LCR Total	**1,417**	**1,616**	**1,741**	**1,956**	**1,686**	**1,399**	**1,732**	**2,067**	**1,590**	**2,077**

Source: LCR Local Authority Annual Monitoring Reports (various)
*Please note that this figure differs from nationally reported data due to reporting inconsistencies

Gross affordable dwellings delivered by land type

3.18 The data table below sets out the gross affordable dwellings delivered in 2021/22, 2020/21 and 2019/20 by land type. Due to lack of data across a number of partner councils, this table does not provide the full City Region picture. However, if the available data was extrapolated out to the Leeds City Region, approximately 66% of affordable housing was delivered on greenfield land, and 34% on brownfield land in 2021/22.

Table 3.7. Gross affordable dwellings delivered by land type (2019/20 – 2021/22)

Local Authority	Greenfield	Brownfield	Total
Bradford	80	69	149
Calderdale	57	46	103
Kirklees	No Data	No Data	120
Leeds	No Data	No Data	556
Wakefield	175*	62*	274*
West Yorkshire Total	**312***	**177***	**1,202**
WY 2020/21 Total	**13***	**74***	**935***
WY 2019/20 Total	**162***	**147***	**1,291**
Barnsley	13	12	25
Craven	18	136	169
Harrogate	302	47	362
Selby	139	0	139
York	51	67	180**
Leeds City Region Total	**835***	**439***	**2,077**
LCR 2020/21 Total	**419***	**323***	**1,590**
LCR 2019/20 Total	**556***	**320***	**2,067**

Source: LCR LA Annual Monitoring Reports (various)
* Please note that these figures do not sum the total due to 'no data' available for some partner councils.
** Includes 62 mixed land types.

Gross affordable dwellings delivered by development type

3.19 Table 3.8 provides the gross affordable dwellings delivered in 2021/22 by development type. Similar to above, due to lack of data across a number of partner councils, this indicator does not provide the full City Region picture. However, if the available data was extrapolated out to the Leeds City Region, approximately 78% of affordable dwellings delivered in 2021/22 were houses and 22% were apartments.

Table 3.8. Gross affordable dwellings delivered by development type (2021/22)

Local Authority	Apartments	Houses	Total
Bradford	30	119	149
Calderdale	0	103	103
Kirklees	No Data	No Data	120
Leeds	No Data	No Data	556
Wakefield	6	231	274
West Yorkshire Total	**36**	**453**	**1,202**
WY 2020/21 Total	**43**	**207**	**935**
WY 2019/20 Total	No Data	No Data	**1,291**
Barnsley	0	25	25
Craven	126*	28*	169
Harrogate	13*	336*	362
Selby	18	121	139
York	102	78	180
Leeds City Region Total	**295***	**1,041***	**2,077**
LCR 2020/21 Total	**115***	**790***	**1,590**
LCR 2019/20 Total	No Data	No Data	**2,067**

Source: LCR LA Annual Monitoring Reports (various)
* Please note that these figures do not sum the total due to ‘no data’ available for some partner councils.

Gross affordable dwellings delivered by tenure type

3.20 Table 3.9 provides the gross affordable dwellings delivered in 2021/22 by tenure type, as defined in the National Planning Policy Framework Annex 2. This data shows that ‘Affordable Housing for Rent’ is the primary tenure type for the delivery of affordable housing, accounting for 56% (1,169 dwellings) in 2021/22.

Table 3.9. Gross affordable dwellings delivered by tenure type (2021/22)

	Affordable Housing for Rent	First Home	Discounted Market Sales Housing	Other Affordable Routes to Home Ownership	Total
Bradford	N/A	N/A	N/A	N/A	149
Calderdale	60	0	0	43	103
Kirklees	52	0	47	21	120
Leeds	451	0	4	101	556
Wakefield	129*	N/A	N/A	108*	274*

West Yorkshire Total	**692**	**0**	**51**	**273**	**1,202**
Barnsley	13	0	0	12	25
Craven	78	0	91	0	169
Harrogate	210	0	0	123	362
Selby	75	0	53	11	139
York	101	0	9	70	180
Leeds City Region Total	**1,169***	**0***	**204***	**489***	**2,077**

Source: LCR LA Annual Monitoring Reports (various)
* Please note that these figures do not sum the total due to 'no data' available for some partner councils.

Dwellings capacity with planning permission

3.21 Table 3.10 shows that capacity for new dwellings via extant planning permissions across the City Region was 78,732 at 1 April 2022, 78,556 at 1 April 2021 and 66,066 at 1 April 2020. The increase in the number of extant housing planning permissions over the last three years may be due, in part, to the impacts of the Covid-19 pandemic on the construction sector, hampering the implementation of planning permissions.

Table 3.10. Remaining capacity with planning permission for housing as of 1 April 2022

Local Authority	Greenfield	Brownfield	Total
Bradford	3,617	5,909	9,526
Calderdale	1,233	2,063	3,296
Kirklees	3,715	4,219	7,934
Leeds	9,591	21,691	31,282
Wakefield	4,501	4,157	8,658
West Yorkshire Total	**22,657**	**38,039**	**60,696**
WY April 2021 Total	**22,914^**	**35,815^**	**58,729**
WY April 2020 Total	**17,928**	**29,011**	**46,939**
Barnsley	1,992	1,172	3,164
Craven	No Data	No Data	1,345
Harrogate	No Data	No Data	5,426
Selby	348	105	453
York	**888**	6,760	7,648
Leeds City Region Total	**25,885***	**46,076***	**78,732**
LCR April 2021 Total	**27,087^**	**43,909^**	**78,556**
LCR April 2020 Total	**28,097**	**37,969**	**66,066**

Source: Leeds City Region LA Annual Monitoring Reports (various)
* Please note that these figures do not sum the total due to 'no data' available for some partner councils.
^ Please note that these figures have been revised from those previously reported

4. Headline conclusions from outputs data

4.1 Across England and Leeds City Region, house price growth increased significantly during the Covid-19 pandemic. There are numerous reasons for this, including government intervention (Stamp Duty reductions) and moving due to increased workplace flexibility. This growth has now slowed, returning to pre-pandemic levels following a dramatic spike.

4.2 At a national level due to increasing house prices and stagnant income levels houses have continued to become less affordable when compared to 2014. The affordability ratio at the England level was 9.1 in 2021, up from 6.84 in 2010. Excluding Harrogate, all districts in the Leeds City Region are more affordable than the national figure.

4.3 Across West Yorkshire, affordability has got worse overall (from 5.7 to 6.1). Affordability in the Leeds City Region has declined most in York and Harrogate with the ratio increasing by 1.3 and 1.9 respectively since 2010.

4.4 Private rents in the Leeds City Region follow a similar pattern to house prices, with Harrogate and York having the highest private rents in the region. Between 2020 and 2021, rents across England went up by 5% with Bradford (+10%) and Leeds (+7%) experiencing higher growth. Since 2016, rents in Leeds grew the quickest (+25%) with Calderdale and Kirklees experiencing the slowest regional growth (+11%).

4.5 Many of the long-term housing market pressures are still apparent. With a continued increase in population both at national and local level, an increasing demand for housing will remain. With the increase in population of those aged 65+ the type of housing in demand may start to change.

4.6 Housing delivery in the City Region rose six years in a row from 2012/13, before falling for two consecutive monitoring years. The latest period saw a recovery, with c10,200 homes being delivered, a level similar to 2016/17. This recovery is in line with national trends, as indicated by Homes England programme completions. Overall, housing delivery has grown significantly over the last nine years.

4.7 The proportion of new build housing delivered on brownfield sites in the City Region has reduced from 63% in 2017/18, to 47% of completions in 2021/22.

4.8 In the City Region 2,077 affordable dwellings were delivered in 2021/22, which is an increase of 487 dwellings from the previous year. This is comparable to the eight-year high of 2,067 affordable dwellings in 2019/20 and equates to 20% of total net housing additions across the City Region. Over the last six years, Harrogate and Selby Councils have increased their delivery of affordable dwellings significantly. Compared with last year, Craven saw a substantial increase in affordable dwellings delivery for 2021/22.

4.9 As of April 2022 there were over 78,000 dwellings with extant planning permission in the City Region, 59% of which are on brownfield land, with the West Yorkshire Authorities accounting for over 60,000 of these extant dwellings (77%).

Appendix 1 – Median price paid for residential property – year to March 2022 – Local Authority Detail Maps

Figure 4.1. Barnsley

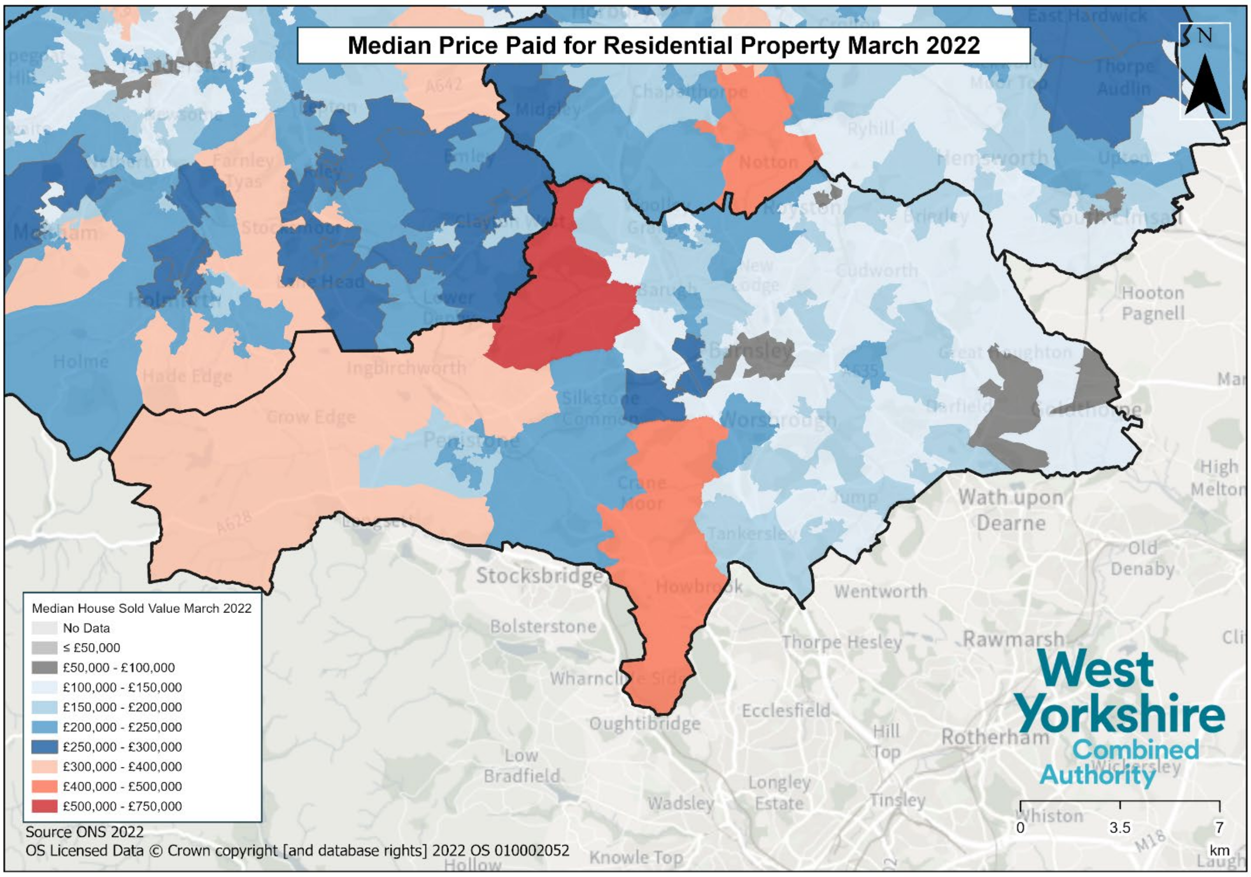


Figure 4.2. Bradford

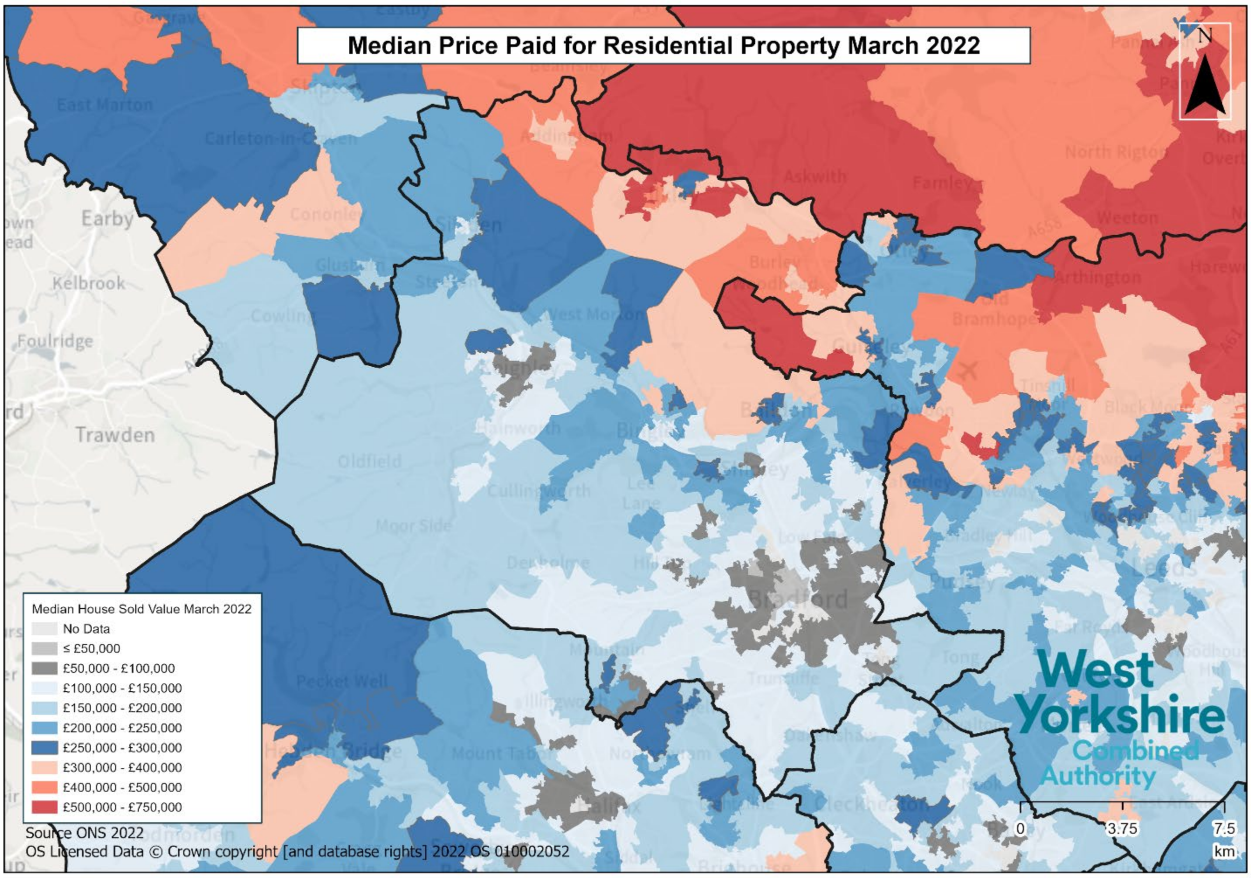


Figure 4.3. Calderdale

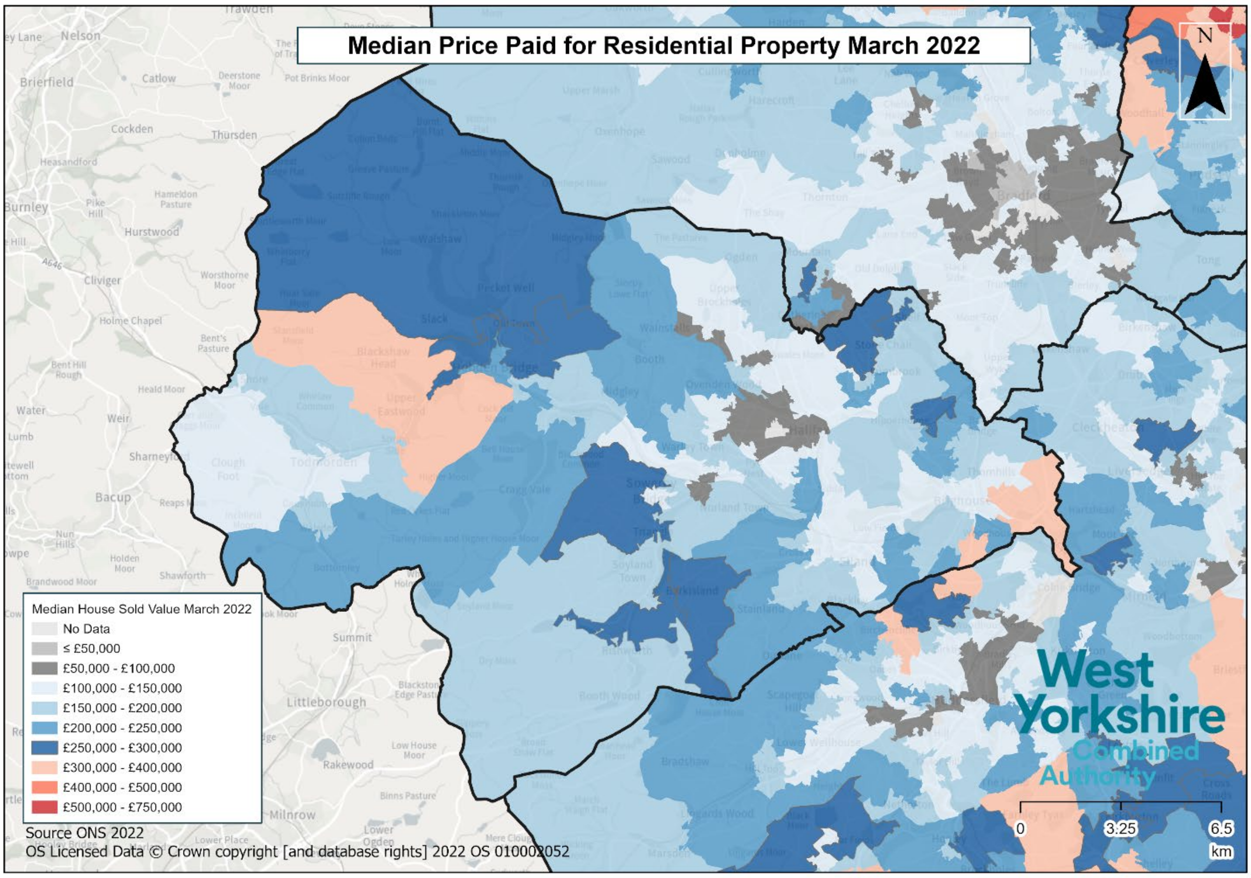


Figure 4.4. Craven

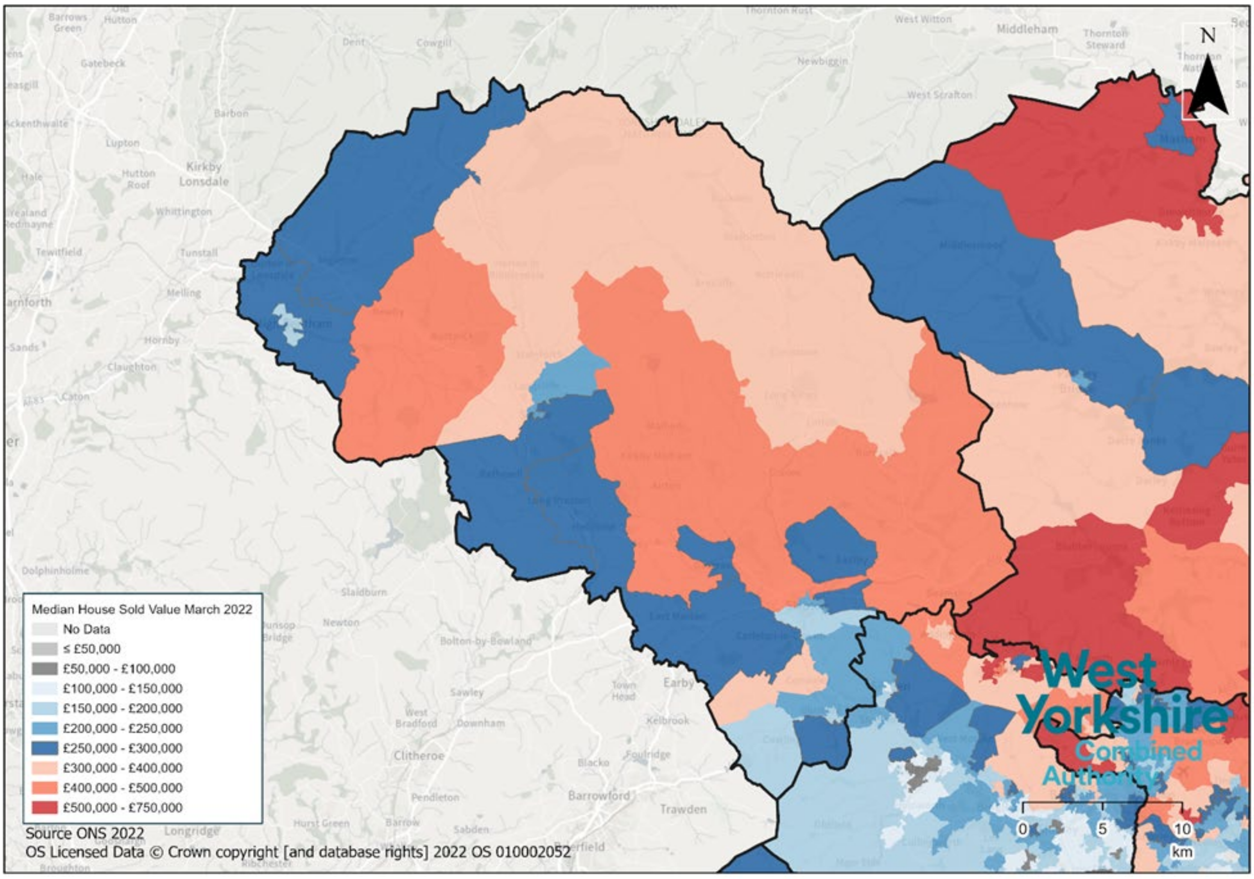


Figure 4.5. Harrogate

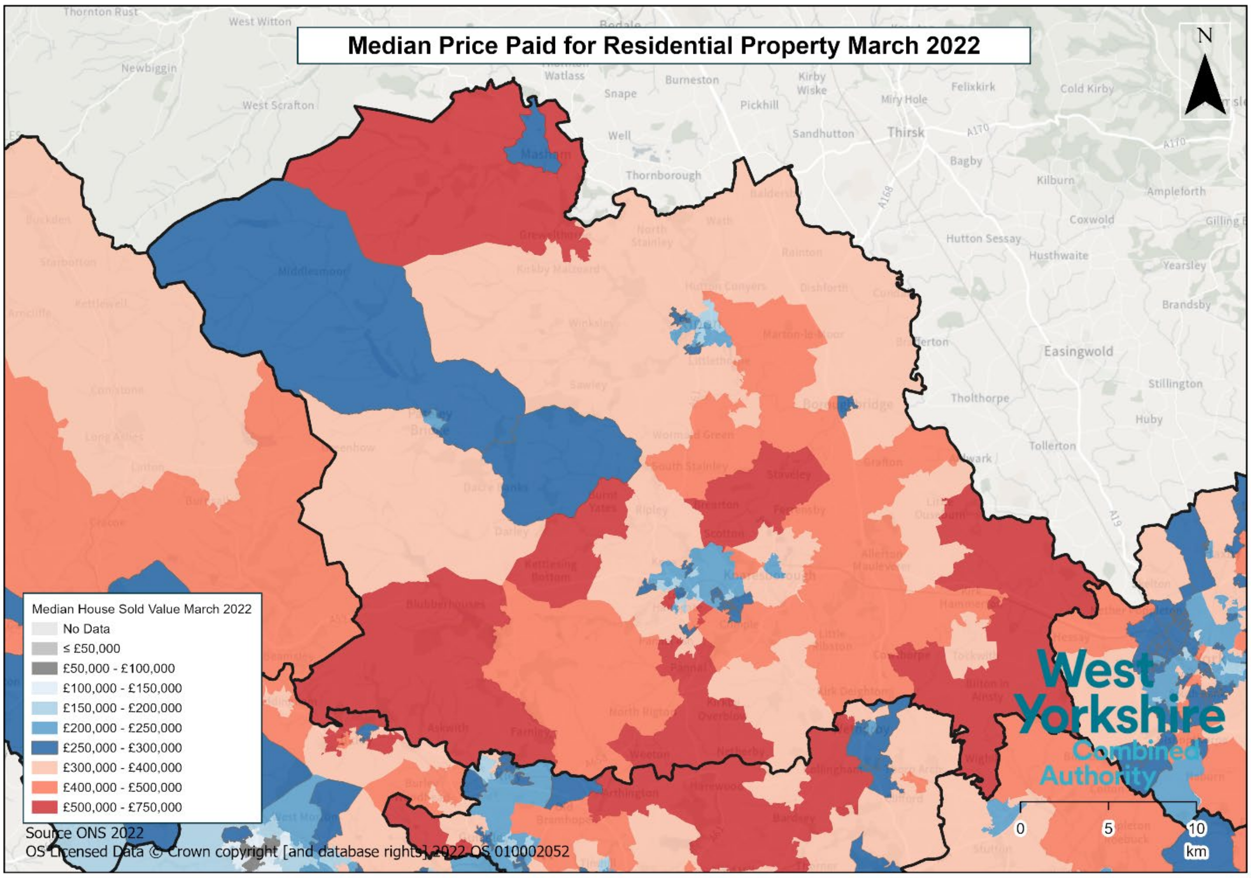


Figure 4.6. Kirklees

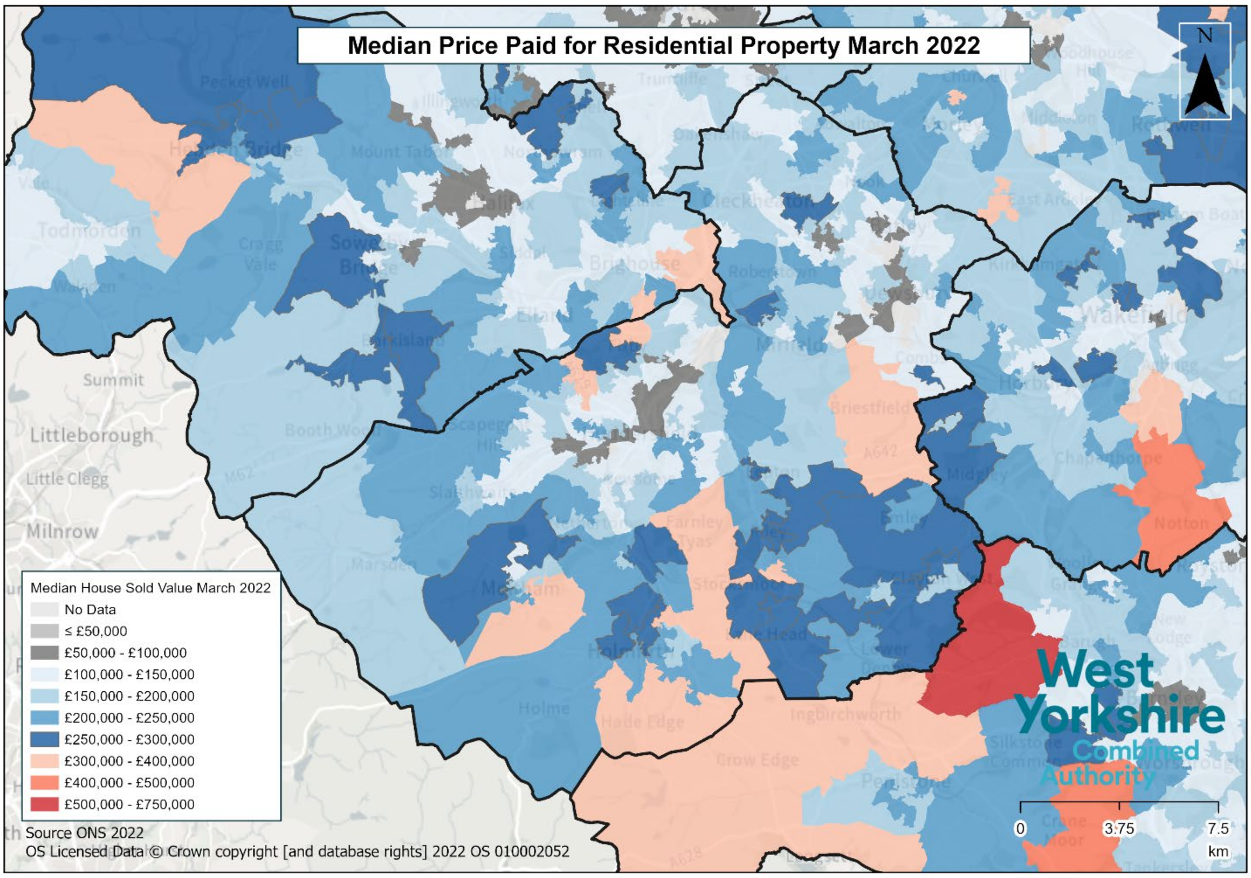


Figure 4.7. Leeds

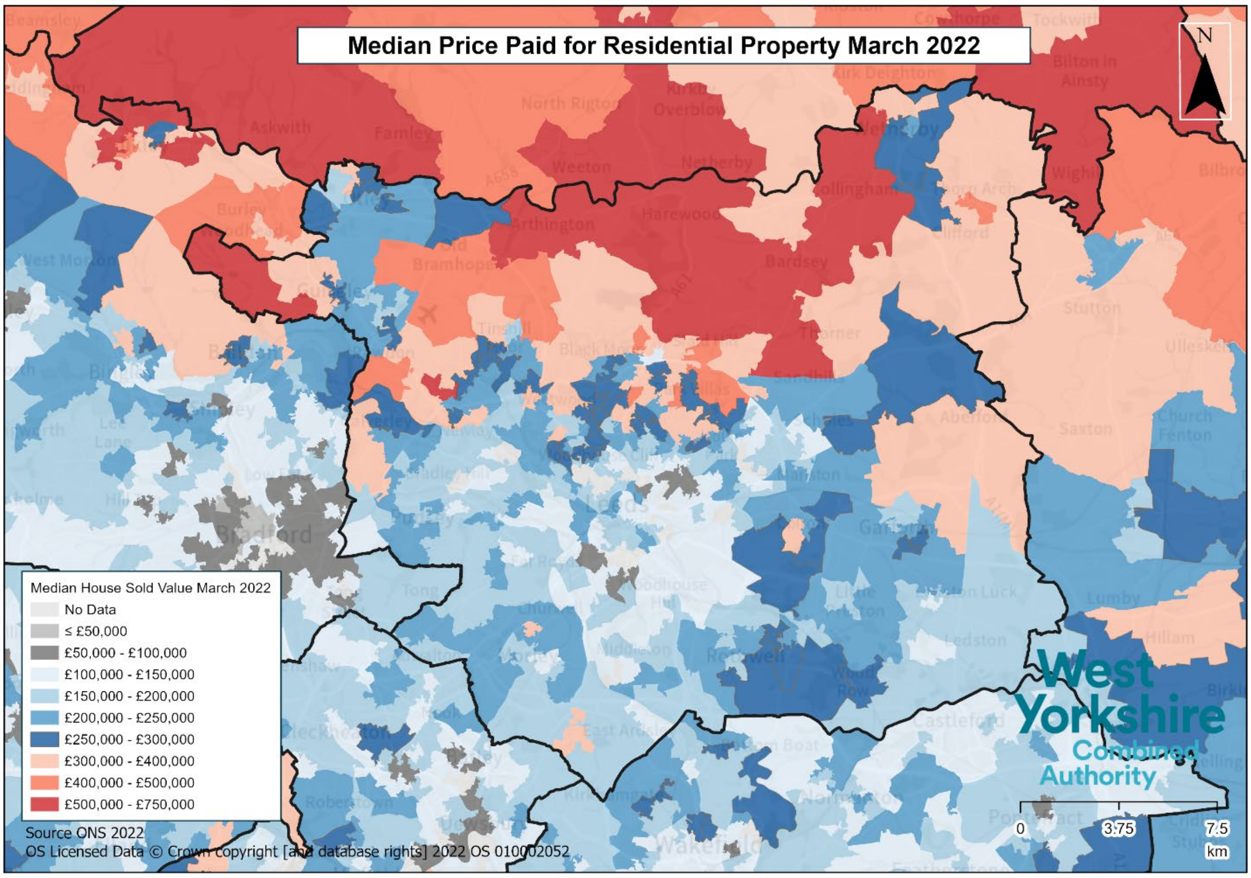


Figure 4.8. Selby

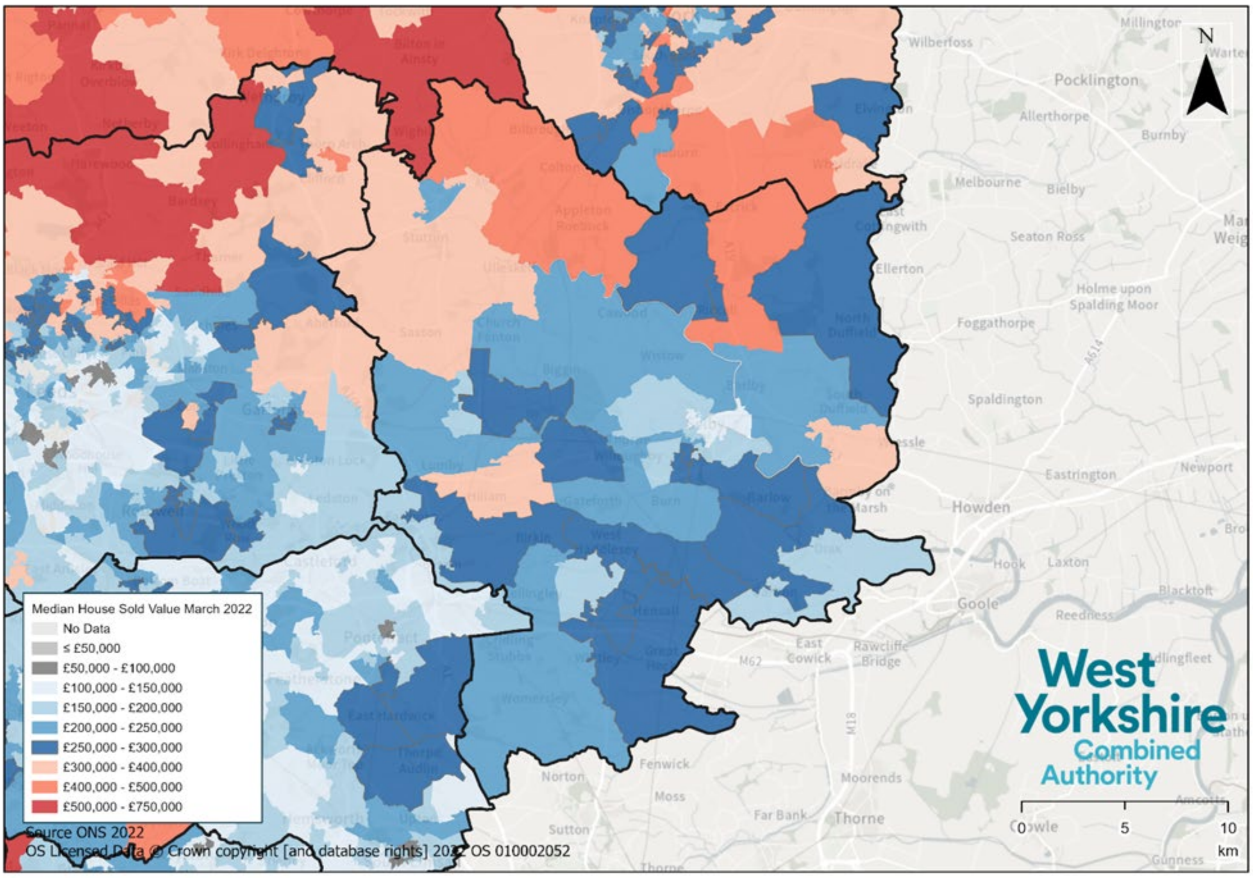


Figure 4.9. Wakefield

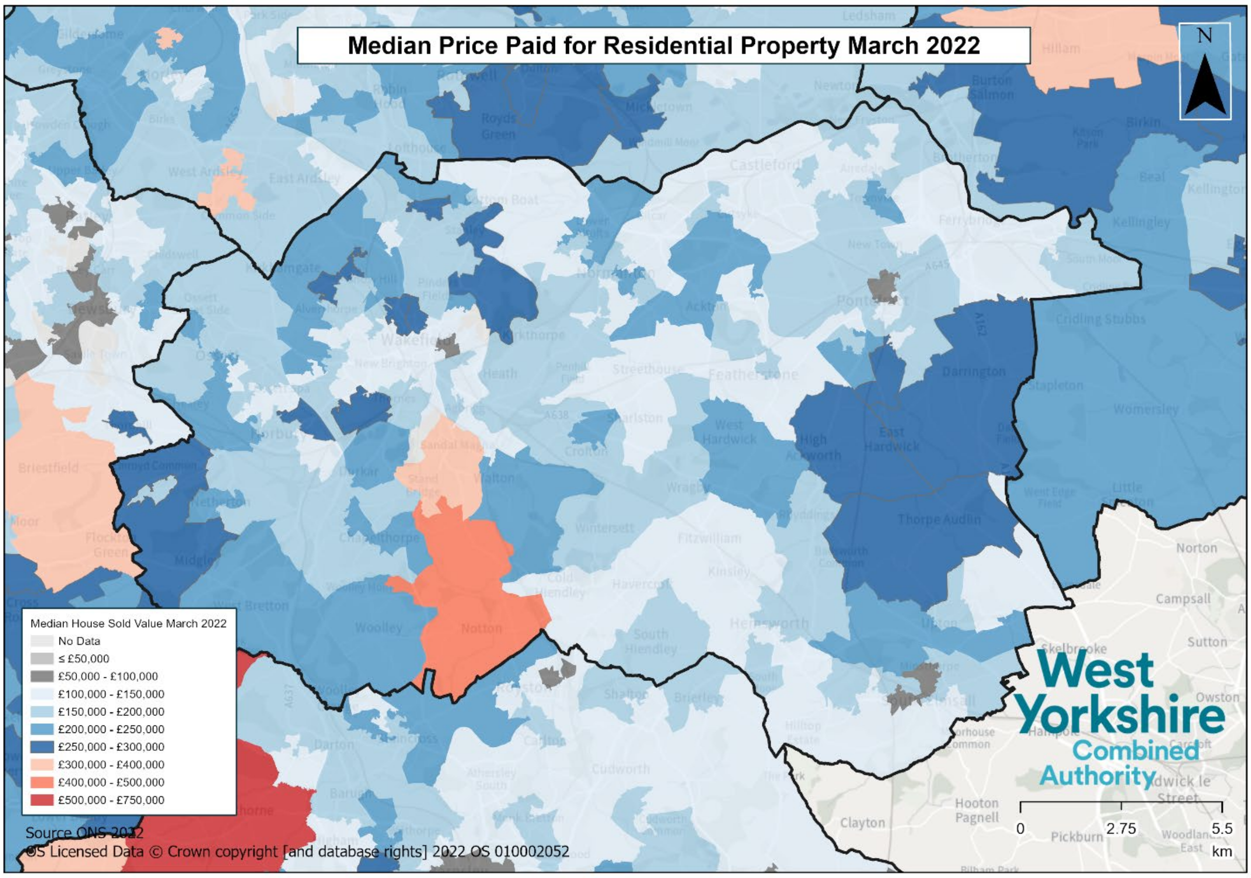
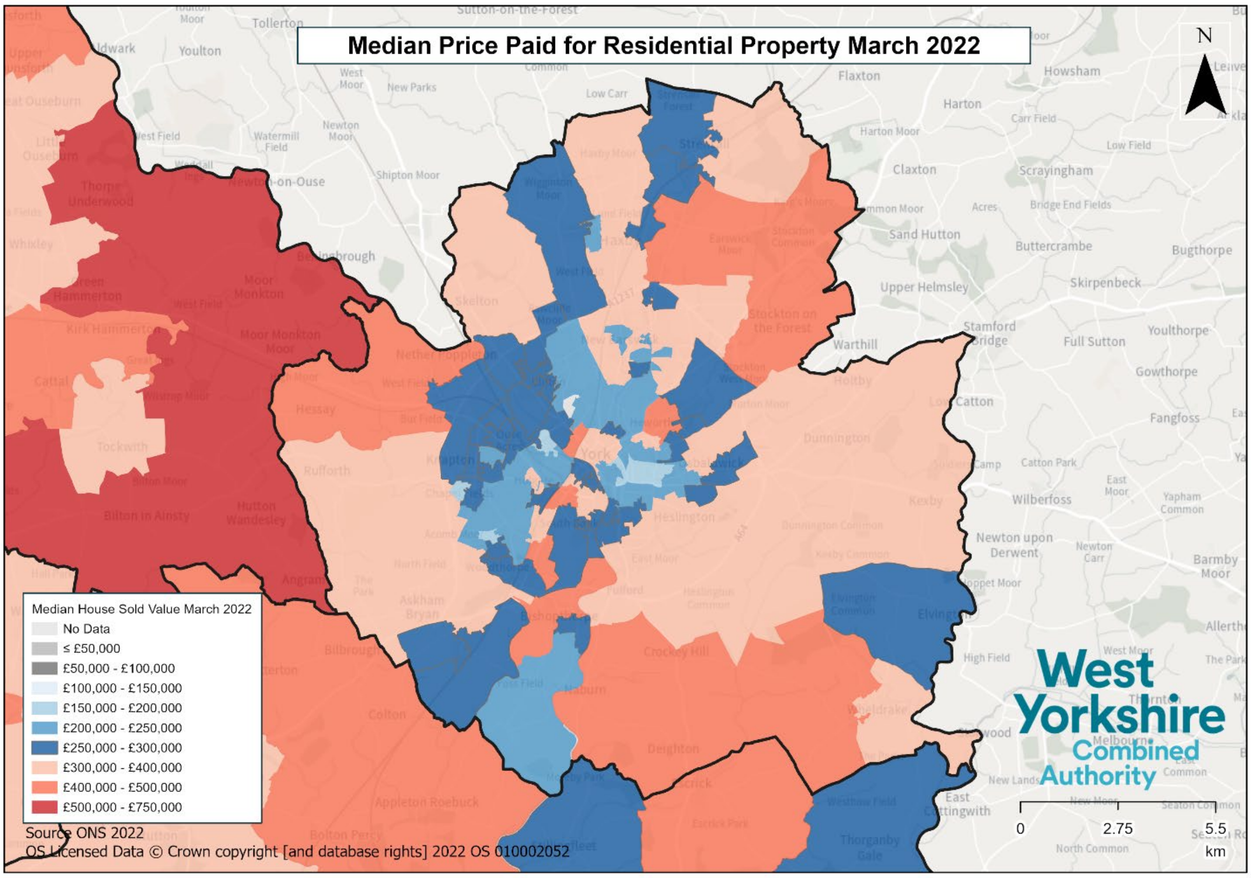


Figure 4.10. York



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