Housing Delivery in West Yorkshire: Annual Monitoring Report

Covering the period from
1st April 2022 to 31st March 2023

Published: December 2023

1. Introduction

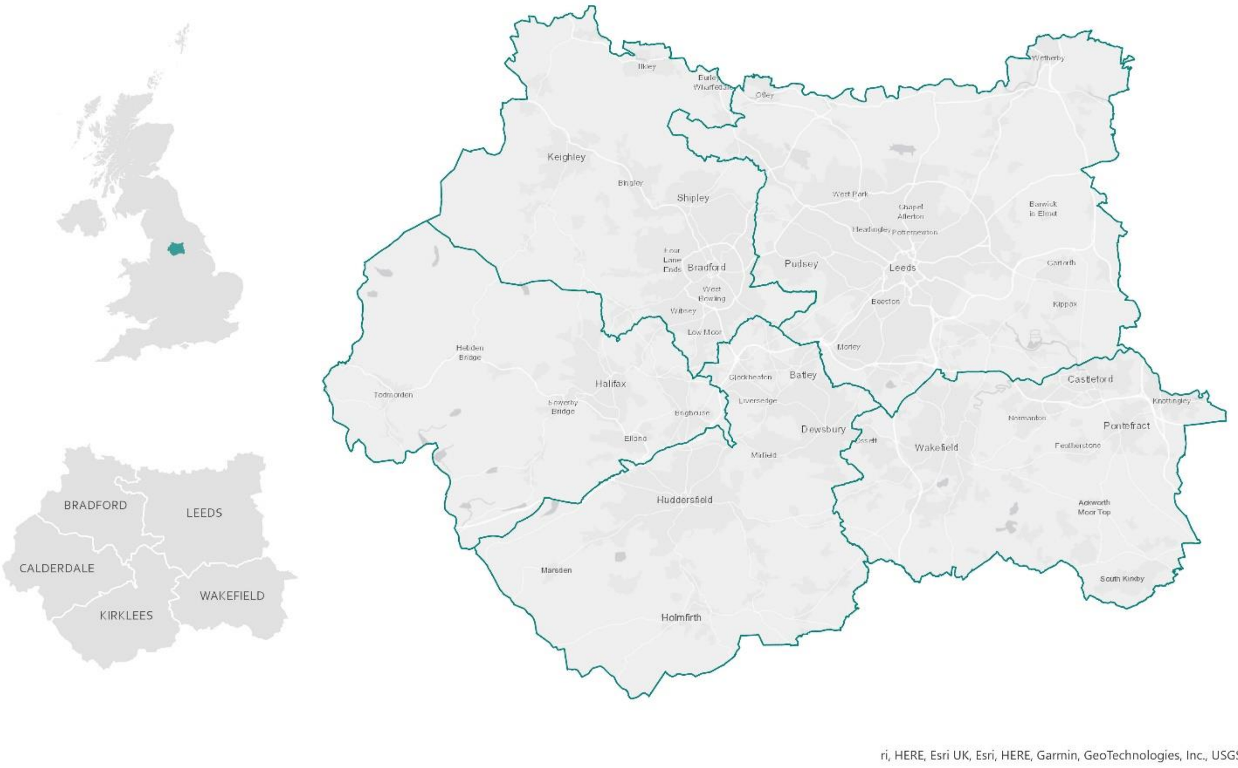
1.1 This annual report provides housing delivery monitoring for the financial year 2022/23 across all West Yorkshire local authorities (LAs). Where suitable, information for previous monitoring years is included to provide context and scope for analysis. Contextual information on housing market trends also features.

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

1.3 The geographic scope of the report, shown in Figure 1 below, includes the following West Yorkshire Local Authority areas:

- Bradford
- Calderdale
- Kirklees
- Leeds
- Wakefield

Figure 1. Map of West Yorkshire



2. Market outcomes

2.1 This section briefly considers several key housing market outcomes, including the latest performance in 2022/23 and how these compare to longer-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:

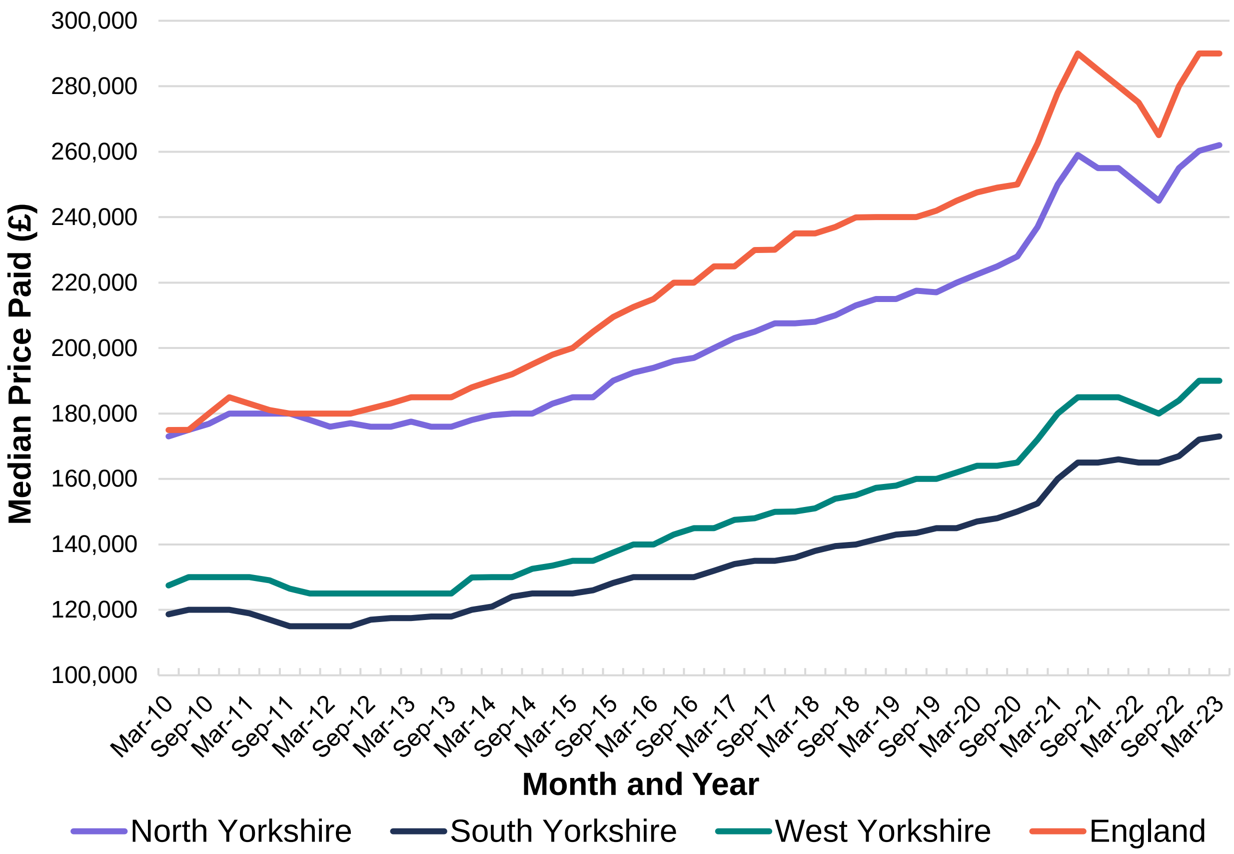
- House prices, rents, and affordability
- Residential sales
- Vacancy trends
- Demographic change

House prices

2.3 The latest available data reveals that the mean house price in West Yorkshire was £221,201, whilst the median house price was £190,000 for the year ending March 2023. Between March 2022 and 2023, the median house price in England increased by 5.5%, whilst the median house price in West Yorkshire increased by 4.1%.

2.4 Comparisons between West Yorkshire and North and South Yorkshire reveal considerable differences in house prices (Figure 2); the median house price in West Yorkshire (£190,000) is lower than North Yorkshire (£262,000), but higher than South Yorkshire (£173,00).

Figure 2. Median house prices (£) – West Yorkshire compared with North Yorkshire, South Yorkshire, and England figures from March 2010 to March 2023



Source: ONS House Price Statistics for Small Areas

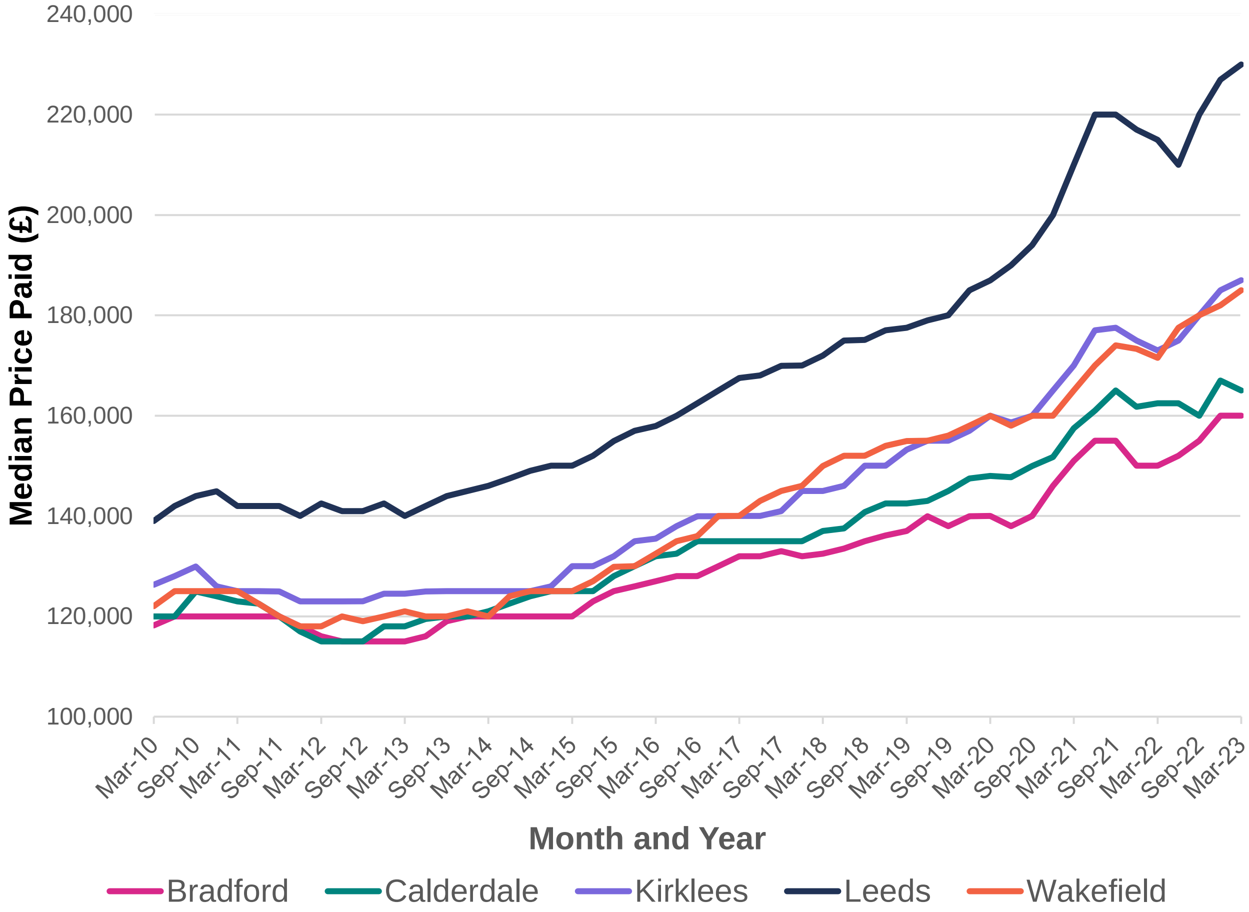
2.5 In 2023, median house prices across West Yorkshire ranged from £160,000 in Bradford to £230,000 in Leeds. The median house price is £187,000 in Kirklees, £185,000 in Wakefield and £165,000 in Calderdale. All the West Yorkshire districts experienced increases in the median house price (4.1% overall in West Yorkshire), with prices locally increasing the most in Kirklees (+8.1%), followed by Wakefield (+7.9%). Over the longer term, house prices have grown most in Leeds (46% growth since 2016), whilst growth in Bradford and Calderdale didn't keep pace with the national average over this period (Table 2.1 and Figure 3.).

Table 2.1. Median house price growth (%) of local authorities in West Yorkshire 2016-2023.

West Yorkshire	2016 Price	2023 Price	% Change
Bradford	£127,000	£160,000	26%
Calderdale	£132,000	£165,000	25%
Kirklees	£135,500	£187,000	38%
Leeds	£157,950	£230,000	46%
Wakefield	£132,500	£185,000	40%
England	£215,000	£290,000	35%

Source: ONS House Price Statistics for Small Areas

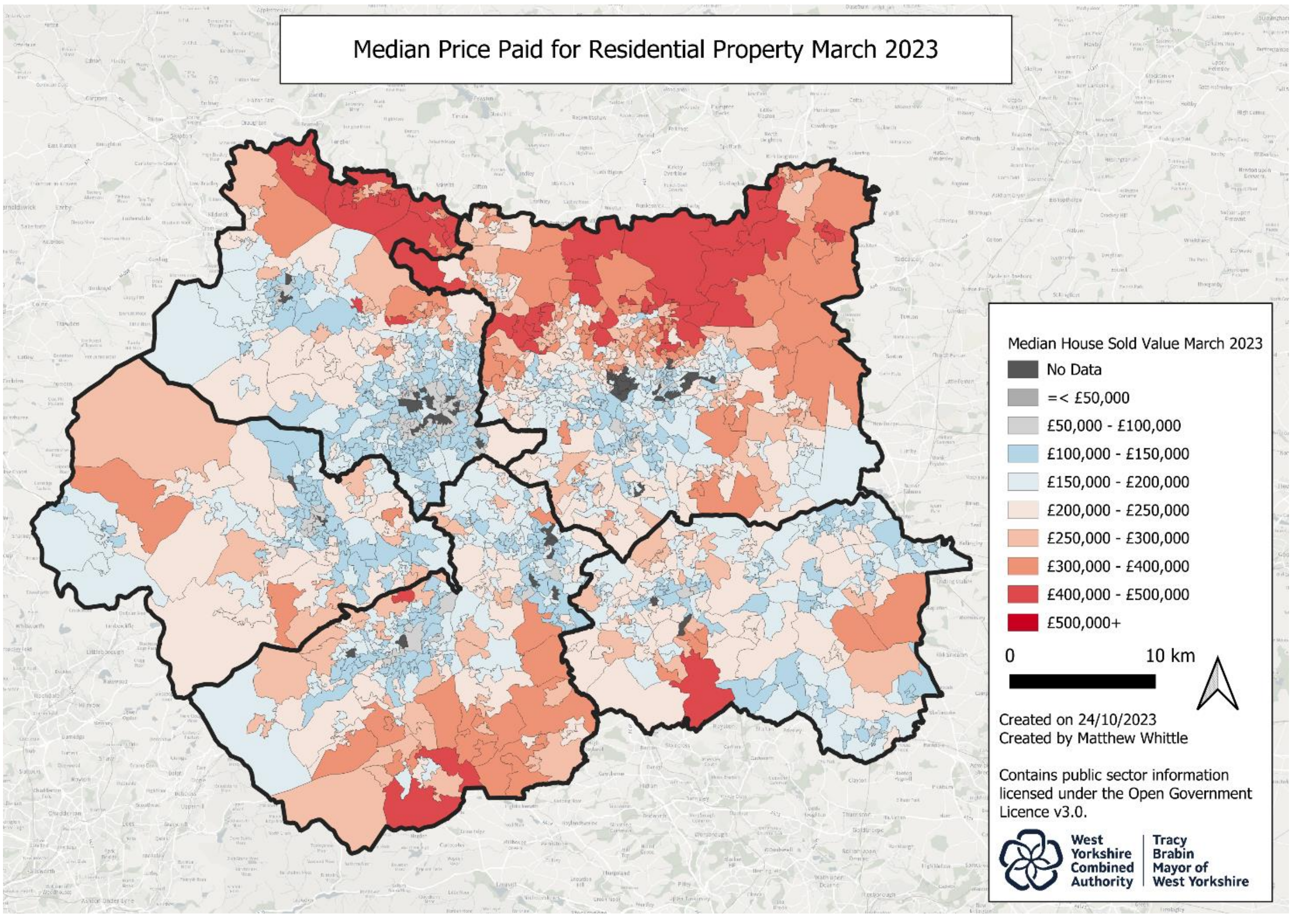
Figure 3. Median house price (£) of local authorities in West Yorkshire 2010-2023



Source: ONS House Price Statistics for Small Areas

2.6 The map in Figure 4 illustrates the spatial variation in median house prices year ending March 2023; house prices tend to higher in more rural areas of West Yorkshire and North Leeds, while house prices are lower in more urban areas of West Yorkshire (shown in blue on the map).

Figure 4. Median house prices In West Yorkshire (year ending March 2023) at lower super output area (LSOA) level for the West Yorkshire Region. The regions with the highest median house price are in the darkest red. The lowest median prices are in grey.

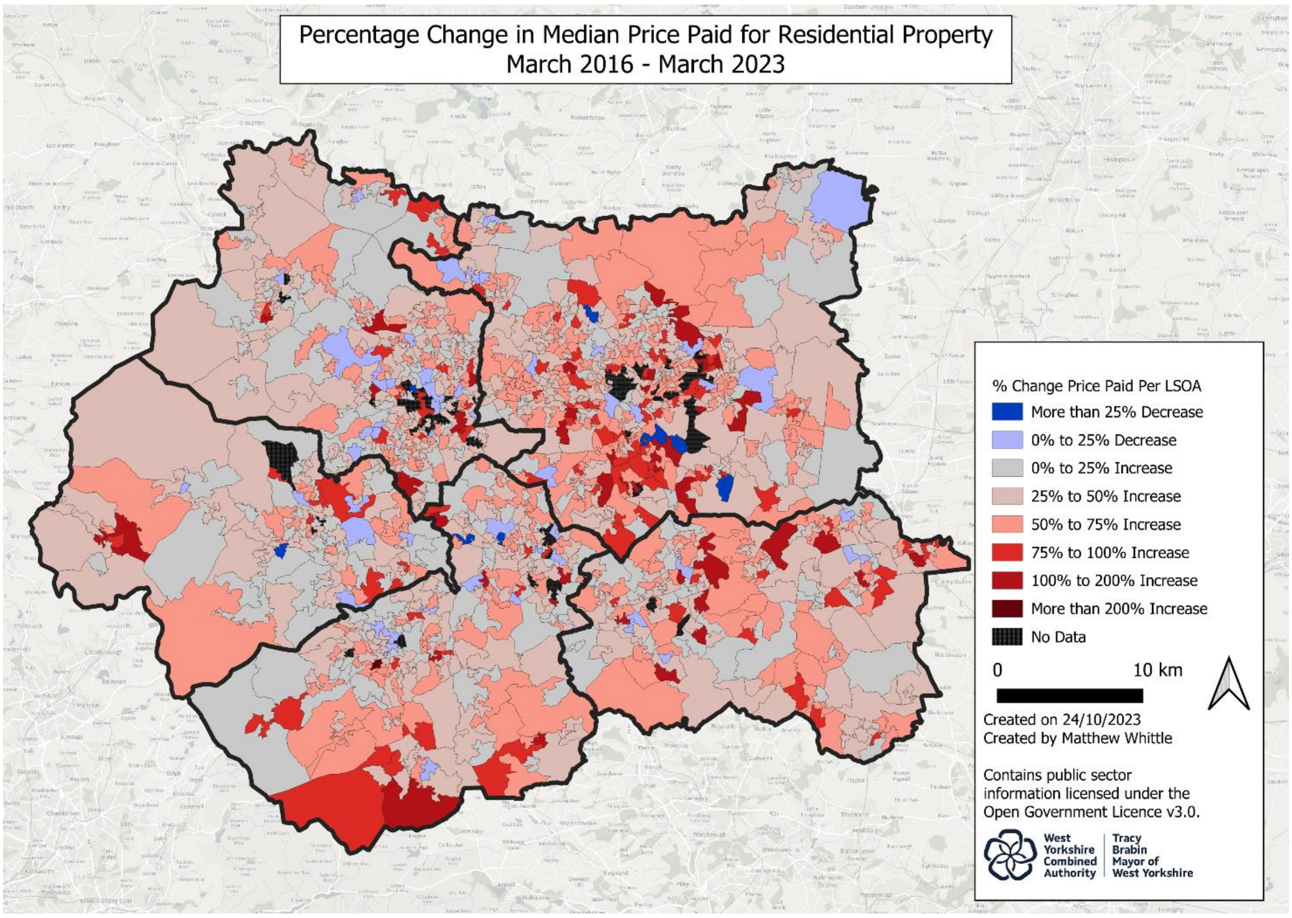


Source: ONS House Price Statistics for Small Areas

2.7 Please see Appendix 1 for Local Authority specific plans, illustrating median price paid for residential properties in March 2023.

2.8 Figure 5 shows where house prices within West Yorkshire have changed in the past 7 years. Areas marked in blue have seen a decline in median house price, whilst red areas have seen an increase in median house price. Note that, areas marked in black with dots have no data as there was not enough data (i.e., house sales) in the reference years.

Figure 5. Median house price percentage growth at LSOA level for West Yorkshire, 2016 – 2023



Source: ONS House Price Statistics for Small 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 neighbourhood level (Lower Super Output Area), which means it's possible to provide a detailed picture of the real estate market in the local area.

Rents

2.9 Private sector median rental prices follow house prices closely, with the highest rents in Leeds (£825 per month, Table 2.2). Between 2022 and 2023, rents across England rose by 4%. With the exception of Bradford, all West Yorkshire districts experienced higher growth than England (Kirklees 13%, Leeds 10%, Wakefield 9%, and Calderdale 5%). Since 2016, rents in Leeds rose the most (+38%), all other districts in West Yorkshire are below median rent growth in England (27%) (Calderdale 16%, Bradford 21%, Wakefield, and Kirklees 25%).

Table 2.2. Median private sector rents (£), 2016-2023

West Yorkshire	2016	2017	2018	2019	2020	2021	2022	2023
Bradford	475	495	495	500	500	525	575	575
Calderdale	475	495	495	495	495	500	525	550
Kirklees	475	495	495	500	500	525	525	595
Leeds	600	650	671	675	725	700	750	825
Wakefield	500	520	525	525	550	550	575	625

Source: ONS Private Rental Market Statistics

2.10 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%. Median social sector rents are shown in Table 2.3.

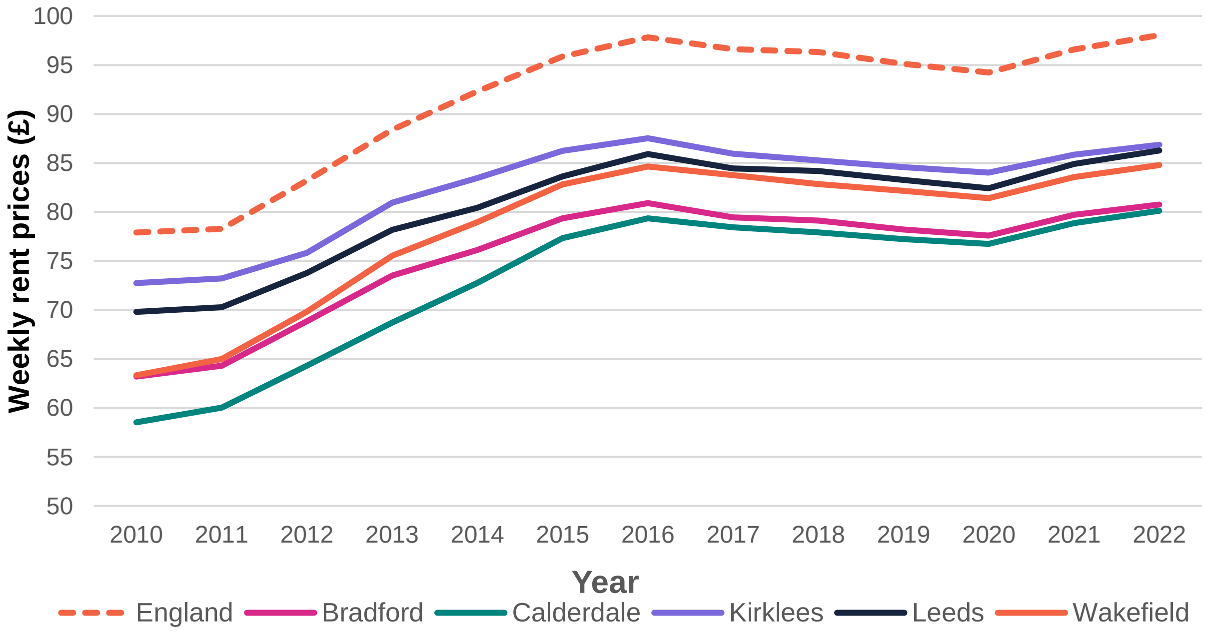
Table 2.3. Median Local Authority rents (£), 2016-2022

West Yorkshire	2016	2017	2018	2019	2020	2021	2022
Bradford	*	*	*	*	£434	£449	£456
Calderdale	*	*	*	*	*	*	*
Kirklees	£309	£306	£302	£299	£296	£304	£308
Leeds	£330	£315	£315	£312	£312	£321	£325
Wakefield	*	*	*	*	*	*	*

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

Source: DLUHC: Regulator of Social Housing Statistical data return – Table 702

Figure 6. Housing association rents (£), 2010 – 2022



Source: DLUHC: Regulator of Social Housing Statistical data return – Table 704

About the data

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

2.11 One measure of house price affordability is 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 and income requirement will be to purchase the median house.

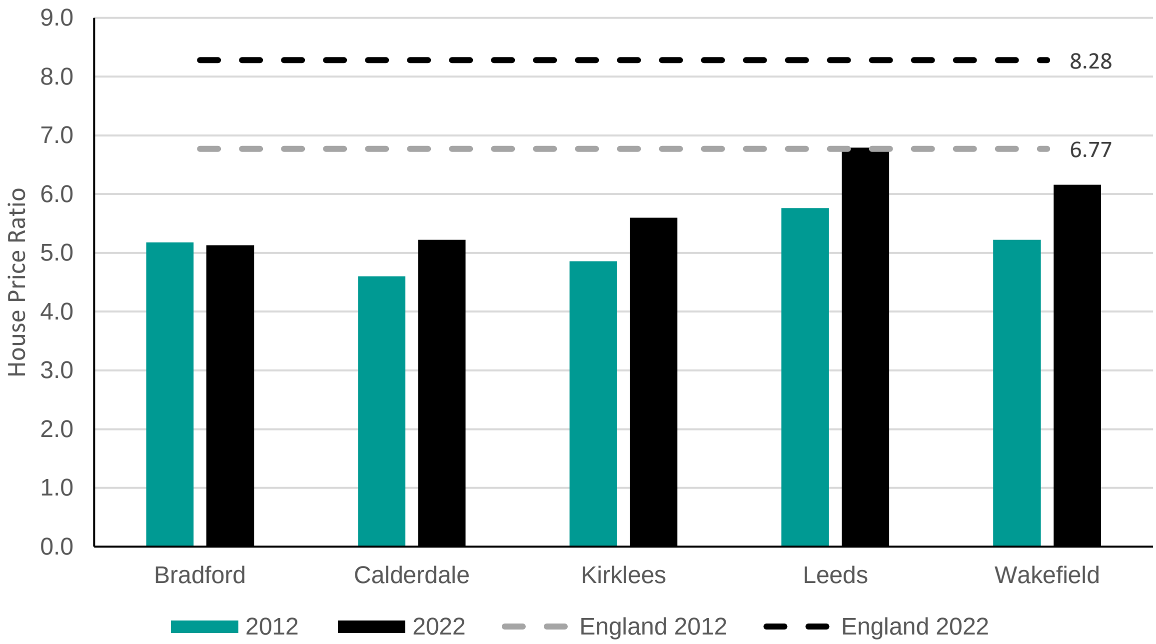
2.12 The issue of housing affordability is more complex than that demonstrated by a simple house price to income/earnings ratio and there are challenges of affordability in West Yorkshire, particularly for households in poverty and newly-forming households, which are covered in more detail in the Leeds City Region Housing Affordability and Need Study (May 2020). In addition, the affordability ratio used here does not factor in housing quality and condition. Lower overall house prices may also reflect a generally lower quality of housing stock.

2.13 Figure 7 shows the housing affordability ratio, which is a ratio of median house price to median residence-based annual wage. In 2022, the median house price of England was 8.28 times the median wage of England, an increase from 6.77 in 2012, meaning that nationally, houses are now less affordable on average. Please note, the way these statistics are measured changed last year, with the figures being provided directly from ONS.

2.14 Out of the 9 English regions, Yorkshire and the Humber had the second lowest housing affordability ratio in 2022 (6.07), behind the North East (4.87). In contrast, the median house price in London was 13.33 times the median wage in 2022.

Figure 7. Affordability of house prices 2012 and 2022 – ratio of median house price to median annual wage (residence-based) at local authority level for West Yorkshire

Districts and England

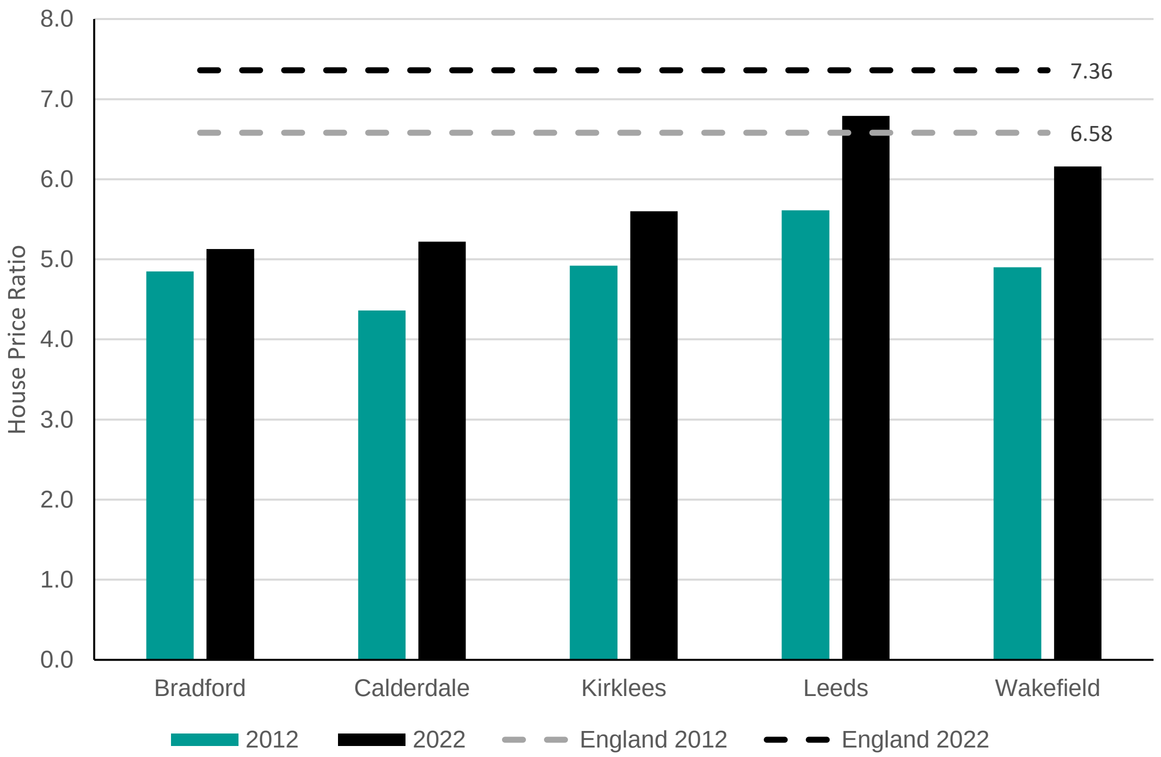


Source: ONS

2.15 In contrast to the national picture, the districts in West Yorkshire have a lower median house price affordability ratio. Whilst 95% of local authority areas in England have seen an increase in the affordability ratio over the last decade (2012-2022), Bradford's affordability ratio declined slightly, driven by strong annual wage growth relative to weaker house price growth (vs the national average). Both Bradford and Calderdale fall within the top 10% most affordable local authorities in England using the house price to income affordability ratio, with house prices 5.13 and 5.22 times median earnings respectively. Again, these measures do not account for wider cost of living factors associated with occupying housing in these areas, including heating, repair, and transportation costs.

2.16 The ratio between lower quartile house price and lower quartile annual wage (Figure 8) 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 7.36 than it is at the median (8.28), meaning properties at this level are slightly more affordable. The 25th percentile affordability ratio has only seen a slight increase over the last decade, from 6.58 in 2011.

Figure 8. Lower quartile house price ratio to lower quartile annual wage ratio (2011 and 2022) for West Yorkshire districts and England
Source: ONS



Source: ONS

About the data
Affordability ratios are calculated by dividing house prices by gross annual earnings, based on the median and lower quartiles of both house prices and earnings. The earnings data are from the Annual Survey of Hours and Earnings which provides a snapshot of earnings in April in each year. Earnings relate to gross full-time individual earnings on a place of residence basis. The house price statistics come from the House Price Statistics for Small Areas, which report the median and lower quartile price paid for residential property and refer to a 12-month period with April in the middle (year ending September). Statistics are available at country, region, county and local authority district level in England and Wales. This measure does not provide a complete picture on how accessible the housing market is to individuals, 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.

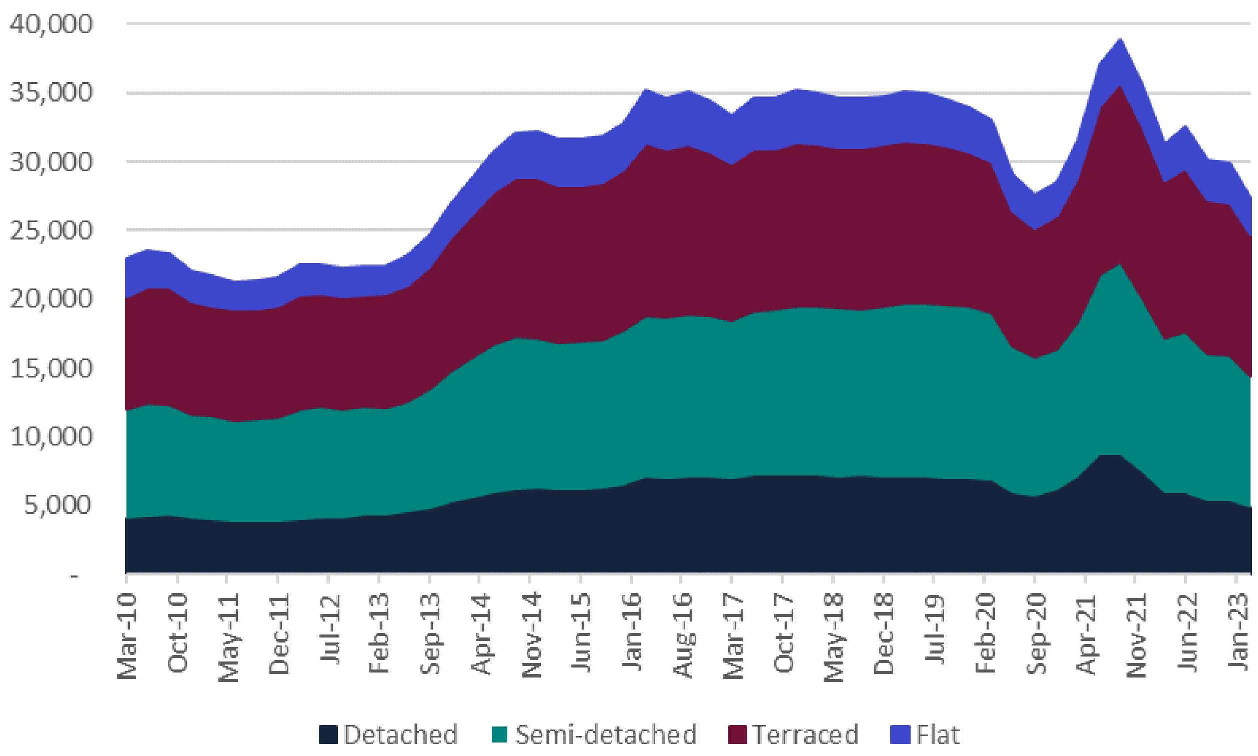
Residential sales and vacant housing

2.17 Figure 9 shows the annual volume of residential house sales by type. From the financial crisis to 2013, sales were fairly flat across West Yorkshire. In 2014, sales began to pick up pace across all types of housing.

2.18 The COVID-19 pandemic resulted in some volatility in house sales trends; sales fell in 2020 following lockdown restrictions, whilst rising sharply in 2021 following government interventions to support the housing market.

2.19 Following the emergence from the COVID-19 pandemic, there has been a continued decline in the number of sales from the September 2021 peak (nationally and locally, Figure 9) as the rise in interest rates has increased and the squeeze on living standards has continued.

Figure 9. West Yorkshire house sales by type March 2010 to January 2023



Source: ONS housing statistics for small areas

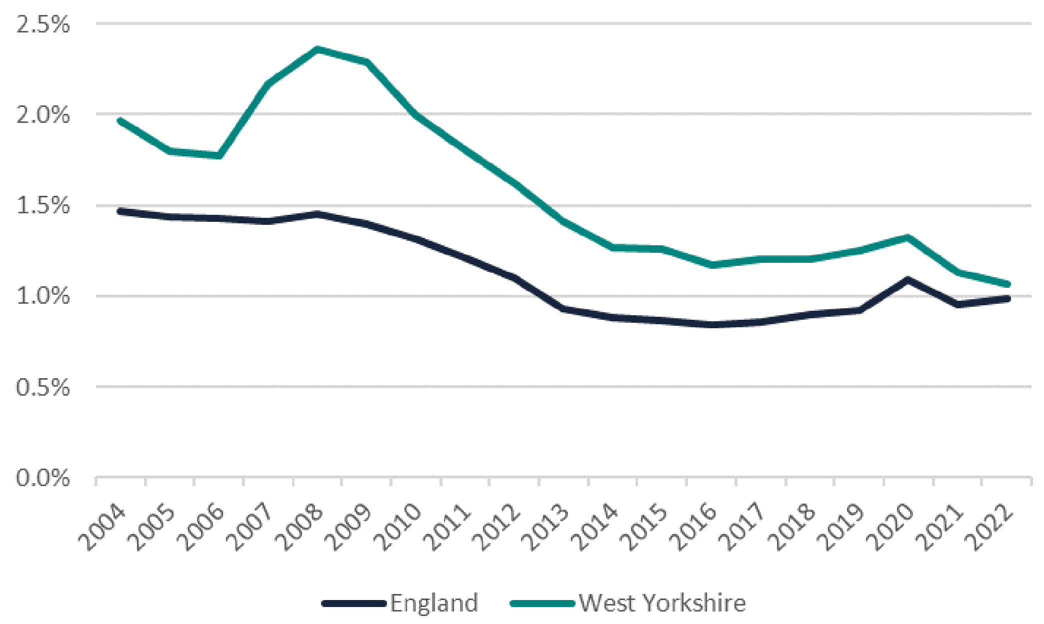
Table 2.4. House sales by Local Authority District (12 months to March 2023)

Area	Detached	Semi-Detached	Terraced	Flats	Total
Bradford	3,991	9,590	11,205	11,205	35,991
Calderdale	1,436	3,065	6,224	6,224	16,949
Kirklees	4,878	7,112	8,835	8,835	29,660
Leeds	6,607	14,778	11,990	11,990	45,365
Wakefield	4,534	8,128	6,090	6,090	24,842
West Yorkshire	**21,446**	**42,673**	**44,344**	**44,344**	**152,807**

Source: ONS housing statistics for small areas

2.20 The proportionate share of vacant and long-term vacant properties across West Yorkshire has declined in the past decade (Figure 10), with the gap between West Yorkshire and England closing to the point that local levels are slightly higher than the national average. Both locally and nationally, the percentage of long-term voids started to slowly increase in 2017 but returned to their downward trajectory in 2021 and remain consistent in 2022 at 1.1%.

Figure 10. Percentage long-term voids



Source: Department for Levelling Up, Housing & Communities Live tables on dwelling stock.

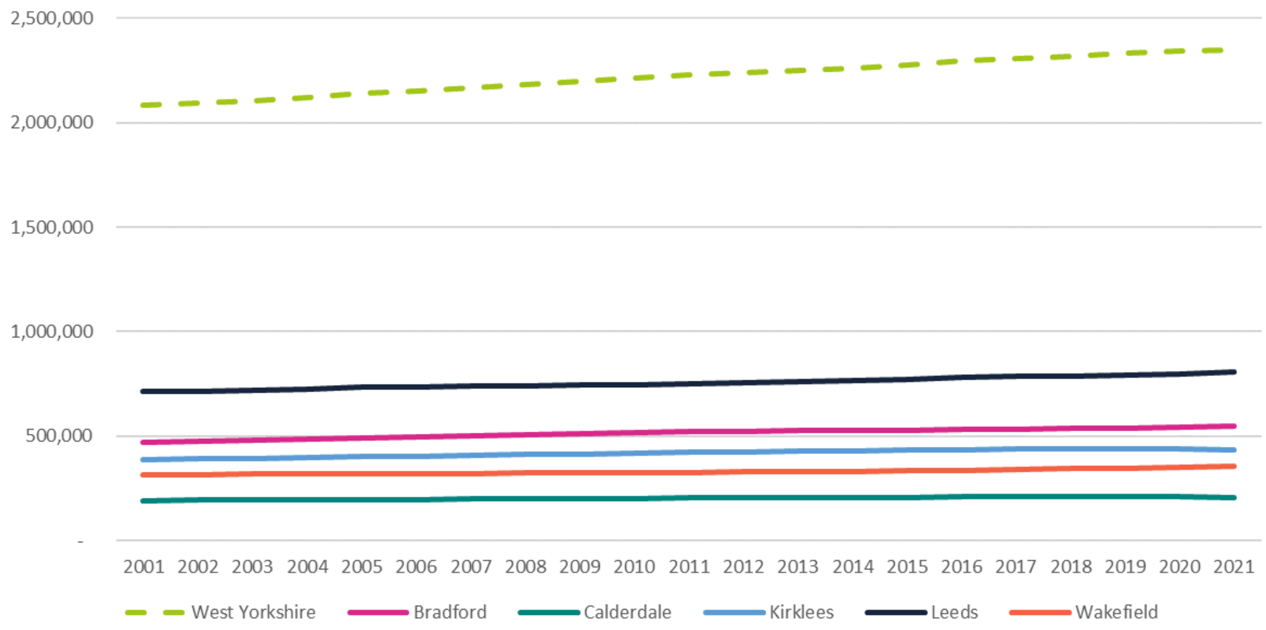
About the data
Long Term Voids are defined as properties liable for council tax that have been empty for more than six months and that are not subject to Empty Homes Discount class D or empty due to specific flooding events.

Demographic change

2.21 The 2021 Census recorded that the population of West Yorkshire has continued to grow; the population in 2021 was 2.35 million (Figure 11), with Leeds and Bradford making up 34% and 23% of the population, respectively. Between 2011 and 2021, the population of West Yorkshire increased by 125,525 people; 5.6% growth compared to a 6.6% rise in England as a whole. The main drivers of this change in the last decade have been increases through natural change (including an aging population) and international migration.

2.22 West Yorkshire has a population density of 1,159 people per km^2, 2.7 times more densely populated than England as a whole. Population density varies by district; Calderdale is the least densely populated district in West Yorkshire at 568 people per km^2, in contrast to Bradford which has the highest density of 1,491 people per km^2.

Figure 11. Total population change, West Yorkshire 2001 – 2021

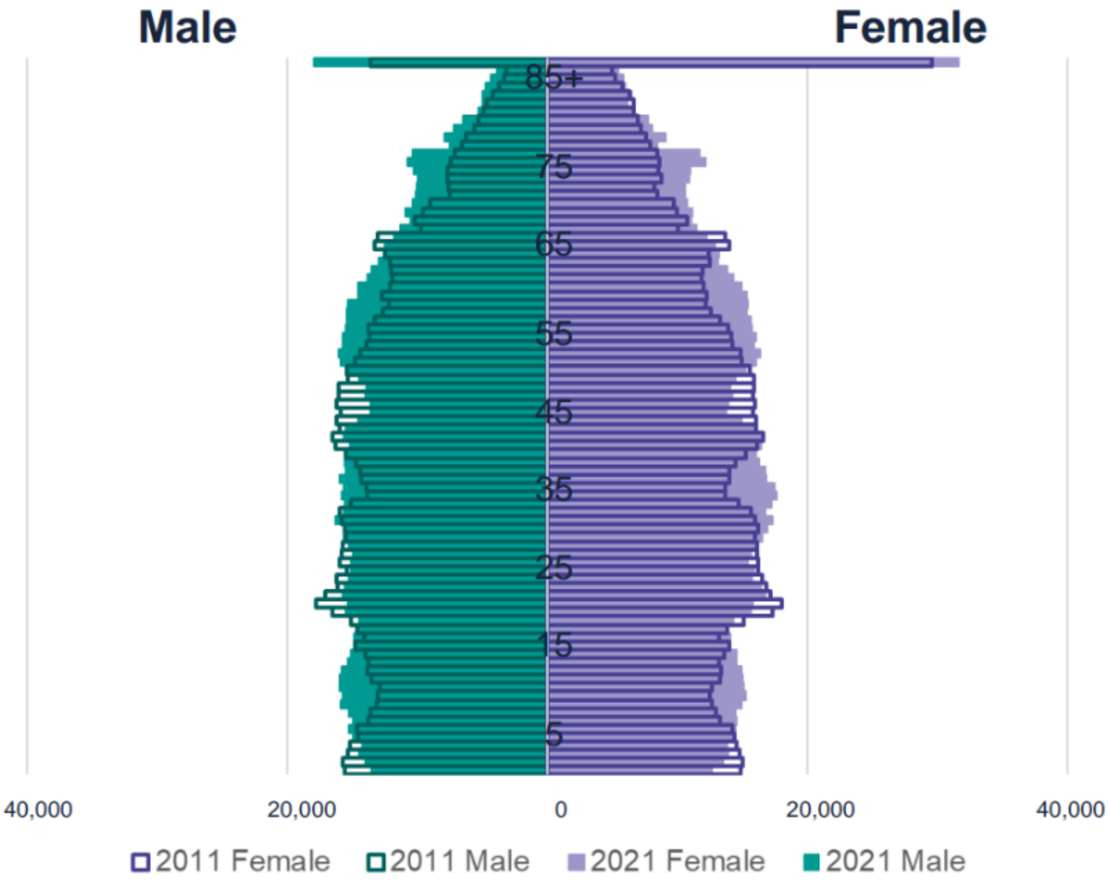


Source: ONS Annual Population Estimates

2.23 Figure 12 illustrates the evolution of the structure West Yorkshire population over the last decade, by sex for single year age bands. During this period, In West Yorkshire, the population under 16 grew by 5.6% and the population aged 65 and over grew by 18.7%, whilst the population under 5 fell by 6.9%. Figure 13 illustrates demographic trends over a longer period and highlights the growth in the share of the population aged 65 and over, relative to other age groups.

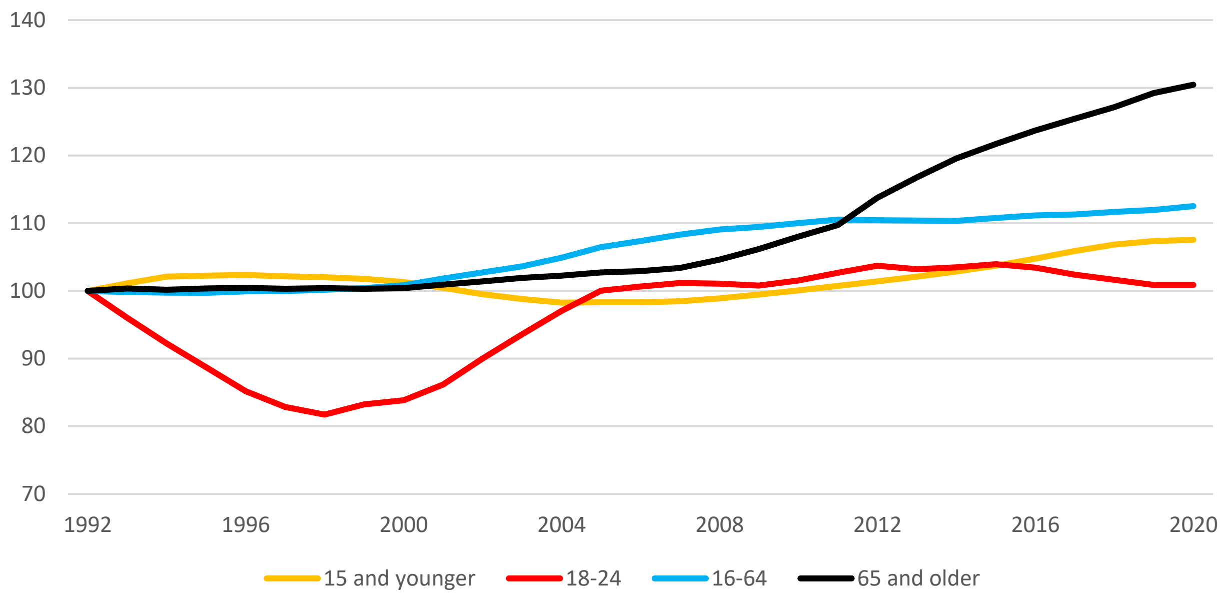
2.24 The dependency ratio is the ratio of those who aren't of working age (as a proxy for those who aren't economically active) to those who are. It is calculated as the population aged 0-14, added to the population aged 65 and over, divided by the population aged 15-64. The dependency ratio is important because it shows the balance of net consumers to producers. i.e., those who are economically inactive tend to be bigger recipients of government spending (e.g., education, pensions and healthcare) versus those who are economically active, who will pay more tax. An increasing dependency ratio means there will be a relatively smaller working age population supporting a growing dependent population. In 2021, the dependency ratio in West Yorkshire was 55%, similar to England as a whole. The dependency ratio in West Yorkshire as a whole increased by 4% in the last decade, increasing most in Calderdale (7%). These demographic trends have important implications for distribution and type of housing supply.

Figure 12. West Yorkshire population pyramid (by gender and single year of age), 2021 vs 2011



Source: ONS Census 2021

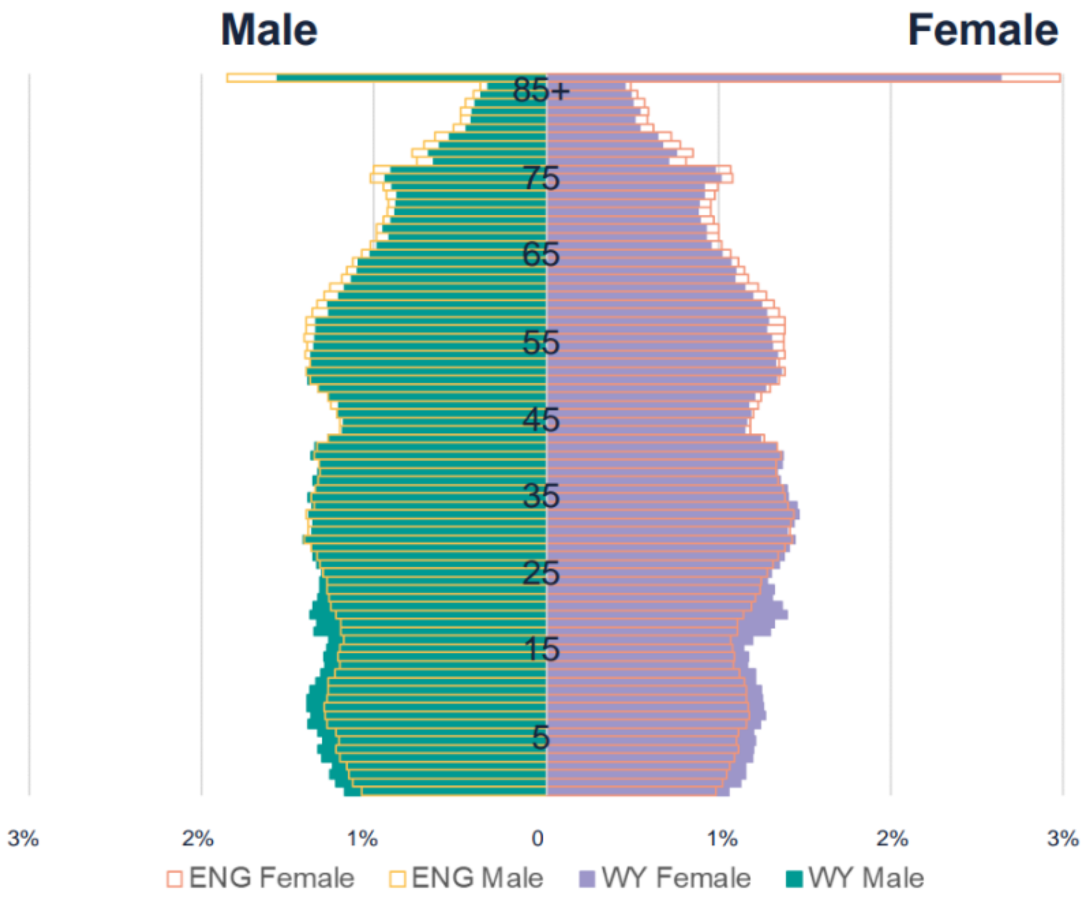
Figure 13. Population change broken down by ages (indexed to 1992)



Source: ONS Annual Population Estimates

2.25 Figure 14 illustrates the difference in the relative size of the 2021 population by sex and single year of age between West Yorkshire and England. Although the population pyramids broadly follow a similar structure, there are some differences. West Yorkshire has proportionately more young people than England as a whole; 1 in 5 people (20%) in West Yorkshire are aged under 16, compared to 18.6% in England. 38.4% of the population of West Yorkshire is under 30, compared to 35.7% of the England population.

Figure 14. West Yorkshire vs England population pyramid (by gender and single year of age) in 2021



Source: ONS Census 2021

Summary

2.26 Median house prices within West Yorkshire between 2022 and 2023 grew slower than the England average (4.1% vs 5.5%). This continuing trend has further widened the local and national housing price gap; in 2010 the median house price in West Yorkshire was 74% of the median house price in England, and the most recent data shows this has fallen to 66%. This challenge exists at a local level too with prices in Leeds increasing at a faster rate than other areas in West Yorkshire; in 2010 the median house price in Bradford was 83% of the median price in Leeds, whilst in 2023 this has fallen to 69%. Given that house prices form a considerable component of household wealth, this continuing trend contributes to widening inequality challenges. With income lagging behind the pace of house price growth, nationally and locally properties continue to become less affordable; in 2022, the median house price of England was 8.28 times the median wage of England, an increase from 6.77 in 2012. Since the COVID-19 pandemic, the associated 'race-for-space' and the end of the stamp duty holiday in September 2021, house sales volumes have declined nationally and locally. Rising interest rates have squeezed living standards and mortgage deals are considerably less attractive than a year ago impacting both current and potential homeowners.

2.27 West Yorkshire experienced significant rental price increases in 2022/23. With the exception of Bradford, all West Yorkshire districts experienced higher growth than England, and some areas saw median rent increases in excess of 10%. Higher rents will exacerbate ongoing cost of living pressures for households in West Yorkshire.

2.28 Recently released data from the 2021 Census provides us with a picture of how the population is changing. Nationally and locally the population is ageing; 16.7% of West Yorkshire residents are over 65 (vs 18.4% nationally), and this brings with it a range of challenges including increased healthcare pressures and social/caregiving needs, as well infrastructure and housing challenges. Although the population is ageing, West Yorkshire, compared to England has a relatively young population; 471k people are under 16 (1 in 5 of the population) and 38.4% are under 30 (vs 35.7% in England). With over 125k more people living in West Yorkshire than a decade ago, housing supply needs to meet demand catered to a range of demographic needs.

3. Monitoring indicators

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

- Net additional dwellings
- Gross new build dwelling 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 2022/23 may have changed from figures previously reported. This is due to updates provided by partner councils.

Housing delivery

3.3 Monitoring information for 2022/23 indicates that a total of 6,391 net additional dwellings were delivered across the West Yorkshire districts. This represents a decrease on last year's 7,207 total and pre-pandemic net housing levels. Cumulative losses to the housing stock across West Yorkshire have increased to 481, from 269 in 2021/22 and 327 in 2020/21. The 2022/23 net additional dwellings delivered is approximately 11% below the net housing delivered in 2021/22.

3.4 Over the previous ten years, net housing completions reached a low of 5,230 in 2014/15. Subsequently, net housing completions increased year-on-year and remained in the average of 7,000+ per year. However, in 2018/19 a record was reached of 9,262. Although, this decreased to 7,575 in 2019/20 and again in 2020/21 to 5,982 as a result of the COVID-19 pandemic. In 2021/22 West Yorkshire saw an increase to 7,207 due to the backlogs in the construction sector caused by the pandemic. In 2022/23 housing delivery decreased to 6,391, which may in part be explained by the significant inflation increases which has seen materials and construction costs rise leading to an impact on the pace of development nationally.

Table 3.1. Net housing additions 2022/23

Local Authority	Gross Losses	Net Total
Bradford	296	1,044
Calderdale	49	332
Kirklees	55	985
Leeds	9	2,697
Wakefield	72	1,324
West Yorkshire 2022/23 Total	**481**	**6,382**
WY 2021/22 Total	**269**	**7,207**
WY 2020/21 Total	**327**	**5,982**

Source: West Yorkshire Combined Authority Annual Monitoring Reports (Various)
*Please note that this figure differs from nationally reported data due to reporting inconsistencies

3.5 Table 3.2 illustrates net additional dwellings delivered across the West Yorkshire Local Authorities between 2013/14 and 2022/23. The data shows that over this ten-year period delivery of net dwellings across West Yorkshire peaked in 2017/18 (9,262 units). The 2014/15 period represents the weakest year of delivery at 5,230 units.

Table 3.2. Net additional dwellings (2013/14 – 2022/23)

Local Authority	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Bradford	874	1,134	1,338	1,489	1,621	1,614	1,010	522	1,325	1,044
Calderdale	357	319	340	301	301	557	348	269	443	332
Kirklees	1,036	666	1,142	983	1,330	1,550	1,131	1,021	704	985
Leeds	2,229	1,979	2,474	2,824	2,283	3,427	3,328	2,943	3,238	2,697
Wakefield	806	1,132	1,921	1,816	1,759	2,114	1,758	1,227	1,497	1,324
WY Total	**5,302**	**5,230**	**7,215**	**7,413**	**7,294**	**9,262**	**7,575**	**5,982**	**7,207**	**6,382**

Source: West Yorkshire Combined Authority Annual Monitoring Report (Various)
*Please note that this figure may differ from nationally reported data due to reporting inconsistencies
*'Net additional dwellings' include change of use to residential and therefore differ from 'new build completions'

Gross new build dwelling completions

3.6 Table 3.3 shows that gross new build completions across West Yorkshire stood at 6,028 dwellings in 2022/23. This represents a decrease from 7,091 dwellings in 2021/22 but is an increase on the year prior in 2020/21 where the figure stood at 5,132 dwellings.

3.7 For 2022/23, 3,254 (54%) new build dwelling completions were on wholly Greenfield sites in West Yorkshire, while 2,780 (46%) were on wholly Brownfield sites. For 2021/22, 3,228 (46%) were on wholly Greenfield sites and 3,863 (54%) were on wholly Brownfield sites. For 2020/21, 2,180 (43%) were on wholly Greenfield sites and 2,952 (58%) were on wholly Brownfield sites.

3.8 For 2022/23, the highest number of gross new build dwelling completions took place in Leeds, totalling 2,713 (39% on Greenfield and 61% on Brownfield). In the same period, the lowest number took place in Calderdale, totalling 383 (40% on Greenfield and 60% on Brownfield). Wakefield reported the highest proportion of gross new build dwelling completions on Greenfield, with 69% of the total 1,294 units.

Table 3.3. Gross new build dwelling completions 2022/23

Local Authority	Greenfield	Brownfield	Mixed	Total
Bradford	508	252	0	760
Calderdale	153	230	0	383
Kirklees	648	230	0	878
Leeds	1,052	1,661	0	2,713
Wakefield	893	407	0	1,294
West Yorkshire 2022/23 Total	**3,254**	**2,780**	**0**	**6,028**
WY 2021/22 Total	**3,228**	**3,863**	**0**	**7,091**
WY 2020/21 Total	**2,180***	**2,952***	**0**	**5,132**

Source: West Yorkshire Combined Authority Annual Monitoring Report (Various)
*Please note that these figures have been revised from those previously reported

3.9 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 2021, 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.

3.10 The report presents several recommendations and actions, specifically tailored to address barriers preventing the successful delivery of brownfield sites in West Yorkshire. The Report is currently being reviewed to support the ongoing development of the West Yorkshire Housing Pipeline.

Completions by windfall

3.11 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. Analysis of monitoring data for the years 2022/23, 2021/22, and 2020/21 reveals a notable trend in windfall completions in West Yorkshire, with 1,926, 2,639, and 2,930 dwellings completed in each respective year, representing a year-on-year decrease.

3.12 While several authorities managed to bolster their windfall completions in 2021/22 compared to the preceding year (2020/21), this achievement was not sustained uniformly across all districts. In fact, all districts recorded lower numbers than those in 2021/22.

Table 3.4. Completions by windfall 2020/21, 2021/22 and 2022/23

Local Authority	2020/21	2021/22	2022/23
Bradford	400	690	660
Calderdale	233	286	188

Kirklees	460	357	347
Leeds	1,373	856	401
Wakefield	464	450	330
West Yorkshire Total	**2,930**	**2,639**	**1,926**

Source: West Yorkshire Combined Authority Annual Monitoring Report (Various)

Net additional gypsies and travellers' pitches

3.13 Monitoring information presented in Table 3.5 shows that seven net gypsy and traveller pitches were delivered across West Yorkshire in 2022/23. While zero gypsy and traveller pitches have been delivered in both 2020/21 and 2021/22.

Table 3.5. Net additional gypsies and travellers' pitches delivered 2020/21, 2021/22 and 2022/23

Local Authority	2020/21	2021/22	2022/23
Bradford	0	0	0
Calderdale	0	0	0
Kirklees	0	0	0
Leeds	0	0	1
Wakefield	0	0	6
West Yorkshire Total	**0**	**0**	**7**

Source: West Yorkshire Combined Authority Annual Monitoring Reports (Various)

Gross affordable dwellings delivered

3.14 Gross affordable housing[1] delivered in 2022/23 is recorded at 1,536, a peak of the last 10 years. The 2022/23 figure is an increase of 334 compared to 2021/22 and 601 compared to 2020/21. When comparing to the most recent reporting periods, 1,202 gross affordable dwellings were delivered in 2021/22 and 935 in 2020/21. Table 3.6 illustrates West Yorkshire LA's gross affordable housing delivery over the last 10 years has fluctuated between a high of 1,536 dwellings (this year – 2022/23) and a low of 840 dwellings (2017/18).

3.15 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, the proportion of affordable housing delivered as net additional homes is higher during periods of housing market downturn. In periods of housing market buoyancy, the proportion of affordable housing delivery may fall as housing associations are more likely to be outbid for development land. However, in stronger market areas, where land is more viable to develop, we would expect to see increased S106 delivery.

[1] 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.

Table 3.6. Gross affordable dwellings delivered (2013/14 – 2022/23)

Local Authority	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Bradford	279	258	92	194	274	267	309	58	149	235
Calderdale	126	53	13	64	22	55	79	29	103	106
Kirklees	320	180	155	121	100	118	155	89	120	126
Leeds	329	455	456	557	239	433	439	596	556	665
Wakefield	232	298	488	335	205	322	309	163	274	404
WY Total	**1,286**	**1,244**	**1,204**	**1,271**	**840**	**1,195**	**1,291**	**935**	**1,202**	**1,536**

Source: West Yorkshire Combined 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

3.16 The data table below sets out the gross affordable dwellings delivered in 2022/23, 2021/22 and 2020/21 by land type. This shows that in 2022/23 approximately 44% (581 dwellings) of affordable housing was delivered on Greenfield land, and 55% (726 dwellings) on Brownfield land. Due to lack of data across a number of partner councils the comparison with previous years cannot be easily made.

Table 3.7. Gross affordable dwellings delivered by land type (2020/21 – 2022/23)

Local Authority	Greenfield	Brownfield	Mixed	Total
Bradford	32	89	22	143
Calderdale	71	35	0	106
Kirklees	73	54	0	127
Leeds	199	434	0	633
Wakefield	206	114	0	320
West Yorkshire 2022/23 Total	**581**	**726**	**22**	**1,329***
WY 2021/22 Total	**312***	**177***	**-**	**1,202**
WY 2020/21 Total	**13***	**74***	**-**	**935**

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

Gross affordable dwellings delivered by development type

3.17 Table 3.8 provides the gross affordable dwellings delivered in 2022/23 by development type. Similar to above, due to the lack of data, this indicator does not provide the full picture of West Yorkshire's gross affordable dwellings by development type. However, if the available data was extrapolated out from the numbers we have, then, approximately 48% of affordable dwellings delivered in 2022/23 were apartments and 52% were houses.

Table 3.8. Gross affordable dwellings delivered by development type (2022/23)

Local Authority	Apartments	Houses	Total
Bradford	5	138	143
Calderdale	41	65	106
Kirklees	No Data	No Data	127
Leeds	473	160	633
Wakefield	53	267	320
West Yorkshire 2022/23 Total	**572**	**630**	**1,329***
WY 2020/21 Total	**36**	**453**	**1,202**
WY 2019/20 Total	**43**	**207**	**935**

Source: West Yorkshire Combined Authority 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

3.18 Table 3.9 provides the gross affordable dwellings delivered in 2022/23 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 45% (598 dwellings) in 2022/23.

Table 3.9. Gross affordable dwellings delivered by tenure type (2022/23)

	Affordable Housing for Rent	First Home	Discounted Market Sales Housing	Other Affordable Routes to Home Ownership	Total
Bradford	No Data	No Data	No Data	No Data	143
Calderdale	91	No Data	No Data	15	106
Kirklees	37	0	48	42	127
Leeds	470	2	0	161	633
Wakefield	No Data	No Data	No Data	No Data	320
West Yorkshire Total	**598**	**2**	**48**	**218**	**1,329***

Source: West Yorkshire Combined Authority 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

3.19 As indicated in Table 3.10, the capacity for new dwellings through extant unimplemented planning permissions across West Yorkshire stood at 56,592 as of

1 April 2023, a decrease from 60,696 on 1 April 2022, and 58,729 on 1 April 2021. Notably, this year's total represents the lowest capacity since the onset of the pandemic.

Table 3.10. Capacity for new dwellings with extant unimplemented planning permission as of 1 April 2023

Local Authority	Greenfield	Brownfield	Total
Bradford	3,020	5,879	8,899
Calderdale	1,014	2,255	3,269
Kirklees	3,340	4,185	7,525
Leeds	8,733	24,141	32,874
Wakefield	1,676	2,349	4,025
West Yorkshire 2022/23 Total	**17,783**	**38,809**	**56,592**
WY April 2022 Total	**22,657**	**38,039**	**60,696**
WY April 2021 Total	**22,914^**	**35,815^**	**58,729**

Source: West Yorkshire Combined Authority 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

3.20 Table 3.10 illustrates that the vast majority (69%) of the extant unimplemented planning permissions for housing are on Brownfield sites, and the overall number (38,809) has remained relatively static over the last 3 years.

4. Headline conclusions

4.1 The latest data on West Yorkshire's housing market reveals a nuanced landscape shaped by diverse factors. Median house prices, while showing a 4.1% increase between 2022 and 2023, lag behind the national average, contributing to a widening affordability gap. This persistent trend poses challenges, particularly as incomes struggle to keep pace with housing costs.

4.2 The local and national housing price gap has expanded, with West Yorkshire's house price now at 66% of the England average, down from 74% in 2010. Leeds experiencing faster growth, exemplifies the localised challenges, as the median house price in Bradford has fallen to 69% of that in Leeds from 83% in 2010.

4.3 The aftermath of the COVID-19 pandemic, marked by the end of the stamp duty holiday and the 'race-for-space' phenomenon, has seen a decline in house sales volumes, both nationally and locally. Rising interest rates have further tightened living standards, impacting both current and potential homeowners.

4.4 Demographic shifts, highlighted by the 2021 Census, showing an aging population in West Yorkshire, posing implications for healthcare, caregiving needs, and housing infrastructure. Despite this, the region boasts a relatively young population compared to England, emphasising the need for housing supply to cater to diverse demographic needs.

4.5 As the housing market navigates these complexities, addressing affordability challenges, demographic shifts, and the impact of economic shifts on housing preferences will be crucial for fostering a resilient and inclusive housing environment in West Yorkshire.

4.6 Further, housing delivery across West Yorkshire demonstrated a nuanced trajectory, marked by a notable decrease of approximately 11% in net additional dwellings compared to the previous year. The total net additions for West Yorkshire districts amounted to 6,391, a decline from the 7,207 recorded in 2021/22. Cumulative losses to the housing stock increased to 481, underscoring the challenges faced in sustaining consistent growth. This decrease is consistent with the broader national context, reflecting the complexities introduced by the lingering effects of the COVID-19 pandemic, and rising inflation, on the construction sector.

4.7 In West Yorkshire, net additional dwellings delivered across Local Authorities from 2012/13 to 2022/23 unveils a fluctuating pattern. While the peak of housing delivery was observed in 2017/18 with 9,262 units, the recent year mirrors a decrease reminiscent of the post-pandemic resurgence in 2021/22. Bradford, Calderdale, Kirklees, Leeds, and Wakefield collectively navigated the challenges posed by evolving market conditions and policy landscapes, contributing to the overall housing dynamics in West Yorkshire.

4.8 The proportion of new build dwelling completions in West Yorkshire on wholly Greenfield sites has increased to 54% in 2022/23 from 46% the previous year.

4.9 However, the monitoring year 2022/23 saw the delivery of the highest number of affordable dwellings in the past 10 years, with a total of 1,536. This equates to 25%

of total net housing additions across West Yorkshire, supporting Mayoral and West Yorkshire Combined Authority Housing priorities.

4.10 Additionally, the capacity for new dwellings through extant unimplemented planning permissions across West Yorkshire saw a decline to 56,592 as of 1st April 2023, down from 60,696 in the previous year. The intricate interplay of planning processes and on-the-ground realities adds a layer of complexity to the housing landscape, necessitating strategic intervention to address these challenges.

5. Appendices

Appendix 1:
Local Authority specific plans, illustrating median price paid for residential properties in March 2023.

Figure 4.1. Bradford

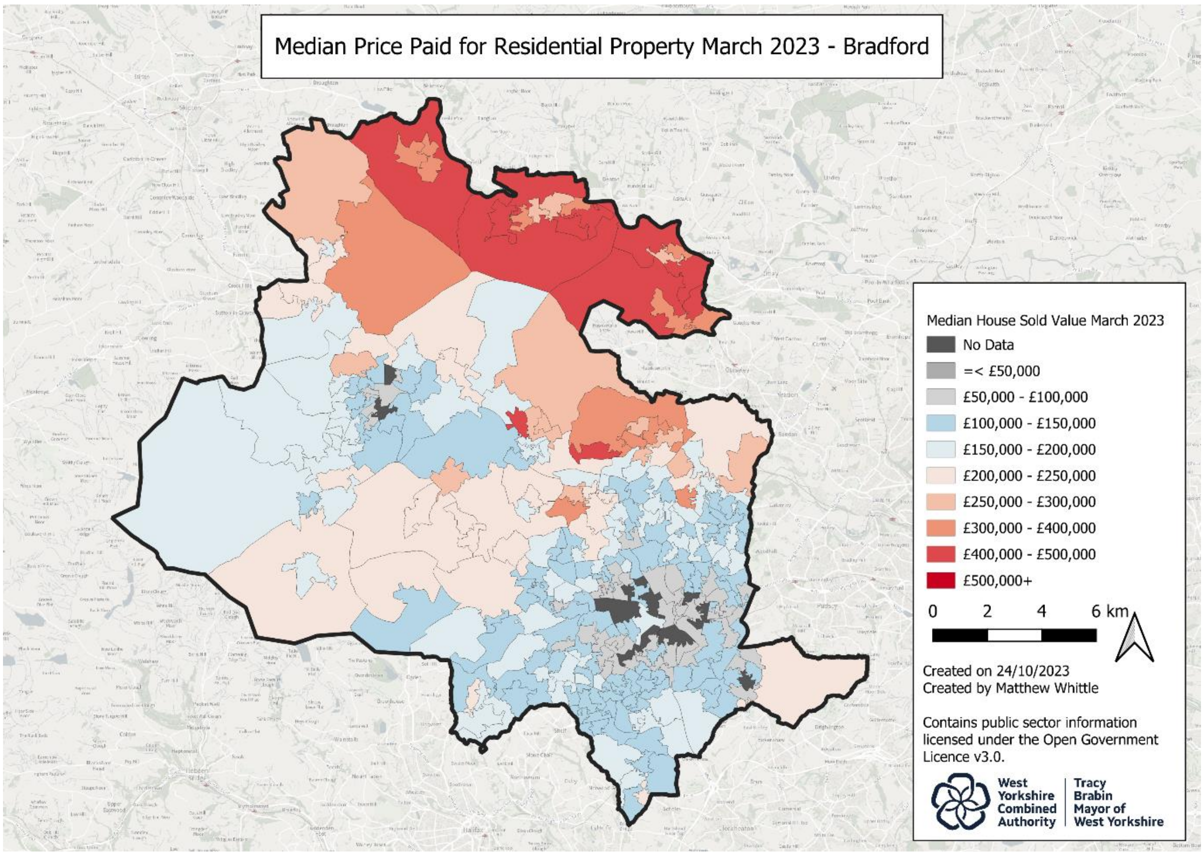


Figure 4.2. Calderdale

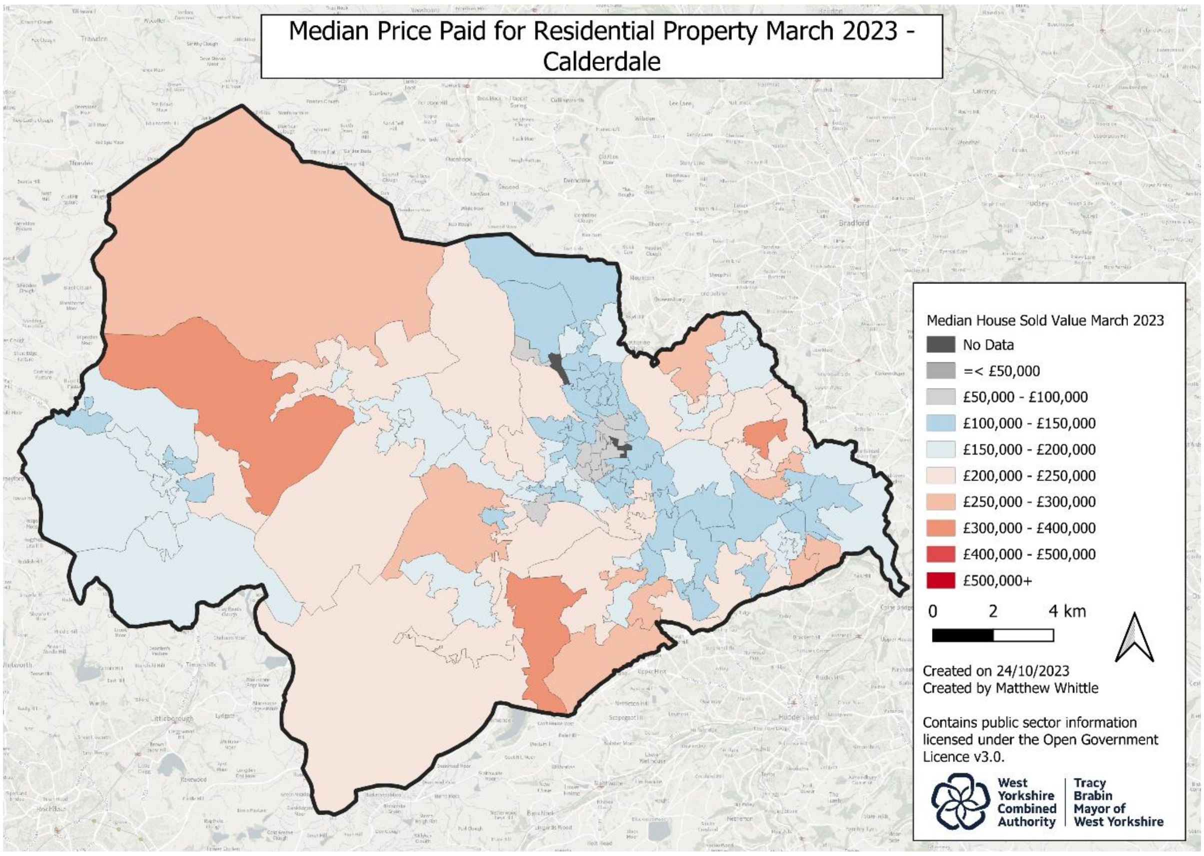


Figure 4.3. Kirklees

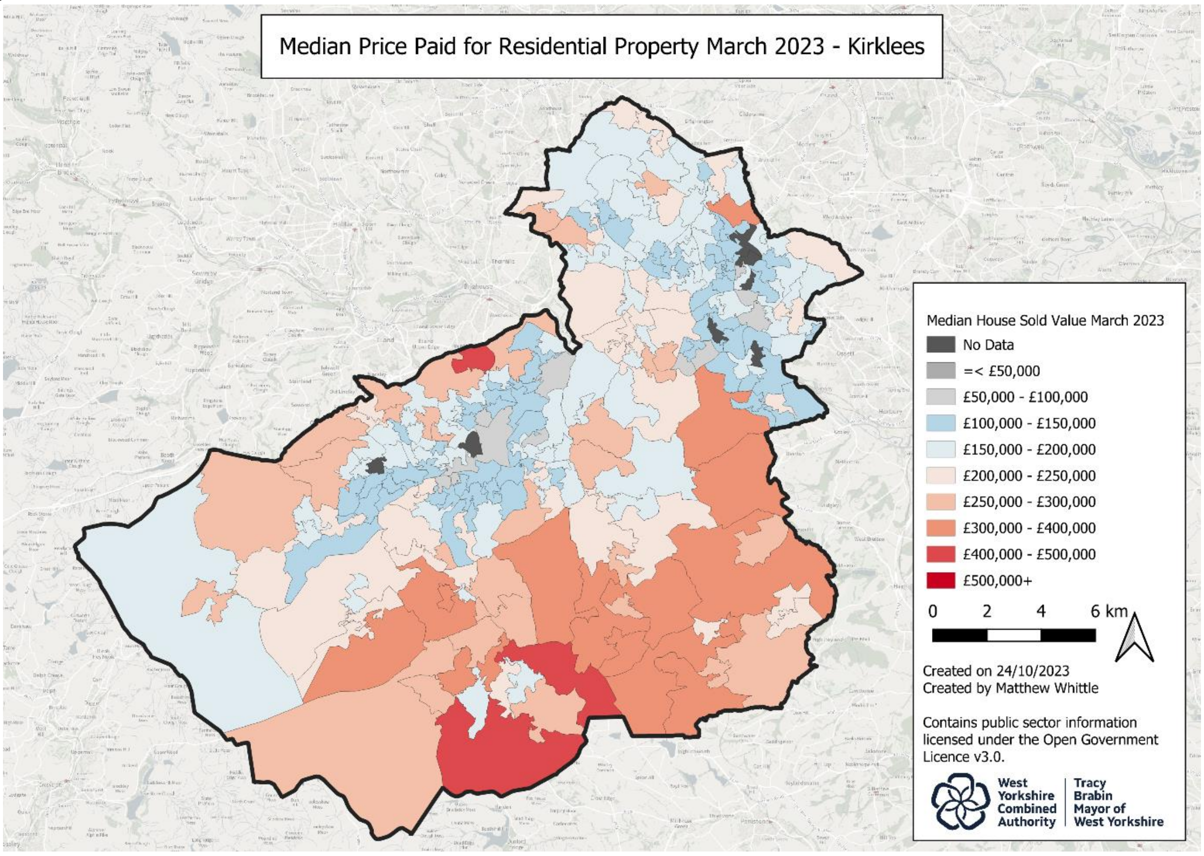


Figure 4.4. Leeds

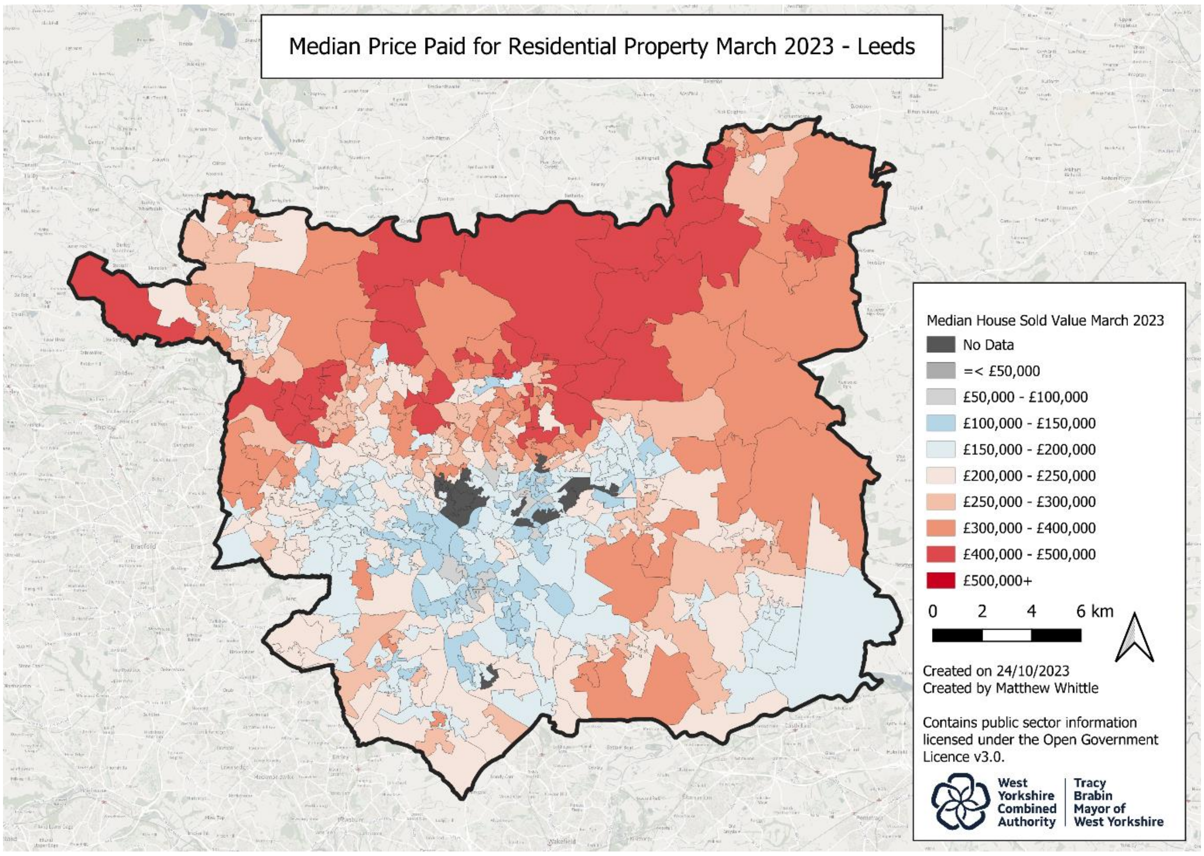
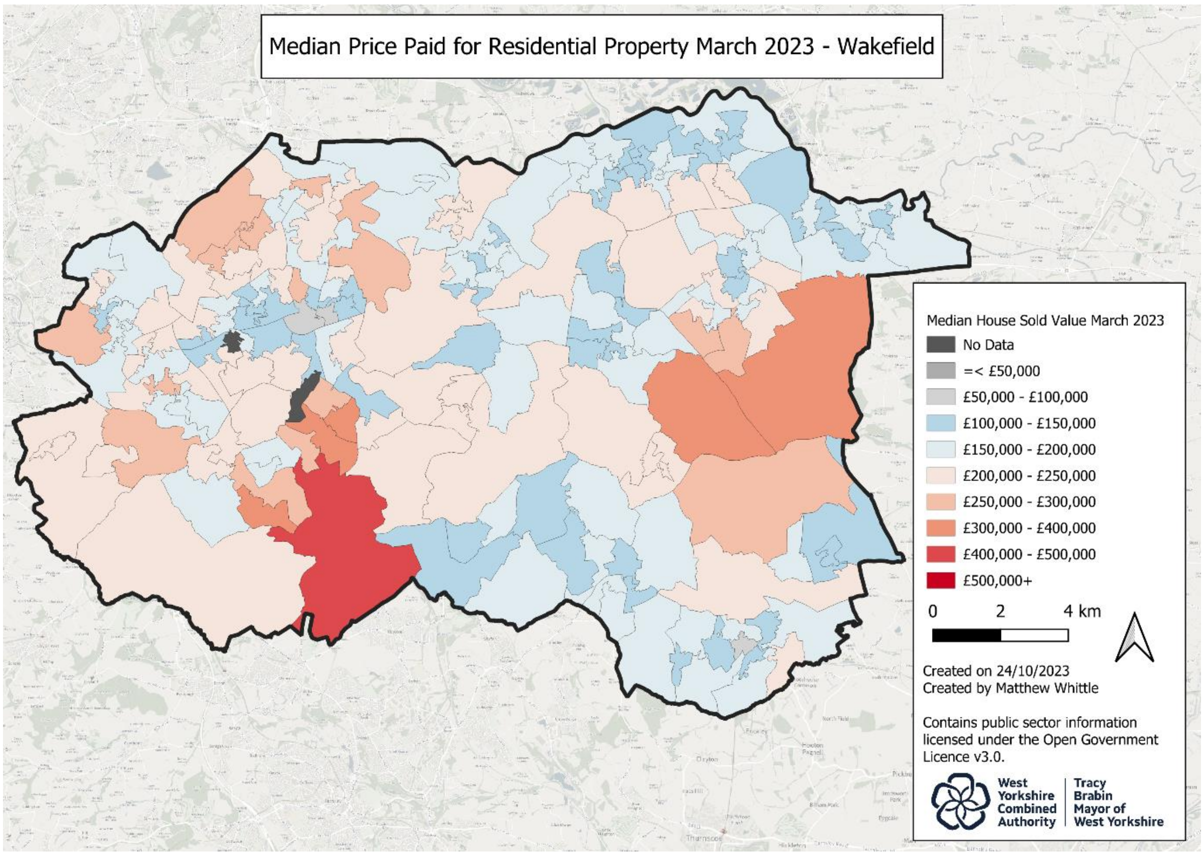


Figure 4.5. Wakefield



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