West Yorkshire Combined Authority

Housing Delivery in the Leeds City Region: Annual Monitoring Report

2022 Report

April 2022

Covers the Period 1 April 2020 to 31 March 2021

Leeds City Region Enterprise Partnership

Working in partnership with the West Yorkshire Combined Authority

1. Introduction

1.1 This report provides housing delivery monitoring for the financial year 2020/21 for all Leeds City Region local authorities (LAs). This is an annual monitoring report. Where available, information for preceding monitoring years are included to provide context and scope for analysis. It also provides contextual information on housing market trends.

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

1.3 Data is presented for West Yorkshire (5 Partner Councils) and the wider Leeds City Region area (10 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 latest performance in 2020 and 2021, how these compare to longer term trends and sets a wider market context to 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.

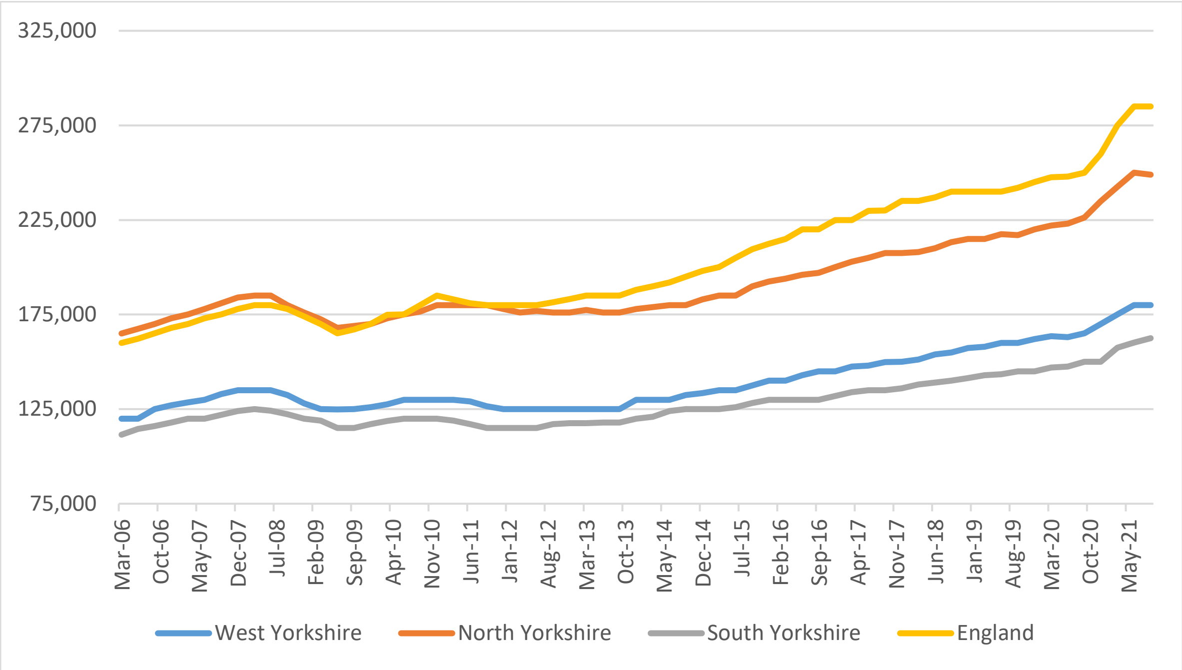
2.2 It reports on:

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

House Prices

2.3 The latest data shows that the average house prices in West Yorkshire are £222,247 and the median house prices in West Yorkshire are £180,000 in the year ending September 2021. Between September 2020 and 2021, the median house price in England increased by 14%, whilst the median house price in West Yorkshire rose by 9%. This was the quickest rate of growth since pre-Financial Crisis.

Figure 2. Median House Prices (£) – West Yorkshire compared with North Yorkshire, South Yorkshire and England figures from March 2006 to September 2021



Source: ONS House Price Statistics for Small Areas

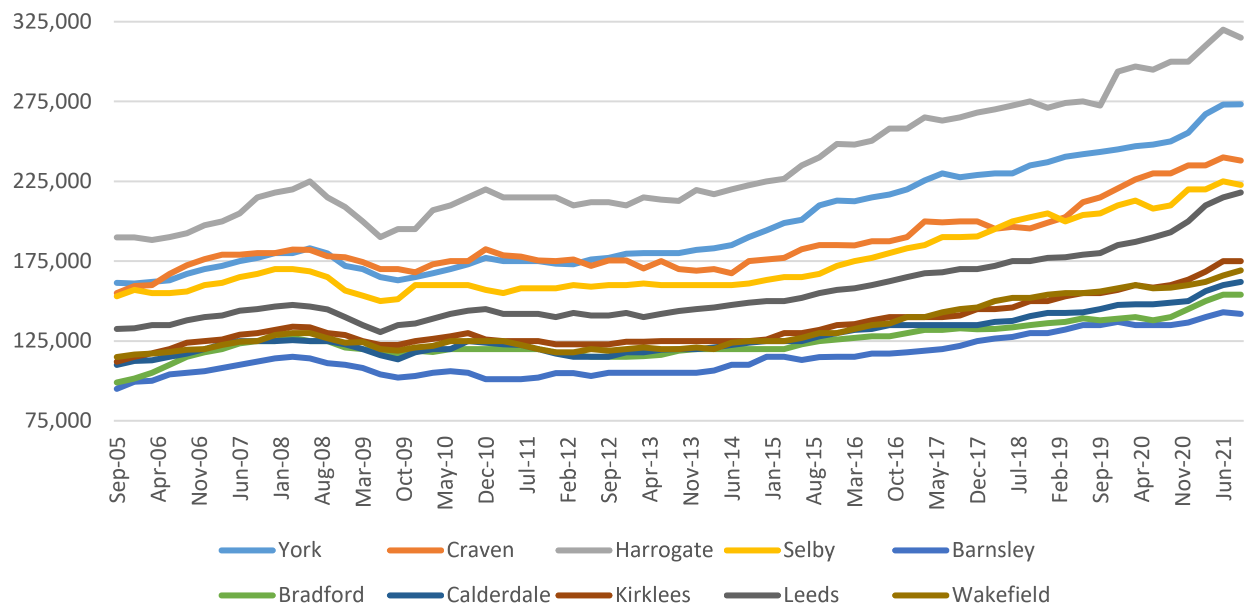
2.4 Across the Leeds City Region house prices are generally higher in the North Yorkshire local authorities. With Harrogate (£315,000) and York (£273,250) having the highest median house prices. Over the last year, prices have grown quickest in Leeds (+13%), followed by Bradford (+10%). The slowest growth was in Craven (+3%), however, in previous years Craven was one of the faster growing districts.

2.5 Median prices across West Yorkshire range from £154,000 in Bradford to £218,000 in Leeds. The median house price in Kirklees is £175,000, £169,200 in Wakefield and £162,000 in Calderdale. Across West Yorkshire districts, Wakefield experienced the slowest growth over the 12 months to September 2021 (+7%).

Table 2.1: Median House Price Growth (%) of local Authorities in Leeds City Region 2015-2021

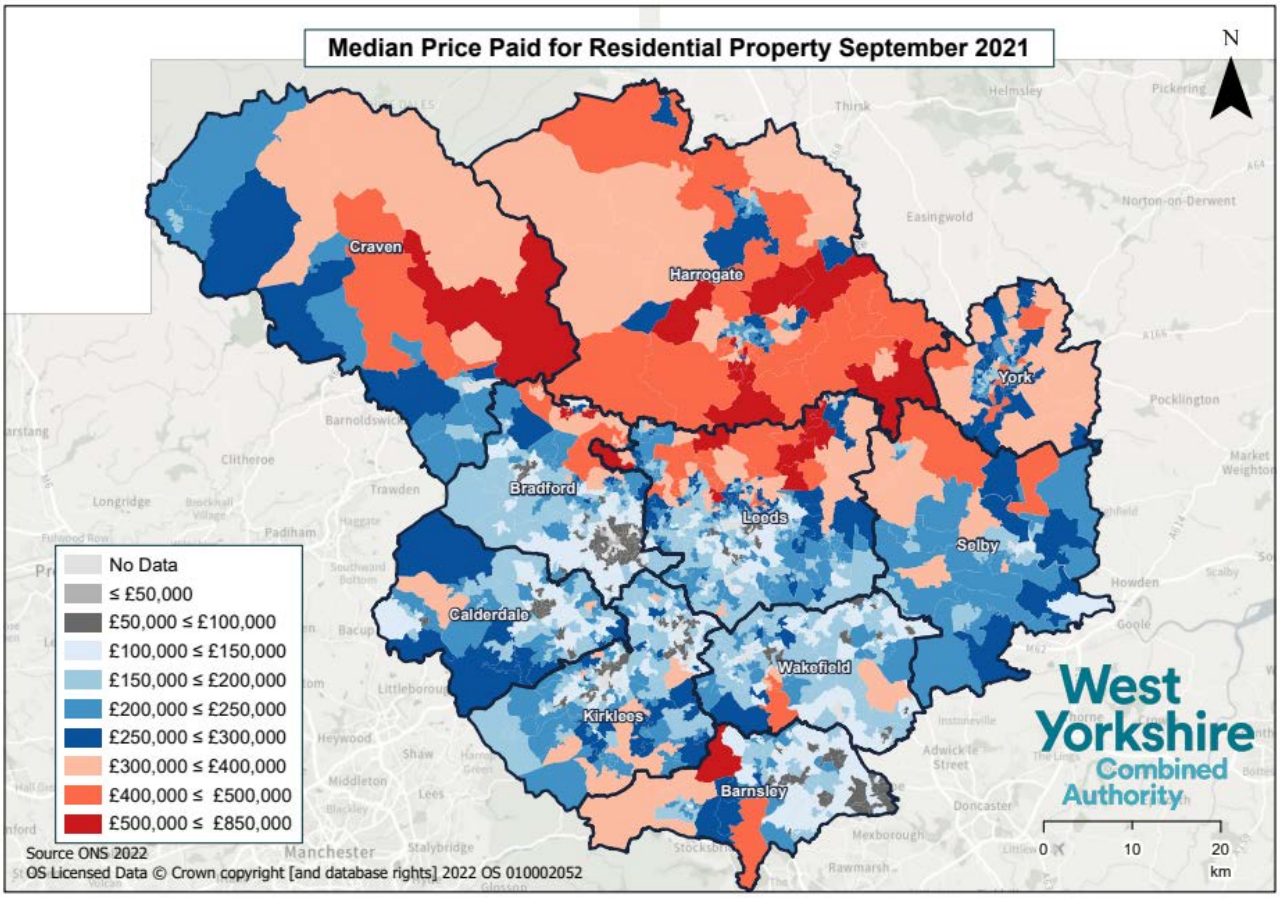
West Yorkshire	2015 Price	2021 Price	% Change
Bradford	£125,000	£154,000	23%
Calderdale	£128,000	£162,000	27%
Kirklees	£132,000	£175,000	33%
Leeds	£154,950	£218,000	41%
Wakefield	£129,896	£169,200	30%
Leeds City Region			
Barnsley	£114,950	£142,000	24%
Craven	£185,000	£238,000	29%
Harrogate	£239,950	£315,000	31%
Selby	£166,995	£222,750	33%
York	£210,000	£273,250	30%

Figure 3. Median House Price (£) of Local Authorities in Leeds City Region 2005 - 2021



Source: ONS House Price Statistics for Small Areas

Figure 4. Median House Prices September 2021 at 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.

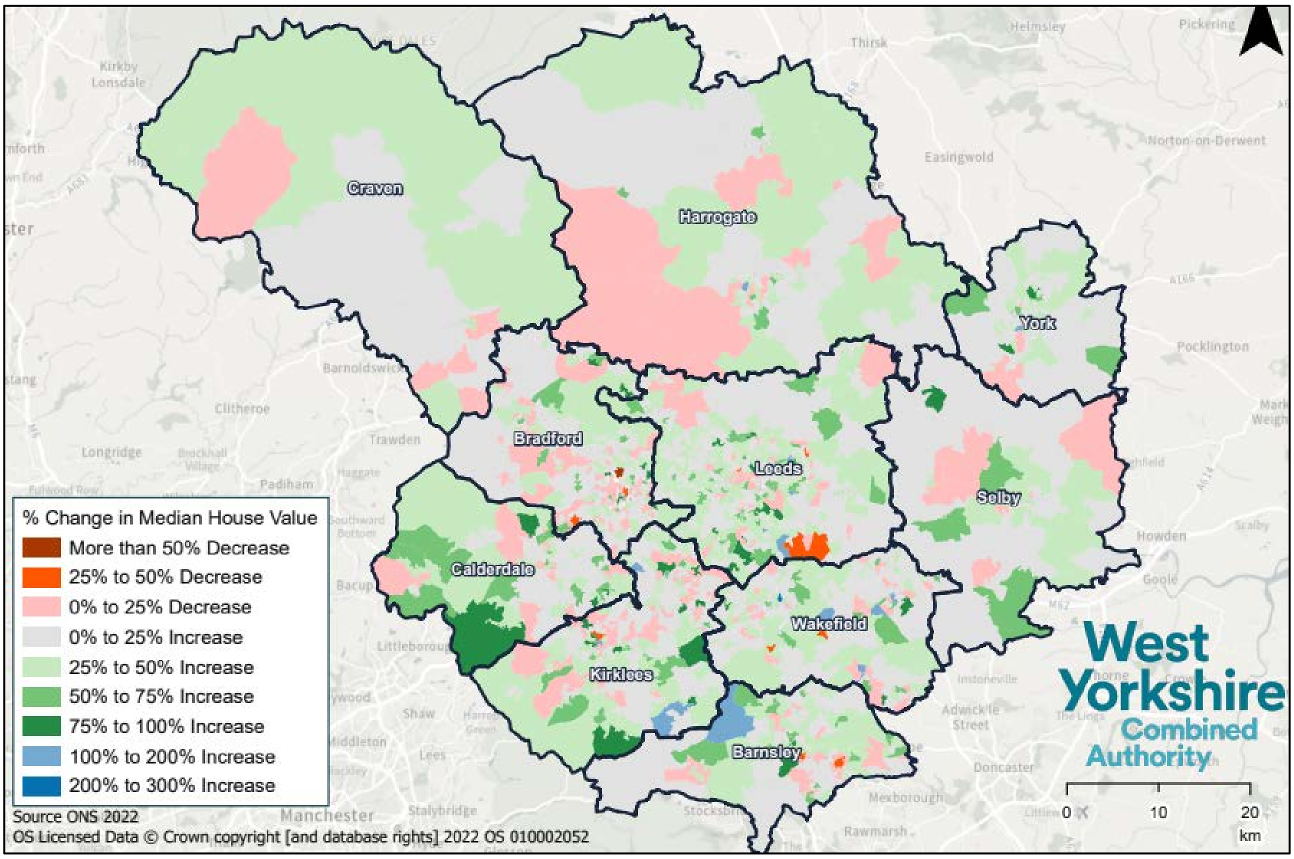


Source: ONS House Price Statistics for Small Areas

2.6 Areas with the highest median house prices tend to be in more rural wards in North Yorkshire. Whilst the areas with the lowest median house price also tend to be in the urban areas in 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).]

Figure 5. Median House Prices percentage growth at LSOA level for the Leeds City Region, 2016 – 2021



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 5 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 Many rural areas across the City Region have seen decreases in house prices over the last 5 years, whilst the majority of areas have seen relative increases (<25%). The longer term impacts of Covid-19 on housing demand are yet to be seen, but demand data will continue to be monitored to understand potential consequences.

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

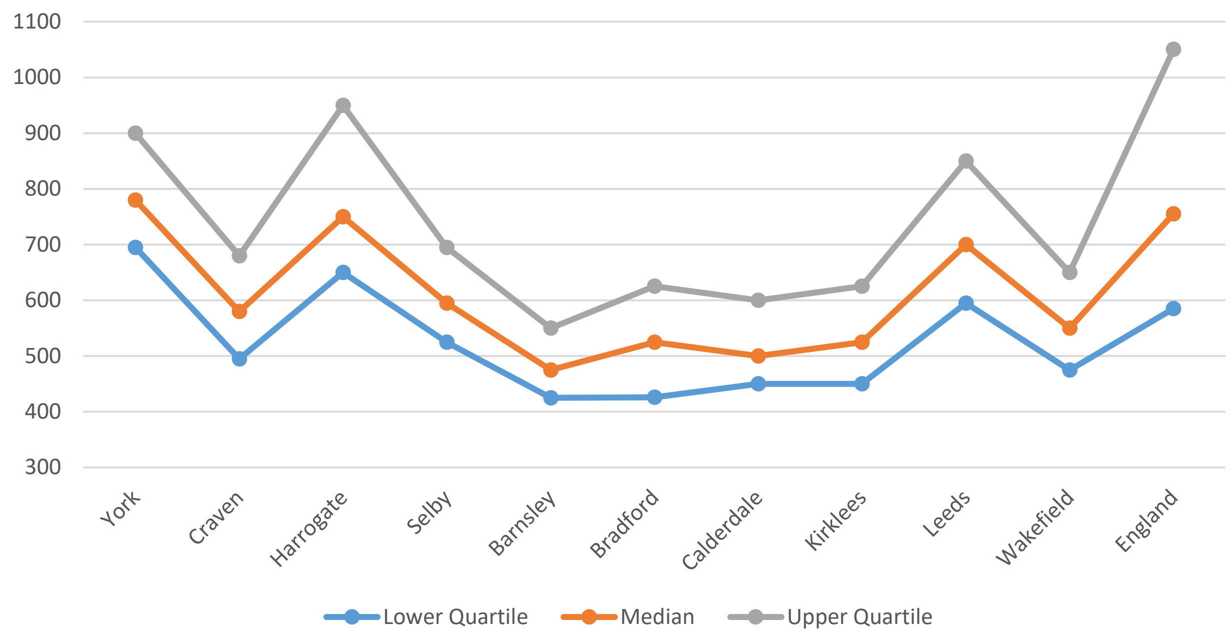
2.10 Private sector rental prices follow house prices closely, with highest prices and rents in York and Harrogate. Between 2020 and 2021, rents across England went up by 4%. Only Bradford (+5%) and Kirklees (+5%) experienced higher growth. In Leeds, rents went down by 3% year-on-year. Since the start of the period, rents in Leeds grew the quickest (+17%) with Calderdale experiencing the slowest growth (+5.3%).

Table 2.2: Median Private Sector Rents (£) 2016-2021

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

Source: ONS Private Rental Market Statistics

Figure 6. Median private sector rents (£) in 2021 for each district in the Leeds City Region and England.

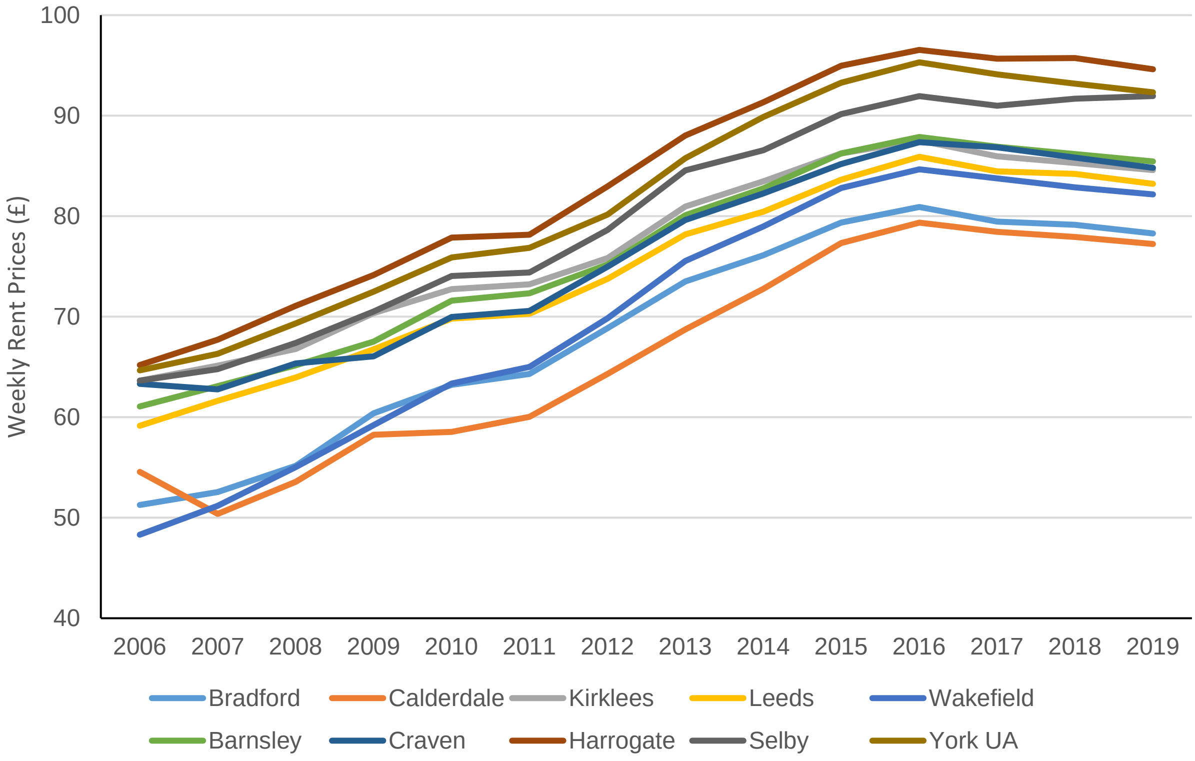


Source: ONS Private Rental Market Statistics

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 also been relatively flat in most areas over the past year, though again they remain highest in North Yorkshire areas.

Figure 7. Housing Association Rents (£) 2006 - 2020



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 Excluding York, Harrogate and Craven, all districts in the Leeds City Region are more affordable than the national figure using this measure of affordability. Due to the slow rate of income growth the national figure of affordability is worse in 2021 than it was in 2014. In the period, incomes have gone up by 15% nationally, but house prices have gone up by 46%. The affordability ratio at the England level was 10.9 in 2021, up from 8.7 in 2014.

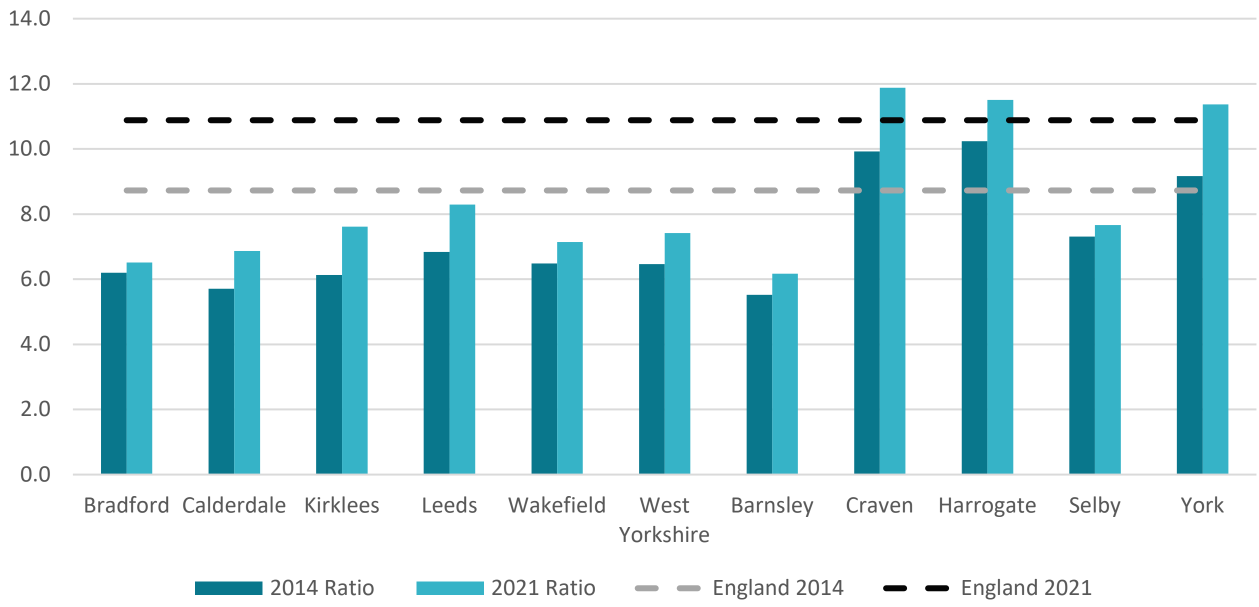
2.15 Across West Yorkshire, affordability has got worse overall (from 6.5 to 7.4) and in each district. Whilst affordability has been reduced across West Yorkshire, it is at a lower rate than nationally. Affordability has declined most in York and Craven with the ratio increasing by 2.2 and 2 in respectively. Affordability has declined the least in Bradford and Selby, where the ratio has increased by 0.3 in both districts.

Table 2:3: Earnings (£) across local authorities in 2014 and 2021

West Yorkshire	2014 Lower Quartile	2014 Median	2014 Upper Quartile	2021 Lower Quartile	2021 Median	2021 Upper Quartile
Bradford	11,996	19,376	28,453	15,557	23,637	32,933
Calderdale	13,602	21,734	31,599	15,605	23,599	35,723
Kirklees	12,728	20,384	31,495	14,987	22,986	33,675
Leeds	13,598	21,787	32,241	17,169	26,298	38,235
Wakefield	12,449	19,267	28,747	16,104	23,681	34,784
Leeds City Region						
York	12,842	20,735	30,865	15,556	24,041	39,540
Craven	9,978	17,629	N/A	12,003	20,035	N/A
Harrogate	13,481	21,735	32,978	17,763	27,382	41,633
Selby	N/A	22,009	N/A	18,431	29,081	41,333
Barnsley	11,688	19,925	30,340	16,470	23,017	34,685

Source: ONS

Figure 8. Affordability of House Prices 2014 and 2021 – Ratio of local prices compared to local incomes at local authority level



Source: ONS housing statistics for small areas

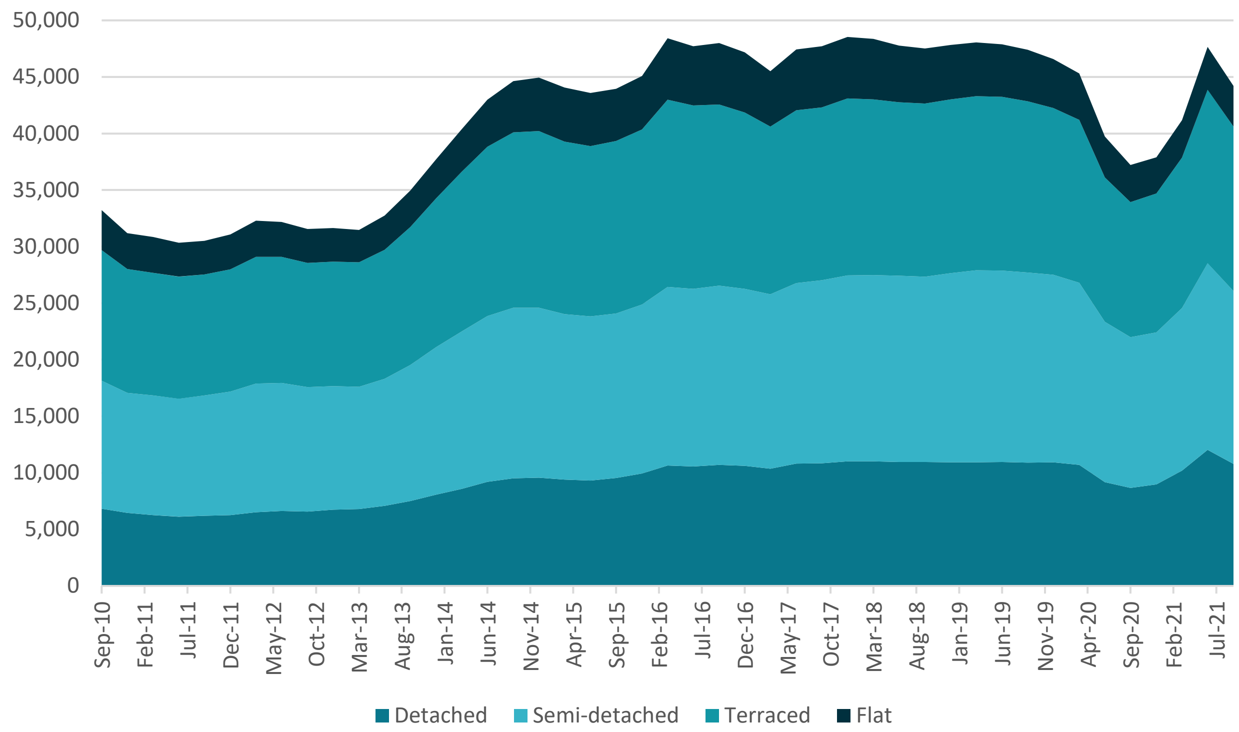
About the data
Housing affordability is taken as a ratio between median house price and the median annual wage of the same area. This measure does not provide a complete picture on how accessible the housing market is to individuals, and the Combined Authority has undertaken more detailed analysis to 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

2.16 The chart below 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%).

2.17 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 when in March 2020, which recovered, but then fell again by September 2021.

Figure 9. Leeds City Region house sales by type September 2010 - September 2021



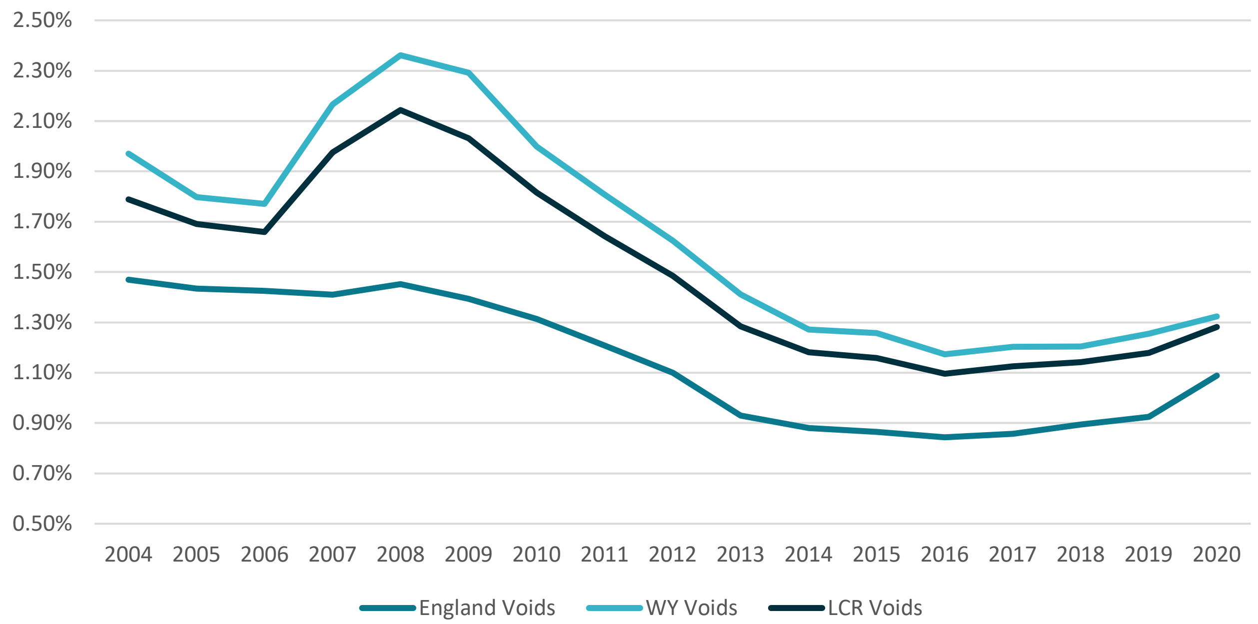
Source: ONS housing statistics for small areas

Table 2.4: House sales by Local Authority District (12 months to September 2021)

West Yorkshire	Detached	Semi-detached	Terraced	Flats	Total
Bradford	1,256	2,499	2,677	530	6,962
Calderdale	562	820	1,624	300	3,306
Kirklees	1,579	1,858	2,136	280	5,853
Leeds	2,296	4,327	3,162	1,238	11,023
Wakefield	1,341	1,867	1,326	194	4,728
Leeds City Region					
Barnsley	982	1,218	1,064	104	3,368
Craven	254	272	475	70	1,071
Harrogate	1,126	913	749	386	3,174
Selby	689	479	346	40	1,554
York	708	1,027	974	449	3,158

Source: ONS housing statistics for small areas

Figure 10. % Long Term Voids



Source: DLUHC Housing statistics

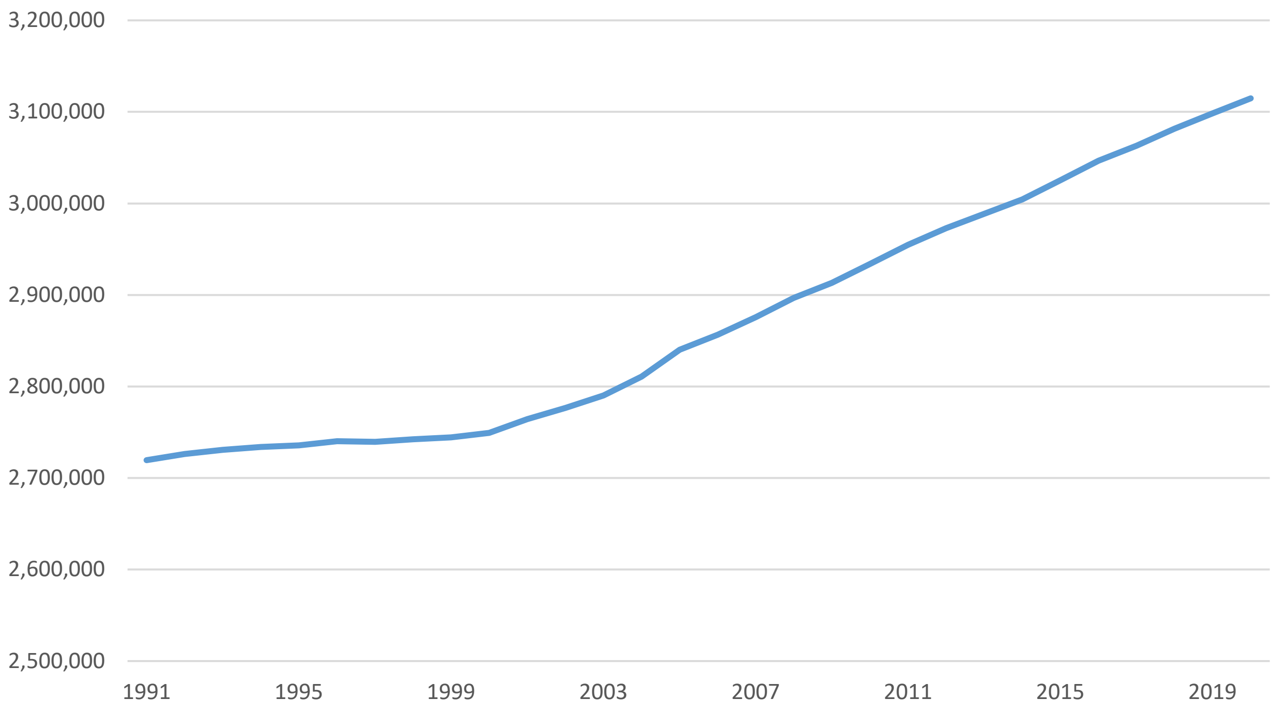
2.18 Positively, numbers of vacant and long-term vacant housing have reduced across the City Region and West Yorkshire in the past decade, though levels remain higher than the national average. Both locally and nationally, the percentage of long term voids started to increase in 2017 and has not returned to its downward trajectory. Therefore, there is more work to be done to get these vacant properties into the housing supply.

Demographic change

2.19 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 on the population across Leeds City Region.

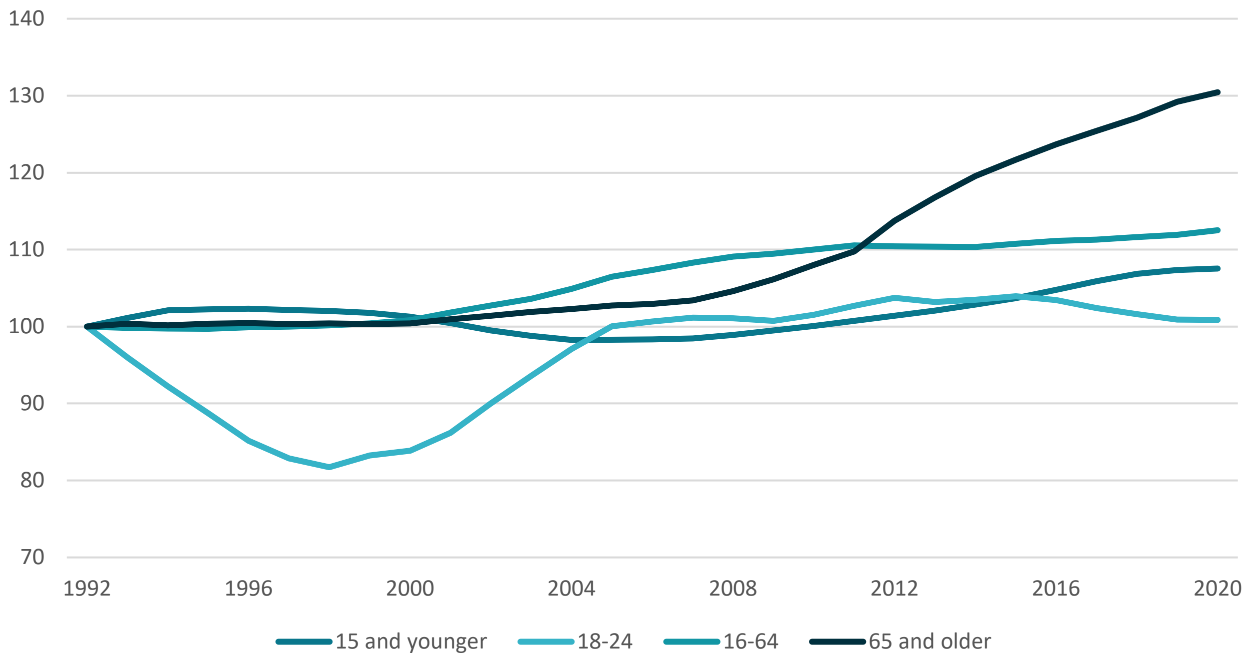
2.20 The latest household estimates project that the population of the Leeds City Region will continue to increase over the longer-term.

Figure 11. Total Population Change, Leeds City Region 1991-2020



Source: ONS Annual Population Estimate

Figure 12. 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 are:

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

3.2 Please note that some data from years preceding 2020/21 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 Covid19 pandemic, which has had a significant impact over the period on all businesses across the region, including the construction sector. On new build housing, Homes England have 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]

Housing Delivery

3.4 Monitoring information for 2020/21 indicates that a total of 8,761 net additional dwellings were delivered across the City Region, this represents a decrease on previous years where 10,943 were delivered in 2019/20 and 12,254 in 2018/19. Cumulative losses to housing stock across the City Region have decreased to 391 from 929 in 2019/20 and 562 in 2018/19.

3.5 The monitoring information for net housing delivery compares with the agreed City Region housing ambition to deliver[2] between 10,239-12,948 net additional homes per annum up to 2036. Table 3.1 shows that the City Region delivered approximately 14% below the lower end of the agreed City Region ambition, which to a degree may be as a result of the impacts of the Covid19 pandemic upon the construction sector. The 2020/21 net additional dwellings delivered is approximately 20% below the net housing delivered in in 2019/20.

3.6 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.

[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] Leeds City Region Strategic Economic Plan (May 2016)

Table 3.1 Net Housing Additions 2020/21

Local Authority	Gross Losses	Net Total
Bradford	229	522
Calderdale	16	269
Kirklees	35	1,021
Leeds	7	2,943
Wakefield	40	1,227
West Yorkshire Total	**327**	**5,982**
WY 2019/20 Total	**837**	**7,575**
WY 2018/19 Total	**457**	**9,260**
Barnsley	7	588
Craven	9	166
Harrogate	19	880
Selby	8	523
York	21	622
Leeds City Region Total	**391**	**8,761**
LCR 2019/20 Total	**929**	**10,943**
LCR 2018/19 Total	**562**	**12,254**

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

3.7 Table 3.2 illustrates net additional dwellings delivered across City Region authorities between 2011/12 and 2020/21. The data shows that over this 10 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 (2011/12 – 2020/21)

Local Authority	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Bradford	733	721	874	1,134	1,338	1,489	1,621	1,614	1,010	522
Calderdale	494	517	357	319	340	301	301	557	348	269
Kirklees	873	753	1,036	666	1,142	983	1,330	1,550	1,131	1,021
Leeds	1,931	1,623	2,229	1,979	2,474	2,824	2,283	3,427	3,328	2,943
Wakefield	852	534	806	1,132	1,921	1,816	1,759	2,114	1,758	1,227
WY Total	**4,883**	**4,148**	**5,302**	**5,230**	**7,215**	**7,413**	**7,294**	**9,262**	**7,575**	**5,982**
Barnsley	840	657	747	623	705	853	1,012	988	1,055	588
Craven	266	116	38	131	187	230	227	238	281	166
Harrogate	188	200	183	415	306	366	598	693	980	880
Selby	338	248	268	435	438	561	610	624	492	523
York	321	482	345	501	1,121	977	1,296	449	560	622
LCR Total	**6,836**	**5,851**	**6,883**	**7,335**	**9,972**	**10,400**	**11,037**	**12,254**	**10,943**	**8,761**

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

Gross New Build Completions

3.8 Table 3.3 shows that gross new build completions across the City Region were 7,682 dwellings in 2020/21. This represents a decrease from 10,269 dwellings in 2019/20, and 10,944 dwellings in 2018/19. This reduction in new build completions from 2019 to 2020 of 25% is in line with the national reduction in completions noted above.

3.9 For 2020/21, 5,041 (66%) new build dwellings were on wholly greenfield sites, 2,641 (34%) 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. For 2018/19, 5,237 (48%) were on wholly greenfield sites and 5,707 (52%) were on wholly brownfield sites.

3.10 For 2020/21, 2019/20 and 2018/19 the highest proportion of greenfield building took place in Selby, accounting for 95%, 96%, and 90% of new build completions respectively. For 2020/21, the lowest proportion of greenfield building took place in York, accounting for 24%. For 2019/20 and 2018/19 the lowest proportion of greenfield building took place in Leeds accounting for 24%, and 20% respectively. The lowest level of absolute new build completions among City Region authorities across 2020/21 was Calderdale (154 dwellings), whilst the lowest level of absolute completions among City Region authorities across for 2018/19 and 2019/20 was Craven (219 and 300 respectively), which is not unexpected as a largely rural authority with a relatively low housing target.

Table 3.3 Gross New Build Completions 2020/21

Local Authority	Greenfield	Brownfield	Mixed	Total
Bradford	305	193	0	498
Calderdale	71	83	0	154
Kirklees	550	290	0	840
Leeds	1,910	592	0	2,502
Wakefield	662	476	0	1,138
West Yorkshire Total	**3,498**	**1,634**	**0**	**5,132**
WY 2019/20 Total	**3,280**	**4,036**	**0**	**7,316**
WY 2018/19 Total	**3,470**	**4,778**	**0**	**8,248**
Barnsley	243	311	0	554
Craven	101	74	0	175
Harrogate	583	238	0	821
Selby	503	28	0	531
York	113	356	0	469
Leeds City Region Total	**5,041**	**2,641**	**0**	**7,682**
LCR 2019/20 Total	**4,966**	**4,981**	**322**	**10,269**
LCR 2018/19 Total	**5,237**	**5,707**	**0**	**10,944**

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

3.11 The West Yorkshire Combined Authority have recently undertaken an assessment of the past delivery of housing (and employment) on brownfield land, covering the period 2007 - 2019 and the current supply of brownfield land available throughout the Leeds City Region. The Combined Authority has also recently completed an indepth examination of the current West Yorkshire brownfield housing land supply (as of early 2020) and delivery between 2010 – 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.

3.12 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. The actions presented are smaller scale interventions and are either currently in development or can be introduced within the next 6 – 12 months.

3.13 Since October 2020, the Combined Authority has been in the process of building an online mapping tool to present brownfield sites appropriate for housing within West Yorkshire. This has culminated in the production of the Brownfield Dashboard, an online mapping tool which presents spatially each brownfield housing site and relevant site information (e.g. Site Summary, Access to Services and Constraints). It is intended to make the Dashboard available on the Combined Authority's website in May 2022.

Completions by Windfall

3.14 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 2020/21, 2019/20 and 2018/19 illustrates that a total of 4,147, 4,223, and 5,653 dwellings respectively were windfall completions in the City Region. This shows a slight decrease in windfall completions between 2018/19 and 2020/21, which to an extent may be due to the Covid 19 pandemic covering this period. However, several authorities, particularly Leeds and York, showed an increase in 2020/21 compared to previous years.

Table 3.4 Completions by Windfall 2018/19, 2019/20 and 2020/21

Local Authority	2018/19	2019/20	2020/21
Bradford	933	589	400
Calderdale	348	350	233
Kirklees	1,522	438	460
Leeds	975	404	1,373
Wakefield	572	636	464
West Yorkshire Total	**4,350**	**2,417**	**2,930**
Barnsley	448	1,070	162
Craven	216	164	112
Harrogate	No Data	No Data	No Data
Selby	379	385	453
York	260	187	490
Leeds City Region Total	**5,653**	**4,223**	**4,147**

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

Net Additional Gypsies and Travellers Pitches

3.15 Monitoring information presented in Table 3.5 shows that the total number of net gypsy and traveller pitches delivered across the City Region was 20 in 2020/21, all of which were in Selby District. However, this data includes 12 retrospective pitches which have been constructed and 8 as yet not implemented. Twelve gypsy and traveller pitches were delivered in 2019/20 and 6 in 2018/19.

Table 3.5 Net Additional Gypsies and Travelers Pitches Delivered 2018/19, 2019/20 and 2020/21.

Local Authority	2018/19	2019/20	2020/21
Bradford	0	0	0
Calderdale	0	0	0
Kirklees	0	0	0
Leeds	0	0	0
Wakefield	6	12	0
West Yorkshire Total	**6**	**12**	**0**
Barnsley	0	0	0
Craven	0	0	0
Harrogate	0	0	0
Selby	0	0	20*
York	0	0	0
Leeds City Region Total	**6**	**12**	**20**

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

3.16 Gross affordable housing[3] delivered in 2020/21 is recorded as 1,590, which shows a decrease of 477 compared to 2019/20. When comparing to the most recent reporting periods 2,067 gross affordable dwellings were delivered in 2019/20 and 1,732 in 2018/19. Table 3.6 illustrates that the City Region's gross affordable housing delivery over the last 10 years has fluctuated between a high of 2,121 dwellings (2011/12) and a low of 1,399 dwellings (2017/18).

3.17 As a proportion of net housing additions in the City Region, gross affordable dwellings constituted 18% in 2020/21, 19% in 2019/20, and 14% in 2018/19.

3.18 Over the last 10-year period 2011/12 saw a peak of 2,121 gross affordable dwellings delivered, constituting 31% of net housing additions.

3.19 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

[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.

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 (2011/12 – 2020/21)

Local Authority	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Bradford	198	196	279	258	92	194	274	267	309	58
Calderdale	100	195	126	53	13	64	22	55	79	29
Kirklees	214	268	320	180	155	121	100	118	155	89
Leeds	495	205	329	455	456	557	239	433	439	596
Wakefield	345	118	232	298	488	335	205	322	309	163
WY Total	**1,352**	**982**	**1,286**	**1,244**	**1,204**	**1,271**	**840**	**1,195**	**1,291**	**935**
Barnsley	367	152	183	144	479	126	152	111	203	128
Craven	122	31	0	79	56	80	99	41	19	8
Harrogate	57	36	58	64	39	42	111	148	305	219
Selby	72	89	39	71	69	76	123	177	125	170
York	151	127	50	139	109	91	74	60	124	130
LCR Total	**2,121**	**1,417**	**1,616**	**1,741**	**1,956**	**1,686**	**1,399**	**1,732**	**2,067**	**1,590**

Source: LCR LA Annual Monitoring Reports (Various)

3.20 The data above shows that over the last 5 years a number of Partner Councils have increased the delivery of affordable dwellings significantly, primarily Harrogate and Selby.

Gross Affordable Dwellings Delivered by Land Type

3.21 The data table below sets out the gross affordable dwellings delivered in 2020/21, 2019/20 and 2018/19 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 56% of affordable housing was delivered on greenfield land, and 43% on brownfield land in 2020/21.

Table 3.7 Gross Affordable Dwellings Delivered by Land Type (2018/19 – 2020/21)

	Greenfield	Brownfield	Total
Bradford	11	47	58
Calderdale	2	27	29
Kirklees	No Data	No Data	89
Leeds	No Data	No Data	596
Wakefield	No Data	No Data	163
West Yorkshire Total	**13**	**74**	**935**
WY 2019/20 Total	**162***	**147***	**1,291**
WY 2018/19 Total	**128***	**139***	**1,195**

Barnsley	26	102	128
Craven	8	0	8
Harrogate	179	40	219
Selby	170	0	170
York	23	107	130
Leeds City Region Total	**419***	**323***	**1,590**
LCR 2019/20 Total	**556***	**320***	**2,067**
LCR 2018/19 Total	**536***	**264***	**1,732**

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 Development Type

3.22 The data table 3.8 provides the gross affordable dwellings delivered in 2020/21 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 87% of affordable dwellings delivered in 2020/21 were houses and 13% were apartments.

3.23 However, this data excludes Leeds which delivered 2,943 net dwellings in 2020/21, 1,755 (60%) of which were apartments and 1,195 (40%) were houses. If the affordable housing development type element of this dataset was available, the proportion of affordable apartment dwellings would be significantly increased.

Table 3.8 Gross Affordable Dwellings Delivered by Development Type (2020/21)

	Apartments	**Houses**	**Total**
Bradford	0	58	58
Calderdale	27	2	29
Kirklees	No Data	No Data	89
Leeds	No Data	No Data	596
Wakefield	16	147	163
West Yorkshire Total	**43**	**207**	**935**
WY 2019/20 Total	No Data	No Data	**1,291**
WY 2018/19 Total	No Data	No Data	**1,195**
Barnsley	0	128	128
Craven	0	8	8
Harrogate	0	219	219
Selby	4	166	170
York	68	62	130
Leeds City Region Total	**115***	**790***	**1,590**
LCR 2019/20 Total	No Data	No Data	**2,067**
LCR 2018/19 Total	No Data	No Data	**1,732**

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

3.24 Table 3.9 provides the gross affordable dwellings delivered in 2020/21 by tenure type, as defined in the National Planning Policy Framework Annex 2. This data shows that 'Affordable Housing for Rent' are the primary tenure type for the delivery of affordable housing, accounting for 54% (853 dwellings) in 2020/21.

Table 3.9 Gross Affordable Dwellings Delivered by Tenure Type (2020/21)

	Affordable Housing for Rent	First Home	Discounted Market Sales Housing	Other Affordable Routes to Home Ownership	Total
Bradford	46	0	0	12	58
Calderdale	29	0	0	0	29
Kirklees	17	0	29	43	89
Leeds	298	0	199	99	596
Wakefield	No Data	No Data	No Data	78	163
West Yorkshire Total	**390**	**0**	**228**	**232**	**935**
Barnsley	91	0	0	37	128
Craven	5	0	0	3	8
Harrogate	150	0	0	69	219
Selby	118	0	44	8	170
York	99	0	3	28	130
Leeds City Region Total	**853***	**0***	**275***	**377***	**1,590**

Source: LCR LA Annual Monitoring Reports (Various)
*Please note that these figures do not sum the total due to 'no data' available for Wakefield Council

Dwellings Capacity with Planning Permission

3.25 Table 3.10 shows that capacity for new dwellings via extant planning permissions across the City Region was 78,556 at 1 April 2021, 66,066 at 1 April 2020 and 57,601 at 1 April 2019. 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 at 1 April 2021

	Greenfield	Brownfield	Total
Bradford	4,110	4,228	8,338
Calderdale	1,854	1,974	3,828
Kirklees	3,367	3,595	6,962
Leeds	21,887	9,300	31,187
Wakefield	4,283	4,131	8,414

West Yorkshire Total	**35,501**	**23,228**	**58,729**
WY April 2020 Total	**17,928**	**29,011**	**46,939**
WY April 2019 Total	**13,961**	**29,108**	**49,729***
Barnsley	1,736	868	2,604
Craven	No Data	No Data	1,576
Harrogate	No Data	No Data	5,984
Selby	1,387	465	1,852
York	1,050	6,761	7,811
Leeds City Region Total	**39,674***	**31,332***	**78,556**
LCR April 2020 Total	**28,097**	**37,969**	**66,066**
LCR April 2019 Total	**16,329**	**34,918**	**57,601^**

Source: Leeds City Region LA Annual Monitoring Reports (Various)
^Estimated figure from Bradford (April 2019)
*Please note that these figures do not sum the total due to 'no data' available for some Partner Councils

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.

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 10.9 in 2021, up from 8.7 in 2014. Excluding York, Harrogate and Craven, 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 6.5 to 7.4). Affordability has declined most in York and Craven with the ratio increasing by 2.2 and 2 in respectively. Affordability has declined the least in Bradford and Selby, where the ratio has increased by 0.3 in both districts.

4.4 Private rents in 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 4%. Only Bradford (+5%) and Kirklees (+5%) experienced higher growth. In Leeds, rents went down by 3% year-on-year. Since 2016, rents in Leeds grew the quickest (+17%) with Calderdale experiencing the slowest growth (+5.3%).

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, there will be continued increase in demand for housing. 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, but has now fallen for two consecutive monitoring years. Overall, housing delivery has grown significantly over the last 8 years, but the most recent monitoring year's delivery (8,761 dwellings) has fallen below the LCR Strategic Economic Plan ambition of delivering 10,000 – 13,000 net additional dwellings annually. However, the reduction in new build completions from 2019 to 2020 of 25% is in line with the national reduction in completions.

4.7 The proportion of new build housing delivered on brownfield sites in the City Region has decreased progressively over the last four years reducing from 57% to 34% of completions.

4.8 In the City Region over 1,500 affordable dwellings were delivered in 2020/21, which is a reduction of approximately 500 dwellings from the 2019/20 eight year high of over 2,000 affordable dwellings. This equates to 18% of total net housing additions across the City Region. Over the last 5 years Harrogate and Selby Councils have increased their delivery of affordable dwellings significantly.

4.9 As of April 2021 there were over 78,000 dwellings with extant planning permission in the City Region, with the West Yorkshire Authorities accounting for approximately 59,000 of these extant dwellings (75%).

Find out more

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