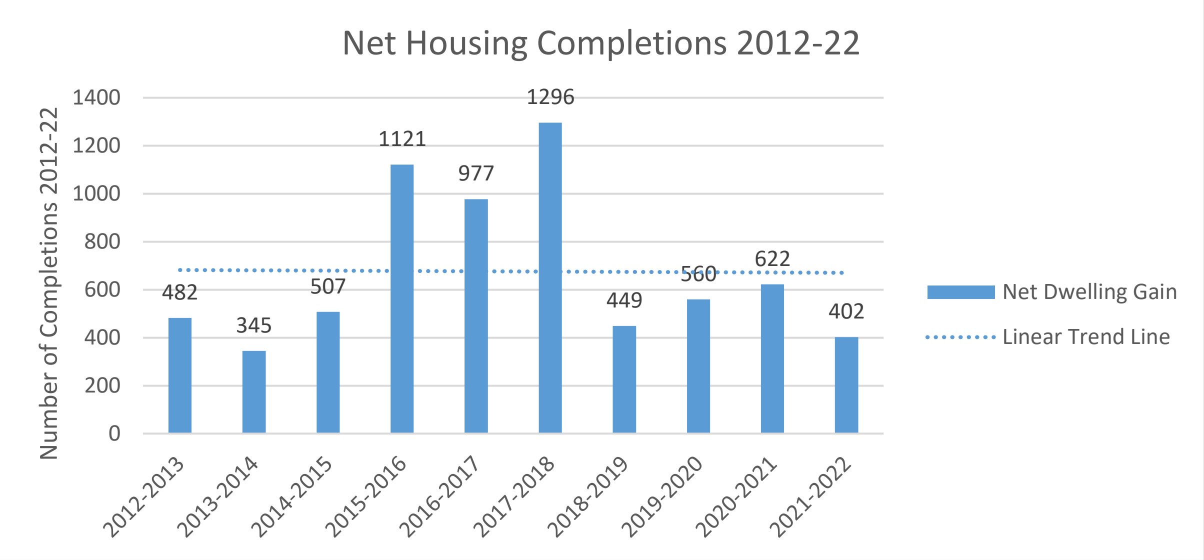
Figure 1: Historic Housing Completions



When adding a linear trend line for the period 2012/13 to 2021/22 Figure 1 indicates that housing completions in York have remained stable averaging 676.1 net additional homes per year over the ten-year period. Significant completion levels were experienced over the three-year period 2015/16 to 2017/18 when a net total of 3,394 homes were added to the housing stock. Completions for 2021/22 reversed an upward trend experienced during the previous three monitoring years and resulted in a total of 402 net additional homes. This fall in housing delivery can in no small part be attributed to the impact the recent pandemic has had on the housing market that is still recovering from new working practices and shortages in both the supply of materials and labour.

It should be noted that a number of equivalent homes resulting from development of communal establishments will be add to these figures when confirmed in our Housing Flows Reconciliation return later in the year. These will align with government approved ratios applied to completed care home and student halls of residence bed spaces carried out during the monitoring year[1].

[1] See the Housing Delivery Test Measurement Rulebook (paragraphs 10 & 11) for full details: https://www.gov.uk/government/publications/housing-delivery-test-measurement-rule-book/housing-delivery-test-measurement-rule-book

Figure 2: Historic Housing Completions by Type

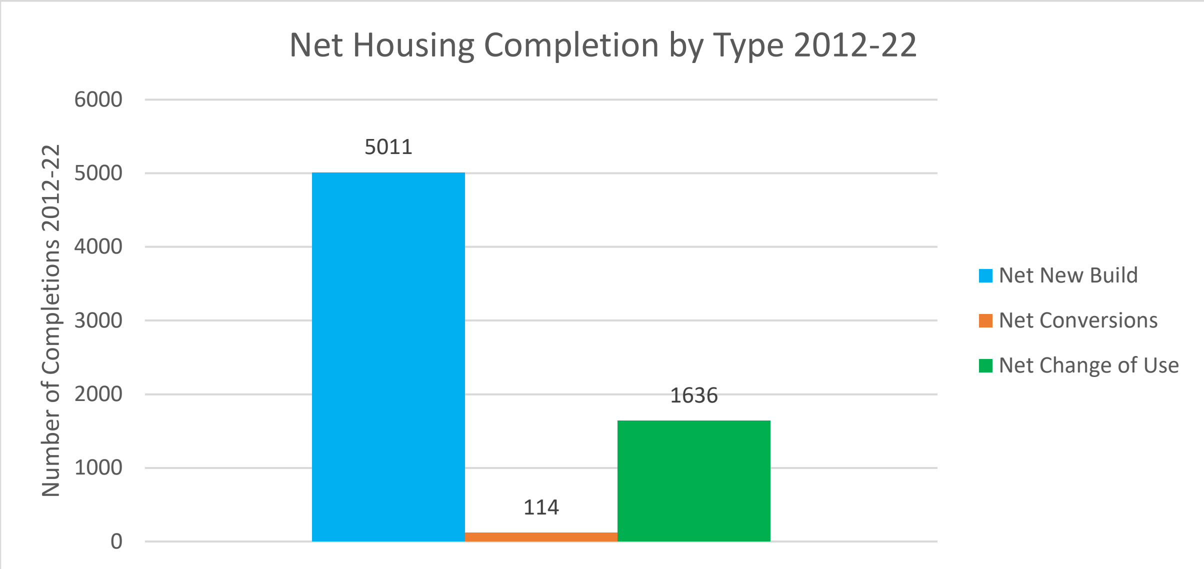


Figure 2 reveals that of the 6,761 net completions 5,011 (74.1%) were new build homes, whilst 1,636 (24.2%) resulted from changes of use from non-residential properties.

Figure 3: Development on Previously Developed Land

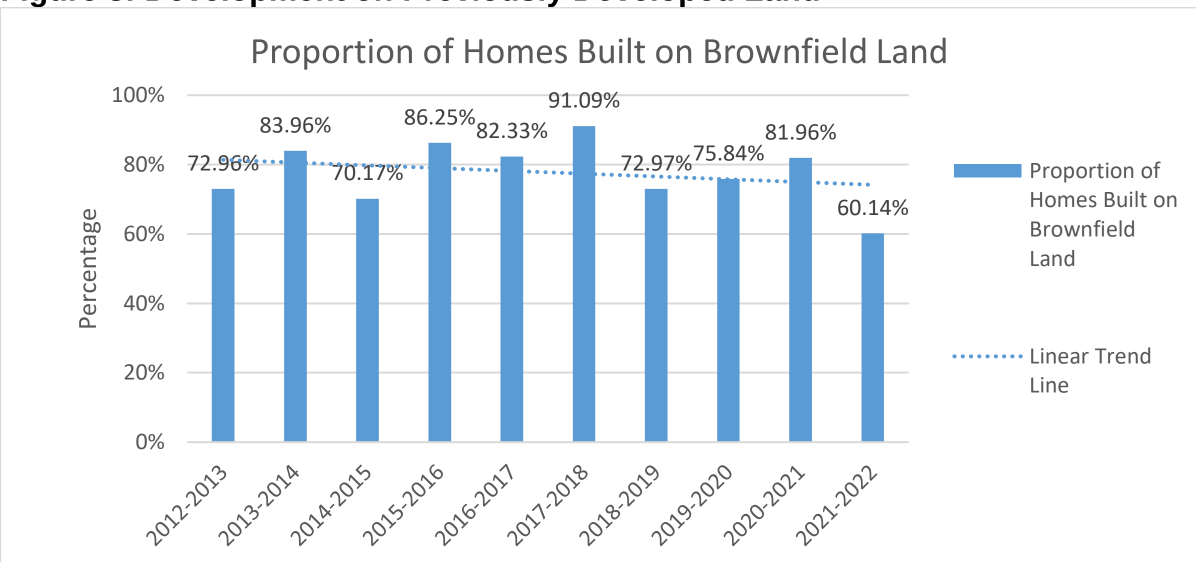
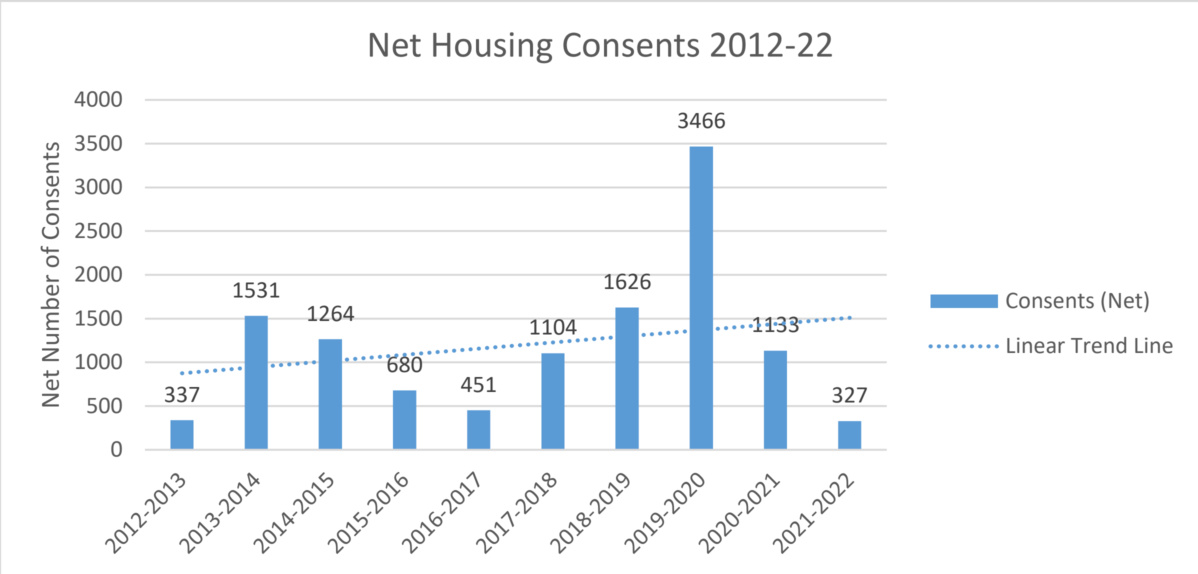


Figure 3 shows that over the previous 10-year period an average of 80.6% of all gross housing completions took place on brownfield land. The linear trend line reveals that there has been a slight decline in the figures during the monitoring period and can generally be attributed to large greenfield sites such as Germany Beck and ones identified through the Local Plan process including development at York St John University Playing Fields, Windmill Lane providing significant completions in recent years. Large brownfield sites such as the Former Nestle Factory site and York Central are programmed for future development. However, should our Local Plan be adopted following examination further greenfield sites have been identified as draft allocations and a trend of proportionately lower brownfield housing completions is likely to be experienced over future years if these sites are deemed appropriate for development.

Figure 4: Historic Housing Consents



An upward trend in housing consents can be seen in Figure 4 which highlights that a significant 3,466 net additional homes were approved in 2019/20 and a further 1,133 net homes in 2020/21. Whilst just 327 net additional homes were approved in 2021/22 a number of previously approved sites had their capacities reduced by an overall -128 net total following amendments to their layouts. Further, four sites had resolutions to grant approval subject to legal agreements for a net additional total of 247 homes during the twelve-month monitoring period and these sites are anticipated to be included within consents for 2022/23.

Previous analysis of housing permissions suggests that up to 10% of all consents will not be implemented. With more than to 88.4% of all commitments being on brownfield sites that often require remediation and potential infrastructure delays this indicates a phased future housing supply rather than an immediate increase to housing completions. However, with net unimplemented consents remaining high together with the prospect of the adoption of the Local Plan in the near future that would bring forward identified sites for development there is much room for optimism in our future housing supply meeting the requirement.

Figure 5: Net Unimplemented Consents each 1st April.

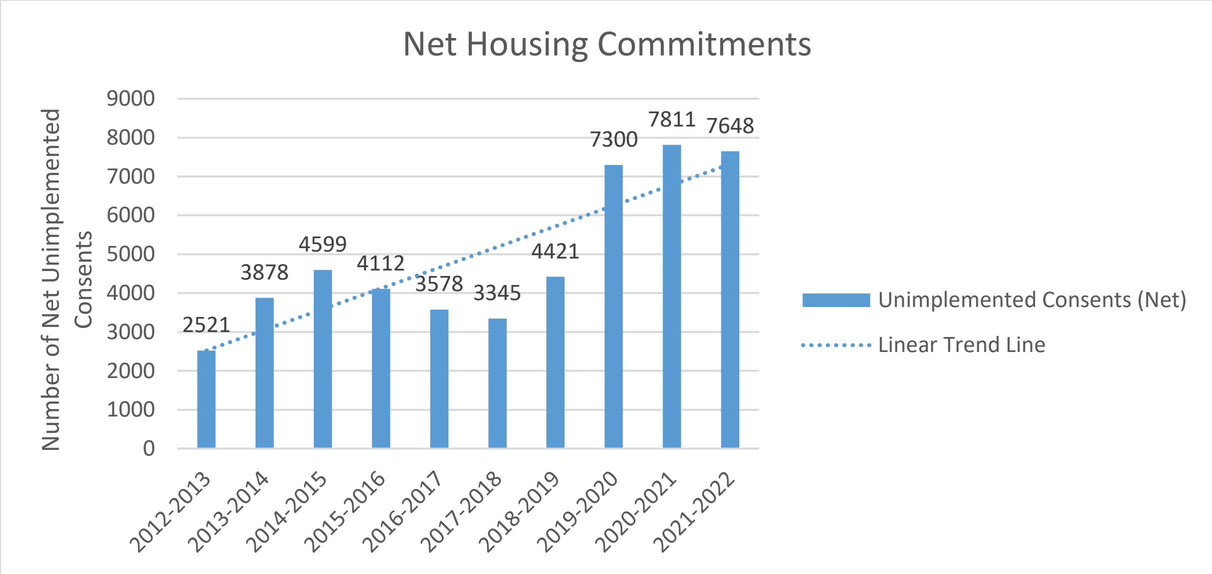
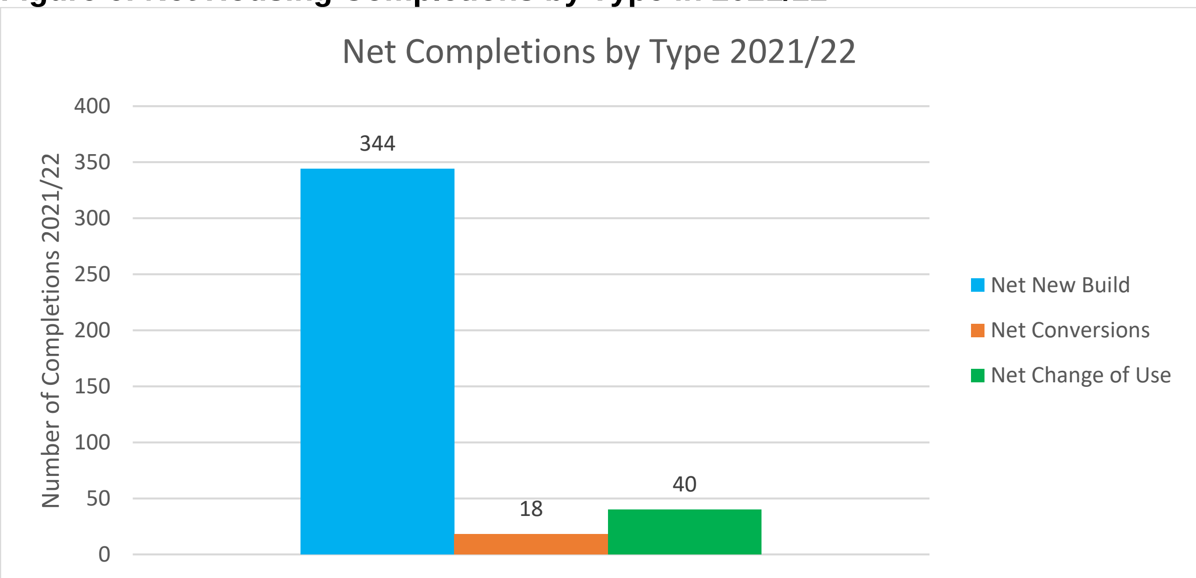


Figure 5 indicates the level of net unimplemented consents on 1st April each year for the past 10 years. The linear trend line shows that there has been a general increase in housing commitments (consented and extant applications) over the monitoring period. On 1st April 2022 a total of 7,648 net additional homes had gained approval and under normal circumstances this should indicate a healthy level of consents to be confident of sustained housing growth in future years. However, new working practices and the economic realities of Brexit, Covid-19 and the conflict in Ukraine may suppress this optimism and the future monitoring of housing commitments and delivery will help to determine the impact these factors have on the housing development industry in future years.

Housing Completions 2021/22

Figure 6: Net Housing Completions by Type in 2021/22



Net housing completions in 2021/22 are separated into the various completion categories in Figure 6, above. Of the 402 net completions 85.6% were new build, whilst 10% were through changes of use. For a full breakdown of both completions and consents please view our 2021/22 housing monitoring update.

Figure 7: 2021/22 Net Housing Completions Split into Site Capacity and by Brownfield/Greenfield Land

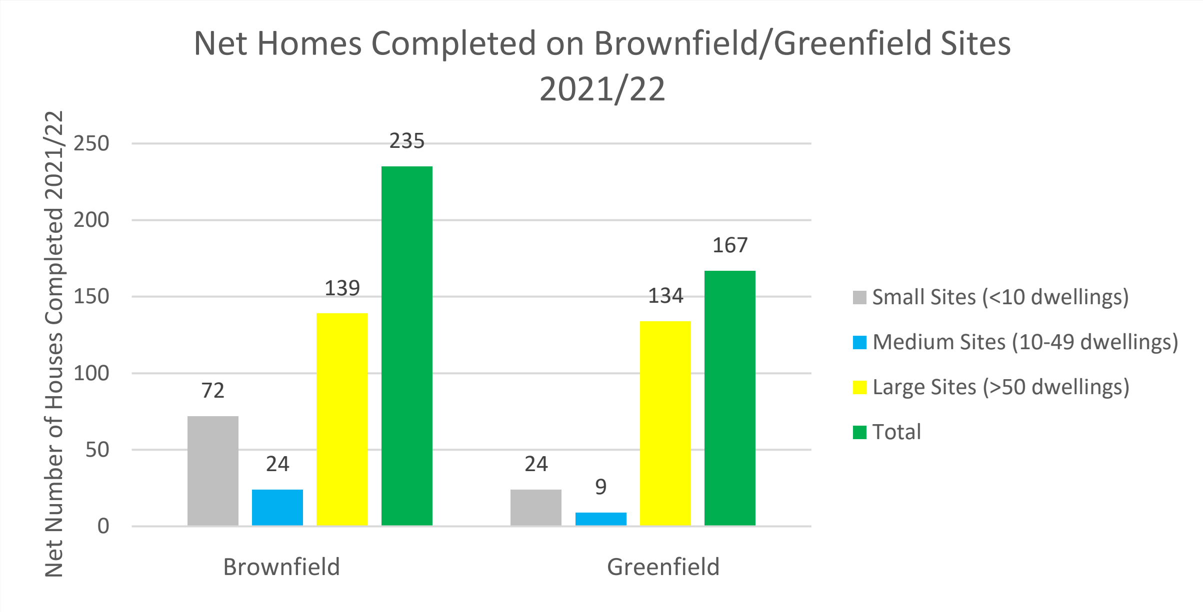


Figure 7 shows that 58.5% of net housing completions in 2021/22 took place on brownfield land and that 273 (67.9%) new homes on both brownfield and greenfield land took place on sites with a capacity of over 50 new homes.

Figure 8: Location and Type of Completion Carried out in 2021/22

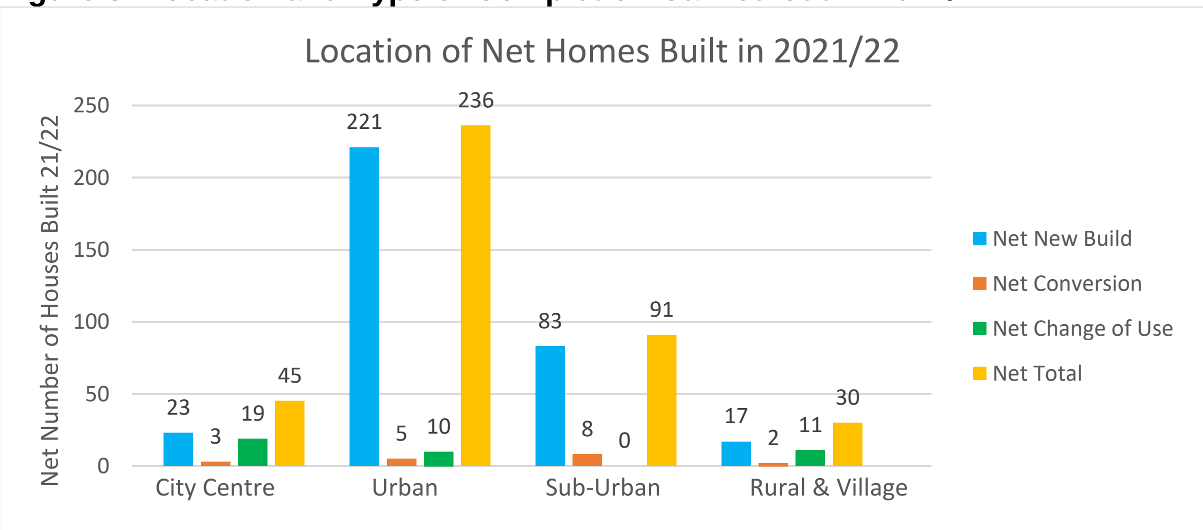
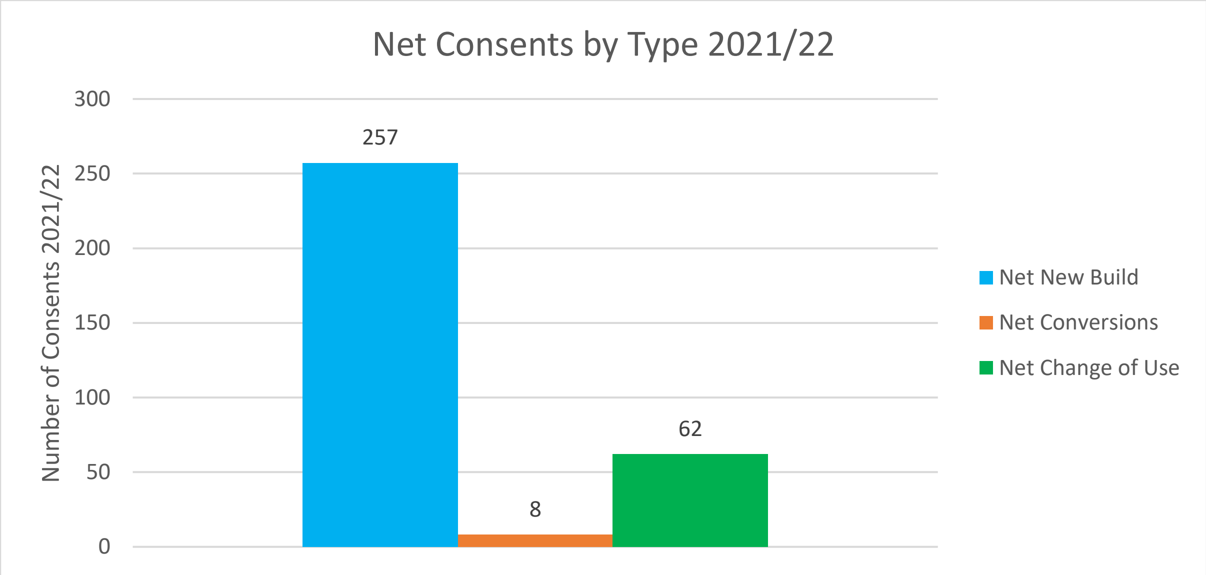


Figure 8 shows that 58.7% of all net housing completions took place within the urban area during 2021/22. A further 22.6% of homes were provided in sub-urban locations, whilst 11.2% were completed in the city centre and 7.5% were in rural or village locations. In each area of the authority new build properties formed the largest proportion of all net additional completions.

Figure 9: Net Housing Approvals in 2021/22



In 2021/22 a net total of 327 new homes were approved, the largest proportion of which was for new build properties (78.6%). Notable housing schemes approved during the monitoring year were for draft housing allocation H7: Former York City Football Club, Bootham Crescent (93), Burnholme Community Hub (83) and Former Duncombe Barracks site (34) all of which were for new build schemes.

Figure 10: Net Housing Consents Granted in 2021/22 Split into Brownfield and Greenfield Sites

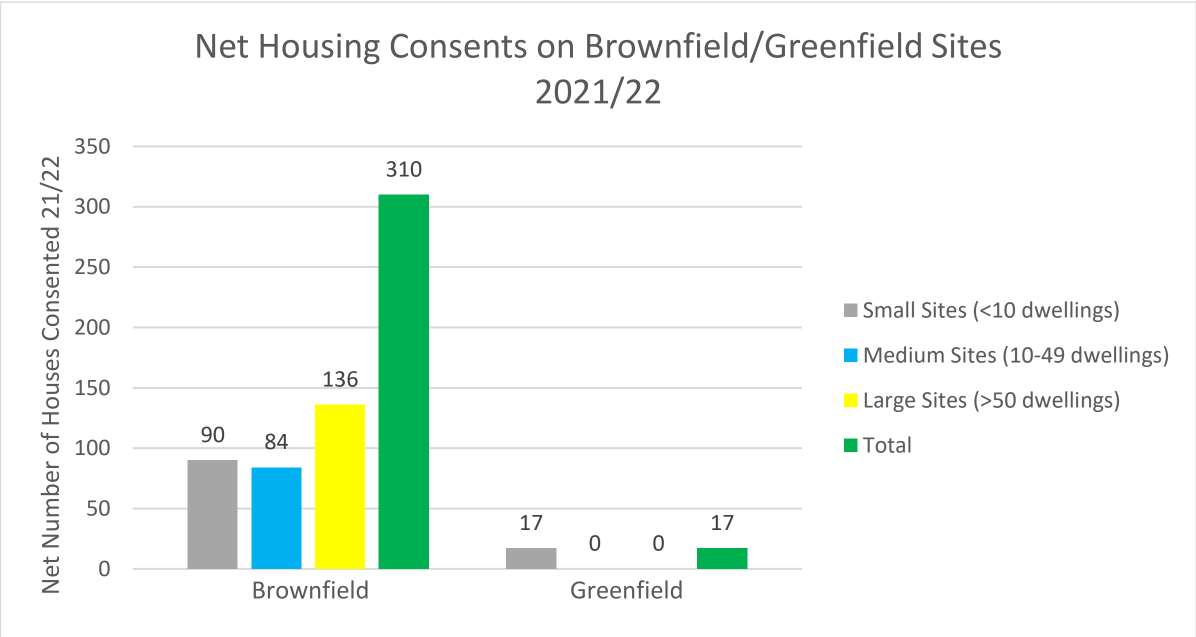
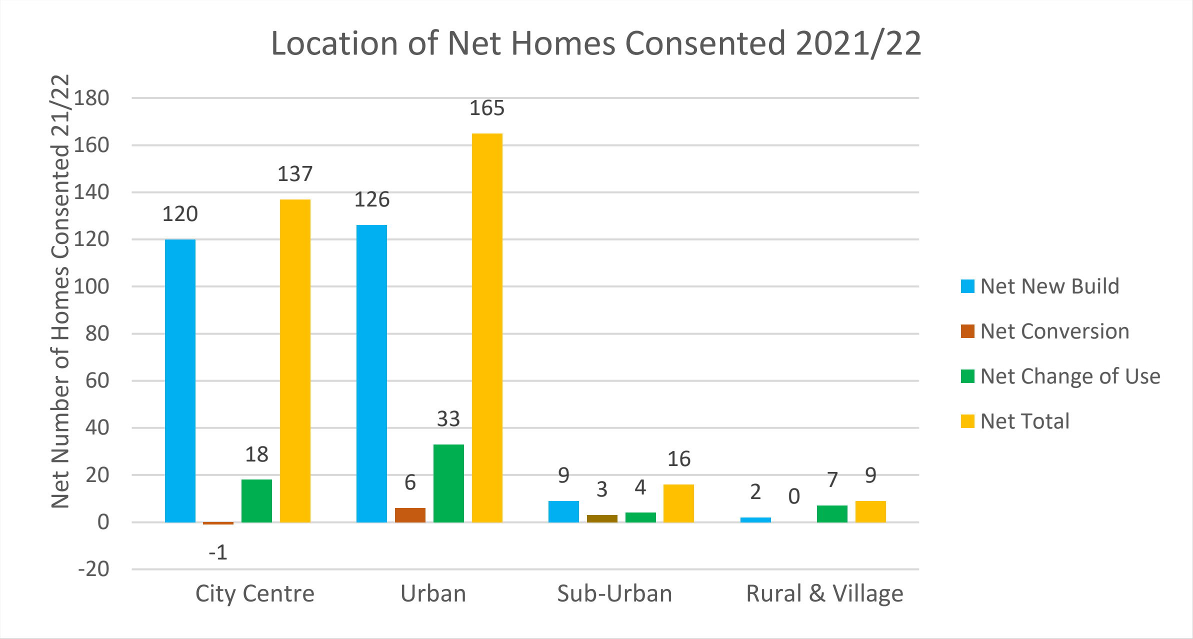


Figure 10 shows that 94.8% of all approvals granted in 2021/22 were on brownfield sites and of this total almost 43.9% were on sites with a capacity of over 50 new homes. Approvals on greenfield sites accounted for 5.2% of all consents with all 17 net approvals being granted on small sites of less than 10 homes.

Figure 11: Location and Type of Home Consented in 2021/22



As shown by Figure 11, the largest contributors to the overall consented homes were for new build schemes approved in both the city centre and its extensions and in the urban area. The 246 net new homes approved in these locations made up 75.2% of all net approvals granted in the authority area.

Figure 12: Location and Capacity of Sites Granted Approval in 2021/22

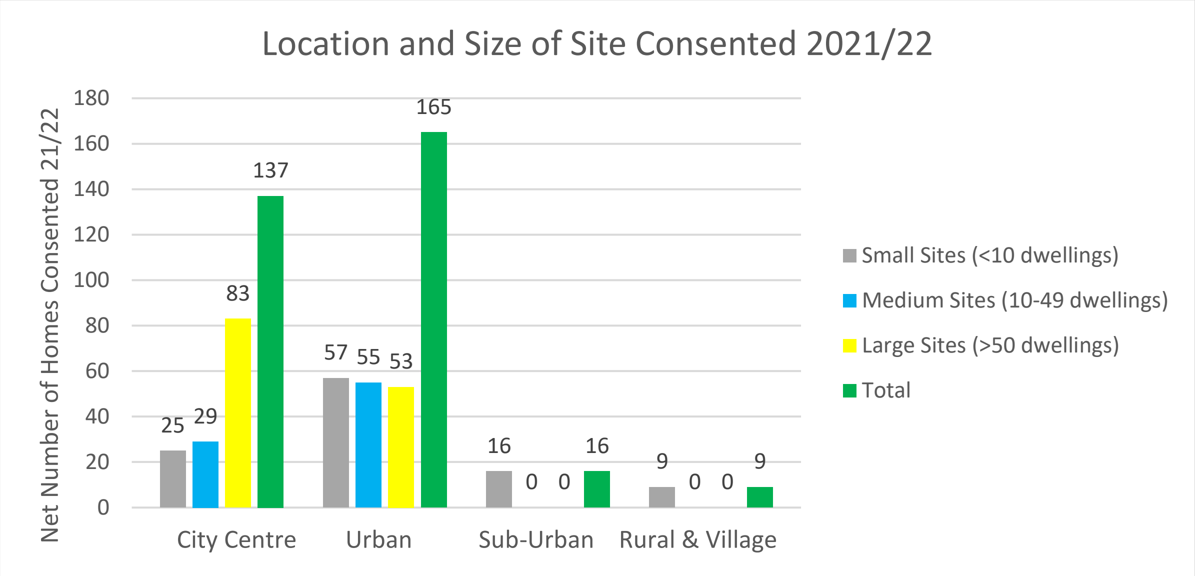
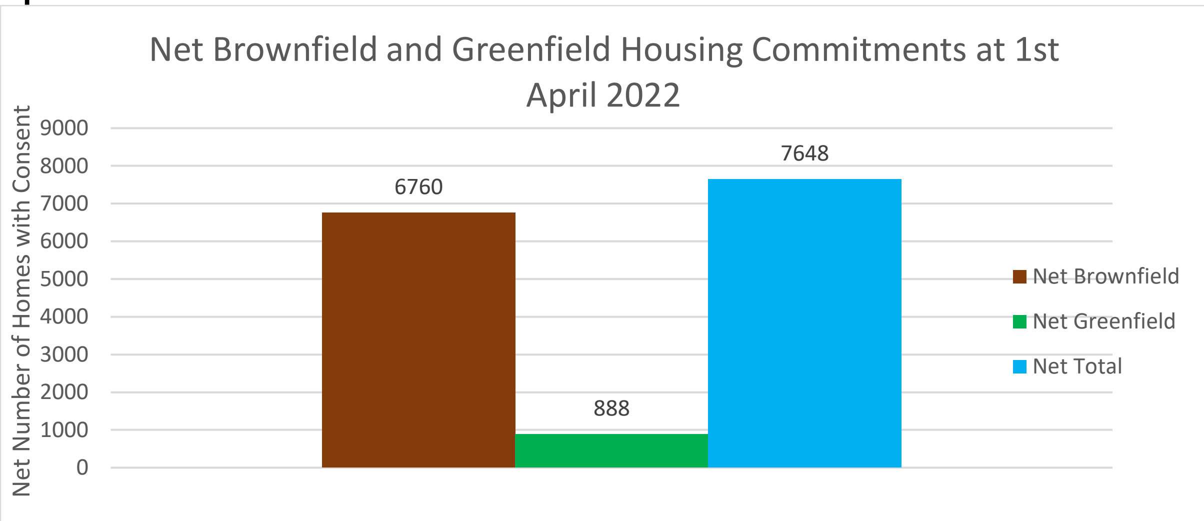


Figure 12 provides evidence to show that 83 homes (60.6%) on sites with a capacity of more than 50 new homes made up the greatest number of net homes approved in the City Centre. The approved homes in the Urban Area were split evenly between each category, whilst approvals on small sites of less than 10 homes in both sub-urban and rural/village locations made up all of the consented development.

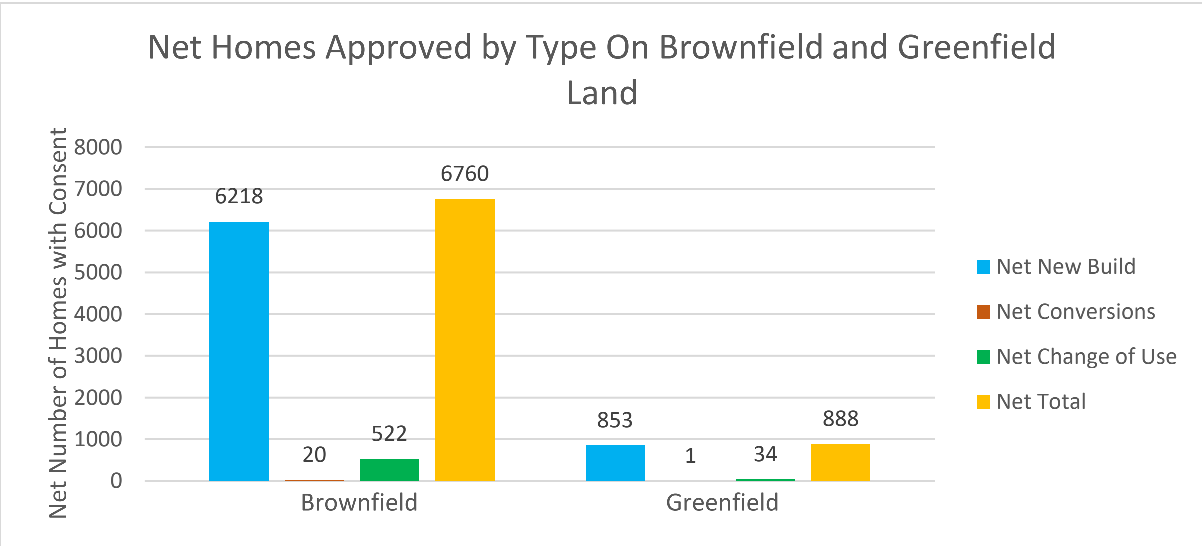
Housing Commitments at 1st April 2022

Figure 13: Housing Commitments on Brownfield and Greenfield Sites at 1st April 2022



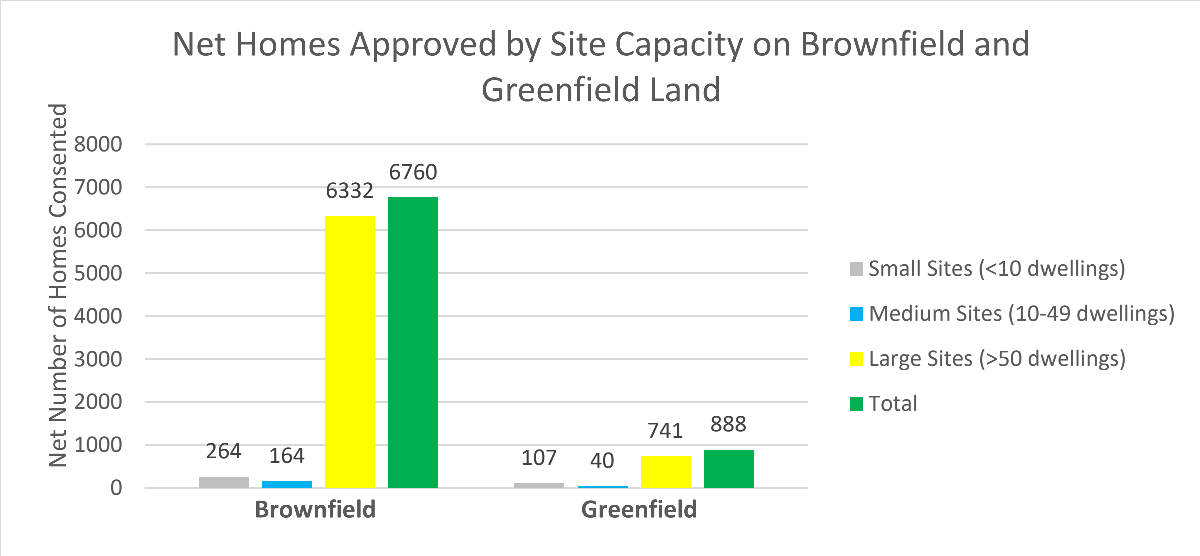
As shown in Figure 13, 88.4% of all net unimplemented housing consents at 1st April 2022 were on brownfield sites. City of York Council are committed to a policy of prioritising brownfield sites over greenfield locations where possible, and this analysis reflects this principal. In order that our housing requirements are met in future years and as the number of brownfield sites with sufficient capacity to meet our needs will be reduced the greenfield sites identified through the draft allocations process will assist in achieving our housing requirement. When this takes place the proportion of brownfield land in our housing commitments is certain to reduce.

Figure 14: Housing Commitments on Brownfield and Greenfield Land Split by Housing Type



Of the 7,648 net housing commitments at 1st April 2022, 7,071 (92.5%) are for new build housing with 691 net homes (7.3%) planned for schemes involving changes of use.

Figure 15: Housing Commitments on Brownfield and Greenfield Land Split by Site Capacity



At 1st April 2022, of the 7,648 net housing approvals 7,073 (92.5%) were on sites with a capacity of greater than 50 new homes. Whilst this may well achieve the housing requirements for future years, the heavy reliance on a relatively small number of large capacity site does have its associated risks as the unforeseen delays may well affect the future phasing of supply.

Figure 16: Location and Type of Housing Commitments at 1st April 2022

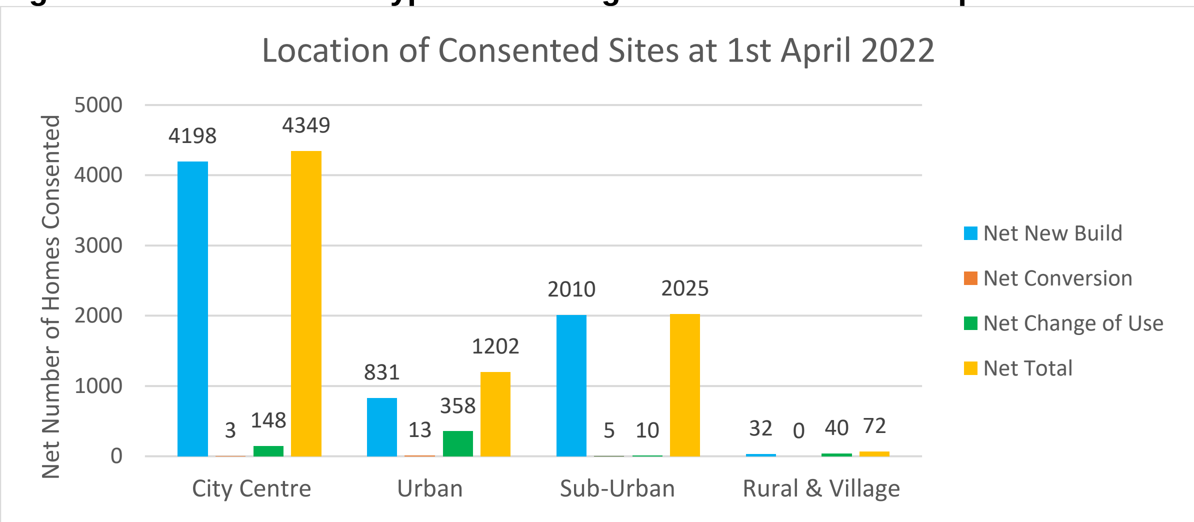


Figure 16 shows the level of housing commitments throughout the authority area and breaks this down to the type of approval granted at 1st April 2022. New build schemes have the greatest number of approvals in each area of the City other than in the village/rural area where changes of use have slightly greater numbers. The City Centre and its extensions make up 4,349 (56.9%) of all commitments.