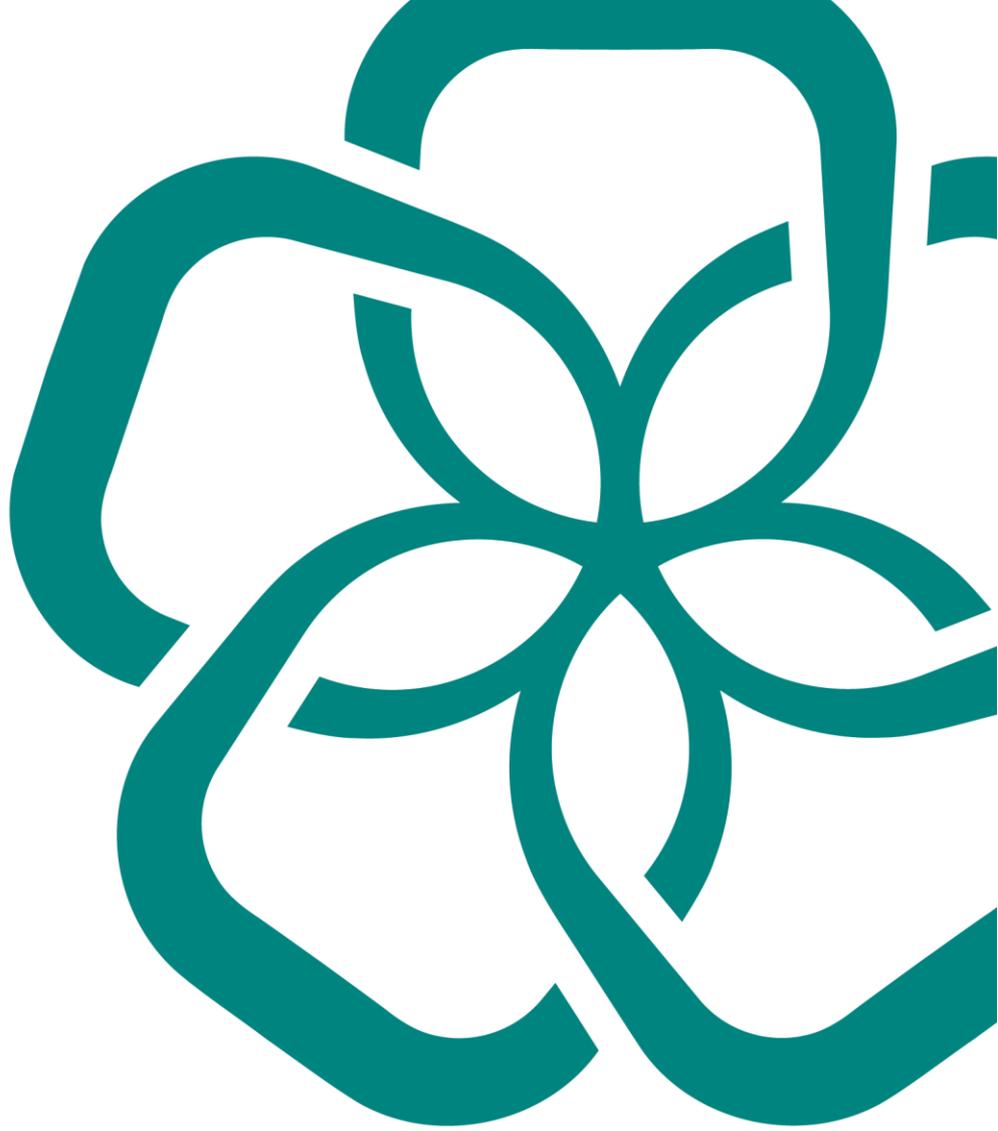




West  
Yorkshire  
Combined  
Authority

Tracy  
Brabin  
Mayor of  
West Yorkshire



# **West Yorkshire Housing Delivery: Annual Monitoring Report**

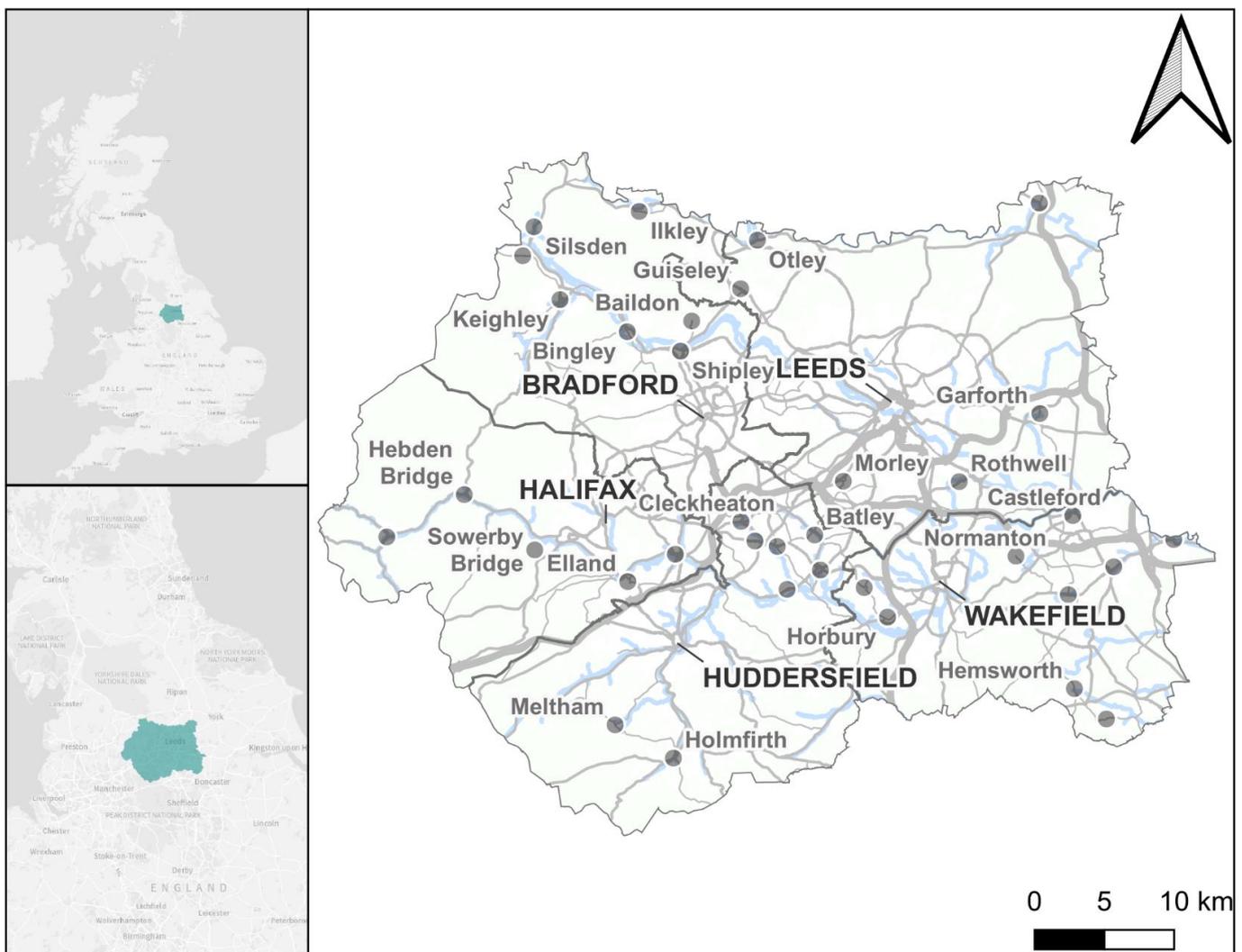
Covering the period from 1<sup>st</sup>  
April 2023 to 31<sup>st</sup> March 2024

February 2025

# 1. Introduction

- 1.1. This annual report provides housing delivery monitoring for the financial year 2023/24 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 and central government data. 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 and Wakefield.

**FIGURE 1** A map of West Yorkshire



## 2. Market Outcomes

2.1. This section briefly considers several key housing market outcomes, including the latest performance in 2023/24 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

### 2.3. House prices

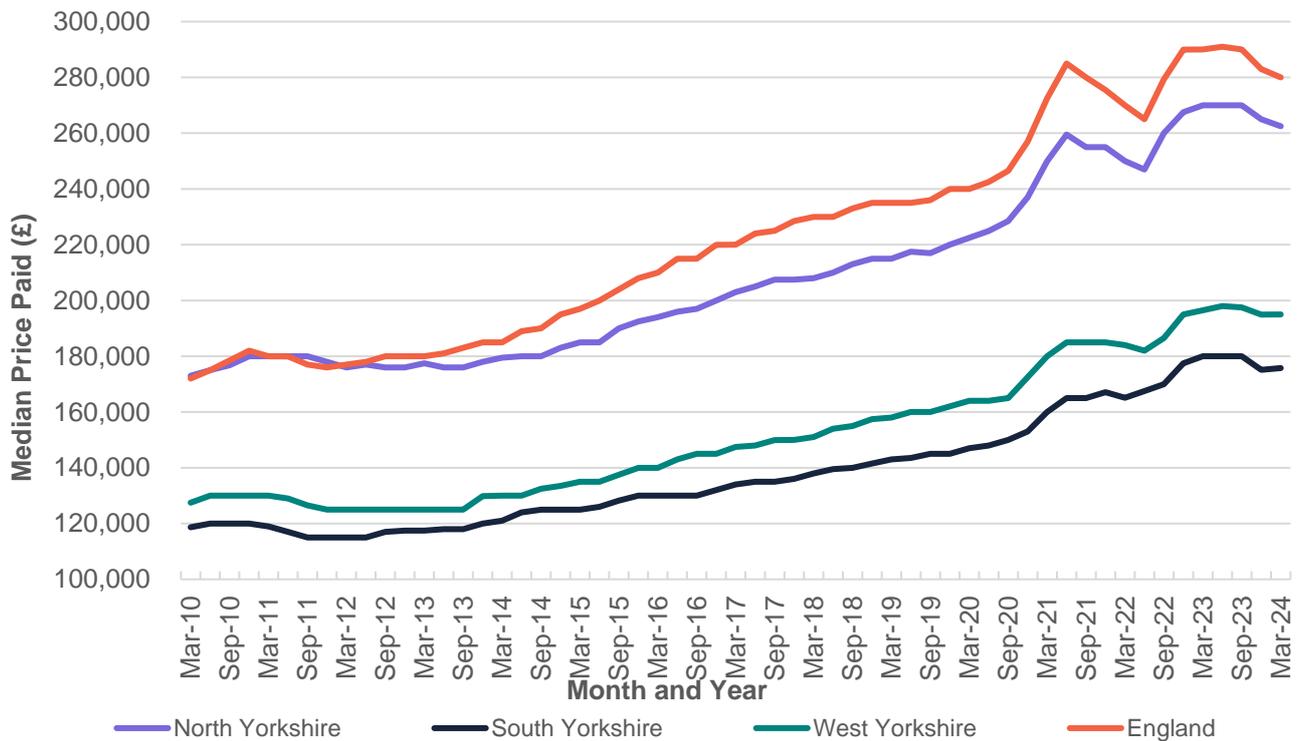
2.3.1. The latest available data reveals that the mean house price in West Yorkshire was £229,862, whilst the median house price was £195,000 for the year ending March 2024. Between March 2023 and March 2024, the median house price in England decreased by 3.4%, whilst the median house price in West Yorkshire decreased by 0.8%.

2.3.2. Comparisons between West Yorkshire and North and South Yorkshire reveal considerable differences in house prices (Figure 2); the median house price in West Yorkshire (£195,000) is lower than North Yorkshire (£262,500), but higher than South Yorkshire (£175,750).

2.3.3. The latest house price data for the year ending March 2024 shows that the median house price in England is £280,000, representing a 3.4% decrease from March 2023 (£283,000). In West Yorkshire, median house prices are significantly lower at £195,000 (Figure 2), with local prices ranging from £160,250 in Bradford to £230,998 in Leeds (Table 2.1). Over the past year, West Yorkshire's median house prices mirrored the downward trend in England, albeit to a lesser extent, with a 0.8% decline. However, there is notable variation within the region. Wakefield experienced the largest decrease (-5.1%), followed by Kirklees (-4.6%). In contrast, prices in Leeds saw only a slight reduction (-0.7%), and Calderdale's prices remained unchanged. These short-term changes should be considered within the context of longer-term trends. Nationally, median house prices in England have risen by 34% since 2016. In West Yorkshire, some areas have experienced substantial growth over this period. Leeds recorded the highest growth, with prices increasing by 46%. However, Bradford and Calderdale lagged behind the national average, with growth rates of 26% and 29%, respectively (Figure 3 and Figure 4).

## West Yorkshire Housing Delivery: Annual Monitoring Report

**FIGURE 2** A graph of median house prices (£) in West Yorkshire compared with North Yorkshire, South Yorkshire, and England from March 2010 to March 2024



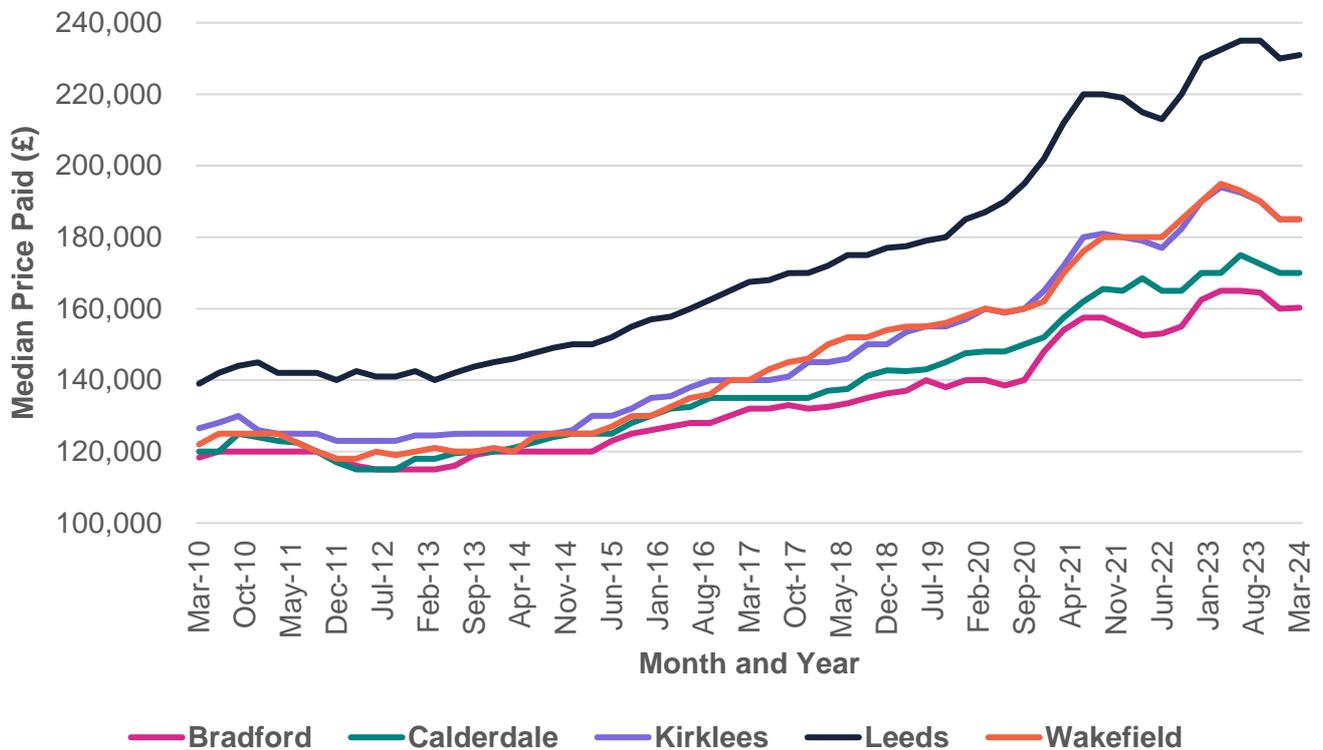
Source: ONS House Price Statistics for Small Areas

**FIGURE 3** A table of median house price growth in each district of West Yorkshire and England as a whole from 2016 to 2024

Region	2016 Price	2024 Price	Change
Bradford	£127,000	£160,250	+ 26%
Calderdale	£132,000	£170,000	+ 29%
Kirklees	£135,500	£185,000	+ 37%
Leeds	£157,950	£230,988	+ 46%
Wakefield	£132,500	£185,000	+ 40%
England	£215,000	£287,500	+ 34%

Source: ONS House Price Statistics for Small Areas

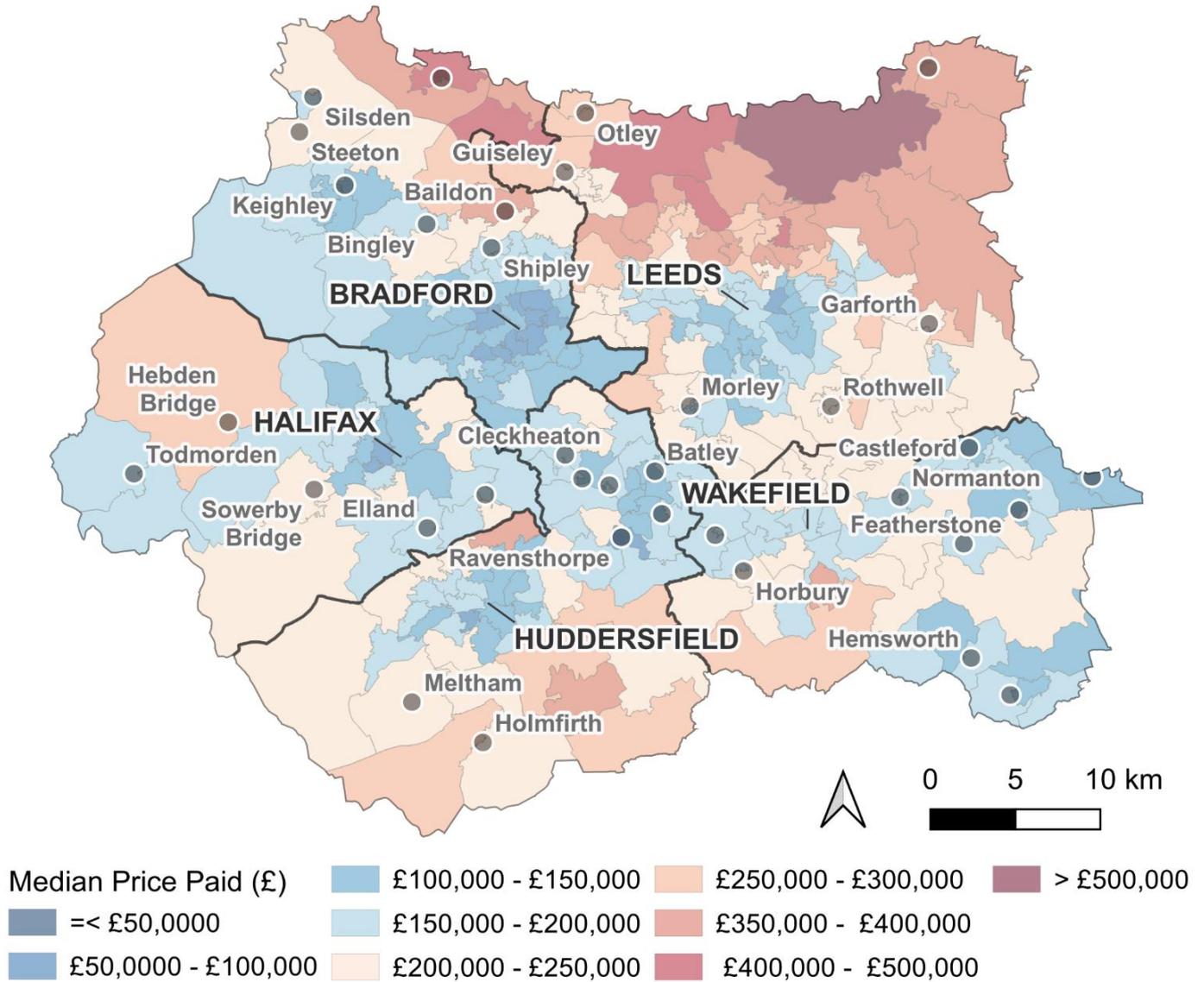
**FIGURE 4** A graph of median house prices (£) in each district of West Yorkshire from March 2010 to March 2023



Source: ONS House Price Statistics for Small Areas

2.3.4. The map in Figure 5 illustrates the spatial variation in median house prices for the year ending March 2024; house prices tend to be 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).

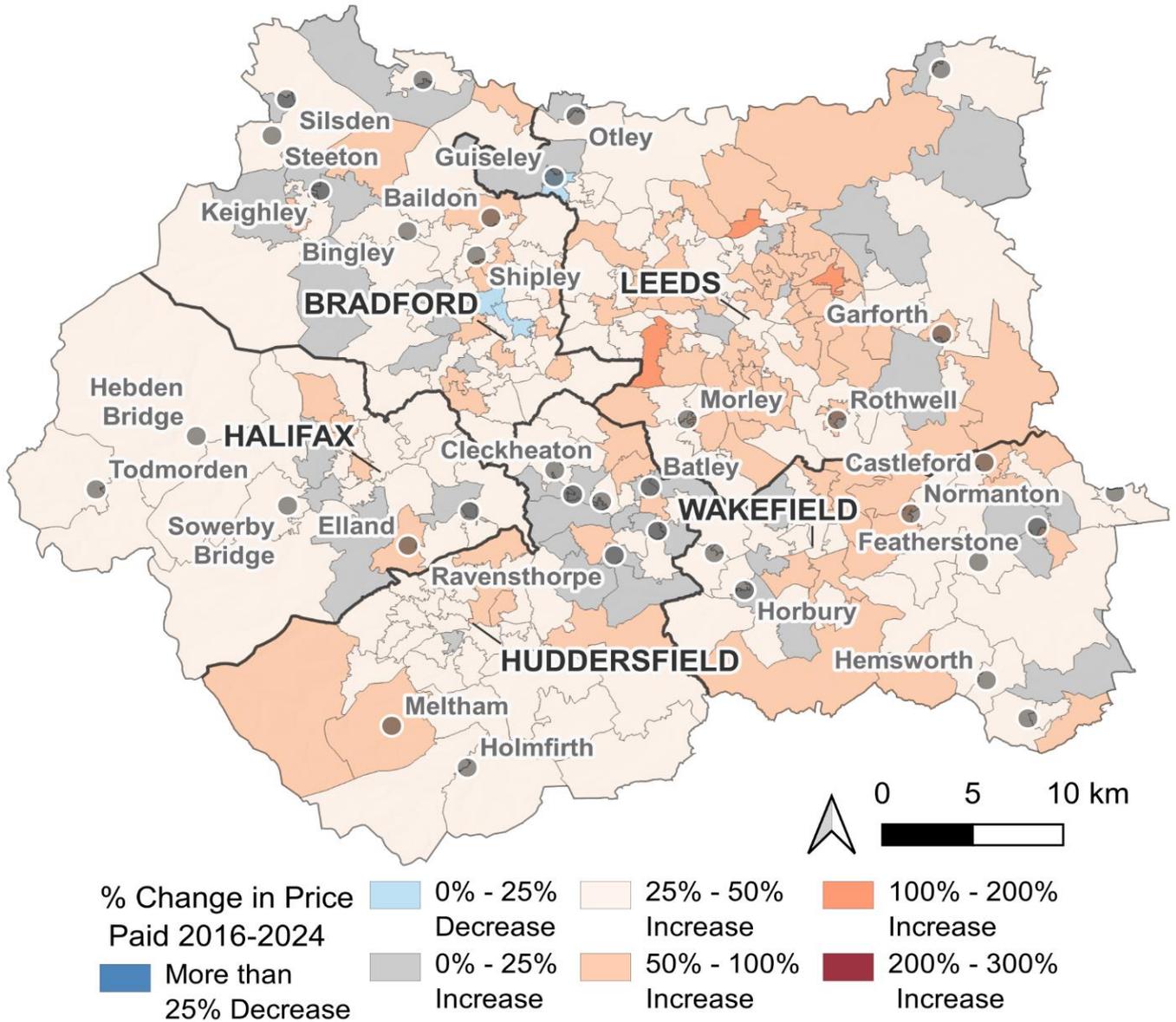
**FIGURE 5** A map of median house prices for reporting year 2023/24 in West Yorkshire at Middle Super Output Area (MSOA) level



Source: ONS House Price Statistics for Small Areas

- 2.3.5. Please see Appendix 1 for Local Authority specific plans, illustrating median price paid for residential properties in March 2024.
- 2.3.6. Figure 6 shows where house prices within West Yorkshire have changed in the past 8 years. Areas marked in blue have seen a decline in median house price, whilst red areas have seen an increase in median house price.

**FIGURE 6** A map of median house percentage growth at MSOA level for West Yorkshire from 2016 to 2024



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 (Middle Super Output Area), which means it's possible to provide a detailed picture of the real estate market in the local area.

**2.4. Rents**

2.4.1. Whilst house prices have decreased over the past 12 months, private sector rents have increased, with the highest rents in Leeds (£850 per month, Figure 7). Between 2023 and 2024, rents across England rose by 3%. All West Yorkshire districts

## West Yorkshire Housing Delivery: Annual Monitoring Report

experienced higher growth than England (Calderdale +7%, Kirklees +5%, Wakefield +9%, Bradford +3%, and Leeds +3%). Since 2016, rents in Leeds (+42%) and Kirklees (+32%) have risen the most, whilst all other districts in West Yorkshire are below median rent growth in England (+31%) during the same period (Calderdale +24%, Bradford +25%, and Wakefield +30%).

**FIGURE 8** A table of median private sector rent (£) in each district of West Yorkshire from 2016 to 2024

Region	2016	2017	2018	2019	2020	2021	2022	2023	2024
Bradford	475	495	495	500	500	525	575	575	595
Calderdale	475	495	495	495	495	500	525	550	590
Kirklees	475	495	495	500	500	525	525	595	625
Leeds	600	650	671	675	725	700	750	825	850
Wakefield	500	520	525	525	550	550	575	625	650

Source: ONS Private Rental Market Statistics

2.4.2. Data analysis conducted as part of the [West Yorkshire Housing Strategy](#) showed that 30% of households in the private rented sector could not afford median rent if their rent was increased to that level.

2.4.3. Rents in the social rented sector are regulated in accordance with the Rent Standard set by the Regulator of Social Housing. Median social sector rents are shown in Figure 9 and Figure 10 below.

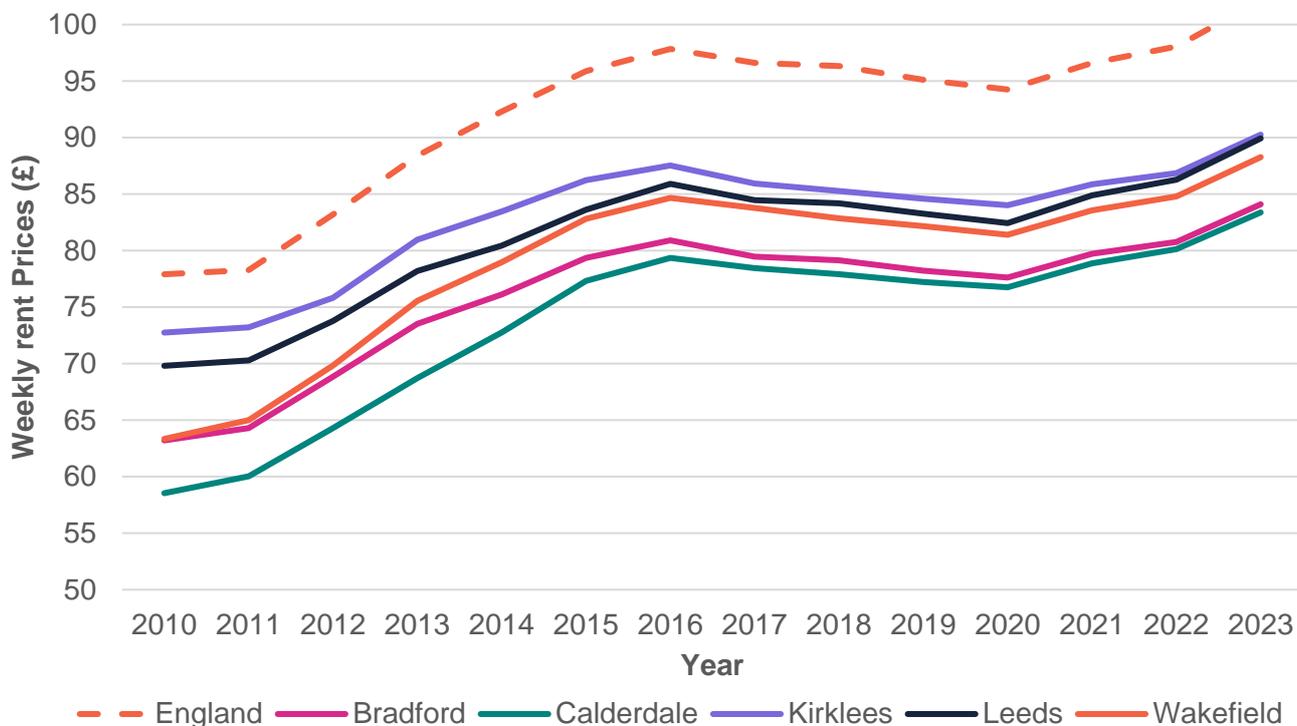
**FIGURE 8** A table of median local authority rent (£) in each district of West Yorkshire from 2016 to 2023

Region	2016	2017	2018	2019	2020	2021	2022	2023
Bradford	*	*	*	*	434	449	456	465
Calderdale	*	*	*	*	*	*	*	*
Kirklees	309	306	302	299	296	304	308	321
Leeds	330	315	315	312	312	321	325	339
Wakefield	*	*	*	*	*	*	*	*

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

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

**FIGURE 9** A graph of housing association rent (£) in each district of West Yorkshire and England as a whole from 2016 to 2023



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

### About the data

Private house rent data is collected by the Ministry of Housing, Communities and Local Government (MHCLG) 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.

## 2.5. Affordability

2.5.1. A common measure of housing affordability is the ratio of median house price to median income, where a higher ratio indicates less affordable housing. Lenders typically assess maximum mortgage affordability using an income [multiple of 4 to 4.5 times salary](#). Therefore, the higher the affordability ratio below, the higher the deposit and income requirement will be to purchase the median house.

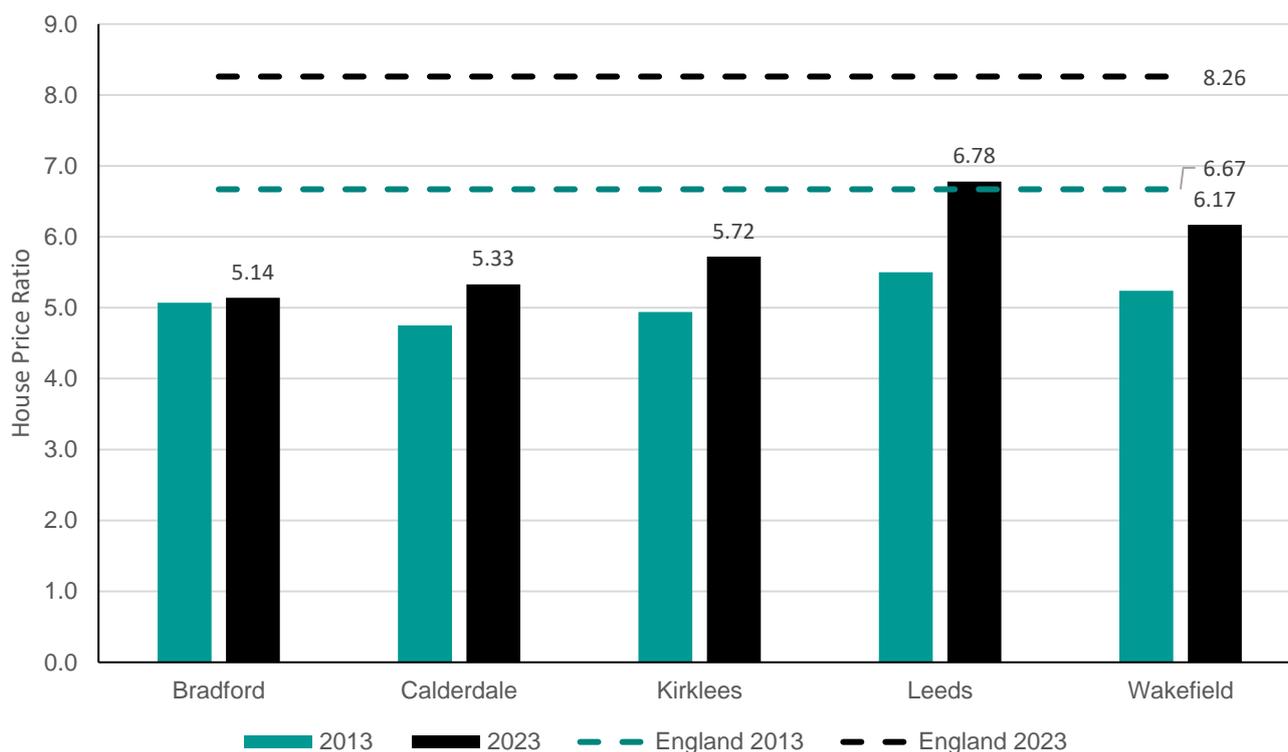
2.5.2. The issue of housing affordability is more complex than a simple house price to income/earnings ratio and there are challenges of affordability in West Yorkshire, particularly for households in poverty and newly-forming households, which are covered in more detail in the [Leeds City Region Housing Affordability and Need Study \(May 2020\)](#). In addition, the affordability ratio used here does not factor in

housing quality and condition, which impact on running costs. Lower overall house prices may also reflect a generally lower quality of housing stock.

2.5.3. Figure 10 shows the change in housing affordability over the last decade. The housing affordability ratio is a ratio of median house price to median residence-based annual wage. Data published by the ONS reveals that for the year ending September 2023, the median house price in England was 8.26 times the median wage of England, an increase from 6.76 over the last decade (2013, Figure 10), meaning that nationally, houses are now less affordable on average.

2.5.4. At the regional level there is considerable variation in house price affordability. Out of the 9 English regions, Yorkshire and the Humber had the third lowest housing affordability ratio in 2023 (6.08), behind the North West (6.05) and the North East (4.93). In contrast, the median house price in London was 12.66 times the median wage in 2023.

**FIGURE 10** A graph of the ratio of median house price to median annual residence-based wage in each district of West Yorkshire and England as a whole from 2013 to 2023



Source: ONS

2.5.5. In contrast to the national picture, the districts in West Yorkshire have a lower median house price affordability ratio. Both Bradford and Calderdale fall within the top 10% most affordable local authorities in England using the resident-based house price to income affordability ratio, with house prices 5.14 and 5.33 times median earnings respectively. For context, Burnley and Hyndburn in the North West have the lowest affordability ratios at Local Authority level, 3.39 and 3.92 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.

- 2.5.6. Over the last decade (2013–2023), 94.6% of local authority areas in England experienced rising affordability ratios. In West Yorkshire, Leeds recorded the largest increase, from 5.49 in 2013 to 6.78 in 2023. In contrast, Bradford’s ratio showed only a slight change, increasing from 5.07 to 5.14, driven by stronger wage growth relative to modest house price growth (Figure 11).

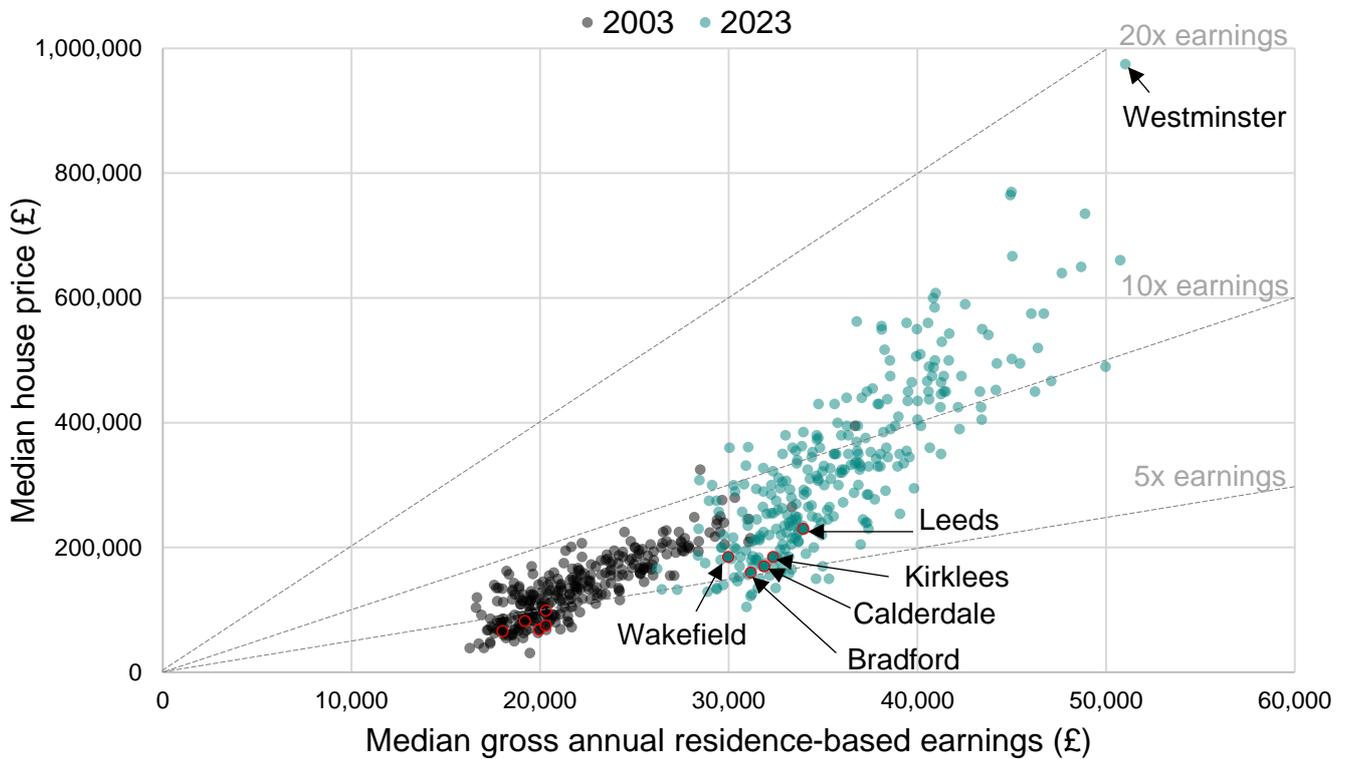
**FIGURE 11** A table of the ratio of median house price to median annual residence-based wage in each district of West Yorkshire and England as a whole from 2013 to 2023

Region	Median house price change	Median gross annual residence-based earnings change
Bradford	+ 34.5%	+ 32.7%
Calderdale	+ 41.7%	+ 26.1%
Kirklees	+ 48.0%	+ 27.9%
Leeds	+ 60.0%	+ 29.6%
Wakefield	+ 54.2%	+ 30.8%
England	+ 56.8%	+ 28.2%

Source: ONS

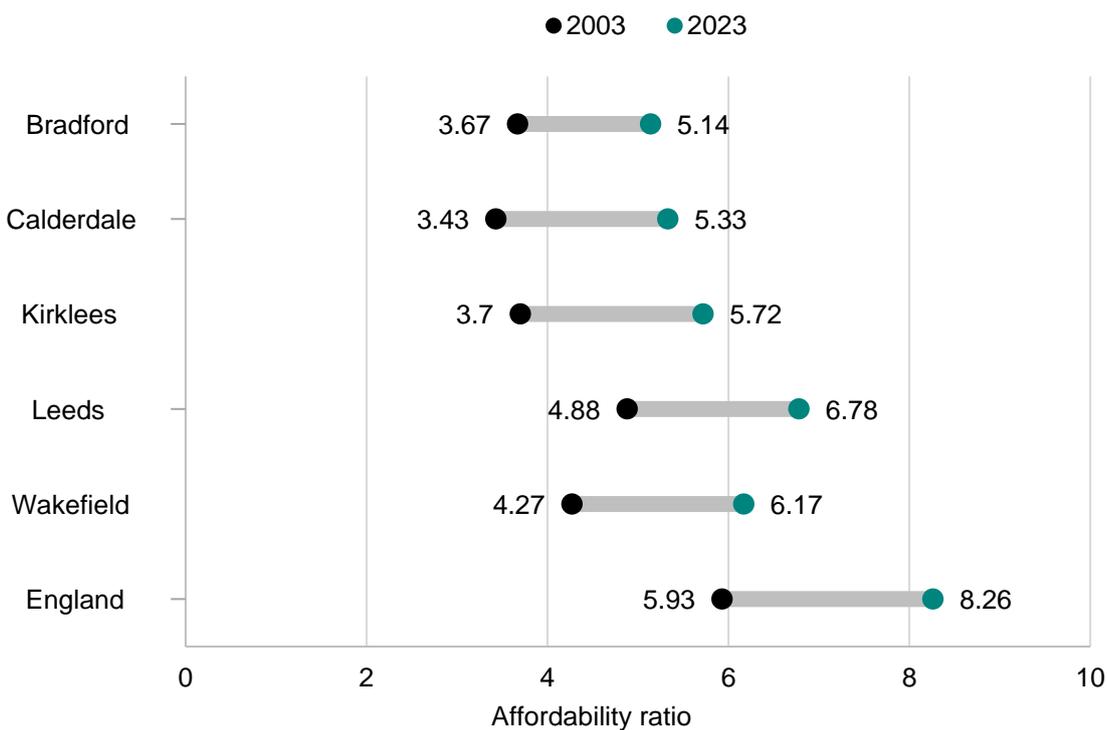
- 2.5.7. Over the last 20 years (2003–2023) for which data is available, affordability has worsened in every West Yorkshire local authority area, but the pace of change between the region and England is uneven (Figure 12). In England house price affordability increased from an average of 5.93 times median earnings in 2003, to 8.26 in 2023, whilst the magnitude of change was much lower in West Yorkshire (Figures 8 and 9). For example, in Bradford the affordability ratio increased from 3.67 to 5.14 over the last two decades. During this time, median earnings in Bradford increased by 73%, from £17,998 in 2003 to £31,153 in 2023.

**FIGURE 12** A graph of divergence in house prices showing median house prices compared with resident-based earnings at local authority level from 2003 to 2023



Source: ONS

**FIGURE 13** A graph of the change in house price affordability over the last 20 years showing median house prices compared with median residence-based annual wage at local authority level



Source: ONS

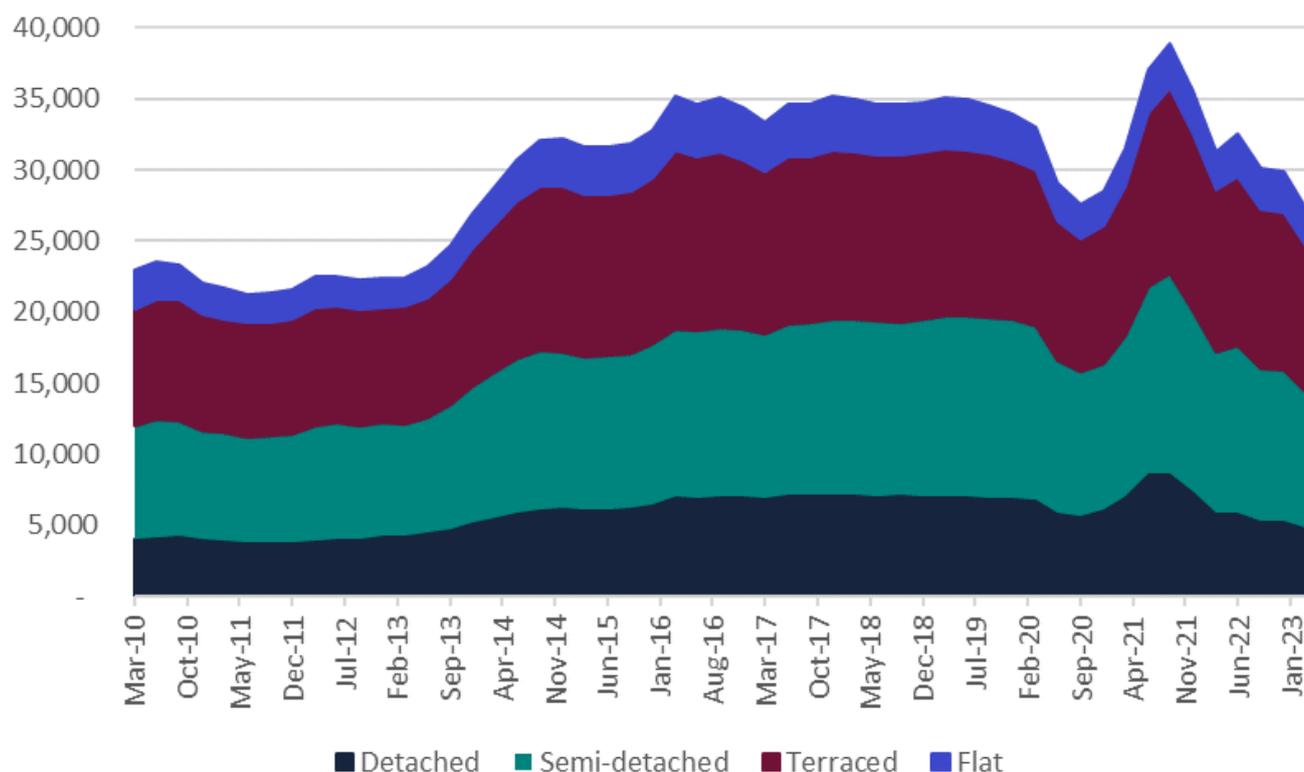
### About the data

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.

## 2.6. Residential sales and vacant housing

- 2.6.1. Figure 14 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.
- 2.6.2. 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.
- 2.6.3. 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 13) as persistently high interest rates and wider cost of living pressures have caused a squeeze on living standards. Changes to the volume of sales have also likely been impacted by wider fiscal policies, such as changes to stamp duty land taxes since 2021.

**FIGURE 14** A graph of West Yorkshire house sales by type from March 2010 to January 2023



Source: ONS housing statistics for small areas

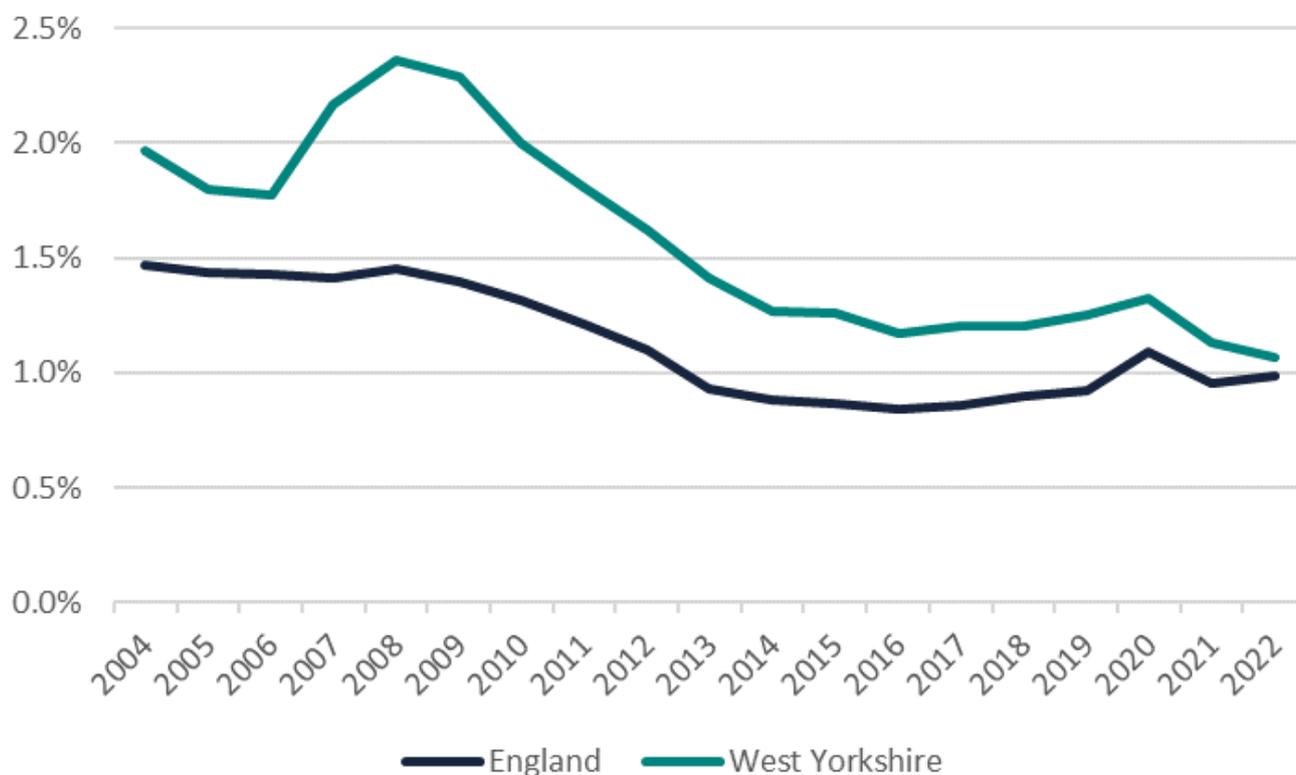
**FIGURE 15** A table of house sales in each district of West Yorkshire in reporting year 2022/23

Region	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

2.6.4. The proportionate share of vacant and long-term vacant properties across West Yorkshire has declined in the past decade (Figure 16), with the gap between West Yorkshire and England closing to the point that local levels are only 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 16** A graph of percentage long-term voids from 2004 to 2022



Source: MHCLG 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.

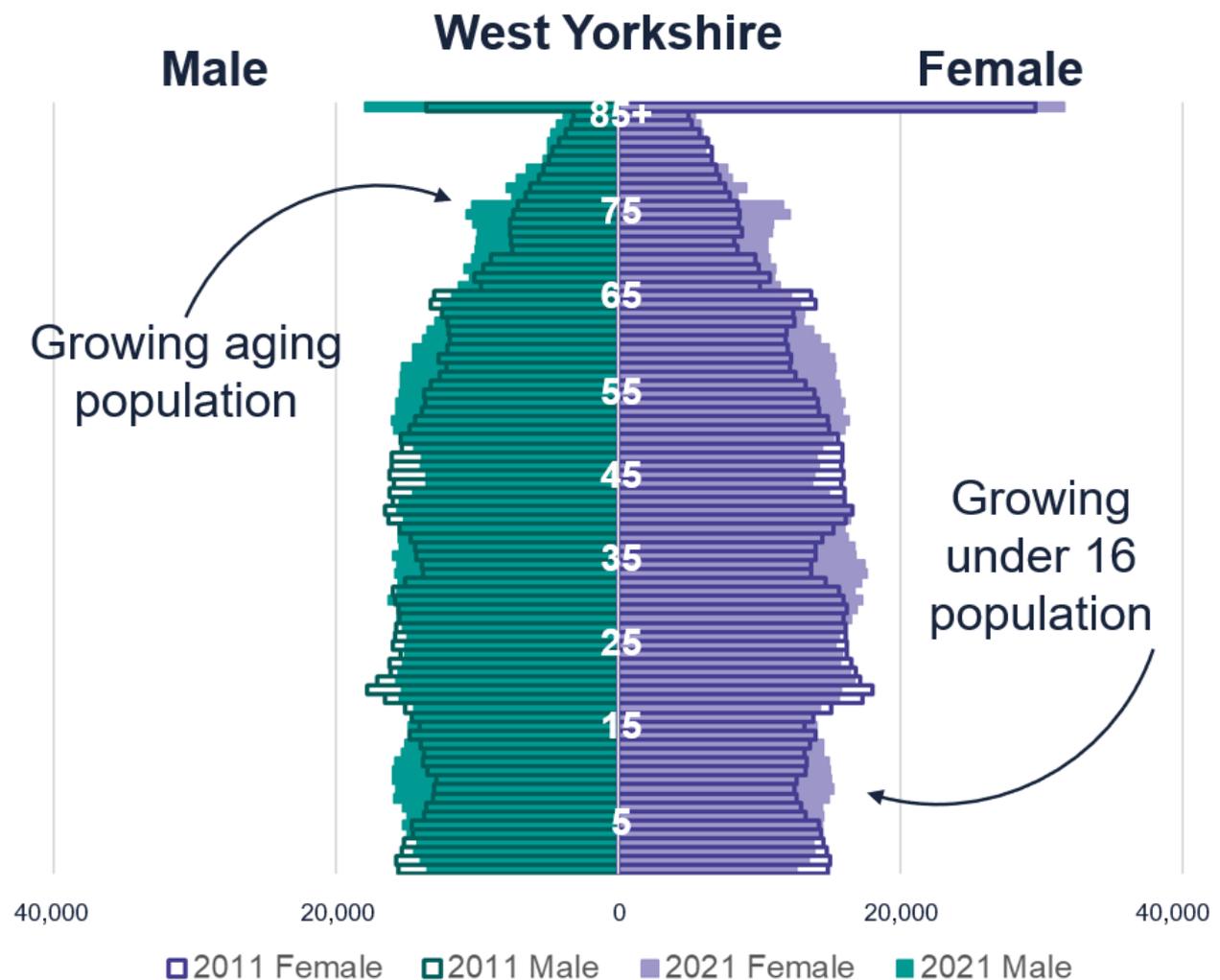
## 2.7. Demographic change

2.7.1. The last Census (2021) recorded 2.35 million people living in West Yorkshire, an increase of 5.6% since 2011. Whilst the population grew at a slower rate than England as a whole (6.6%) during that period, in absolute terms there are still 125,525 more people than a decade ago. Over the longer term, Census data reveals the West Yorkshire population has grown by 16% since 1981, that's 330,000 people, which is equivalent to 1.6 times Calderdale's current population. The main drivers of this change in the last decade have been increases through natural change (including an aging population) and international migration.

2.7.2. West Yorkshire has a population density of 1,159 people per km<sup>2</sup>, 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<sup>2</sup>, in contrast to Bradford which has the highest density of 1,491 people per km<sup>2</sup>.

2.7.3. One of the standout features of West Yorkshire’s population is its younger age profile (Figure 17). With 1 in 5 residents (20%) aged under 16, West Yorkshire surpasses the national figure of 18.6%. This youthful population is particularly prominent in Bradford, where 1 in 4 (25%) of the city’s residents are under 16, making it the second highest proportion of under-16s in all towns and cities in England and Wales, behind only Oldham.

**FIGURE 17** A graph of population in West Yorkshire by gender and age in 2011 and 2021



Source: ONS Census 2021

2.7.4. The under-16 population grew by 5.6% over the last decade (Figure 18), outpacing the national growth rate of 4.6%. Similarly, the under-19 population grew by 4.7%, compared to 3.3% for England as a whole. This reinforces the importance of continued investment in services for young people, including education and transport.

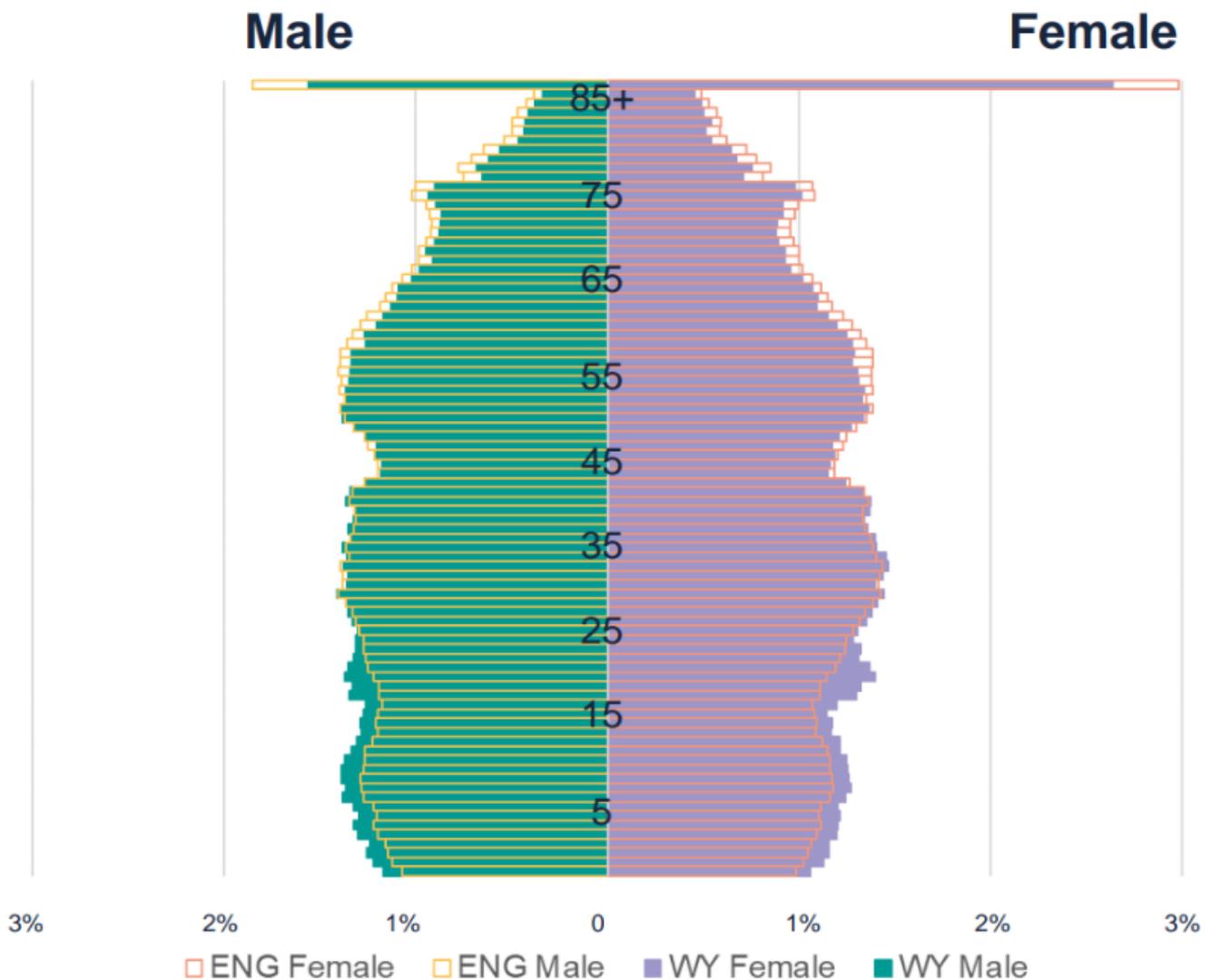
## West Yorkshire Housing Delivery: Annual Monitoring Report

**FIGURE 18** A graph of absolute and relative change in population for broad age groups for each district of West Yorkshire from 2011 to 2021

		Bradford	Calderdale	Kirklees	Leeds	Wakefield	West Yorkshire
Under 16	2021	124,837	39,994	86,944	153,480	65,827	471,082
	Change	2,506	-187	795	15,987	5,787	24,888
	% change	2.0%	-0.5%	0.9%	11.6%	9.6%	5.6%
Aged 16-64	2021	338,577	127,328	269,464	531,703	220,926	1,487,998
	Change	7,848	-3,845	-2,695	27,309	10,271	38,888
	% change	2.4%	-2.9%	-1.0%	5.4%	4.9%	2.7%
Aged 65+	2021	83,000	39,312	76,812	126,768	66,607	392,499
	Change	13,608	6,840	12,662	17,170	11,465	61,745
	% change	19.6%	21.1%	19.7%	15.7%	20.8%	18.7%

Source: ONS Census 2021

**FIGURE 19** A graph of population in West Yorkshire by gender and age in 2021



Source: ONS Census 2021

- 2.7.5. The region's older population is growing too; 1 in 6 (16.7%) of West Yorkshire residents are aged 65 and over, slightly below the national figure (18.4%), and this demographic group has increased by 18.7% over the last decade (20.1% nationally, Figure 18). The growing elderly population will require attention in terms of provision of care, housing adaptations, and public transport accessibility.
- 2.7.6. A simple way of summarising and comparing change to age structures between geographies is by examining the dependency ratio. 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 recipients of more 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. At the time of the last Census 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.

## 2.8. Summary

- 2.8.1. Over the past year, median house prices in West Yorkshire declined by 0.8%, significantly less than England overall, which decreased by 3.4%. Despite this decline, a significant gap persists between local and national house prices, as well as within West Yorkshire itself; for example, median house prices in Leeds are 44% higher than those in Bradford. As house prices represent a substantial component of household wealth, these disparities contribute to widening inequality both regionally and nationally.
- 2.8.2. With income lagging behind the pace of house price growth, nationally and locally properties continue to become less affordable; for the year ending September 2023, the median house price in England was 8.26 times the median wage of England, an increase from 6.76 over the last decade. In contrast to the national picture, West Yorkshire districts have a much lower median house price affordability ratio, with both Bradford and Calderdale falling within the top 10% most affordable local authorities in England. However, these ratios do not account for wider affordability factors, such as higher running costs resulting from the often older and less thermally efficient homes in these areas.
- 2.8.3. The housing market has faced additional pressures in recent years. Since the COVID-19 pandemic and the end of the stamp duty holiday in September 2021,

house sales volumes have declined, exacerbated by persistently high interest rates since early 2022. With the Bank of England increasing rates to control inflation, mortgage deals have become less attractive, squeezing living standards for both current and prospective homeowners.

- 2.8.4. While house price increases have softened slightly, private sector rents in 3 of the 5 West Yorkshire districts have grown faster than the England average (3%), adding further strain to household budgets amidst ongoing cost-of-living pressures.
- 2.8.5. Data from the 2021 Census provides 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 2023/24 may have changed from figures previously reported. This is due to updates provided by partner councils.

### 3.3. Housing delivery

3.3.1. Monitoring information for 2023/24 indicates that a total of 8,393 net additional dwellings were delivered across the West Yorkshire districts. This represents an increase on last year's 6,382 total and indicates a return to pre-pandemic net housing levels. Cumulative losses to the housing stock across West Yorkshire have decreased to 369, from 481 in 2022/23, but remain higher than the 269 seen in 2021/22. The 2023/24 net additional dwellings delivered is approximately 31% above the net housing delivered in 2022/23.

3.3.2. 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 at an average of c.7,000+ per year.

3.3.3. Net additions peaked at 9,262 in 2018/19, but subsequently declined 2019/20 and 2020/21 as a result of the COVID-19 pandemic.

3.3.4. In 2021/22, West Yorkshire saw an increase to 7,207, likely due to the backlog of houses due to be completed during the pandemic. In 2022/23, net additions decreased to 6,391, which may in part be explained by the significant inflationary pressures which saw materials and construction costs rise, leading to an impact on the pace of development nationally.

3.3.5. In 2023/24, net additions increased to 8,393. This is likely a result of the completion of the high number of housing starts seen in 2021/22 as developments that were delayed by the pandemic started on site as restrictions were eased.

**FIGURE 20** A table of net housing additions in each district of West Yorkshire in reporting year 2023/24

Region	Gross Losses	Net Total
Bradford	191	1,396
Calderdale	18	411
Kirklees	72	1,204
Leeds	13	4,327
Wakefield	75	1,055
West Yorkshire	369	8,393
WY 2022/23	481	6,382 <sup>^</sup>
WY 2021/22	269	7,207

<sup>^</sup> Amended from previous years

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

3.3.6. Table 3.2 illustrates net additional dwellings delivered across the West Yorkshire Local Authorities between 2014/15 and 2023/24. The data shows that over this ten-year period delivery of net dwellings across West Yorkshire peaked in 2018/19 (9,262 units). The 2023/24 period represents the second highest delivery over the last 10-year period. The 2014/15 period represents the weakest year of delivery at 5,230 units.

**FIGURE 21** A table of net housing additions in West Yorkshire from reporting year 2014/15 to reporting year 2023/24

Region	14/15	15/16	16/17	17/18	18/19	19/20	20/21	21/22	22/23	23/24
Bradford	1,134	1,338	1,489	1,621	1,614	1,010	522	1,325	1,044	1,396
Calderdale	319	340	301	301	557	348	269	443	332	411
Kirklees	666	1,142	983	1,330	1,550	1,131	1,021	704	985	1,204
Leeds	1,979	2,474	2,824	2,283	3,427	3,328	2,943	3,238	2,697	4,327
Wakefield	1,132	1,921	1,816	1,759	2,114	1,758	1,227	1,497	1,324	1,055
W. Yorks.	5,230	7,215	7,413	7,294	9,262	7,575	5,982	7,207	6,382 <sup>^</sup>	8,393

<sup>^</sup> Amended from previous years

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

### 3.4. Gross new build dwelling completions

- 3.4.1. Figure 22 shows that gross new build completions across West Yorkshire stood at 6,722 dwellings in 2023/24. This represents an increase from 6,028 dwellings in 2022/23 but is a decrease on the year prior in 2021/22, where the figure stood at 7,091 dwellings.
- 3.4.2. For 2023/24, 4,317 (64%) new build dwelling completions were on wholly Greenfield sites in West Yorkshire, while 2,405 (36%) were on wholly Brownfield sites. For 2022/23, 3,254 (54%) were on wholly Greenfield sites and 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.
- 3.4.3. For 2023/24, the highest number of gross new build dwelling completions took place in Leeds, totalling 3,492 (74% on Greenfield and 26% on Brownfield). In the same period, the lowest number took place in Calderdale, totalling 339 (33% on Greenfield and 67% on Brownfield). Leeds reported the highest proportion of gross new build dwelling completions on Greenfield, with 74% of the total 3,492 units.

**FIGURE 22** A table of gross new build dwelling completions in each district of West Yorkshire in reporting year 2023/24

Region	Greenfield	Brownfield	Mixed	Total
Bradford	393	583	0	976
Calderdale	113	226	0	339
Kirklees	669	320	0	989
Leeds	2,574	918	0	3,492
Wakefield	568	358	0	926
West Yorkshire	4,317	2,405	0	6,722
WY 2022/23	3,254	2,780	0	6,028
WY 2021/22	3,228	3,863	0	7,091

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

- 3.4.4. 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.

- 3.4.5. 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.

### 3.5. Completions by windfall

- 3.5.1. 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 2023/24, 2022/23, and 2021/22 indicate a significant proportion of windfall completions.

- 3.5.2. The period 2023/24 saw a 30% increase in the total number of windfall completions, with all districts, bar Calderdale, recording a higher number than the previous year.

**FIGURE 23** A table of completions by windfall in each district of West Yorkshire in reporting years 2021/22, 2022/23, and 2023/24

Region	2021/22	2022/23	2023/24
Bradford	690	660	801
Calderdale	286	188	187
Kirklees	357	347	464
Leeds	856	401	702
Wakefield	450	330	358
West Yorkshire	2,639	1,926	2,512

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

### 3.6. Net additional gypsy and traveller pitches

- 3.6.1. Monitoring information presented in Figure 24 shows that there were zero net additional gypsy and traveller pitches delivered in 2023/24. This represents a decline from 7 net additional pitches delivered in 2022/23.

**FIGURE 24** A table of completions by windfall in each district of West Yorkshire in reporting years 2021/22, 2022/23, and 2023/24

Region	2021/22	2022/23	2023/24
Bradford	0	0	0
Calderdale	0	0	0
Kirklees	0	0	0
Leeds	0	1	0
Wakefield	0	6	0
West Yorkshire	0	7	0

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

### 3.7. Gross affordable dwellings

3.7.1. Gross affordable housing<sup>1</sup> delivered in 2023/24 is recorded at 1,766. The 2023/24 figure is an increase of 337 compared to 2022/23 and 552 compared to 2021/22. Table 3.6 illustrates West Yorkshire LA's gross affordable housing delivery over the last 10 years has fluctuated between a high of 1,766 dwellings (this year – 2023/24) and a low of 840 dwellings (2017/18).

3.7.2. 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 central government funding support and other economic factors. Often, 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.

<sup>1</sup> 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

**FIGURE 25** A table of total affordable dwellings delivered in West Yorkshire from reporting year 2014/15 to reporting year 2023/24

Region	14/15	15/16	16/17	17/18	18/19	19/20	20/21	21/22	22/23	23/24
Bradford	258	92	194	274	267	228	110	149	235	286
Calderdale	53	13	64	22	55	79	29	103	106	69
Kirklees	180	155	121	100	118	178	93	120	126	325
Leeds	455	456	557	239	433	465	595	568	668	665
Wakefield	298	488	335	205	322	398	196	274	294	421
W. Yorks.	1,244	1,204	1,271	840	1,195	1,348	1,023	1,214	1,429	1,766

Please note that these figures may differ from Local Authority reports due to reporting differences with national data  
 Source: West Yorkshire Combined Authority Annual Monitoring Reports (various) and

### 3.8. Gross affordable dwellings delivered by land type

3.8.1. The data table below sets out the gross affordable dwellings delivered in 2023/24, 2022/23, and 2021/22 by land type. This shows that in 2023/24 approximately 29% (506 dwellings) of affordable housing was delivered on Greenfield land, and 44% (780 dwellings) on Brownfield land. Due to lack of data across a number of partner councils the comparison with previous years cannot be easily made.

**FIGURE 26** A table of total affordable dwellings delivered by land type in West Yorkshire in reporting years 2021/22, 2022/23, and 2023/24

Region	Greenfield	Brownfield	Mixed	Total
Bradford	49	164	0	286*
Calderdale	0	69	0	69*
Kirklees	N/A	N/A	0	325*
Leeds	256	409	0	665*
Wakefield	201	138	0	421*
West Yorkshire	506	780	0	1,766*
WY 2022/23	581	726	22	1,429*
WY 2021/22	312	177	0	1,214*

\* Please note that figures do not sum due to no data available for some partner councils

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

### 3.9. Gross affordable dwellings delivered by development type

3.9.1. Figure 27 provides the gross affordable dwellings delivered in 2023/24 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 23% of affordable dwellings delivered in 2023/24 were apartments and 77% were houses.

**FIGURE 27** A table of total affordable dwellings delivered by development type in West Yorkshire in reporting year 2023/24

Region	Apartments	Houses	Total
Bradford	0	213	286*
Calderdale	0	69	69*
Kirklees	N/A	N/A	325*
Leeds	256	409	665*
Wakefield	24	315	421*
West Yorkshire	280	1,006	1,766*
WY 2022/23	572	630	1,429*
WY 2021/22	36	453	1,214*

\* Please note that figures do not sum due to no data available for some partner councils

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

### 3.10. Gross affordable dwellings delivered by tenure type

3.10.1. Figure 28 provides the gross affordable dwellings delivered in 2023/24 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 68% (1,208 dwellings) in 2023/24.

**FIGURE 28** A table of total affordable dwellings delivered by tenure type in West Yorkshire in reporting year 2023/24

Region	Affordable Housing for Rent	First Homes	Discounted Market Sales Housing	Other Affordable Routes to Home Ownership	Total
Bradford	178	10	0	98	286
Calderdale	69	0	0	0	69
Kirklees	217	10	3	95	325
Leeds	511	10	0	144	665
Wakefield	233	6	0	182	421
W. Yorks.	1,208	36	3	519	1,766

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

### 3.11. Dwellings capacity with planning permission

3.11.1. As indicated in Figure 29, the capacity for new dwellings through extant unimplemented planning permissions across West Yorkshire stood at 49,174 as of 1 April 2024, a decrease from 56,592 on 1 April 2023, and 60,696 on 1 April 2022. Notably, this year's total represents the lowest capacity since the onset of the pandemic.

**FIGURE 29** A table of capacity for new dwellings with extant unimplemented planning permission\* in each district of West Yorkshire as of 1 April 2024

Region	Greenfield	Brownfield	Total
Bradford	N/A	N/A	N/A
Calderdale	954	2,215	3,169
Kirklees	3,189	3,968	7,157
Leeds	8,834	25,865	34,699
Wakefield	1,803	2,346	4,149
West Yorkshire	14,780	34,394	49,174
WY 2022/23	17,783	38,809	56,592
WY 2021/22	22,657	38,039	60,696

\* Please note that these figures do not include units where construction on site has begun

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

3.11.2. Figure 29 illustrates that the vast majority (70%) of the extant unimplemented planning permissions for housing are on Brownfield sites, and the overall number (34,394) has decreased slightly over the last 3 years.

# 4. Headline Conclusions

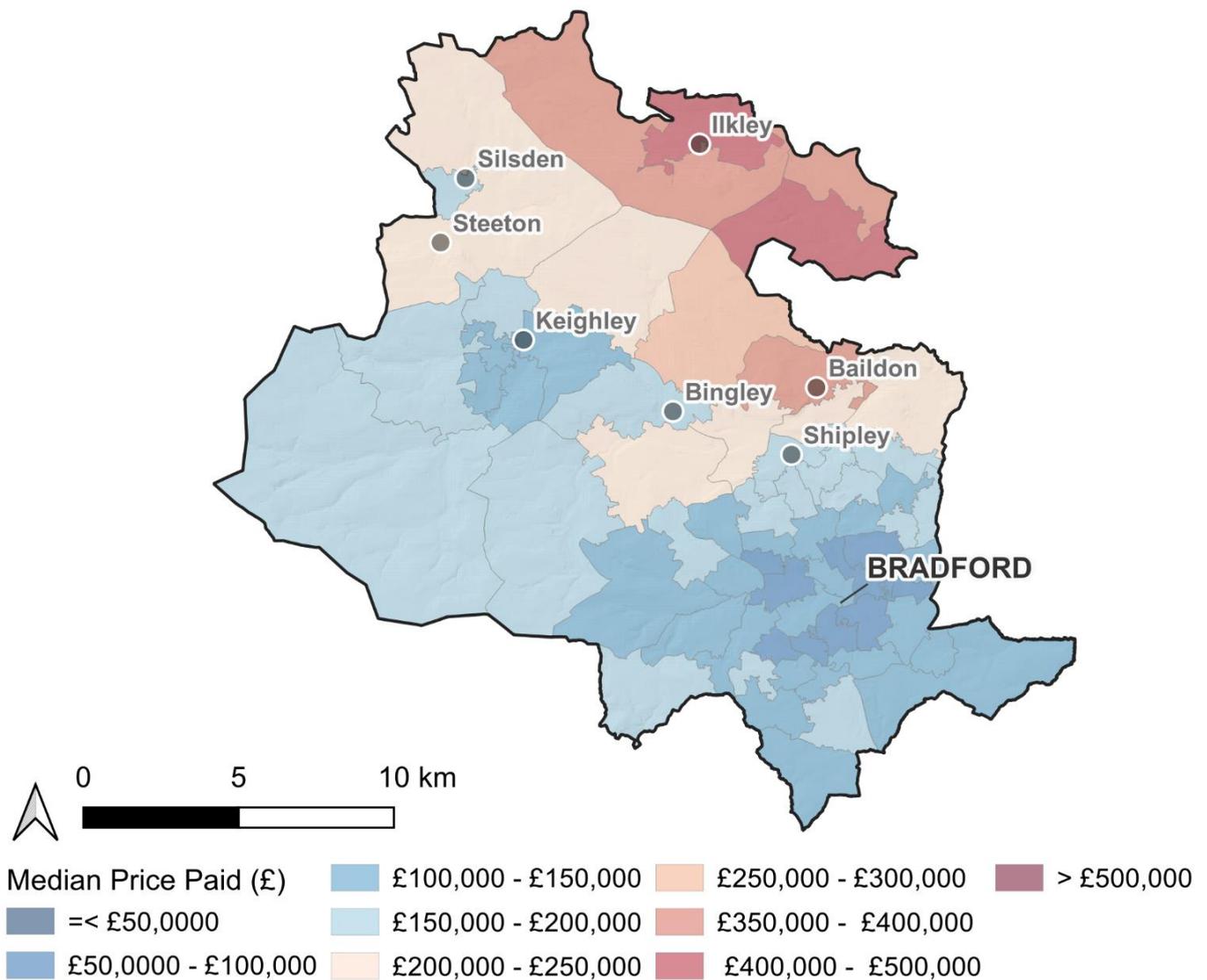
- 4.1. The latest data on West Yorkshire's housing market reveals a nuanced landscape shaped by diverse factors. Regionally, median house prices showed a smaller annual decrease than the national average between 2023 and 2024 (-0.8% vs -3.4% nationally). Nonetheless, affordability remains a challenge with affordability ratios worsening across all West Yorkshire district over the course of the past decade. These headline indicators also fail to capture wider affordability pressures faced by households in West Yorkshire, such as higher running costs caused by lower levels of thermal efficiency.
- 4.2. The local and national housing price gap has expanded, with West Yorkshire's house price now at 69% of the England average, down from 74% in 2010. Leeds has experienced faster growth than other areas of West Yorkshire, exemplifying the uneven spatial distribution of house price growth. For instance, the median house price in Bradford has fallen to 69% of that in Leeds from, down from 83% in 2010.
- 4.3. The aftermath of the COVID-19 pandemic, coupled with changes to stamp duty land tax relief has seen a decline in house sales volumes, both nationally and locally. Rising interest rates have further tightened living standards, impacting affordability for 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. Housing delivery across West Yorkshire has demonstrated a nuanced trajectory, marked by a notable increase of approximately 31% in net additional dwellings compared to the previous year. The total net additions for West Yorkshire districts amounted to 8,393, an increase from the 6,382 recorded in 2022/23, and the highest rate of delivery since 2018/19.
- 4.7. Analysis of net additional dwellings delivered across Local Authorities from 2013/14 to 2023/24 reveals a fluctuating pattern. While the peak of housing delivery was observed in 2018/19 with 9,262 units, recent years demonstrate a recovery from the lows seen in the immediate aftermath of the pandemic in 2020/21.

- 4.8. Cumulative losses to the housing stock were 369, a decrease from 481 the previous year, but challenges remain in sustaining consistent growth in net additional dwellings.
- 4.9. The proportion of new build dwelling completions in West Yorkshire on wholly Greenfield sites has increased to 64% in 2023/24 from 54% the previous year. In addition, 39% of affordable housing was developed on Greenfield. This shows a clear upwards trend from 45% total new builds on greenfield sites in 2021/22 and 42% in reporting year 2020/21.
- 4.10. However, the monitoring year 2023/24 saw the delivery of the highest number of affordable dwellings in recent years, with a total of 1,766. This supports Mayoral and West Yorkshire Combined Authority Housing priorities surrounding the delivery of affordable homes.
- 4.11. Capacity for new dwellings through extant unimplemented planning permissions across West Yorkshire saw a decline to 49,174 as of 1st April 2024, down from 56,592 in the previous year. This indicates reduced capacity for imminent development, which could impact on future delivery.

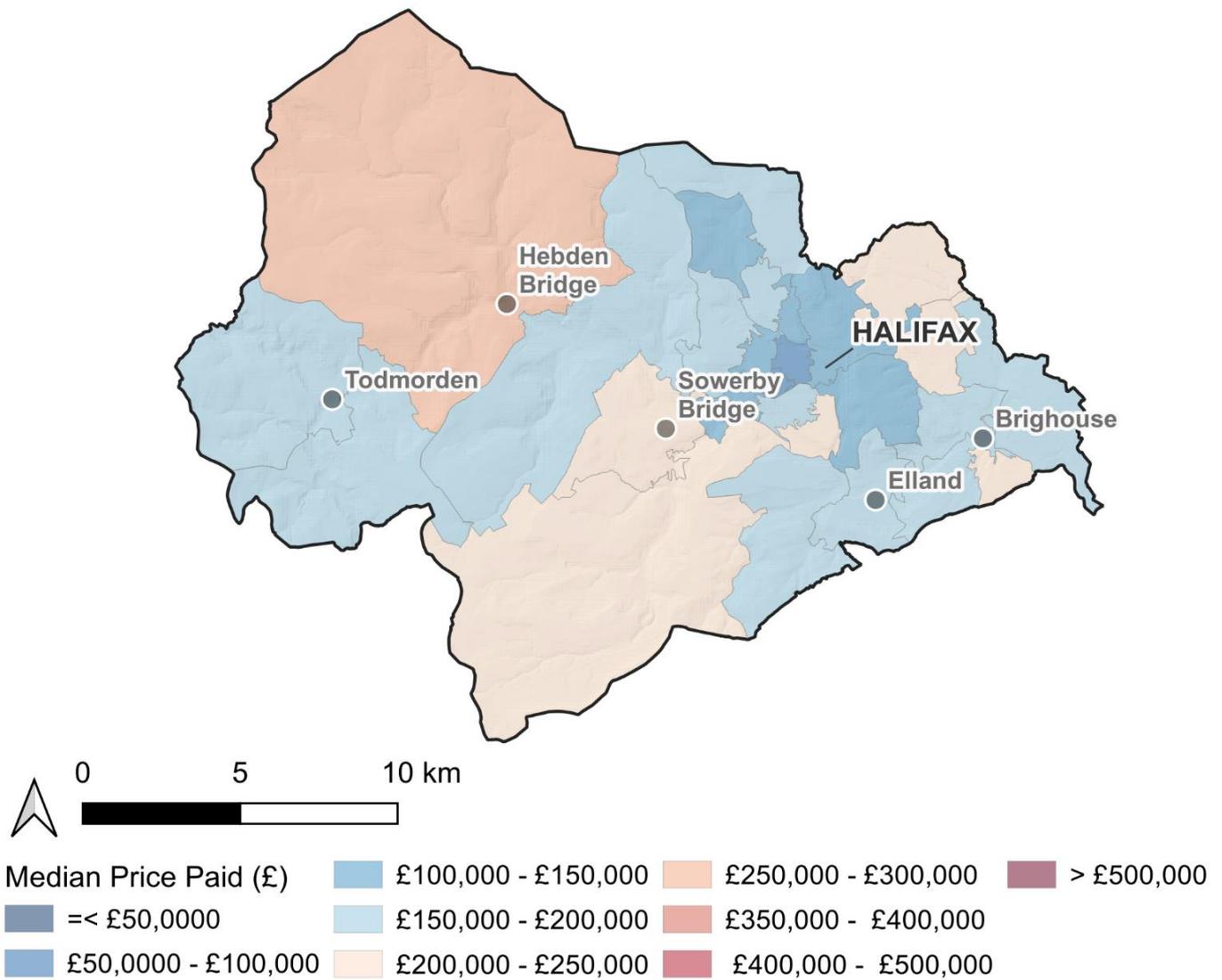
## 5. Appendices

5.1. Local authority specific plans, illustrating median price paid for residential properties in March 2024

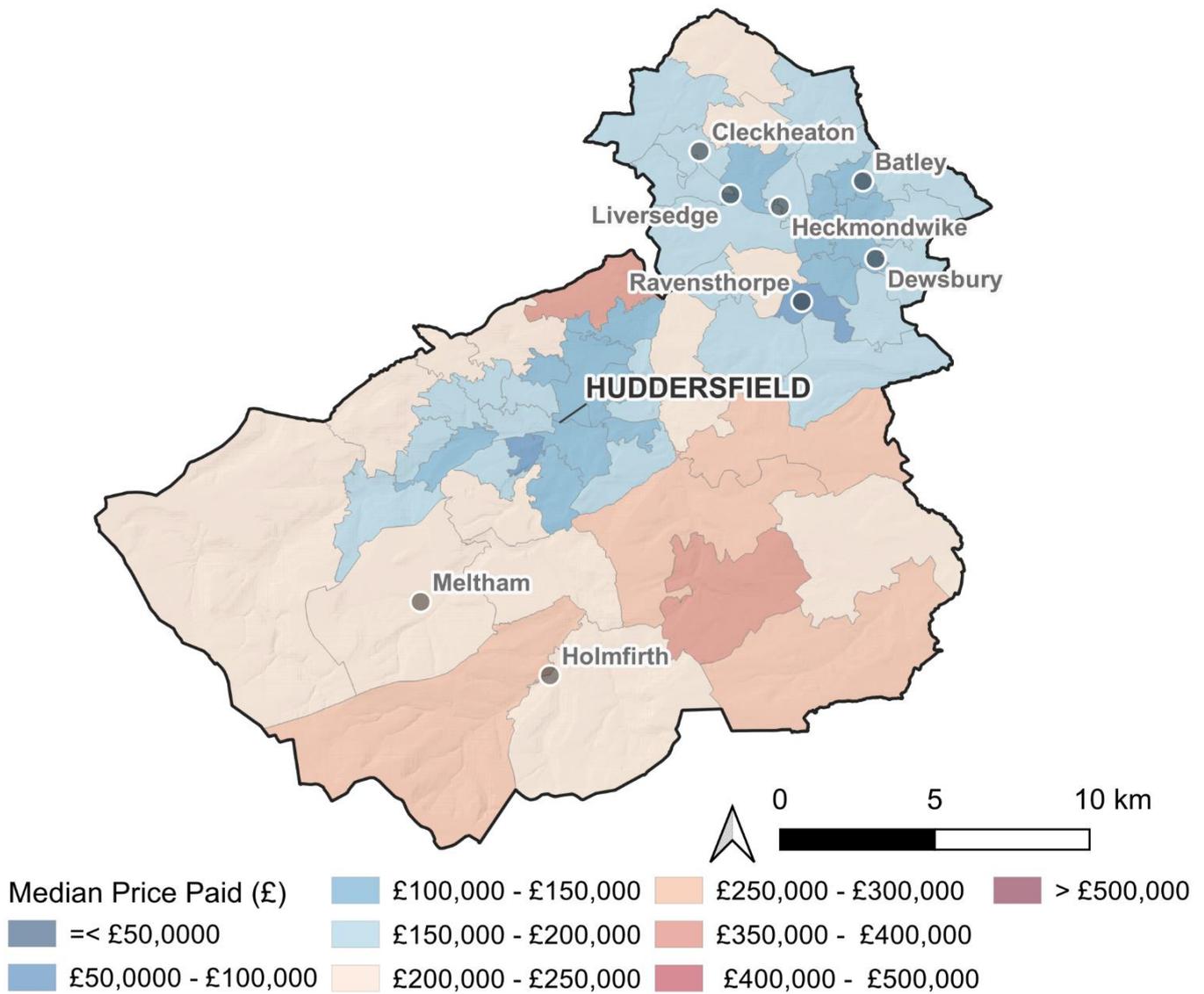
5.1.1. Bradford



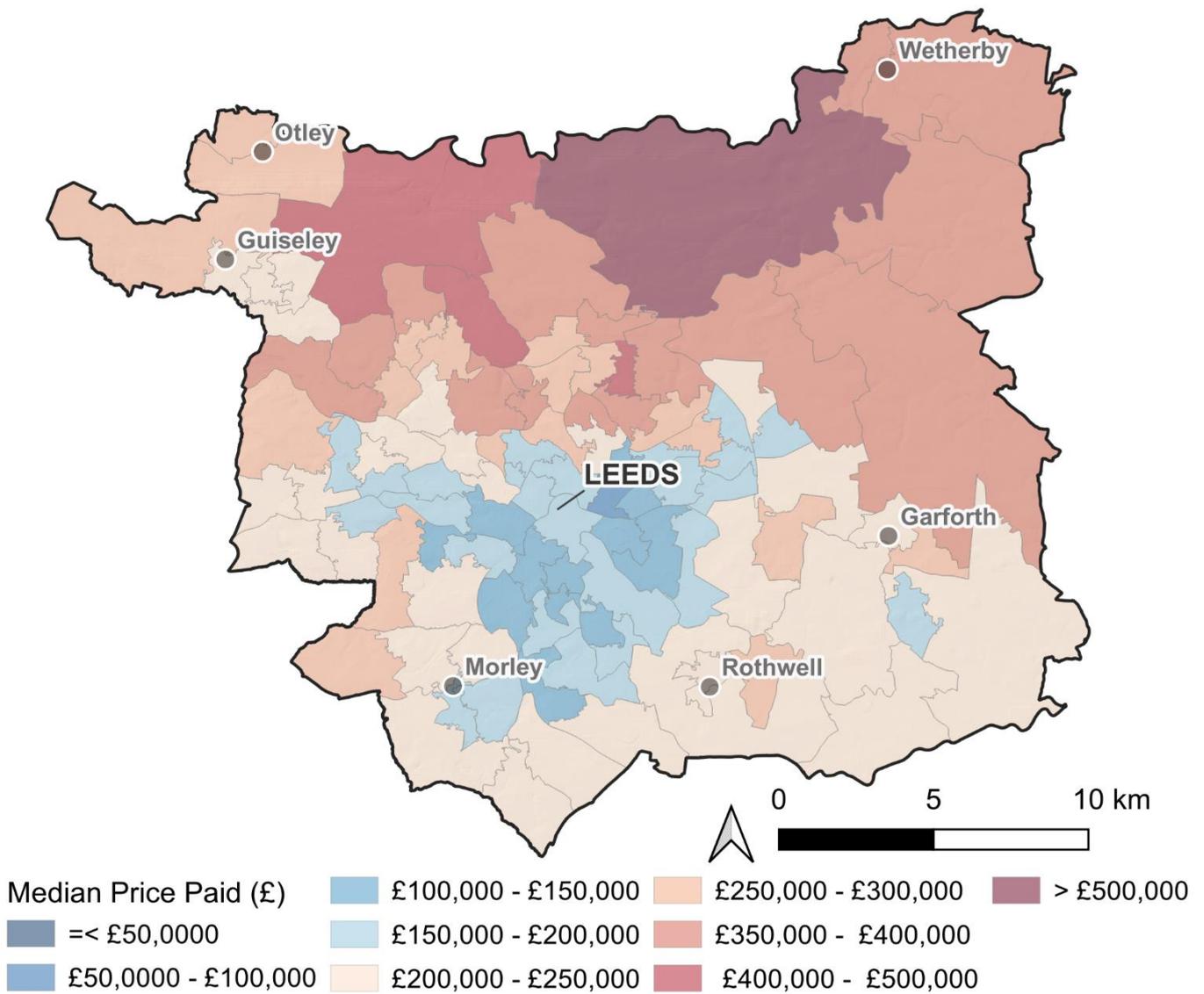
5.1.2. Calderdale



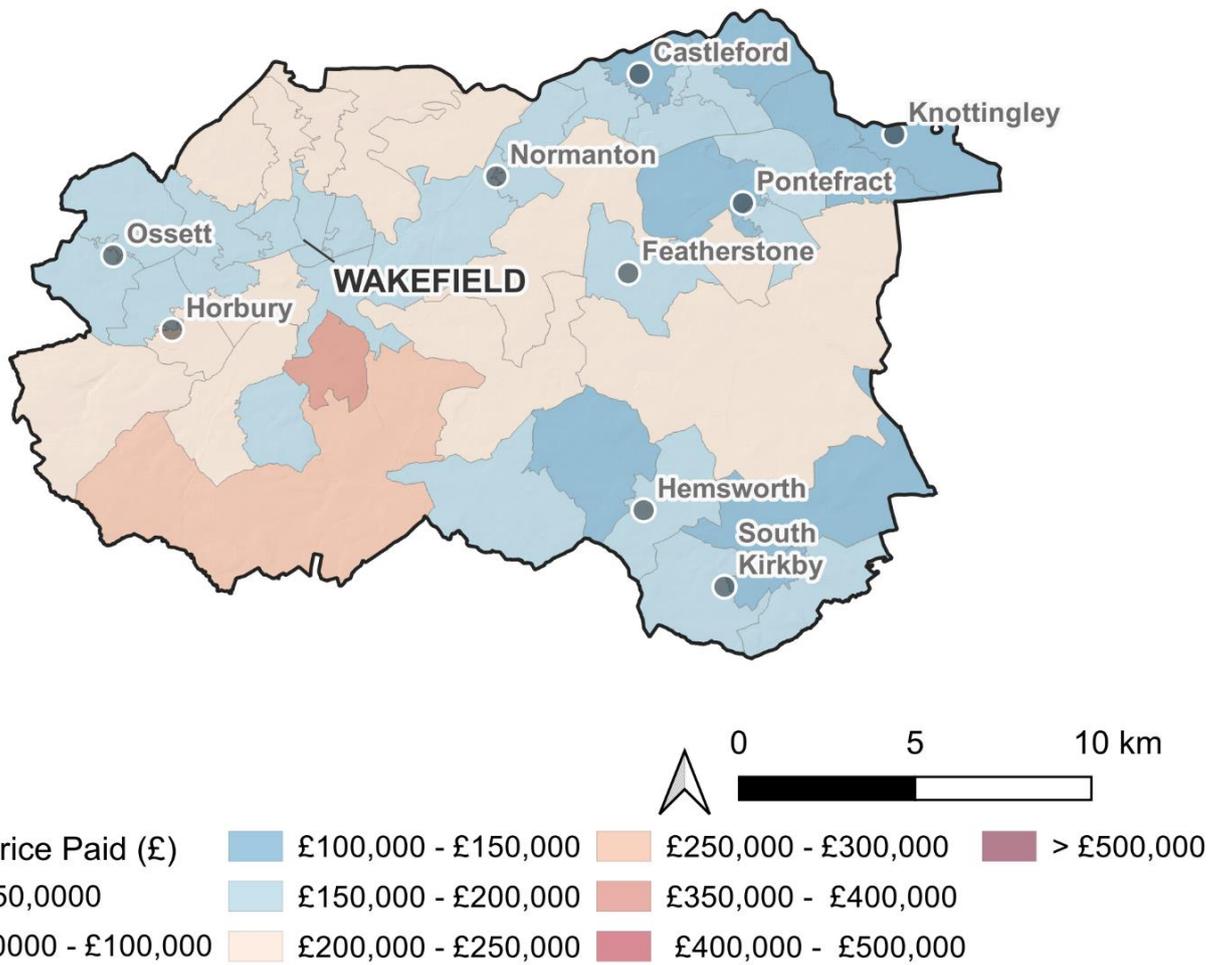
5.1.3. Kirklees



5.1.4. Leeds



5.1.5. Wakefield





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All information correct at time of writing