

LEEDS LOCAL PLAN

AUTHORITY MONITORING REPORT

1st April 2017 to 31st March 2018

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The Authority Monitoring Report (AMR)

As outlined the Localism Act 2011, the subsequent Local Planning Regulations 2012 removed the requirement for local planning authorities to submit an Authority Monitoring Report to the Secretary of State, whilst retaining the overall duty to monitor. The primary purpose of the AMR is to assess the implementation of the Local Development Scheme and the extent to which policies in Local Development Documents are being achieved. It also enables the Council to share the performance and achievements of the planning service with the local community at least once every 12 months. Authorities can largely choose for themselves which targets and indicators to include in the report provided they are in line with the relevant UK and EU legislation.

Monitoring helps to address key issues, including:

- are policies achieving their objectives?
- have the predicted effects on sustainability objectives actually occurred?
- are policies delivering sustainable development?
- have policies had unintended consequences?
- are the assumptions behind policies still correct?
- are targets being achieved?

The monitoring of plan preparation (including Neighbourhood Plan progress) is set out in the Local Development Scheme which can be viewed at <https://www.leeds.gov.uk/planning/planning-policy/adopted-local-plan/local-development-scheme>. This document looks at April 2017 – March 2018 however some more recent information is given in places on the progress of development plan documents. The key documents are set out below:

Development Plan Documents

Adopted Development Plan Documents

| Table 1: Adopted Plans | |
|--|---------------|
| Title | Adoption Date |
| Unitary Development Plan Review https://www.leeds.gov.uk/planning/planning-policy/adopted-local-plan/unitary-development-plan | July 2006 |
| Core Strategy https://www.leeds.gov.uk/planning/planning-policy/adopted-local-plan/core-strategy-introduction | November 2014 |
| Natural Resources and Waste Local Plan https://www.leeds.gov.uk/planning/planning-policy/adopted-local-plan/natural-resources-and-waste-local-plan | January 2013 |
| Aire Valley Leeds Area Action Plan https://www.leeds.gov.uk/planning/planning-policy/adopted-local-plan/aire-valley-area-action-plan | November 2017 |
| Policies Map https://www.leeds.gov.uk/planning/planning-policy/policies-maps | |

| Table 2: Made Neighbourhood Plans | |
|-----------------------------------|---------------|
| Title | Date Made |
| Clifford | March 2017 |
| Collingham | June 2017 |
| Bardsey-cum-Rigton | November 2017 |
| Barwick in Elmet and Scholes | November 2017 |
| Boston Spa | November 2017 |
| Thorp Arch | January 2018 |
| Linton | March 2018 |
| Holbeck | April 2018 |
| Alwoodley | July 2018 |
| Walton | October 2018 |

Further information on progress of all neighbourhood plans within Leeds can be found at <https://www.leeds.gov.uk/planning/planning-policy/neighbourhood-planning>.

Development Plan Documents in production

| Table 3: Documents in Production | | | |
|---|--|---|-----------------------------------|
| Title | Stage at February 2019 | Anticipated stage in LDS (March 2018) | Expected Adoption |
| Site Allocations Plan https://www.leeds.gov.uk/planning/planning-policy/emerging-local-plan/site-allocations-plan | Consultation on proposed modifications | Adopted | Late 2018 |
| Core Strategy Selective Review https://www.leeds.gov.uk/planning/planning-policy/emerging-local-plan/core-strategy-selective-review | At examination | Adopted | Winter 2018 |
| Neighbourhood Plans https://www.leeds.gov.uk/planning/planning-policy/neighbourhood-planning | See link | Dependent on qualifying body | Various |
| Updates to Policies Map https://www.leeds.gov.uk/planning/planning-policy/policies-maps | In progress | In progress. Update to take into account the above documents. | N/A. Ongoing updates as required. |

Other Local Development Documents (not part of the Statutory Development Plan)

Supplementary Planning Documents

Supplementary Planning Documents (SPD's) are part of the Local Plan and carry weight when the Council makes decisions on planning applications. SPDs build and expand on existing policies in DPDs. A list of adopted SPDs can be found on the Council's web-site

<https://www.leeds.gov.uk/planning/planning-policy/supplementary-planning-documents-and-guidance/adopted-supplementary-planning-documents>.

The Local Development Scheme 2018 states that the following SPDs are in preparation:

| Table 4: SPD's in Preparation | | | |
|--------------------------------------|---|---------------------------------------|--|
| SPS | Details | Stage stated in LDS March 2018 | Current Stage |
| Hot Food Takeaways | sets out exclusion zone around secondary schools for Hot Food Takeaways | pending adoption in April 2018 | pending adoption in July/August 2018 |
| East Leeds Extension | guides development of over 5,000 new homes in three quadrants | pending adoption in April 2018 | Pending adoption in July/August 2018 |
| South Bank Regeneration Framework | guides development of specific City Centre southern gateway which includes the location of the High Speed 2 station | pending adoption Spring 2018 | Pending adoption in Summer 2018 |
| Leeds Bradford International Airport | guides implementation of the employment hub and other uses at the airport. | due for drafting during Summer 2018 | Awaiting outcome of Site Allocations Plan Inquiry before commencing. |

Monitoring Indicators

The indicators used in this AMR are set out in the Monitoring Framework November 2013 Update which relate to policies within the Core Strategy, the Natural Resources and Waste Local Plan and the Aire Valley Area Action Plan.

Many of the indicators depend on development occurring on the ground in the right place at the right time. For the initial years of the Core Strategy plan period this development was constrained by the effects of the economic recession however the 2016/17 AMR recorded increased development and growth. 2017/18 has seen a slowing in this growth in many areas.

The City Centre

Leeds City Centre performs a key economic, strategic and cultural role at the heart of the Metropolitan District and the Leeds City Region. It is approximately 460 hectares in area (less than 1% of the area of the District as a whole) yet attracts a quarter of all employees who live and work in Leeds. Over 140,000 people work in the city centre (full time equivalents) with a large proportion in financial and business services. The city centre is a focus for jobs, shopping, cultural experiences, education and housing with over 250 bars, restaurants, cafés and nightclubs as well as museums, galleries, cinemas and theatres and two University campuses with roughly 58,000 students. Most of the City Centre Housing Market Characteristic Area (HMCA) can be reached in less than 20 minutes' walk from City Station. The City Centre is also a focus for development, in particular office, retail, housing and supporting services. Growth has occurred and further expansion is planned, especially to the south of the river where large scale development, open space provision and linkages are being planned for.

Indicator 1: % of development activity to the south of the river in the City Centre as compared to north of the river

Relevant Core Strategy Policies:

Policy SP3 Role of Leeds City Centre
Policy CC2 City Centre South

Historically, the retail/commercial core has focussed in the northern half of the City Centre, with recent key retail, residential and office developments all located north of the River Aire. However, 2017/18 has seen the first office and A1 retail developments south of the river as Table 5 illustrates. Indeed, all A1 retail development was located south of the river, which is in contrast to the previous year when all 29,500 sqm was located to the north. The office accommodation was provided due to the conversion of vacant ground floor retail units. It could be concluded that this shows the beginnings of a tangible shift in the focus of development however it could equally be the result of an anomaly in development location. Whilst there has been a notable drop in office, retail and other A use class development since 2016/17, the causes of this are not entirely clear. The delivery of particularly office and retail space is somewhat "lumpy" due to the fact that construction takes time and the floorspace is considered delivered only when the entire floorspace is complete, unlike housing where units can be incrementally completed and counted. Nevertheless, there are signs of a shift as the south side increasingly becomes a focus for growth and regeneration such as through the South Bank proposals, development around Globe Road and development related to HS2. It is anticipated that there will be a greater focus south of the river over the next few years in line with the provisions of Core Strategy Policy CC2 and the commitment to development south of the river and readdressing the balance.

| Table 5: Amount of Development North and South of the River Aire 2017/18 | | | | |
|--|------------------------|------------------------|-------------------------------|-------------------------------|
| Type of development | Total Amount (2016/17) | Total Amount (2017/18) | Amount to the North (2017/18) | Amount to the South (2017/18) |
| Office | 46,869 sqm | 28,129 sqm | 25,875 sqm | 2,254 sqm |
| Residential | 411 units | 294 units | 294 | 0 |
| A1 Retail | 29,500 sqm | 500 sqm | 0 | 500 sqm |
| A2 Financial & Professional | | 30 sqm | 30 sqm | 0 |
| A3 Restaurants & Cafes | 4,838 sqm | 2,151 sqm | 2,151 sqm | 0 |
| A4 Drinking Establishments | | 593 sqm | 593 sqm | 0 |
| D2 Assembly & Leisure | | 542 sqm | 542 sqm | 0 |

Offices

There is currently over 900,000 sqm of office floorspace in the City Centre, with 28,129 sqm of new additional office floorspace completed in during 2017/18. This was lower than last year's total (46,869 sqm) however the 2017/18 figure does not account for two major office refurbishment schemes which completed during the year which brought out-dated vacant office space back into use (Merrion House and Platform, New Station Street). The refurbishment of these buildings provided a further 27,500 sqm of new Grade A office floorspace.

The majority of schemes delivered during 2017/18 were north of the River Aire, including the following larger scale developments:

- 3 Wellington Place, LS1 4AP (13,565 sqm)
- 6 Queen Street, Leeds LS1 2TW (8,070 sqm)
- Merrion House, 110 Merrion Centre, LS2 8BB (extension 2,990 sqm / refurbishment 11,816 sqm)
- Platform (formerly City House), New Station Street (extension 953 sqm / refurbishment 15,645 sqm)

The following development was completed to the south of the River Aire:

- The Boulevard (Leeds Dock), Hunslet, LS10 1PZ (Change of use – 2,254 sqm)

The Core Strategy sets out target to accommodate 655,000 sqm of new office development in the City Centre. Allowing for a margin of choice of sites of five years supply, this represents an annual expected delivery target of 31,000 sqm. Table 6 indicates the level of delivery of new office floorspace against the Core Strategy target. In 2017/18 delivery was slightly below the target and over the plan period as a whole delivery has been 56% of that expected. However, this is due to very low levels of construction early in the plan period as the economy recovered from recession. The average of new floorspace in the last two years has exceeded the expected delivery target at 37,500 sqm.

| Table 6: Net Additional Office Floorspace in the City Centre (sqm) | | |
|--|---------|----------------|
| | Total | Annual average |
| Expected delivery target (2012-28) | 495,000 | 31,000 |
| Completed floorspace - 2017/18 | 28,129 | 28,129 |

| Table 6: Net Additional Office Floorspace in the City Centre (sqm) | | |
|--|---------|----------------|
| | Total | Annual average |
| Completed floorspace - last 5 years (2013-18) | 104,500 | 20,900 |
| Completed floorspace – Core Strategy plan period (2012-18) | 104,500 | 17,400 |

Office Lettings

Over the decade 2008-17, total office lettings averaged 844,000 sq ft; with 537,000 sq ft in the city centre and 307,000 sq ft out of town. With a total office lettings in the City Centre above 1 million sq ft in 2017, this is a significant increase compared with previous years. The total office lettings for the last 5 years is set out in the table below.

| Table 7: Office Lettings | | |
|--------------------------|---------------------|---------------------|
| Year | City Centre (sq ft) | Out of town (sq ft) |
| 2013 | 797,811 | 488,231 |
| 2014 | 545,426 | 236,719 |
| 2015 | 680,105 | 268,041 |
| 2016 | 430,014 | 312,086 |
| Quarter | City Centre (sq ft) | Out of town (sq ft) |
| 1Q 2017 | 104,936 | 55,732 |
| 2Q 2017 | 134,796 | 91,713 |
| 3Q 2017 | 557,990 | 119,554 |
| 4Q 2017 | 216,893 | 55,944 |
| TOTAL | 1,014,615 | 322,943 |
| 1Q 2018 | 191,861 | 83,830 |

The following offices (of over 10,000 sqft) were let in 2017/18, with 3 lettings over 50,000 sq ft and the largest being 378,000 sq ft.

| Table 8: Office lettings (over 10,000 sq ft) in the City Centre: 2017/18 | | |
|--|---------------|------------|
| Accommodation (sq ft) | Let to | Date |
| 33 Wellington Street (76,000) | Walker Morris | March 18 |
| The Mint (48,272) | Dart Group | January 18 |
| Sovereign Street (80,654) | LBS | Dec 17 |
| Greek Street (12,748) | Our Space | Dec 17 |

| Table 8: Office lettings (over 10,000 sq ft) in the City Centre: 2017/18 | | |
|--|---------------------------|--------|
| Accommodation (sq ft) | Let to | Date |
| Central Square (11,600) | PWC | Nov 17 |
| New York Street (12,750) | Peoples Holdings | Oct 17 |
| Platform (19,600) | Tech Hub | Oct 17 |
| 10-12 East Parade (30,527) | Confidential | Sep 17 |
| 7 & 8 Wellington Place (378,000) | GPU/HMRC | Aug 17 |
| Central Square (25,740) | Sky Subscription Services | Aug 17 |
| Whitehall II (12,303) | Dept of Health | Jul 17 |
| 6 Queen Square (46,058) | Project Primrose | Jun 17 |
| 7 Canal Wharf (10,681) | Baird Group | Apr 17 |

Homes

The number of units delivered in the City Centre in 2017/18 fell from 411 in 2016/17 to 294 (including windfall), though this was still more than the 194 delivered in 2015/16. 294 units was 12.9% of all completions in 2017/18.

| Table 9: Additional Homes in the City Centre 2017/18 | | |
|--|------------------|-------------------|
| | Target to 2028 | Delivered 2017/18 |
| Homes | 10,200 dwellings | 294 |

The following schemes delivered units during 2017/18:

| Table 10: Housing Schemes in the City Centre 2017/18 | | | |
|--|--|--------------|---|
| Planning Ref | Location | N/S of River | Number of units developed 2017/18 (total permitted) |
| 14/07366/DPD | 5 - 7 New York Road, Leeds, LS2 7PF | North | 14 (74) |
| 17/05728/DPD | Sunshine House, Whingate Business Park, Whingate, Armley | North | 19 (65) |
| 13/04584/FU | City Campus, Calverley Street | North | 1 (145) |
| 15/01546/FU | 61-67 St Pauls Street | North | 3 (6) |
| 14/06675/FU | Kendal Carr, Hanover Mount, Woodhouse | North | 22 (23) |
| 15/04150/DPD | Aspect Court, 47 Park Square East, Leeds, LS1 2NL | North | 29 (29) |
| 16/01319/DPD | Forsyth House, 5 South Parade | North | 13 (34) |
| 16/03396/FU | Zicon House, Wade Lane, Leeds, LS2 8NL | North | 79 (79) |
| 14/02167/DPD | 117 The Headrow | North | 14 (27) |
| 14/05037/FU | Pearl Chambers, 22 East Parade, Leeds, LS1 5BY | North | 26 (26) |
| 15/07289/FU | North Crescent Apartments, 55 North Street | North | 6 (51) |
| 12/04154/FU | Pennine House, Russell Street | North | 14 (112) |

| Table 10: Housing Schemes in the City Centre 2017/18 | | | |
|--|--|--------------|---|
| Planning Ref | Location | N/S of River | Number of units developed 2017/18 (total permitted) |
| 16/06185/DPD | Trafalgar House, 29 Park Place, Leeds, LS1 2SP | North | 35 (40) |
| 11/04825/FU | University Of Leeds, 20 - 28 Hyde Terrace, Woodhouse | North | 4 (28) |
| 11/01798/FU | 65 Clarendon Road, Woodhouse | North | 4 (12) |
| | TOTAL | | 283 (751) |

Once built out these schemes will generate 751 units however only 283 units (excluding windfall) were delivered in 2017/18. Delivery clearly takes time however build out rates can be slow and some planning permissions remain extant or incomplete.

Retail

The Prime Shopping Quarter contains over 1000 shops, employs approximately 10,000 people and serves a catchment area of 3.2million people. 2016/17 saw an unprecedented amount of A1 retail development in Leeds with the opening of the Victoria Gate/John Lewis development (29,500 sqm) in the City Centre. This meant the total A1 development jumped from 3,025sqm in 2015/16 to 30,929sqm in 2016/17. 2017/18 has seen a drop to 15,798 sqm with only 500sqm of A1 retail being delivered in the City Centre and over 96% located outside the City Centre. As can be seen in Table 11, there was more development outside the City Centre than inside in all retail and leisure use classes except A4 drinking establishments as the out of city centre retail and leisure market continued to expand.

| Table 11: Retail & Leisure Developments in the City Centre 2017/18* | | | |
|---|----------------------------------|--------------------------|---------------------------|
| Use | Within City Centre (sqm) 2016/17 | Within City Centre (sqm) | Outside City Centre (sqm) |
| A1 Retail | 29500 | 500 | 15,298 |
| A2 Financial & Professional | | 30 | 492 |
| A3 Restaurants & Cafes | 4838 | 2,151 | 2,663 |
| A4 Drinking Establishments | | 593 | 565 |
| A5 Hot Food Takeaway | | 0 | 225 |
| D2 Assembly & Leisure | | 542 | 5,679 |
| Total | | 3,816 | 24,922 |

**It must be noted that there is a roughly 6 month delay on receiving completions data from business rates therefore some 2017/18 completions will come through in 2018/19 and not be included in the 2017/18 figures.*

The Colliers Midsummer Retail Report 2018 states that prime shopping pitches in Leeds City Centre remained strong. Briggate and Trinity had minimal vacancies and new retailers were taking vacant space. More broadly, there were closures across the City Centre however take up was relatively good.

Footfall

Footfall throughout the city centre increased following the opening of Trinity Leeds and the First Direct Arena, from 53.8 million steps to nearly 55 million steps. This rise continued to a peak in 2016 which coincided with the opening of Victoria Gate. However, 2017 saw a fall in footfall overall as retail trends pushed more trade online – according to ONS data, online spending increased by 15% nationally compared to 2016/17 - and overall national retail spending plateaued in the first quarter of 2018.

| Table 12: Footfall in the City Centre* | | |
|--|------------|------------|
| Footfall Data Breakdown | 2017 | 2018 |
| Total footfall for year | 49,959,927 | 48,638,509 |

**Footfall figures are collected over a calendar year, rather than the financial year. Data for previous years has had to be revised as a result of computing errors in some of the camera estimations. As such, the City Centre has moved from 8 to 6 cameras, and comparisons across years prior to 2017 is no longer possible.*

South of the River - South Bank Proposals

Leeds City Council has ambitious plans for growth across the city including the expansion of Leeds city centre to effectively double its size and economic impact. Key to this is the regeneration of South Bank Leeds where 253 hectares of land south of the River Aire have been earmarked for development to accommodate some 8,000 new homes (including high rise blocks), offices, shops, leisure (including a hotel) cafes, bars, restaurants and open space which will create more than 35,000 local jobs and include the proposed HS2 integrated station.

The Draft South Bank Leeds Regeneration Framework Supplementary Planning Document (SPD), which provides principles and guidance for future development and growth of South Bank, was further revised in 2017 following public consultation in late 2016. In addition, the Holbeck Neighbourhood Plan was emphatically supported at referendum by the residents of Holbeck, and allows the community to shape future growth and development of the Holbeck area.

The Leeds Integrated Station Masterplan also went out for consultation. The delivery of the Masterplan will

- create a world class gateway for the City Region that is at the heart of the UK's rail network;
- seamlessly integrate High Speed Two (HS2), the Northern Powerhouse Rail (NPR) programme and enhancements to the classic rail services which use the Station;
- accommodate the planned doubling of growth in passenger numbers using the Station over the next 30 years;
- enable a step-change in rail connectivity and capacity in the North of England – better connecting people and business to jobs and markets;
- deliver a new internationally significant district in Leeds City Centre with the potential for 300,000 square meters of commercial development;
- be a catalyst for accelerating the regeneration of South Bank Leeds as one of Europe's largest City centre regeneration initiatives that will double the size of the City Centre economy.

In July 2017, the government confirmed its preferred route for Phase 2b of the High Speed Two (HS2) railway. This has enabled HS2 Ltd to progress early design and construction proposals.

Hunslet Riverside Regeneration Delivery Plan was approved by Executive Board. The Regeneration Delivery Plan is a key tool for the Council, working with landowners, stakeholders and developers, to bring forward development and investment opportunities that will support the delivery of the South

Bank programme, enabling investment in new homes and employment. There is also a focus on securing development solutions for the land at Armouries Drive, and progressing land assembly to unlock site capacity for both development and important public realm connectivity.

Plans to deliver a new city centre park (approx 3.5ha) took a step closer with the ongoing management and maintenance approach and the parks design brief being approved by Leeds City Council's Executive Board. To further support the plans, Leeds City Council also proposes to redevelop its own land at Meadow Lane – a site which adjoins the former Tetley Brewery – with some of this land becoming part of the Park. Contributions towards the Park could also be sought from potential new development opportunities at Meadow Lane. In October 2017 City Plans Panel approved in principle an outline planning application by Vastint, the owners of the former Tetley Brewery site, to deliver 850 homes, 85,000 sqm offices, a hotel and the majority of the proposed City Park.

Major plans to develop the country's largest sustainable low-carbon housing development (over 500 homes), the Leeds Climate Innovation District by developer Citu, progressed on-site at Low Fold and Clarence Road, near Leeds Dock. The scheme includes a new pedestrian footbridge which will improve connectivity between the South Bank and Cross Green, and the surrounding areas

Indicator 2: Vibrancy, character and cultural appeal of the City Centre

Relevant Core Strategy Policies

Policy SP2 Hierarchy of Centres & Spatial Approach to Retailing, Offices and Intensive Leisure & Culture

Policy SP3 Role of Leeds City Centre

Policy CC1 City Centre Development

Policy CC2 City Centre South

Policy P8 Sequential and Impact Assessments for Town Centre Uses

Policy P9 Community Facilities and Other Services

The Core Strategy aims to improve the vibrancy, character and cultural appeal of the city centre and the evidence below suggests that 2017/18 was another successful year, despite the failure of the Capital of Culture bid. Leeds ranked fifth in the largest retail markets in Britain sorted by retail spend potential with an array of independent and well-known retail firms and boasts four major theatres, with over 16 museums and galleries. Lonely Planet travel guides ranked Leeds fifth on their list of the 10 best places to visit in Europe in 2017. An infographic highlighting key economic impacts of visitors to Leeds is in Appendix 1. The city hosted the first Leeds International Festival in April 2017 which focussed on music, the moving image and technology (through Leeds BID) and the 2017 MOBO Awards ceremony in November.

Much of 2017 was spent preparing a bid for Leeds to be 2023 European Capital of Culture. However in November as bidding cities in the UK prepared to undertake shortlisting interviews in London, the director general in the European Commission's Education and Culture Department confirmed the United Kingdom could not participate in the European Capital of Culture action. In January 2018, Full Council agreed to continue with the intentions of the bid and work in partnership with existing support organisations to host Leeds' own 'Year of Culture' by 2023 to showcase the cultural heritage of Leeds, deliver exciting events and projects and highlight Leeds as a thriving and successful city capable of delivering its own cultural showpiece. The intention is to establish Leeds 2023 Trust to deliver the project.

An in depth visitor profile study was commissioned as part of the Leeds 2023 bid which showed the biggest barriers to visiting were people not knowing what's here and believing there isn't enough to do. Current marketing is challenging these perceptions. Shopping was the main reason for visits and Leeds is successfully drawing regional day visitors however other attractions need to be showcased and measures are required to increase overnight visitors which bring more economic benefits. The study showed high satisfaction rates, that 96% would recommend Leeds as a place to visit.

Leeds was awarded the Purple Flag Standard for a second year in January 2018 by the Association of Town and City Management in recognition for achieving "standards of excellence in managing the evening and night time economy (ENTE)." This award signifies Leeds offers an entertaining, diverse, safe and enjoyable night out. Initiatives include a dedicated Street Support Team, Leeds Evening Ambassadors (introduced September 2017) who provide help and advice to visitors and close partnership support with groups such as Leeds Street Angels and the Angels of Freedom that work closely with the LGBT+ community.

Leeds has been ranked as the fifth best performing city in the UK for attracting foreign direct investment (FDI), with 19 FDI projects locating in the city in 2017 (23% of all projects locating in Yorkshire & Humber). Despite Leeds not being a dedicated conference destination (no conference facility), it is 4th most popular conference destination in the UK.

The City Centre has continued to build on its existing appeal and vibrancy. Local, national and international events have taken place, internationally acknowledged development has been delivered generating jobs and increased visitor numbers and the outstanding management of the city centre at night has been recognised.

Conclusions and trends:

2017/18 has seen a reduction in overall development and a noticeable shift in location with the first office and A1 retail developments south of the river. Indeed, all retail development occurred south of the river which is in stark contrast to 2016/17 when all was located to the north. The reasons for the fall in development are not entirely clear however delivery is often characterised by peaks and troughs, and 2016/17 was a marked retail "peak" with the opening of Victoria Gate and the John Lewis store. There is inevitably a time lag between the granting of planning permission and completion on site which is influenced by complex factors beyond the control of planning policy and the City Council. Nevertheless, there are signs of a shift in growth and regeneration and it is anticipated that this will increase over the next few years. There was a reduction in the amount of housing delivered in the city centre which will have been influenced by various factors such as the lag in delivery and the weather in late 2017/18.

Office lettings rose considerably and there was over 1 million sq ft of let office space in the City Centre which indicates a buoyant office market and that Leeds is considered an attractive employment location. Footfall fell as the trend for online shopping continued to grow.

The City Centre remained a popular destination for a range of visitors with high satisfaction rates, however research showed there are some negative perceptions of the city which need to be addressed. The City has responded positively to the exclusion from bidding to be 2023 European Capital of Culture with commitment to hosting a year of culture by 2023 to showcase the city. The initiatives to manage the evening and night time economy in the City Centre were recognised for a second year running through achieving the Purple Flag Standard again.

Managing the needs of a successful district

Housing

This section sets out progress against housing development indicators over 2017/18 and compares this against performance in recent years and against the level of development set out in the Core Strategy. It is important to note when considering performance of housing delivery that updated national population and household projections reveal lower growth requirements for Leeds and that national policy on how to calculate housing requirements is in the process of being amended¹. This eventuality was anticipated in the Adopted Core Strategy² and therefore caution needs to be used when considering the performance in the delivery of new homes against Policy SP6. These issues are being addressed through a Selective Review of the Core Strategy.

Supply of Housing

The housing requirement for Leeds since 2012/13 is set out in the Core Strategy as summarised below.

| Period | Start of period | End of period | Total housing required |
|-------------------|-----------------|------------------------|------------------------|
| Plan period | 1st April 2012 | 31st March 2028 | 70,000 |
| Year | | Net annual requirement | |
| 2012/13 – 2016/17 | | 3,660 | |
| 2017/18 – 2027/28 | | 4,700 | |

2017/18 is the first year of the higher net annual requirement of 4,700 units. This inevitably increases the challenge of meeting the housing requirement and rises the importance of measures to boost supply such as the Site Allocations Plan and the Aire Valley Area Action Plan. The AVLAAP was adopted in November 2017, giving a clear strategy and detailed site allocations for housing delivery and the examination of the Site Allocations Plan commenced with hearing sessions being held in October 2017. Unfortunately the housing related hearing sessions have been delayed due to a change in the methodology of calculating housing requirements which has necessitated a review of the approach to housing provision and the proposed housing allocations. These are expected to take place during summer 2018. Nevertheless, these documents identify a mix of brown and green field housing sites, allocations and broad locations to deliver an allocations target of 66,000 homes and a range of measures to accelerate development, especially of brownfield sites. The analysis below shows that delivery fell in 2017/18 against the backdrop of an increased housing requirement figure.

Overall completions for Leeds during the Core Strategy period

The overall completions for Leeds during the Core Strategy period are set out below.

¹ Draft NPPF (March 2018) proposes a standardised approach to housing requirements which is significantly lower than the Core Strategy requirement

² Para 4.6.3 notes that the Core Strategy Policy SP6 housing requirement is “based primarily on the 2008-based population projections and has not reflected the 2012-based population projections which were published at a very late stage of the Core Strategy Examination process. As part of the implementation of the Core Strategy, the City Council will continue to monitor the evidence base and delivery...”

| Table 14: Overall completions since 2012/13 by delivery type | | | | | | | % of target | Under delivery |
|--|--------------------------|-------------------------|--------------|----------------------------|-------------|----------------|---------------|----------------|
| Year | Core Strategy Policy SP6 | Type | | | Demolitions | Total | | |
| | | New and converted units | Empty homes | Older persons housing (C2) | | | | |
| 2012/13 | 3,660 | 1,650 | 149 | 29 | 27 | 1,801 | 49.2% | -1,859 |
| 2013/14 | 3,660 | 2,235 | 880 | 86 | 6 | 3,195 | 87.3% | -465 |
| 2014/15 | 3,660 | 2,076 | 215 | 32 | 97 | 2,226 | 60.8% | -1,434 |
| 2015/16 | 3,660 | 2,516 | 755 | 67 | 42 | 3,296 | 90% | -364 |
| 2016/17 | 3,660 | 2,878 | 437 | 45 | 54 | 3,306 | 90.3% | -354 |
| 2017/18 | 4,700 | 2,289 | -18 | 68 | 6 | 2,333 | 49.64% | -2,367 |
| Total | 23,000 | 13,644 | 2,418 | 327 | 232 | 16,157 | 71.21% | -6,843 |
| 6 year average | 3,833 | 2,274 | 403 | 54.5 | 38.7 | 2,692.8 | 11.87% | |

Over the last 6 years the total amount of net additional dwellings delivered (including the return of long term empty properties to use) has fluctuated somewhat with a significant increase in 2013/14 followed by a noticeable drop in completions in 2014/15. Numbers rose until 2015/16 and 2016/17 but fell again in 2017/18 by almost 1,000 units. The precise reasons for this are unclear however there was a slowdown nationally in number of completions in last 3 months of 2017/18 because of the severe weather brought by “the Beast from the East”.. This fall must be considered against the increase in the annual target set out in Core Strategy Policy SP6 to 4,700 units per annum for years between 2017/18 – 2027/28 which means less than half of the target was delivered. Against a backdrop of historic under delivery, this could be cause for concern, however the Council is currently undertaking a selective review of the Core Strategy which includes revisiting the housing requirement for Leeds as set out in Policy SP6. The Publication Draft Documents (subject to consultation January – March 2018) proposed the overall provision of 51,952 (net) new dwellings between 2017 and 2033, with an annual delivery target of 3,247 dwellings per year. The 2,333 units delivered in 2017/18 would be 71.85% of this alternative annual target. The Core Strategy Review is not expected to be complete until 2019.

Indicator 3: Net additional dwellings (new and converted units) by location within the Settlement hierarchy

Relevant Core Strategy Policies

- Policy SP3 Role of Leeds City Centre
- Policy SP6 The Housing Requirement and Allocation of Housing Land
- Policy SP7 Distribution of Housing Land and Allocations
- Policy SP10 Green Belt
- Policy CC2 City Centre South
- Policy H1 Manged Release of Sites
- Policy H2 New Housing Development on Non Allocated Sites
- Policy H3 Density of Residential Development
- Policy H4 Housing Mix
- Policy H8 Housing for Independent Living

Core Strategy Policy SP7 sets out an indicative strategy for the location and distribution of housing land and allocations and therefore the primary locations of new housing development, excluding windfall. The location of housing delivery during 2016/17 and 2017/18 is set out below:

| Table 15: Net additional dwellings by location within the Settlement Hierarchy (2016/17. 2017/18)(exc. empty homes) | | | | | | | | | |
|--|---|--|--------------|------------------------------|----------|---|--------------|-------------------------|-------------|
| Location | Core Strategy Policy SP7 (excluding windfall) | Total housing (gross) (including windfall) | | Demolished and/or lost units | | Total change (net) (including windfall) | | % of Total change (net) | |
| | | 2016/17 | 2017/18 | 2016/17 | 2017/18 | 2016/17 | 2017/18 | 2016/17 | 2017/18 |
| Main Urban Area | 33,300 (50%) | 1,456 | 1,135 | 54 | 6 | 1,402 | 1,129 | 51% | 50% |
| City Centre | 10,200 (15%) | 411 | 279 | 0 | 0 | 411 | 279 | 15% | 12% |
| Major Settlements | 14,300 (22%) | 455 | 326 | 0 | 0 | 455 | 326 | 17% | 14% |
| Garforth | | 3 | 2 | 0 | 0 | 3 | 2 | 0% | 0% |
| Guiseley/Yeadon/Rawdon | | 121 | 51 | 0 | 0 | 121 | 51 | 4% | 2% |
| Morley | | 91 | 141 | 0 | 0 | 91 | 141 | 3% | 6% |
| Otley | | 116 | 81 | 0 | 0 | 116 | 81 | 4% | 4% |
| Rothwell | | 19 | 3 | 0 | 0 | 19 | 3 | 1% | 0% |
| Wetherby | | 105 | 48 | 0 | 0 | 105 | 48 | 4% | 2% |
| Smaller Settlements | 7,500 (11%) | 184 | 122 | 0 | 0 | 184 | 122 | 7% | 5% |
| Villages/Rural/Outside Hierarchy | 700 (2%) | 281 | 427 | 0 | 0 | 281 | 427 | 10% | 19% |
| Total | 66,000 (100%) | 2,787 | 2,289 | 54 | 6 | 2,733 | 2,283 | 100% | 100% |

In 2017/18, the majority of housing delivery was in the Main Urban Area, the City Centre and major settlements, in line with Core Strategy Policies SP1 and SP7. Nevertheless, the distribution has changed slightly with a small reduction in proportion of housing development in these key locations and smaller settlements and a slight increase in the proportion outside the hierarchy. This means development in the Main Urban Area, the City Centre, major settlements and smaller settlements was below the targets in Policy SP7 whereas development in villages/rural areas/outside the hierarchy (19%) was considerably higher than the 2% target and the 10% delivered in the previous year.

Indicator 4: Net additional dwellings (new and converted units) by Housing Market Characteristic Area

Relevant Core Strategy Policies

Policy SP6 The Housing Requirement and Allocation of Housing Land
 Policy SP7 Distribution of Housing Land and Allocations
 Policy SP10 Green Belt
 Policy H1 Managed Release of Sites

Core Strategy Policy SP7 also sets out an indicative distribution of housing land and allocations across the eleven Housing Market Characteristic Area. The table below illustrates the level of

delivery in each HMCA and enables comparisons to be made between indicative targets and actual change. It should be noted that there is not an expectation that the distribution of housing completions keep pace year on year. Some areas because of particular active development may meet or exceed their indicative target earlier in the plan period than others.

| Table 16: Net additional dwellings by Housing Market Characteristic Area (exc. empty homes) 2017/18 | | | | | |
|--|--|-----------------------------------|-------------------------------------|---------------------------|--------------------------------|
| Location | Core Strategy Policy SP7 (excluding windfall) | Total housing gain (gross) | Demolished and/or lost units | Total change (net) | % of Total change (net) |
| Aireborough | 2,300 (3%) | 89 | 0 | 89 | 3.9% |
| City Centre | 10,200 (15.5%) | 294 | 0 | 294 | 12.9% |
| East Leeds | 1,400 (17%) | 48 | 0 | 48 | 2.1% |
| Inner Area | 10,000 (15%) | 616 | 6 | 610 | 26.7% |
| North Leeds | 6,000 (9%) | 309 | 0 | 309 | 13.5% |
| Outer North East | 5,000 (8%) | 117 | 0 | 117 | 5.1% |
| Outer North West | 2,000 (3%) | 86 | 0 | 86 | 3.8% |
| Outer South | 2,600 (4%) | 114 | 0 | 114 | 5% |
| Outer South East | 4,600 (7%) | 95 | 0 | 95 | 4.2% |
| Outer South West | 7,200 (11%) | 349 | 0 | 349 | 15.3% |
| Outer West | 4,700 (7%) | 172 | 0 | 172 | 7.5% |
| Total | 66,000 (100%) | 2,289 | 6 | 2,283 | 100% |

Delivery over 2017/18 has broadly been in line with the indicative target splits set out in Core Strategy Policy SP7 however it is acknowledged that yearly delivery will fluctuate due to various factors such as market forces. Delivery was particularly different to the targets in East Leeds (target of 17%, delivery of 2%) and Inner (target 15%, delivery 26.7% (23% in 2016/17)). East Leeds saw a fall in delivery, reducing its contribution from 8% in 2016/17 to 2% however it is recognised that much of the planned delivery will come later in the plan period e.g. Skelton Gate (AV111 – 1,801 units), the East Leeds Extension (HG1-288 - circa 3771 units), Bridgewater Road North (AV40 – 546 units) and the former Vickers Tank factory (HG2-120 – 450 units) as these sites either require significant remediation, demolition and clearance, or major infrastructure delivery before the majority of development can be started in earnest.

Again the Inner Area accommodated more new housing than any other HMCA in 2017/18 and actually saw an increase from 23.2% to 26.7% of the total delivered. Outer South West overtook the City Centre to deliver the second highest amount of development and the City Centre fell to fourth behind North. The lowest delivery was in East Leeds (2.1%) with Outer North West delivering 3.8%.

Indicator 4(a): Net additional dwellings (new and converted units) in Aire Valley

Relevant Core Strategy Policies

Policy SP6 The Housing Requirement and Allocation of Housing Land
 Policy SP7 Distribution of Housing Land and Allocations
 Policy SP10 Green Belt
 Policy H1 Managed Release of Sites

Relevant Aire Valley Leeds Area Action Plan Policies

Policy AVL6: Identified Housing Sites in Aire Valley Leeds
 Policy AVL7: Housing and Mixed Use Allocations in Aire Valley Leeds

Table 17: Net additional dwellings within Aire Valley Leeds Area Action Plan boundary

| Site | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | Total | Brownfield |
|---|-----------|-----------|-----------|-----------|------------|------------|-------------|
| East Street Mills, East Street | 0 | 0 | 7 | 0 | 147 | 154 | 100% |
| Land At Yarn Street, Hunslet | 53 | 56 | 29 | 0 | 0 | 138 | 100% |
| Land On St Hildas Crescent, St Hildas Grove, Cross Green Crescent, Cross Green, Leeds | 21 | 0 | 0 | 0 | 0 | 21 | 100% |
| Windfall - Unidentified site less than 5 units | 4 | 4 | 3 | 0 | 4 | 15 | 100% |
| Boyd's Mill, 177 East Street, Leeds, LS9 8QE | 0 | 0 | 0 | 9 | 1 | 10 | 100% |
| Long Closed Lane, Richmond Hill | 0 | 0 | 0 | 8 | 0 | 8 | 100% |
| AVLAAP Total | 78 | 60 | 39 | 17 | 152 | 346 | 100% |

The Aire Valley Leeds Area Action Plan was adopted in November 2017 and provides a clear strategy and policy framework to stimulate and guide development in the area. Housing delivery in the AVAAP area was less than anticipated in the early years of the Plan period due to the economic recession, however Table 17 shows a significant increase in additional dwellings provided in 2017/18, mainly due to the East Street Mills development. All development was located on brownfield land.

Permitted Development

The Government has sought to increase the supply of housing by making it easier to change the use of offices and agricultural buildings to dwellings. Table 18 below sets out the number of units created over the last 5 years. In 2017/18, all units were delivered through the conversion of office space to residential.

| Table 18: Additional units delivered under Permitted Development | | |
|--|-------------------|-----------------|
| Year | Number of schemes | Number of Units |
| 2013/14 | 8 | 106 |
| 2014/15 | 15 | 61 |
| 2015/16 | 14 | 437 |
| 2016/17 | 17 | 502 |
| 2017/18 | 9 | 371 |

Outstanding Housing Capacity

On 31st March 2018, 21,618 units had planning permission with a further 12,711 units available to gain planning permission on allocated land including nearly 6,000 on new allocations in the Aire Valley. Of the 21,618 units, 17,019 have detailed planning permission. Considering that 4,104 units are under construction, this leaves 12,915 units with detailed planning permission that have not yet started. Again, this shows clearly that whilst Core Strategy targets have not been reached this is not a symptom of a lack of supply of deliverable land or extant permissions.

Total outstanding capacity increased by 6,066 units over the previous twelve months with the adoption of the AVLAAP and new approvals replacing completed units and planning permissions that expired in the same period. The number of new homes on sites under construction increased by 581 units.

Total outstanding capacity increased by 2,434 units up to the end of 2017 with new approvals replacing completed units and planning permissions that expired in the same period. This increase was predominantly an increase of sites with detailed permission where the outstanding capacity has increased by 2,139 units.

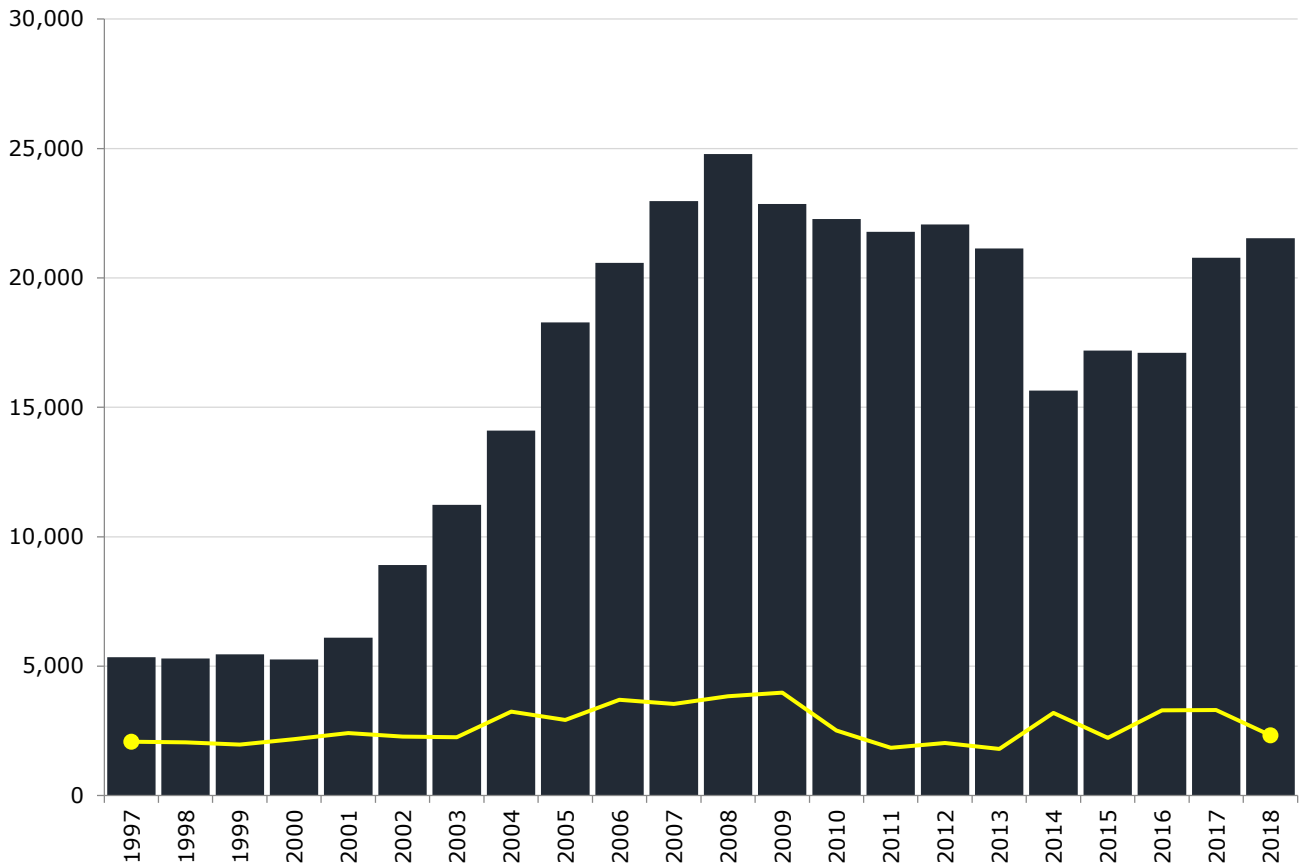
| Table 19: Outstanding Housing Capacity | | | | | | | | |
|--|---------------------|--------------|---------------|--------------------|-----------------|---------------|--------------|---------------|
| Site | Planning Permission | | | Development Status | | Previous Use | | Total |
| | None | Outline | Detailed | Under con | Not yet started | B'field | G'field | |
| City Centre | 0 | 1,034 | 3,903 | 339 | 4,598 | 4,937 | 0 | 4,937 |
| Rest of MUA | 0 | 2,885 | 7,256 | 1,190 | 8,951 | 8,558 | 1,583 | 10,141 |
| Outside MUA | 0 | 630 | 2,349 | 642 | 2,337 | 801 | 2,178 | 2,979 |
| Total | 0 | 4,549 | 13,508 | 2,171 | 15,886 | 14,296 | 3,761 | 18,057 |

| | | | | | | | | |
|--------------|---------------|-----------|--------------|--------------|---------------|--------------|--------------|---------------|
| H3-1 | 620 | 0 | 1,373 | 869 | 1,124 | 1,725 | 268 | 1,993 |
| H3-2 | 327 | 0 | 585 | 172 | 740 | 7 | 905 | 912 |
| H3-3 | 5,870 | 50 | 222 | 36 | 6,106 | 0 | 6,142 | 6,142 |
| AVLAAP | 5,894 | 0 | 1,331 | 856 | 6,369 | 5,229 | 1,996 | 7,225 |
| Total | 12,711 | 50 | 3,511 | 1,933 | 14,339 | 6,961 | 9,311 | 16,272 |

| | | | | | | | | |
|-------------------|---------------|--------------|---------------|--------------|---------------|---------------|---------------|---------------|
| Total land | 12,711 | 4,599 | 17,019 | 4,104 | 30,225 | 21,257 | 13,072 | 34,329 |
|-------------------|---------------|--------------|---------------|--------------|---------------|---------------|---------------|---------------|

Figure 1 below shows clearly that delivery has not kept pace with the growth of supply. The ratio of permissions to completions has expanded from 3:1 or less in the 1990s to approximately 6:1 in 2008 and stands at 9:1 in 2018.

Figure 1: Stocks of planning permissions and completions 1997-2018



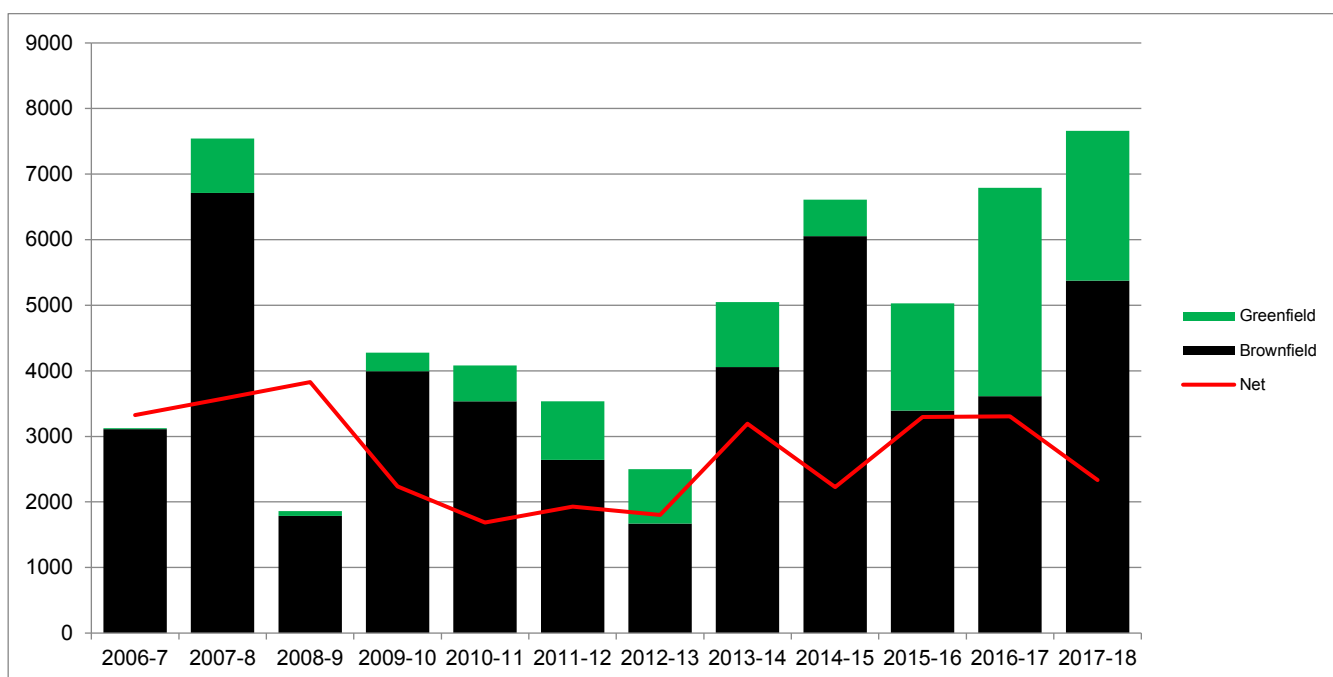
Further information about housing land supply can be found in the Housing Land Supply – Spring Statement 2018

<https://www.leeds.gov.uk/docs/Housing%20Land%20Supply%20Spring%20Statement%202018.pdf>

Brownfield/greenfield split

Core Strategy Policy SP1 establishes the principle of prioritising development on previously developed land which reflects national policy and regeneration priorities. Figure 2 below shows the split of planning permissions between brownfield and greenfield sites and that greenfield approvals fell in 2017/18 after a record year in 2016/17 though the number remained relatively high compared to numbers in 2014/15 and earlier. Brown field approvals increased noticeably. This increase in development on green field land reflects a shift in national policy which, whilst still promoting brownfield first, seeks more flexibility, choice and competition in housing land market to boost delivery which inevitably results in an increased focus on greenfield sites. This was reflected in the Core Strategy and the subsequent Site Allocations Plan as well as the Council's revised interim policy which released over 1,400 homes on UDP Protected Areas of Search between 2013 and 2016.

Figure 2: Planning permissions approved on brownfield and greenfield sites against completions since 2006/07



Indicator 5: New and converted housing units on Previously Developed Land

Relevant Core Strategy Policies

Policy SP4 Regeneration Priority Programme Areas,
 Policy SP5 Aire Valley Leeds Urban Eco-Settlement)
 Policy SP6 The Housing Requirement and Allocation of Housing Land
 Policy SP7 Distribution of Housing Land and Allocations
 Policy SP10 Green Belt
 Policy H1 Managed Release of Sites
 Policy H2 New Housing Development on Non Allocated Sites
 Policy H6 Houses in Multiple Occupation (HMOs), Student Accommodation and Flat Conversion
 Policy H8 Housing for Independent Living

| Table 20: New and converted housing units on Previously Developed Land (exc. empty homes) | | | | | |
|---|-----------------|------------|-------|--------|-----------|
| Period | Gross dwellings | Number PDL | % PDL | Target | Indicator |
| 2008/09 | 3976 | 3787 | 95% | 65% | |
| 2009/10 | 2519 | 2341 | 93% | 65% | |
| 2010/11 | 1839 | 1682 | 91% | 65% | |
| 2011/12 | 2032 | 1931 | 85% | 65% | |
| 2012/13 | 1650 | 1439 | 87% | 65% | |
| 2013/14 | 2235 | 1669 | 75% | 65% | |
| 2014/15 | 2076 | 1649 | 79% | 65% | |
| 2015/16 | 2516 | 1954 | 78% | 65% | |
| 2016/17 | 2878 | 2399 | 83% | 65% | |
| 2017/18 | 2289 | 1727 | 75% | 65% | |
| Last 5 years | 11,264 | 9,110 | 81% | 65% | |

Whilst 2017/18 saw a drop in the amount of housing delivered on PDL to the lowest level since 2013/14, it was still well above the target of 65%. This shows there was continued success in reusing sites and delivering in the inner area and city centre where brownfield opportunities are greatest and the activities of the Council tend to be focussed. However it also reflects the shift in national and local policy and a greater acceptance of development on greenfield sites to boost delivery.

| Table 21: Annual net additional dwellings by Housing Market Characteristic Area (2012/13 – 2017/18) | | | | |
|---|---------|--------------|------------|--------------|
| HMCA | Year | Brown | Green | Total |
| Aireborough | 2012/13 | 162 | 0 | 162 |
| | 2013/14 | 152 | 5 | 157 |
| | 2014/15 | 155 | 1 | 156 |
| | 2015/16 | 69 | 0 | 69 |
| | 2016/17 | 129 | 1 | 130 |
| | 2017/18 | 89 | 0 | 89 |
| TOTAL | | 756 | 7 | 763 |
| City Centre | 2012/13 | 298 | 0 | 298 |
| | 2013/14 | 171 | 0 | 171 |
| | 2014/15 | 199 | 2 | 201 |
| | 2015/16 | 194 | 0 | 194 |
| | 2016/17 | 411 | 0 | 411 |
| | 2017/18 | 289 | 5 | 294 |
| TOTAL | | 1,562 | 7 | 1,569 |
| East Leeds | 2012/13 | 69 | 1 | 70 |
| | 2013/14 | 140 | 9 | 149 |
| | 2014/15 | 155 | 44 | 199 |
| | 2015/16 | 86 | 233 | 319 |
| | 2016/17 | 42 | 185 | 227 |
| | 2017/18 | 14 | 34 | 48 |
| TOTAL | | 506 | 506 | 1,012 |
| Inner Area | 2012/13 | 326 | 96 | 422 |
| | 2013/14 | 375 | 141 | 516 |
| | 2014/15 | 324 | 14 | 338 |
| | 2015/16 | 692 | 36 | 728 |
| | 2016/17 | 702 | 7 | 709 |

| Table 21: Annual net additional dwellings by Housing Market Characteristic Area (2012/13 – 2017/18) | | | | |
|---|---------|--------------|------------|--------------|
| HMCA | Year | Brown | Green | Total |
| | 2017/18 | 588 | 28 | 616 |
| TOTAL | | 3,007 | 322 | 3,329 |
| North Leeds | 2012/13 | 126 | 7 | 133 |
| | 2013/14 | 210 | 2 | 212 |
| | 2014/15 | 207 | 10 | 217 |
| | 2015/16 | 407 | 6 | 413 |
| | 2016/17 | 262 | 31 | 293 |
| | 2017/18 | 264 | 45 | 309 |
| TOTAL | | 1,476 | 101 | 1,577 |
| Outer North East | 2012/13 | 35 | 9 | 44 |
| | 2013/14 | 39 | 70 | 109 |
| | 2014/15 | 40 | 73 | 113 |
| | 2015/16 | 44 | 69 | 113 |
| | 2016/17 | 125 | 30 | 155 |
| | 2017/18 | 71 | 46 | 117 |
| TOTAL | | 354 | 297 | 651 |
| Outer North West | 2012/13 | 5 | 0 | 5 |
| | 2013/14 | 35 | 26 | 61 |
| | 2014/15 | 104 | 23 | 127 |
| | 2015/16 | 40 | 0 | 40 |
| | 2016/17 | 111 | 6 | 117 |
| | 2017/18 | 84 | 2 | 86 |
| TOTAL | | 379 | 57 | 436 |
| Outer South | 2012/13 | 19 | 1 | 20 |
| | 2013/14 | 11 | 3 | 14 |
| | 2014/15 | 12 | 4 | 16 |
| | 2015/16 | 23 | 46 | 69 |
| | 2016/17 | 21 | 125 | 146 |
| | 2017/18 | 10 | 104 | 114 |
| TOTAL | | 96 | 283 | 379 |
| Outer South East | 2012/13 | 63 | 2 | 65 |
| | 2013/14 | 53 | 140 | 193 |
| | 2014/15 | 47 | 85 | 132 |
| | 2015/16 | 54 | 27 | 81 |
| | 2016/17 | 122 | 8 | 130 |
| | 2017/18 | 71 | 24 | 95 |
| TOTAL | | 410 | 286 | 696 |
| Outer South West | 2012/13 | 129 | 74 | 203 |
| | 2013/14 | 185 | 166 | 351 |
| | 2014/15 | 183 | 170 | 353 |
| | 2015/16 | 129 | 117 | 246 |
| | 2016/17 | 262 | 58 | 320 |
| | 2017/18 | 125 | 224 | 349 |
| TOTAL | | 1,013 | 809 | 1,822 |
| Outer West | 2012/13 | 204 | 24 | 228 |
| | 2013/14 | 298 | 4 | 302 |
| | 2014/15 | 223 | 1 | 224 |
| | 2015/16 | 217 | 27 | 244 |

| Table 21: Annual net additional dwellings by Housing Market Characteristic Area (2012/13 – 2017/18) | | | | |
|---|---------|---------------|--------------|---------------|
| HMCA | Year | Brown | Green | Total |
| | 2016/17 | 211 | 29 | 240 |
| | 2017/18 | 122 | 50 | 172 |
| TOTAL | | 1,275 | 135 | 2289 |
| ALL HMCAs | | 10,834 | 2,810 | 13,644 |

Not surprisingly the split between brownfield and greenfield varied greatly across the HMCA's which was inevitably influenced by the availability of green and brownfield land. In all HMCAs except East and Outer South, more units were delivered on brownfield land over the last 6 years than green field.

Indicator 6: Five year supply of housing sites and the long term housing trajectory

Relevant Core Strategy Policies:

Policy SP6 The Housing Requirement and Allocation of Housing Land

Policy SP7 Distribution of Housing Land and Allocations

Policy SP10 Green Belt

Policy H1 Managed Release of Sites

Policy H2 New Housing Development on Non Allocated Sites

The SHLAA 2018 Update shows 33,704 units in the short term across 550 sites. This includes sites yet to be released from Green Belt and safeguarded land designations which are not available now for the purposes of the NPPF until the adoption of the SAP. Accordingly, the Council removes 128 sites from the assessed supply and discounts 5,487 dwellings from the SHLAA short-term deliverable supply to complete the five year supply picture from identified supply (i.e. excluding windfall). This includes sites in the SHLAA without planning permission that are being promoted in the SAP but currently in alternative use and are therefore excluded from five year supply calculations.

This leaves a minimum policy compliant (Identifiable) deliverable supply of 28,217, the majority of which is either under construction or has detailed planning permission. A further 3,805 with outline permission means some two-thirds (18,740 units) are either under construction or have planning permission. The 6,663 dwellings with no or expired planning permission are allocations in the SAP. These include brownfield sites that will be granted permission in principle (PiP) through the Brownfield Land Register route. PiP is a new instrument which has the strong likelihood of enabling a significant level of housing growth in Leeds. PiP will confirm the principle and amount of residential development for relevant sites, thereby providing developers with increased certainty, subject only to the technical details stage.

The Council's current published five year housing land supply is **30,492 units** and **4.79 years**. However if the simplified calculation provided for in the MHCLG requirement is applied there is a supply of 16.52 years and applying the soon-to-be-adopted CSSR requirement results in a supply of 8.94 years. Each method results in significant exceedance of a five year supply. This provides a very important context to the consideration of the Council's supply, when calculated against the (very high) Core Strategy requirement.

Indicator 7: Housing completions (new and converted units) by land type

Relevant Core Strategy Policies:

Policy SP6 The Housing Requirement and Allocation of Housing Land
Policy SP7 Distribution of Housing Land and Allocations

| Table 22: Gross housing completions by land type | | | | |
|--|-------------|------------------|-------------|------------------|
| Classification of site | 2016/17 | | 2017/18 | |
| | Completions | FYS category | Completions | FYS category |
| New build | 2394 | Identified sites | 1,752 | Identified sites |
| Conversions | 484 | Identified sites | 537 | Identified sites |
| Total | 2878 | | 2289 | |
| SHLAA sites | 2376 | Identified sites | 1,827 | Identified sites |
| Sites under SHLAA threshold | 502 | Windfall | 462 | Windfall |
| Total | 2878 | | 2289 | |
| Windfall % of total | 17% | | 20% | |

In 2017/18, gross housing completions dropped slightly to 2,289 units, 76.5% of which was new build and 23.5% was conversions. 80% of development was on site identified in the SHLAA whilst 20% was on sites under the SHLAA threshold.

Indicator 8: Density of new housing sites

Relevant Core Strategy Policies:

Policy H1 Managed Release of Sites
Policy H3 Density of Residential Development

| Table 23: Housing Densities | | | | |
|--|--------------|-----------------|-------------------|-------------|
| Period | City Centre | Main Urban Area | Major Settlements | Rural |
| 2013/14 | 292.9 | 64.8 | 41.9 | 22.9 |
| 2014/15 | 354.3 | 87.2 | 109.4 | 35.0 |
| 2015/16 | 318.3 | 79.8 | 59.6 | 17.5 |
| 2016/17 | 393.4 | 90.5 | 56.9 | 45.6 |
| 2017/18 | 358.0 | 94.0 | 78.2 | 20.2 |
| Average | 343.4 | 83.3 | 69.2 | 28.2 |
| Policy H3 minimum (dwellings/hectare) | 65 | 40 | 35 | 30 |
| Indicator | | | | |

The Core Strategy sets minimum densities in Policy H3 to encourage sustainable housing development and more efficient use of land in order to avoid more greenfield land being developed than is necessary. In 2017/18 new development continued to exceed minimum densities in all parts of Leeds, except in rural areas where densities dropped below the minimum standard of 30 dwellings/hectare. As would be expected, densities continued to be highest in the city centre where

they exceeded the minimum standards considerably with the predominance of apartment blocks development. High density development in particularly the city centre, main urban area and major settlements helps to achieve the effective and efficient use of land throughout Leeds.

However, there has been growing concern that the internal space of new dwellings is getting smaller with implications for accessibility, sustainability and quality of life including health. The Core Strategy Selective Review is therefore seeking to improve the quality housing provided in Leeds to create a healthy and sustainable living environment for current and future generations. It proposes a new policy - Policy H9 – which will reflect the Nationally Described Space Standards (NDSS) of 2015 and set out internal space requirements for new dwellings (the Gross Internal (floor) Area at a defined level of occupancy, floor areas and dimensions for key parts of the home).

Housing Type and Mix

Indicator 9: Mix of net housing (new and converted units) delivered each year by housing type and number of bedrooms

Relevant Core Strategy Policies:

Policy SP3 Role of Leeds City Centre

Policy H4 Housing Mix

Policy H6 Houses in Multiple Occupation (HMOs), Student Accommodation and Flat Conversion

Policy H8 Housing for Independent Living

Table 24: Mix of housing units delivered each year by housing type and number of bedrooms (exc. empty homes)

| Year | Flats / Maison's | Housing units (includes bungalows) | | | Total |
|---------------------|---------------------|------------------------------------|---------------|-----------|-------------|
| | | Terrace | Semi detached | Detached | |
| 2013/14 (%delivery) | 841 (38%) | 398 (18%) | 429 (19%) | 561 (25%) | 2229 (100%) |
| 2014/15 (%delivery) | 668 (34%) | 437 (22%) | 426 (21%) | 448 (23%) | 1979 (100%) |
| 2015/16 (%delivery) | 1119 (39%) | 682 (23%) | 311 (17%) | 362 (21%) | 2474 (100%) |
| 2016/17 (%delivery) | 1397 (49%) | 725 (25%) | 311 (11%) | 445 (15%) | 2878 (100%) |
| 2017/18 (%delivery) | 1050 (46%) | 502 (22%) | 326 (14%) | 411 (18%) | 2289 (100%) |
| Total | 5075 | 2744 | 1803 | 2227 | 11849 |
| Average | 43% | 23% | 15% | 19% | 100% |
| Policy H4 | 25% | 75% | | | |
| 2017/18 | | | | | |

| Type | Number of bedrooms | | | | Total |
|--------------------------------|--------------------|--------------|--------------|--------------|-------|
| | 1 | 2 | 3 | 4+ | |
| Flats/Maisonettes | 503 | 491 | 33 | 23 | 1050 |
| Houses/Bungalows | 2 | 205 | 562 | 470 | 1239 |
| Total | 505 | 696 | 595 | 493 | 2289 |
| % Delivery | 22.1% | 30.4% | 26.0% | 21.5% | 100% |
| Core Strategy Policy H4 target | 10% | 50% | 30% | 10% | 100% |

2017/18 has seen the continued dominance of flats and apartment building, though at a slightly lower level than 2016/17. It also saw a decrease in terrace and detached properties and a slight increase in semi-detached.

The number of bedrooms in new dwellings provides an indication of the size and type of dwelling developed. This information is important to ensure that the appropriate housing mix is being developed. In 2017/18, 2 bedroomed units represented the largest share of completions nevertheless, over a quarter of all completions were 3 bedroomed properties and 1 and 4+ bedroomed properties were just less than a quarter. These figures are in line with Core Strategy Policy H4 target splits which are highest for 2 and 3 bedroomed properties however the actual delivery of 2 and 3 bedroomed units was below the target.

Indicator 9 (A): Mix of net housing (new and converted units) delivered each year by housing type and number of bedrooms in Aire Valley

Relevant Core Strategy Policies:

Policy SP3 Role of Leeds City Centre
 Policy H4 Housing Mix
 Policy H6 Houses in Multiple Occupation (HMOs), Student Accommodation and Flat Conversion
 Policy H8 Housing for Independent Living

Table 25: Net housing delivered each year by housing type within AVLAAP boundary

| Type | Bedrooms | | | | | | | | | | | | Total | | |
|----------------------|-----------|----------|-----------|-----------|-----------|-----------|-----------|----------|----------|----------|----------|----------|------------|-----------|------------|
| | 1 | | | 2 | | | 3 | | | 4 | | | 2015/16 | 2016/17 | 2017/18 |
| 2015/16 | 2016/17 | 2017/18 | 2015/16 | 2016/17 | 2017/18 | 2015/16 | 2016/17 | 2017/18 | 2015/16 | 2016/17 | 2017/18 | | | | |
| Detached | 0 | 0 | 0 | 2 | 0 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 5 | 0 | 0 |
| Flats | 22 | 0 | 60 | 47 | 17 | 92 | 0 | 0 | 0 | 1 | 0 | 0 | 70 | 17 | 152 |
| Terraced | 0 | 0 | 0 | 8 | 0 | 0 | 72 | 0 | 0 | 6 | 0 | 0 | 86 | 0 | 0 |
| Semi-detached | 0 | 0 | 0 | 12 | 0 | 0 | 4 | 0 | 0 | 0 | 0 | 0 | 16 | 0 | 0 |
| AVLAAP Total | 22 | 0 | 60 | 69 | 17 | 92 | 79 | 0 | 0 | 7 | 0 | 0 | 177 | 17 | 152 |

Delivery within AVLAAP increased significantly compared to 2016/17 and was exclusively flatted accommodation, reflecting the citywide predominance of flats/maisonettes.

Affordable housing

Indicator 10: Gross affordable housing completions

Relevant Core Strategy Policies:

Policy SP1 Location of Development,
 Policy SP4 Regeneration Priority Programme Areas,
 Policy SP5 Aire Valley Leeds Urban Eco-Settlement,
 Policy H5: Affordable Housing

Table 26: Gross affordable housing completions

| Period | Section 106 | HCA Grant assisted (RP / LCC delivery) | LCC Programme (PFI, RtB & LAMS) | Total |
|---------|-------------|--|---------------------------------|------------|
| 2012/13 | 72 | 119 | 14 | 205 |
| 2013/14 | 109 | 175 | 45 | 329 |
| 2014/15 | 79 | 288 | 88 | 455 |
| 2015/16 | 129 | 78 | 249 | 456 |
| 2016/17 | 112 | 302 | 143 | 557 |
| 2017/18 | 88 | 115 | 36 | 239 |

239 affordable housing units were completed in 2017/18, with 88 through Section 106 Agreements and 115 through grant assisted schemes

The Housing Growth Programme was established by the Council to help deliver new homes across all tenures through the delivery of affordable housing, direct delivery of council new build (including the acquisition of long term empty homes) and helping to unlock stalled private sites in partnership with the development sector.

The main method of delivering affordable housing is through the Affordable Homes Programme (AHP), funded by Homes England and delivered by Registered Providers (RPs). The AHP has delivered over 500 properties since 2015 and is due to produce a further 500 over the period to 2021. It represents well over £100m investment into the city. Other streams include the development of specialist housing (e.g. bespoke properties, self-build) and delivery by RPs and the 3rd sector using land and grants from the Council, including Right to Buy receipts. An innovative new funding route via long term borrowing was approved by Executive Board in February 2018

Affordable housing is also delivered through S106 agreements (on site and through commuted sums.) Commuted sums can be matched with other funding to maximise resources; in 2016 it was anticipated that for every £1 of S106 commuted sums spent, £8 would be invested from other funding sources.

The Housing Growth Programme includes the Acceleration Programme which helps to unlock stalled sites through e.g. identifying possible sites, brokering finance discussions with Homes England/LEP to marry up RPs with land owners, and the council housing growth programme which delivers new units through direct new build, off plan acquisitions and the acquisition of long term empty homes. At March 2018, 28 sites had been supported into delivery – almost 1900 units. Furthermore the council has successfully secured support through Homes England’s Accelerated Construction programme and the Housing Infrastructure Fund - Marginal Viability Fund which will provide over £7m for otherwise unviable sites unlocking c600 units. The outcome of a further and much larger HIF bid is awaited.

The council housing growth programme has delivered over 600 units so far through direct new build, off plan acquisitions and the acquisition of long term empty homes. The next phase of the programme will focus on the delivery of extra care housing, using HRA investment as a catalyst to deliver 360 units of mixed tenure development. This investment will be spread across a number of schemes, either fully council owned or through units acquired on another providers scheme. Procurement has commenced through a dedicated procurement framework.

125 long term empty properties have been returned to use through this programme funded by either Homes England grant or RTB receipts. This includes the conversion of some community centres and former caretakers’ properties. The Chancellor of the Exchequer in the Autumn Budget outlined the borrowing cap will be raised by up to £1b in areas where local authorities are faced with high

affordability pressures. Local Authorities who are eligible will be able to bid for a programme which will run from 2019/20 for two years. The Prospectus, which will be released by Homes England, is expected soon.

Older Persons Accommodation

The number of older people as a proportion of the population is increasing and placing additional demands for services. It is important that the provision of specific older persons housing provision is monitored so we can understand whether new homes are meeting their needs e.g. the right type and are sufficiently adaptable.

Indicator 11: Total number of C2 housing units delivered per annum

Relevant Core Strategy Policies:

Policy SP1 Location of Development
 Policy SP4 Regeneration Priority Programme Areas
 Policy SP5 Aire Valley Leeds Urban Eco-Settlement
 Policy H4: Housing Mix
 Policy H5: Affordable Housing
 Policy H8: Housing for Independent Living

| Table 27: Number of C2 housing units delivered each year | | | | | |
|--|--------------|---|--|------|-----------|
| Period | Planning Ref | Proposal | Location | Beds | Units |
| 2012/13 | 10/01593/FU | Part 2 part 3 storey residential care home with 58 bedroom | Wetherby Health Centre, St James's Street | 58 | 29 |
| 2013/14 | 11/00915/FU | Three storey residential care home | Grove Lane, Headingley | 76 | 38 |
| 2013/14 | 10/04942/FU | Change of use and extension to education centre to form 96 bed space care home | The Grange, York Road, Seacroft | 96 | 48 |
| 2014/15 | 12/03868/FU | One three storey care home | Theaker Lane | 64 | 32 |
| 2015/16 | 14/02689/FU | Demolition of restaurant and erect 74 bedroom residential care home | China Red Dragon, 3 Wakefield Road, Oulton | 74 | 37 |
| 2015/16 | 14/01942/FU | 2 storey 60 bedroom care home | Grange Court, Church Gardens, Garforth | 60 | 30 |
| 2017/18 | 15/03475/FU | Demolition of restaurant and erect 74 bedroom residential care home for the elderly with car parking and associated external works. | Land Adj Seacroft Grange Care Village, The Green, Seacroft | 74 | 37 |

Build out rates

In April 2018 the number of sites under construction increased to 124, the greatest level of sites operating at the same time since 2008. Analysis of sites completed as at 1 April 2018 that were under construction for a period of more than 60 days between building control commencement and completion reveals an average build out rate of 45 units per annum (in comparison to 39 units per annum in 2016/17). This ranges from 14 units for sites under 20 units to 68 units on sites over 100 units. This increase reflects improved activity across all markets in Leeds and the continued resurgence of the city centre.

For those sites which will take more than 3 years to deliver (i.e. sites over 50 dwellings), the SHLAA build out rates of up to 50 dwellings per annum are achievable. The Council continues to press for increased build out rates and acknowledges the Government's report as part of the Letwin Review to support proposals that diversify the market in order to accelerate construction to meet targets.

| Table 28: Build Out Rates (April 2018) | | | |
|--|-----------------|--|--|
| Site Capacity | Number of sites | Total units complete (as at 31 March 2018) | Build out (units per annum) |
| Under 20 units | 78 | 772 | 23.9 |
| Between 20 to 50 units | 32 | 1016 | 48.2 |
| Between 50 to 100 units | 18 | 1257 | 47.9 |
| 100 or more units | 19 | 3,318 | 60.7 |
| Total | 147 | 6,363 | Average build out rate 45 units per annum |
| Based on analysis of sites completed as at 31 March 2018 that were under construction for a period more than 60 days between building control commencement and completion. | | | |

Demolition rates

2017/18 saw a further reduction in demolitions to just 6 units located in the inner area. The Council has continued its approach to increase its social housing stock.

Gypsies, Travellers and Travelling Show people

Indicator 12: Total number of Gypsy and Traveller pitches in the District as compared to the previous year

Relevant Core Strategy Policies:

Policy H7: Accommodation for Gypsies, Travellers and Travelling Show People

The number of Gypsy and Traveller pitches remained unchanged at 66 in 2017/18.

| Table 29: Total number of Gypsy and Traveller plots in the District | | | | |
|--|-----------------------------|----------------|----------------|----------------|
| Type | Site | Pitches | | |
| | | 2015/16 | 2016/17 | 2017/18 |
| Public provision | Cottingley Springs | 41 | 41 | 41 |
| | Kidacre Street | 5 | 8 | 8 |
| Private provision | Nepshaw Lane | 2 | 2 | 2 |
| | Rose Neath | 1 | 1 | 1 |
| | Ninevah Lane | 1 | 1 | 1 |
| | Knotford Nook | 1 | 1 | 1 |
| | Springfield Villas | 2 | 2 | 2 |
| Private provision (tolerated sites) | Dunningley Lane, Middleton | 2 | 2 | 2 |
| | White Rose Farm, Gildersome | 2 | 2 | 2 |
| | Scarecrow Farm, Gildersome | 1 | 1 | 1 |
| | Thorp Lane, Tingley | 3 | 3 | 3 |
| | Urn Farm, Middleton | 2 | 2 | 2 |
| Total provision | | 63 | 66 | 66 |

Indicator 13: Total number of Travelling Showpeople plots in the District as compared to the previous year

Relevant Core Strategy Policies:

Policy H7: Accommodation for Gypsies, Travellers and Travelling Show People

The number of plots did not change in 2017/18. There is still a tolerated site at Whitehall Road, Drighlington where 8 families are reported by the Showmen's Guild to currently reside. There is also a longstanding small site at Town Street, Yeadon.

Vacancy rates

Indicator 14: % of empty homes in the District (as measured through properties classified as long term vacant)

Relevant Core Strategy Policies:

Policy SP6 The Housing Requirement and Allocation of Housing Land
 Policy SP7 Distribution of Housing Land and Allocations,
 Policy H1: Managed Release of Sites

Table 30: % of empty homes (as measured through properties classified as long term vacant) at 1 April 2018

| Type | Total |
|----------------------------|--------------|
| Number of properties | 351,601 |
| Number of empty properties | 4053 |
| % of empty homes | 1.15% |

The number of vacant properties has increased by 713 from 3,340 in 2016/17 to 4053.

A healthy housing market has vacancy levels within it as it allows churn (a rule of thumb is that a 3% vacancy rate is appropriate in a healthy housing market). Vacancy rates allow choice within the market and that a property can sit empty for a short period of time between residents. If the vacancy rate rises alongside new development, there is concern that the new development is not helping the housing market. In such a case, a review of demand for housing, alongside knowledge of vacant housing stock, will be required. The long term³ vacancy rate at April 2018 was 1.15%. The Leeds Empty Homes Strategy <https://www.leeds.gov.uk/docs/empty%20homes%20strategy%202016%20-%202019.pdf> is helping to bring empty homes back into use and since March 2012 there has been a net reduction of approximately 2000 long term empty homes in the city. More information is available on the Leeds Empty Homes web-page <https://www.leeds.gov.uk/housing/help-with-empty-homes>

³ Longer than 6 months

Conclusions and trends

During 2017/18, 2,333 dwellings (including empty homes and older persons housing) were completed against the increased Core Strategy target of 4,700 units per annum which represented only 49.64% of the target. This was a reduction of nearly 1000 units compared to 2016/17 which compounded historic under delivery to give a shortfall of 6,843 units over the last 6 years. The Council has responded to this by revisiting the housing requirement for Leeds and proposing a revised figure of 51,952 (net) new dwellings between 2017 and 2033, with an annual delivery target of 3,247 dwellings per year. The majority of housing delivery was in the Main Urban Area, the City Centre and major settlements, in line with Core Strategy Policies SP1 and SP7 nevertheless this was below the targets and an increased amount (19%) was located in villages/rural areas/outside the hierarchy (target of 2% target). As in 2016/17, the Inner Area delivered the most housing (610 units (26.7% of the total)) whilst East Leeds saw a fall to deliver the least, just 48 units (2%, compared to 8% in 2016/17) however it is recognised that much of the planned delivery will come later in the plan period.

On 31st March 2018, 21,618 units had planning permission (17,019 with detailed permission) and 12,711 units were available to gain planning permission on allocated land. 4,104 units were under construction (an increase of 581 units on 2016/17) therefore 12,915 units with detailed planning permission had not yet started (an increase of 6,066 units on 2016/17 mainly due to the adoption of AVLAAP). Again, this shows clearly that whilst Core Strategy targets have not been reached this is not a symptom of a lack of supply of deliverable land or extant permissions.

Permissions on greenfield land fell compared to 2016/17 however the figure still remained higher than pre-2015/16 which reflected changes in national policy and the need for flexibility, choice and competition in housing land market to boost delivery. 75% of development was still on PDL. New residential development continued to exceed minimum densities in all parts of Leeds, except in rural areas where densities dropped below the minimum standard of 30 dwellings/hectare and 46% of new accommodation was flats/maisonettes.

239 affordable housing units were delivered, reduction from 557 on 2016/17. 37 older persons units were also delivered. Vacancy rates were at 1.15% of all properties.

The Council's published five year housing land supply is 30,492 units and 4.79 years. When applying the simplified calculation provided for in the MHCLG requirement, the supply is 16.52 years and applying the soon-to-be-adopted CSSR requirement results in a supply of 8.94 years.

Employment

This section looks at progress during 2017/18 against the employment indicators set out in the Core Strategy Monitoring Framework. It compares progress against performance in recent years and against the level of development anticipated in the Core Strategy (2012 – 2028) and provides data on current employment land availability.

Overall commentary

Indicator 15: Total amount of additional employment floorspace by type

Relevant Core Strategy Policies:

Policy EC1: General Employment Land

Policy EC2: Office Development

Table 31 shows that the significant recent pick up in development activity identified in the 2016/17 AMR continued into 2017/18. Total new completed floorspace in 2017/18 (92,899 sqm) was 44% more than the average for the last five years (64,175 sqm) and at a similar level to 2015/16 and 2016/17.

| Table 31: Completed floorspace and land developed by employment type | | | | | | |
|--|--------------|------------------|--------------------|------------------|--------------|------------------|
| Year | Offices | | General Employment | | Total | |
| | Area (ha.) | Floorspace (sqm) | Area (ha.) | Floorspace (sqm) | Area (ha.) | Floorspace (sqm) |
| 2017/18 | 1.47↓ | 44,193↑ | 22.17↑ | 48,706↑ | 23.64↑ | 92,899↑ |
| 2016/17 | 2.17 | 49,317 | 17.18 | 46,287 | 19.35 | 95,604 |
| 2015/16 | 3.74 | 29,388 | 20.04 | 66,011 | 23.78 | 95,399 |
| 2014/15 | 2.66 | 20,355 | 2.11 | 6,745 | 4.77 | 27,100 |
| 2013/14 | 0.27 | 2,100 | 2.50 | 7,771 | 2.77 | 9,871 |
| TOTAL | 10.31 | 145,353 | 64 | 175,520 | 74.31 | 320,873 |
| 5 YEAR AVERAGE | 2.06 | 29,071 | 12.80 | 35,104 | 14.86 | 64,175 |
| CS NEED ESTIMATE (P.A) | - | 33,600 | 23.5 | - | - | - |

↑↓ - 2017/18 compared to 5 year average

2017/18 saw the second highest level of office completions over the last five years at 44,193 sqm, more than 50% higher than the five year average (29,071 sqm). Since the beginning of the Core Strategy plan period in 2012, 148,033 sqm of office floorspace has been completed at an average of 24,672 sqm per annum. This is below the anticipated level of development of 33,600 sqm per annum derived from the Core Strategy requirement (see Indicator 16 for details) but this it is mainly a result of a low level of completions in the first two years of the plan period due to the effects of the recession. Development in the last two years has been higher than anticipated in the Core Strategy.

22.17 ha of land was developed for general employment uses (defined in the Core Strategy as research & development, industry and warehousing/distribution uses) and waste management uses in 2017/18. This is the highest level of development activity over the last 5 years and is over 70% more than the five year average (12.8 ha). 66.3 hectares has been developed for general employment/waste management uses since the start of the plan period. The average amount of land developed per year (11 ha) is well below the expected level derived from the Core Strategy requirement (23.5 ha). However completions in the past three years have picked up significantly averaging 19.8 ha per year. The development of sites within the Leeds Enterprise Zone has been an important driver of the increased level of activity.

Indicator 16: Total demand for employment land forecasted in the District until the end of the plan

Relevant Core Strategy Policies:

Policy SP8 Economic Development Priorities,
Policy SP9 Provision for Offices, Industry & Warehouse Employment Land and Premises
Policy CC1 City Centre Development
Policy CC2 City Centre South
Policy EC2: Office Development
Policy EC3: Safeguarding Existing Employment Land and Industrial Areas

Based on the Leeds Employment Land Review (2010 Update), the following requirements have been identified over the Core Strategy plan period (2012-2028).

- *General employment (research & development; industrial and warehousing/distribution uses⁴)* - a minimum of 493 hectares is required to be identified in allocations documents under Core Strategy Spatial Policy 9. This reflects an estimated need for 376 hectares (23.5 hectares per annum) to provide new or relocated jobs in these sectors and a further allowance to provide a margin of choice of 5 years supply for market choice.
- *Office floorspace* - a minimum of 706,250sqm is required reflecting an estimated need for 33,600 sqm of office floorspace each year and allowing for further margin of choice of 5 years. The Core Strategy made a further allowance for allocations documents to increase the requirement to 1,000,000 sqm. This was because existing planning permissions at the time amounted to 840,000 sqm and it was considered appropriate for a further 160,000 sqm of office floorspace to be identified to help prioritise locating of offices in centres, especially the City Centre, reflecting its role as a regional economic centre.

⁴ Also includes waste management uses.

Indicator 17: Employment land available by sector

Relevant Core Strategy Policies:

Policy SP4 Regeneration Priority Programme Areas
 Policy SP5 Aire Valley Leeds Urban Eco-Settlement
 Policy SP8 Economic Development Priorities
 Policy SP9 Provision for Offices, Industry & Warehouse Employment Land and Premises
 Policy SP10 Green Belt
 Policy CC1 City Centre Development
 Policy CC2 City Centre South
 Policy EC1 General Employment Land
 Policy EC2: Office Development
 Policy EC3: Safeguarding Existing Employment Land and Industrial Areas
 Policy P7: The Creation of New Centres
 Policy P8: Sequential and Impact Assessments for Town Centre Uses

Table 32a shows the land available for office development at 31st March 2018 in terms of estimated floorspace and the number of years supply against the expected level of development anticipated in the 2010 Employment Land Review (33,600 sqm per annum). Land with an estimated capacity of 765,000 sqm was available on current sites representing 22.7 years supply. A further 184,000 sqm is proposed in the Site Allocations Plan giving an overall total supply of 949,000 sqm. The potential floorspace available has increased from the 918,000 sqm recorded in 2017 as the amount of office floorspace permitted in new planning approvals has exceeded the amount developed or lost to other uses. The level of office floorspace potentially available now represents approximately 28 years supply compared to the assumed level of development in the Core Strategy.

It should be noted that most of the new office development proposed in the SAP is in the form of mixed use development within or close to the City Centre. Whilst a figure for office development is assumed for these sites, many of the sites could come forward for a range of residential and town centre uses, such as retail and leisure uses, depending on the needs and market conditions prevailing at the time the scheme are progressed.

| Table 32a: Land available for new development (B1 office floorspace estimate) | | |
|---|------------------|---------------------------|
| Site Status | Floorspace (sqm) | Years supply @ 31/03/2018 |
| Current (available short term) ⁵ | 421,344 | 12.5 |
| Current (available medium / long term) ⁶ | 343,800 | - |
| <i>Sub-total: All current sites</i> | <i>765,144</i> | <i>22.8</i> |
| Sites in emerging plans ⁷ | 184,212 | - |

⁵ Current sites are defined as those with an extant planning permission and/or shown on the Leeds Local Plan Policies Map as of 01/04/2018 which have been assessed as being capable of being delivered within the Core Strategy plan period up to 2028. Sites are defined as available in the short term if they have no known availability or achievability constraints.

⁶ Site are defined as available in the medium / long term if they have known availability or achievability constraints such as existing or temporary uses on the site or significant infrastructure constraints.

⁷ Includes employment allocations proposed in the Site Allocations Plan (Submission Draft September 2015) and Aire Valley Leeds Area Action Plan (AVLAAP, Submission Draft Plan, September 2016). Identified sites proposed in these documents are included within the current sites where they have an extant planning

| | | |
|------------------------------|----------------|-------------|
| TOTAL (ALL ELA SITES) | 949,356 | 28.3 |
|------------------------------|----------------|-------------|

Table 32b shows the land available for general employment uses (research & development, industry and warehousing / distribution). 317.5 ha was available on current sites as of March 2018 supply with a further 106 ha proposed in the SAP giving a total of 423.5 ha of employment land available for these uses. This is a reduction from the 437 ha available in 2017 as sites developed for employment or lost to other uses have exceeded new employment permissions but this trend would be expected as the plan period progresses. Overall there is approximately 18 years supply of general employment land, which allowing for a margin of choice of sites, would provide sufficient land until around 2031.

It should be noted that the land area identified as available in the medium / long term in Table 32b includes approximately 50 hectares of employment land within the red line boundary of the HS2 scheme⁸. The red line boundary includes land required for both the construction and operational phases of HS2. The detailed design of the HS2 scheme is still ongoing and therefore the boundary of the land required for the scheme remains subject to change. The two most significant employment sites with the red line boundary are:

- Temple Green, Pontefract Lane (within Enterprise Zone) – 19.4 hectares
- Hawks Park, North Newhold, Garforth – 19 hectares

Some of the land within the 50 hectares is likely to only be required for construction and therefore may still be available for employment use in the longer term following construction of the HS2 scheme. The 50 hectares also includes the proposed East Leeds rolling stock depot at the Temple Green site off M1 Junction 45 which would provide employment development when operational.

Discounting the HS2 land entirely, there is 373 hectares of general employment land available representing about 16 years supply and sufficient to meet employment needs until 2029 with a margin of choice of sites. However, in addition to quantitative provision, further consideration also needs to be given to the type and size of employment land available in the district given HS2 has a potential impact on two larger sites with excellent motorway access and which were considered capable of accommodating large scale industrial/distribution units.

| Table 32b: Land available for new development (B1 other, B2 Industrial & B8 Warehouses) | | |
|--|------------------------|----------------------------------|
| Site Status | Land area (ha.) | Years supply @ 31/03/2018 |
| Current (available short term) | 232.46 | 9.9 |
| Current (available medium / long term) | 85.00 | - |
| <i>Sub-total: All current sites</i> | <i>317.46</i> | <i>13.5</i> |
| Sites in emerging plans | 106.06 | - |
| TOTAL (ALL ELA SITES) | 423.52 | 18.0 |

permission and/or are allocated in the Leeds UDP (Review 2006). The AVLAAP was adopted in November 2017.

⁸ Based on the boundary shown in the HS2 Phase 2B Working Draft Environmental Statement, published for consultation in October 2018.

Indicator 18: Net change of employment land in Leeds

Relevant Core Strategy Policies:

Policy EC1 General Employment Land

Policy EC2: Office Development

Policy EC3: Safeguarding Existing Employment Land and Industrial Areas

There was a net gain in developed employment land during 2017/18 (2.2 ha) which was marginally lower than the net gain of 3.3 ha in 2016/17. As with previous years, existing employment land re-used for housing has accounted for the majority of losses (12.57 ha) which, subject to the policy framework set out in the Core Strategy for loss of employment land, will make an important contribution to meeting the housing targets set out in the Core Strategy.

Whilst the indicator focuses on quantitative losses, there is also a need to ensure that losses of existing employment premises and land do not unduly harm the primary function of established business parks and industrial estates and the businesses that operate from those locations. This issue needs to be balanced against the advantages of adopting a flexible approach to support re-use of buildings and creation of new jobs. This is flagged as an issue which requires further investigation.

Table 33: Losses and gains of employment land to / from other land uses

| Loss / Re-use: | Area (ha) | Number of sites |
|----------------------------|---------------|-----------------|
| Housing | 12.82 | 20 |
| Retail/Other Commercial | 3.81 | 4 |
| Other | 0.94 | 7 |
| Total loss: 2017/18 | 17.57 | 31 |
| Total loss: 2016/17 | 9.34 | 44 |
| Total loss: 2015/16 | 20.3 | 44 |
| Total loss: 2014/15 | 31.44 | 51 |
| Gain from: | | |
| Greenfield sites | 2.39 | 1 |
| Brownfield sites | 17.38 | 11 |
| Total gain: 2017/18 | 19.77 | 12 |
| Total gain: 2016/17 | 12.65 | 13 |
| Total gain: 2015/16 | 13.63 | 10 |
| Total gain: 2014/15 | 3.73 | 11 |
| Net: | | |
| Net (loss) 2017/18 | 2.2 | -19 |
| Net (loss) 2016/17 | 3.31 | -31 |
| Net (loss) 2015/16 | -6.67 | -34 |
| Net (loss) 2014/15 | -27.71 | -40 |

Note: Losses/gains are based on the start of development. Losses relate to land last used for employment purposes

Employment development within Housing Market Characteristic Areas (HMCA) and the Aire Valley Leeds AAP area

HMCA boundaries originate from the Strategic Housing Market Assessment, and relate to the housing characteristic areas used in the Economic Viability Assessment. Using HMCA boundaries for employment monitoring is consistent with the advanced emerging Site Allocation Plan which identifies and allocates sites for employment use up to 2028.

Table 34 shows that approximately 64% of office developments were completed within the City Centre (28,129 sqm), including 13,565 sqm at 3 Wellington Place and 8,070 sqm at 6 Queen Street. Whilst figures for completed floorspace only include additional floorspace provided (new build, extensions or changes of use), two large office refurbishments providing new Grade A floorspace were also completed during 2017/18, Merrion House (refurbished 11,816 sqm, extension 2,990 sqm) and Platform, New Station Street (formerly City House, refurbished 15,645 sqm, extension 953 sqm).

Outside the City Centre, the only major office development completed was at Kirkstall Forge within the Outer West area (15,534 sqm).

General employment developments consisting of industrial and warehousing/distribution land uses were mainly concentrated within East Leeds (10.07 ha), Outer South (5.58 ha), Outer South West (3.55 ha) and the Inner Area (2.23 ha). The five largest completed development by site area were:

- Moran Logistics, Pontefract Road, Stourton (5.58 ha / 5,397sqm) – Outer South
- Land at former Woodkirk Quarries, Britannia Road, Morley (3.55 ha / 5,522 sqm) – Outer South West
- Land at Coal Road, Whinmoor (3.29 ha, 12,877 sqm) – East Leeds
- Hub 45, Knowsthorpe Gate, Cross Green (2.55ha . 3,520 sqm – East Leeds
- Unit 8 (John Lewis warehouse), Skelton Moor Way (Logic / Skelton Moor Farm) (2.39 ha, 4,368 sqm) – East Leeds

| Table 34: Completed employment floorspace by HMCA | | | | |
|---|-----------|-----------|--------------------|--------|
| Area | Size* | B1 Office | General Employment | Total |
| Aireborough | Area (ha) | 0 | 0 | 0 |
| | Sqm | 0 | 0 | 0 |
| City Centre | Area (ha) | 1.10 | 0 | 1.10 |
| | Sqm | 28,129 | 0 | 28,129 |
| East Leeds | Area (ha) | 0 | 10.07 | 10.07 |
| | Sqm | 0 | 28,705 | 28,705 |
| Inner Area | Area (ha) | 0 | 2.23 | 2.23 |
| | Sqm | 0 | 8,107 | 8,107 |
| North Leeds | Area (ha) | 0.13 | 0 | 0.13 |
| | Sqm | 500 | 0 | 500 |
| Outer North East | Area (ha) | 0.01 | 0.74 | 0.75 |
| | Sqm | 30 | 975 | 1,005 |
| Outer North West | Area (ha) | 0 | 0 | 0 |
| | Sqm | 0 | 0 | 0 |
| Outer South | Area (ha) | 0 | 5.58 | 5.58 |
| | Sqm | 0 | 5,397 | 5,397 |

| | | | | |
|------------------|------------------|---------------|---------------|---------------|
| Outer South East | Area (ha) | 0 | 0 | 0 |
| | Sqm | 0 | 0 | 0 |
| Outer South West | Area (ha) | 0 | 3.55 | 3.55 |
| | Sqm | 0 | 5,522 | 5,522 |
| Outer West | Area (ha) | 0.23 | 0 | 0.23 |
| | Sqm | 15,534 | 0 | 15,534 |
| Total | Area (ha) | 1.47 | 22.17 | 23.64 |
| | Sqm | 44,193 | 48,706 | 92,899 |

The Adopted Aire Valley Leeds Area Action Plan (AVLAAP) area is identified as a strategic location for new employment development in the Core Strategy. The area has a target to identify 250 hectares of land for employment use (both office and general employment) over the period 2012-28. Allowing for a margin of choice of sites this equates to an expected level of employment development of 11.9 hectares per year.

As Table 35 shows, 12.6 ha of land was developed for employment in 2017/18 in the AVLAAP area. This is more than in 2016/17 (9.1 ha) and the average over the last five years (7.5 ha) and is above the assumed area target (11.9 ha). In 2017/18 most land (12.4 ha) was developed for general employment (industrial and distribution uses) and this represented 56% of all development in these sectors across the district, highlighting the area's strategic role as an employment location. The largest developments were:

- Moran Logistics, Pontefract Road, Stourton (5.58 ha / 5,397sqm) – Outer South
- Hub 45, Knowsthorpe Gate, Cross Green (2.55ha, 3,520 sqm) – East Leeds
- Unit 8 (John Lewis warehouse), Skelton Moor Way (Logic / Skelton Moor Farm) (2.39 ha, 4,368 sqm) – East Leeds
- Newmarket Lane, Cross Green (1.83ha, 7,710 sqm) – East Leeds
- The Boulevard (Leeds Dock), South Bank (Offices, 0.25ha, 2254 sqm) – City Centre

Office development in 2017/187 (2,254 sqm) was slightly higher than that completed in in 2016/17 (2,028 sqm) and higher than the average of the last 5 years (1,946 sqm). The area accounted for 5% of office development across the district.

Since the start of the Core Strategy plan period 37.6 hectares of employment land has been developed in the AVLAAP area at an average of 6.3 ha per annum. This is below the level of development anticipated in the Core Strategy (11.9 ha per annum). However, in the last three reported years levels of economic activity have been broadly in line with the expected levels, averaging 12 ha per year, as the Enterprise Zone sites come on stream following the construction of enabling infrastructure during the early part of the plan period.

Table 35: Completed floorspace and land developed by employment type within Aire Valley Leeds AAP area

| Year | B1 Office | | General Employment | | Total | |
|-------------------|-------------|------------------|--------------------|------------------|--------------|------------------|
| | Area (ha.) | Floorspace (sqm) | Area (ha.) | Floorspace (sqm) | Area (ha.) | Floorspace (sqm) |
| 2017/18 | 0.25↓ | 2,254↑ | 12.36↑ | 21,225↑ | 12.61↑ | 23,479↑ |
| 2016/17 | 0.77 | 2,028 | 8.31 | 18,016 | 9.08 | 20,044 |
| 2015/16 | 0.46 | 4,126 | 13.76 | 38,422 | 14.22 | 42,548 |
| 2014/15 | 0 | 0 | 0.99 | 2,600 | 0.99 | 2,600 |
| 2013/14 | 0.10 | 1,320 | 0.54 | 2,015 | 0.64 | 3,335 |
| TOTAL | 1.58 | 9,728 | 35.96 | 82,278 | 37.54 | 92,006 |
| 5 YR AVERAGE | 0.32 | 1,946 | 7.19 | 16,456 | 7.51 | 18,401 |
| AREA TARGET (P.A) | - | - | - | - | 11.9 | - |

↑↓ - 2017/187 compared to 5 year average

Conclusions and Trends:

After a few years of more limited employment development at the start of the plan period, activity has increased significantly towards and, in the case of office development, exceeding that anticipated in the Core Strategy since the start of 2015/2016. This is indicative of a strongly growing local economy across a number of economic/employment sectors. This employment development has been concentrated in locations identified and promoted in the Core Strategy and allocation documents (the AVLAAP and SAP) and wider Council economic development strategies and programmes.

Office development

The City Centre has been the main focus of office development in sustainable and highly accessible locations over recent years. This include prestige Grade A developments with excellent access to rail and bus services such as Wellington Place, Central Square and Sovereign Square. The first office building at the mixed use scheme at Kirkstall Forge development next to the new rail station was completed on 2017/18.

Industrial and Distribution

The Aire Valley regeneration area has been a key driver of growth particularly the Leeds Enterprise Zone sites designated in 2012. Development of the former wholesale markets and Thornes Farm sites is continuing and the early phases on the Logic development at Skelton Moor Farm are now completed. Council economic development / regeneration programmes have supported the provision of infrastructure including spine roads and a flood relief channel supported which has enabled larger sites to be brought forward. These have generated new jobs within the area.

Employment Land Supply

There continued to be a sufficient supply of good quality sites in suitable locations to meet anticipated market demand/needs in the office sector. In the industrial / distribution sector, the pipeline of new sites identified in the advanced draft SAP will add to the supply of employment land and help support strategic economic priorities. The overall supply of industrial / distribution land is considered to be adequate to meet needs to the end of the current plan period (2028) but the recent consultation on the Working Draft Environmental Statement for the HS2 scheme has confirmed that current employment land is likely to be lost during construction and permanently. This will particularly impact on delivery of two of the larger sites - Temple Green (Gateway 45) in the Enterprise Zone and North Newhold in Garforth. The impact of the HS2 scheme on the quantity and quality of employment land supply will require further detailed consideration.

Retail and Leisure development

This section sets out information on the amount of retail and leisure development across the whole district and more specifically within or on the edge of town and local centres.

Indicator 19: Total A1 (Retail) development in the District dated

Relevant Core Strategy Policies:

Policy SP3 Role of Leeds City Centre
 Policy SP8 Economic Development Priorities
 Policy CC1 City Centre Development
 Policy CC2 City Centre South
 Policy P2: Acceptable Uses in and on the edge of Local Centres
 Policy P3: Uses in Local Centres
 Policy P4: Shopping Parades & Small Scale Stand Alone Food Stores Serving Local Neighbourhoods and Communities
 Policy P5: Approach to Accommodating New Food Stores Across Leeds
 Policy P6: Approach to Accommodating New Comparison Shopping in Town and Local Centres
 Policy P7: The Creation of New Centres
 Policy P8: Sequential and Impact Assessments for Town Centre Uses

A1 Retail development during 2017/18 (15,798sqm) has decreased compared to 2016/17 (30,929 sqm) but is above the 5 year average (12,667 sqm) and the 2015/16 figure of 3,025sqm. The significant increase in last year's A1 Retail development was mainly due to the new Victoria Gate/John Lewis development within the City Centre. There has not be a similar development this year. New supermarket stores accounted for almost half of all A1 Retail floorspace (7,143 sqm).

| Use Class | 2017/18 | | 2016/17 | 2015/16 | 2014/15 | 2013/14 |
|------------|------------------|------------|------------------|------------------|------------------|------------------|
| | Floorspace (sqm) | Area (.ha) | Floorspace (sqm) | Floorspace (sqm) | Floorspace (sqm) | Floorspace (sqm) |
| A1 Retail | 15,798 | 5.36 | 30,929 | 3,025 | 9,515 | 4,070 |
| D2 Leisure | 6,221 | 1.09 | 6,018 | 3,927 | 3,148 | 4,860 |
| Total | 22,019 | 3.59 | 36,947 | 6,952 | 12,663 | 8,930 |

Note: All figures are gross development

The location of development changed significantly during 2017/18, with nearly 97% of A1 retail development located outside the city centre compared to 95% of development in the City Centre in 2016/17. The out of town retail market continued to expand whilst in-centre developments reduced significantly in 2017/18.

| Table 37: Retail & Leisure Developments 2017/18 | | |
|---|--------------------------|---------------------------|
| Use | Within City Centre (sqm) | Outside City Centre (sqm) |
| A1 Retail | 500 | 15,298 |
| A2 Financial & Professional | 30 | 492 |
| A3 Restaurants & Cafes | 2,151 | 2,663 |
| A4 Drinking Establishments | 593 | 565 |
| A5 Hot Food Takeaway | 0 | 225 |
| D2 Assembly & Leisure | 542 | 5,679 |
| Total | 3,816 | 24,922 |

**It must be noted that there is a roughly 6 month delay on receiving completions data from business rates therefore some 2017/18 completions will come through in 2018/19 and not be included in the 2017/18 figures.*

Indicator 20: Total D2 (Leisure) development in the District

Relevant Core Strategy Policies:

Policy SP1 Location of Development

Policy SP2 Hierarchy of Centres & Spatial Approach to Retailing, Offices and Intensive Leisure & Culture

Policy SP4 Regeneration Priority Programme Areas

Policy SP5 Aire Valley Leeds Urban Eco-Settlement

Policy CC1 City Centre Development

Policy CC2 City Centre South

Policy P1: Town and Local Centre Designations

Policy P2: Acceptable Uses in and on the edge of Local Centres

Policy P3: Uses in Local Centres

Policy P9: Community Facilities and Other Services

As Table 36 shows, new D2 Leisure developments were at a similar level to last year. Most of these developments were change of use from vacant retail and industrial units to uses such as gymnasiums and fitness centres. The majority of new D2 development was located outside the city centre.

Conclusions and Trends:

There was a significant fall in A1 retail development compared to 2016/17 however it must be noted that 2016/17 was an exceptional year with the opening of Victoria Gate, including John Lewis. The figure is still considerably higher than earlier years. Retail delivery is often characterised by noticeable peaks and troughs as developments are only counted once entire developments are completed. The fall was mainly in the City Centre due to the absence of similar large scale schemes. Out of City Centre provision became dominant as schemes were delivered.

Leisure development was at a similar level to 2016/17 and was focussed outside the City Centre.

These figures belie worrying trends that have emerged nationally in 2017/18 which have had, and will continue to have, negative implications at a Leeds level. The national and local footfall trends show a slowdown on the High Street, with internet-trade taking an ever-increasing share of the overall retail economy.

Place making

Indicator 21: % of A1-A5, B1a, C1 and D1-D2 development within and on the edge of town and local centres

Relevant Core Strategy Policies:

Policy SP2 Hierarchy of Centres & Spatial Approach to Retailing, Offices and Intensive Leisure & Culture

Policy SP8 Economic Development Priorities

Policy EC1 General Employment Land

Policy EC2: Office Development

Policy EC3: Safeguarding Existing Employment Land and Industrial Areas

Policy P1: Town and Local Centre Designations

Policy P2: Acceptable Uses in and on the edge of Local Centres

Policy P3: Uses in Local Centres

Policy P4: Shopping Parades & Small Scale Stand Alone Food Stores Serving Local Neighbourhoods and Communities

Policy P7: The Creation of New Centres

Policy P8: Sequential and Impact Assessments for Town Centre Uses

Policy P9: Community Facilities and Other Services

Core Strategy Policy SP2 stipulates that town and local centres will be the focus for retail, offices/employment, intensive leisure, culture and community development to promote their vitality and viability. The majority of new A1-A5 and B1a development in 2017/18 occurred within and on the edge of town and local centres, with particularly A1 Retail developments concentrated within (59%) and on the edge (33%) of such centres. A1 Food development including supermarkets was more evenly spread across in (31%), edge (49%) and out (20%) of centre with nearly half located on the edge of centre. This is in contrast to 2016/17 when 98% of A1 Retail and 100% of A1 Food development was located in centre. There has also been a significant change in the location of A5 (hot food takeaway) developments from 100% of development on the edge of centre to 82% in centre

Reflecting the trend of 2016/17, the majority of B1a Office developments were located within the City Centre (including 3 Wellington Street (13,565sqm) and Queen Street (8,070sqm)) however there was a significant increase in the delivery of out of centre B1a Office floor space at Kirkstall Forge (15,534 sqm). D1 Non-Residential Institutions and D2 Assembly and Leisure developments were mainly located on the edge or outside centre.

Table 38: % of A1-A5, B1a , C1 and D1-D2 development floorspace within and on the edge of town and local centres

| Use Class | IN | | | EDGE | | | OUT | | |
|-------------------|------------|-----------|-----------|------------|-----------|-----------|------------|-----------|-----------|
| | Size (sqm) | % 2017/18 | % 2016/17 | Size (sqm) | % 2017/18 | % 2016/17 | Size (sqm) | % 2017/18 | % 2016/17 |
| A1 Food | 2,230 | 31% | 100% | 3,495 | 49% | 0% | 1,418 | 20% | 0% |
| A1 Retail General | 5,070 | 59% | 98% | 2,813 | 33% | 1% | 772 | 9% | 1% |
| A2 | 70 | 13% | 100% | 452 | 87% | 0% | - | 0% | 0% |
| A3 | 3,243 | 68% | 94% | 870 | 18% | 0% | 671 | 14% | 6% |
| A4 | 1,158 | 100% | 100% | - | 0% | 0% | - | 0% | 0% |
| A5 | 185 | 82% | 0% | - | 0% | 100% | 40 | 18% | 0% |
| B1a | 28,159 | 64% | 95% | 500 | 1% | 1% | 15,534 | 35% | 4% |
| C1 | - | - | 100% | - | - | 0% | - | - | 0% |
| D1 | 983 | 12% | 12% | 2,984 | 40% | 40% | 3,635 | 48% | 48% |
| D2 | 635 | 10% | 9% | 2,702 | 44% | 21% | 2,884 | 46% | 70% |

Indicator 22: % of A1-A5 development within and on the edge of town and local centres dividing between schemes of units larger or smaller than 372sqm

Relevant Core Strategy Policies:

Policy P4: Shopping Parades & Small Scale Stand Alone Food Stores Serving Local Neighbourhoods and Communities

Policy P5: Approach to Accommodating New Food Stores Across Leeds

Policy P6: Approach to Accommodating New Comparison Shopping in Town and Local Centres

In 2017/18, all A1 Food development was above 372 sqm. This was mainly made up of new supermarkets located outside designated centres, with 69% of developments being either on the edge of or outside designated centres. This included a new Aldi store in Guiseley, and a new Lidl supermarket at the former Belgrave Works in Pudsey. This was in contrast to 2016/17 when all A1 Food development was in units below 372 sqm which were located in town and local centres. There was also a general shift in the location of A1 retail units below and above 372 sqm from in centre to

edge and out of centre whereas the location of A5 floorspace (all below 372 sqm) shifted the other way to be more focussed in centres. The majority of A2-A5 development of all sizes were also mainly located within and on the edge of town and local centres.

Table 39: % of A1-A5, development floorspace within and on the edge of town and local centres outside town and local centres dividing between units larger and smaller than 372sqm gross

| Use Class | Units below 372sqm | | | | | | Units above 372sqm | | | | | |
|-------------------|--------------------|---------|---------|---------|---------|---------|--------------------|---------|---------|---------|---------|---------|
| | IN | | EDGE | | OUT | | IN | | EDGE | | OUT | |
| | 2017/18 | 2016/17 | 2017/18 | 2016/17 | 2017/18 | 2016/17 | 2017/18 | 2016/17 | 2017/18 | 2016/17 | 2017/18 | 2016/17 |
| A1 Food | 0% | 100% | 0% | 0% | 0% | 0% | 31% | 0% | 49% | 0% | 20% | 0% |
| A1 Retail/General | 10% | 80% | 60% | 0% | 30% | 20% | 56% | 99% | 23% | 1% | 21% | 0% |
| A2 | 13% | 100% | 87% | 0% | 0%- | 0% | 0% | 0% | 0% | 0% | 0%- | 0% |
| A3 | 70% | 58% | 23% | 0% | 7% | 42% | 66% | 0% | 16% | 0% | 18% | 100% |
| A4 | 100% | 100% | 0% | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% | 0% |
| A5 | 82% | 0% | 0% | 0% | 18% | 100% | 0% | 0% | 0% | 0% | 0% | 0% |

Conclusions and Trends:

There has been a general shift in the location of retail development from in centre to edge and out of centre.

The overall reduction in footfall outlined above is being compounded by an increase in out of town development, conflicting with Policy SP2 and placing further strain on designated centres. In a depressed market, developers are looking for more certainty and opportunities for retail and car parking in close proximity which are found in out of town locations. Local policy is being undermined by the weakness of nation policy set out in the NPPF and the relative ease developments can pass the impact and sequential tests. The high level of demand for retail in the City Centre will ensure its survival however careful monitoring will be required to ensure that these trends do not result in a significant adverse impact on Leeds’ other designated centres.

Infrastructure to support regeneration and growth

Infrastructure Delivery Plan

Infrastructure is essential to support social, economic, and environmental objectives. The term 'infrastructure' has a very wide meaning and relates to all facilities and services which are necessary for successful communities to function. This includes services such as transport (e.g. roads, railways, buses, public transport systems, cycle and pedestrian provision, parking, travel cards and real-time information) education, health facilities, greenspaces, leisure and cultural facilities, and utilities for instance water and electricity.

The Infrastructure Delivery Plan supports the LDF and identifies, as far as possible, the currently planned infrastructure provision in the Leeds Metropolitan District, including the critical infrastructure necessary for the delivery of the Core Strategy over the whole time period. It provides an overarching framework for other service providers' plans and programmes, to bring them into one place and to ensure that all providers are planning for the predicted level and locations of future growth as set out in the Core Strategy.

Due to the level of growth identified in the Site Allocations Plan, there is a clear need for infrastructure provision. The SAP therefore identifies infrastructure needs, particularly in relation to transport and schools, which are set out in the Infrastructure Background Paper (May 2017) https://www.leeds.gov.uk/SiteAllocationMaps/SAP_Submission_Documents_May%202017/CD1-35%20Infrastructure%20Background%20Paper%20Updated%20Submission%20Draft,%20May%202017.pdf. This document includes:

- The **Infrastructure Delivery Plan** which contains a table of completed projects (pages 51 - 53) and a table of planner projects (2017 onwards)(pages 54 – 79)
- a **Schools Background Paper** which outlines the implications of the proposed site allocations in the SAP for school places in the Leeds, including references to sites identified for new schools.
- a **Transport Background Paper** which sets out the current conditions for travel and expected impacts of the proposed development sites contained within the SAP upon the transport system of Leeds. It also provides an overview of planned interventions and a forecast of conditions at the end of the plan period in 2028 if all development is delivered.

Community Infrastructure Levy Receipts

Indicator 23: Provision of Infrastructure as outlined in CIL

Relevant Core Strategy Policies:

Policy SP1 Location of Development
Policy SP4 Regeneration Priority Programme Areas
Policy SP5 Aire Valley Leeds Urban Eco-Settlement
Policy ID2: Planning Obligations and Developer Contributions

Income for CIL in 2016/17 and 2017/18 is set out below in Table 40 and shows an increase in receipts. The amount spent has stayed the same however whilst this amount has been allocated for education and the provision of learning places, it has not been technically spent.

Table 40: CIL income and expenditure

| CIL income (£) | | Amount retained by Council (Strategic Fund@80%)(£) | | Amount paid to Parish/Town Councils or Community Committees (Neighbourhood Fund)(£) | | Amount of Strategic Fund Spent since CIL adopted (£) | |
|----------------|--------------|--|--------------|---|------------|--|---------|
| 2017/18 | 2016/17 | 2017/18 | 2016/17 | 2017/18 | 2016/17 | 2017/18 | 2016/17 |
| 4,151,410.86 | 3,800,570.86 | 3,317,645.16 | 3,042,491.49 | 621,171.10 | 570,425.83 | 685,431.61 | 685,434 |

Indicator 24: Provision of Green Infrastructure and green space as obtained through development process and other sources

Relevant Core Strategy Policies:

- Policy SP1 Location of Development)
- Policy SP3 Role of Leeds City Centre
- Policy SP4 Regeneration Priority Programme Areas
- Policy SP5 Aire Valley Leeds Urban Eco-Settlement
- Policy SP13 Strategic Green Infrastructure
- Policy CC1 City Centre Development
- Policy CC2: City Centre South
- Policy G1: Enhancing and Extending Green Infrastructure
- Policy G3: Standards for Open Space, Sport and Recreation
- Policy G4: New Greenspace Provision
- Policy G5: Open Space Provision in the City Centre

Part of the Best Council Plan involves ambitions for Leeds to be a child-friendly city and a healthy city. Providing green spaces, which improve quality of life is key to this ambition. The Core Strategy will help secure over 500 ha of new greenspace provision in association with its delivery of 70,000 new homes.

In 2017/18 £2,118,619.58 was received from S106 contributions towards greenspace improvements and provision and the creation of play areas. These are no longer recorded separately. £1,319,083.55 was spent.

Table 41:Section 106 green space contributions - £ received and spent

| Year | Green Space | | Play Areas | |
|---------|-----------------|---------------|-----------------------------|-----------------------------|
| | Amount received | Amount spent | Amount received | Amount spent |
| 2017/18 | £2,118,691.58 | £1,319,083.55 | Included green space figure | Included green space figure |
| 2016/17 | £1,702,649 | £1,171,134 | £26,790 | £0 |
| 2015/16 | £2,009,517 | £1,241,825 | £0 | £30,740 |
| 2014/15 | £1,103,334 | £1,259,367 | £16,579 | £0 |
| 2013/14 | £1,530,417 | £336,972 | £112,269 | £50,000 |
| 2012/13 | £804,873 | £991,087 | £43,792 | £0 |

In 2017/18, the City Council undertook 52 green space schemes, the majority of which were improvements to existing green space funded by S106 off site contributions.

Green Space Lost to Development

Indicator 25: Amount of green space lost to redevelopment

Relevant Core Strategy Policies:

Policy SP1 Location of Development
Policy SP4 Regeneration Priority Programme Areas
Policy SP5 Aire Valley Leeds Urban Eco-Settlement
Policy, CC1 City Centre Development
Policy CC2 City Centre South
Policy G5: Open Space Provision in the City Centre
Policy G6: Protection and Redevelopment of Existing Greenspace

No information available.

Indicator 26: Number of Conservation Area appraisals completed as a proportion of total Conservation Areas

Relevant Core Strategy Policies:

Policy P11 Conservation

No information available

Indicator 27: Number of buildings noted as 'At Risk' on the 'At Risk Register'

Relevant Core Strategy Policies:

Policy P11 Conservation

No information available

Indicator 28: Number of Listed Buildings demolished

Relevant Core Strategy Policies:

Policy P11 Conservation

No information available

Indicator 29: Total development in Regeneration Priority Programme

Areas

Relevant Core Strategy Policies:

Policy SP1 Location of Development
 Policy SP4 Regeneration Priority Programme Areas
 Policy SP5 Aire Valley Leeds Urban Eco-Settlement
 Policy SP6 The Housing Requirement and Allocation of Housing Lane
 Policy SP7 Distribution of Housing Land and Allocations
 Policy SP10 Green Belt
 Policy H1 Managed Release of Sites
 Policy EC1 General Employment Land
 Policy EC2: Office Development

There are 4 regeneration priority areas in the Core Strategy, East Leeds, Aire Valley Leeds, Leeds Bradford Corridor (incorporating the West Leeds Gateway), and South Leeds. In the Aire Valley, 2017/18 saw a significant increase in housing delivery with more units completed than in the previous 3 years though this was mainly due to just one scheme. Delivery of employment development was higher than the 5 year average in all types except the area of B1 office development. Whilst the average annual amount of employment land developed since 2012 (6.3ha/annum) is below that anticipated in the Core Strategy (11.9ha/annum), the amount delivered in 2017/18 and the previous 2 years have broadly been in line with expectations as the Enterprise Zone sites come on stream following the construction of enabling infrastructure during the early part of the plan period.

Table 42: Net additional dwellings within Aire Valley Leeds Area Action Plan boundary

| Site | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | Total | Brownfield |
|---|-----------|-----------|-----------|-----------|------------|------------|-------------|
| East Street Mills, East Street | 0 | 0 | 7 | 0 | 147 | 154 | 100% |
| Land At Yarn Street, Hunslet | 53 | 56 | 29 | 0 | 0 | 138 | 100% |
| Land On St Hildas Crescent, St Hildas Grove, Cross Green Crescent, Cross Green, Leeds | 21 | 0 | 0 | 0 | 0 | 21 | 100% |
| Windfall - Unidentified site less than 5 units | 4 | 4 | 3 | 0 | 4 | 15 | 100% |
| Boyd's Mill, 177 East Street, Leeds, LS9 8QE | 0 | 0 | 0 | 9 | 1 | 10 | 100% |
| Long Closed Lane, Richmond Hill | 0 | 0 | 0 | 8 | 0 | 8 | 100% |
| AVLAAP Total | 78 | 60 | 39 | 17 | 152 | 346 | 100% |

Table 43: Completed floorspace and land developed by employment type within Aire Valley Leeds AAP area

| Year | B1 Office | | General Employment | | Total | |
|-------------------|-------------|------------------|--------------------|------------------|--------------|------------------|
| | Area (ha.) | Floorspace (sqm) | Area (ha.) | Floorspace (sqm) | Area (ha.) | Floorspace (sqm) |
| 2017/18 | 0.25↓ | 2,254↑ | 12.36↑ | 21,225↑ | 12.61↑ | 23,479↑ |
| 2016/17 | 0.77 | 2,028 | 8.31 | 18,016 | 9.08 | 20,044 |
| 2015/16 | 0.46 | 4,126 | 13.76 | 38,422 | 14.22 | 42,548 |
| 2014/15 | 0 | 0 | 0.99 | 2,600 | 0.99 | 2,600 |
| 2013/14 | 0.10 | 1,320 | 0.54 | 2,015 | 0.64 | 3,335 |
| TOTAL | 1.58 | 9,728 | 35.96 | 82,278 | 37.54 | 92,006 |
| 5 YR AVERAGE | 0.32 | 1,946 | 7.19 | 16,456 | 7.51 | 18,401 |
| AREA TARGET (P.A) | - | - | - | - | 11.9 | - |

↑↓ - 2017/18 compared to 5 year average

The amount of employment, retail and leisure development in the other three Regeneration Priority Areas is set out below.

| Table 44: Employment, Retail & Leisure development (sqm) within Regeneration Priority Programme Areas | | | | |
|---|--------|--------------------|----------------|---------|
| Regeneration Area | Office | General Employment | Retail (A1-A5) | Leisure |
| Leeds Bradford Corridor | 0 | 322 | 240 | 1,195 |
| East Leeds | 0 | 0 | 2,843 | 2,917 |
| South Leeds | 0 | 5,522 | 60 | 472 |

Indicator 30: Performance as measured by the Index of Multiple Deprivation

Relevant Core Strategy Policies:

Policy SP4 Regeneration Priority Programme Areas
Policy SP5 Aire Valley Leeds Urban Eco-Settlement

The Ministry of Housing, Communities and Local Government (MGCLG) last published The English Indices of Deprivation 2015 in September 2015. They have not been updated since. Leeds is 31 out of 326 when ranking on proportion of neighbourhoods in most deprived 10% nationally. Leeds has 105 neighbourhoods (22%) in the most deprived 10% nationally and has 148 (31%) neighbourhoods in the most deprived 20% nationally.

Indicator 31: Delivery of a City Centre park

Relevant Core Strategy Policies:

Policy SP13 Strategic Green Infrastructure
Policy CC1 City Centre Development
Policy CC2 City Centre South
Policy G1 Enhancing and Extending Green Infrastructure
Policy G3: Standards for Open Space, Sport and Recreation
Policy G4 New Greenspace Provision, Policy
Policy G5 Open Space Provision in the City Centre
Policy G6 Protection and Redevelopment of Existing Greenspace

Relevant Aire Valley Leeds Area Action Plan Policies:

Policy SB2: New City Park

Plans to deliver a new 3.5 ha City Centre Park took a step closer during 2017/18 with the approval of the design brief by the Council's Executive Board. The City Council earmarked some of its Meadow Lane site to be part of the park in addition to contributions from other development opportunities on Meadow Lane. In October 2017 City Plans Panel approved in principle an outline planning application by Vastint, the owners of the former Tetley Brewery site, to deliver 850 homes, 85,000 sqm offices, a hotel and the majority of the proposed City Park

Conclusions and Trends:

Infrastructure

'Infrastructure' is all facilities and services which are necessary for successful communities to function and to support social, economic and environmental objectives. CIL receipts increased compared to 2016/17 though the allocation of the Strategic Fund stayed the same. There was also an increase in S106 funds received for green space however this may be due, in part, to contributions for play provision being included in the green space figure. Spending was at its highest over the last 5 years.

Regeneration

The Aire Valley saw the most development with a significant increase in housing delivery mainly due to just one scheme. Delivery of employment development was higher than the 5 year average in all types except the area of B1 office development whilst the amount of employment land developed in 2015/16 - 2017/18 has broadly been in line with expectations as the Enterprise Zone sites have come on stream. The other 3 regeneration areas delivered limited development.

City Centre Park

Delivery of the park took further steps forward with the City Council earmarking some of its Meadow Lane site to be part of the park and the approval in principle of the outline planning application by Vastint, the owners of the former Tetley Brewery site, to deliver 850 homes, 85,000 sqm offices, a hotel and the majority of the proposed City Park.

A well connected district

Accessibility and Transport

Indicator 32: Accessibility of new dwellings to local services, employment, health, education and centres.

Relevant Core Strategy Policies:

- Policy SP6 The Housing Requirement and Allocation of Housing Land
- Policy SP7 Distribution of Housing Land and Allocations
- Policy SP10 Green Belt
- Policy SP11 Transport Infrastructure Investment Priorities
- Policy CC1 City Centre Development
- Policy H1: Managed Release of Sites
- Policy H2: New Housing Development on Non Allocated Sites
- Policy H8: Housing for Independent Living
- Policy T1: Transport Management
- Policy T2: Accessibility Requirements and New Development

Identifying how accessible new housing developments of 5 or more dwellings are to the services and facilities which they will access provides a measurement of how sustainable these new locations are.

Over 92% of all new housing developments were within a 30 minute bus journey to key local services such as employment, primary schools, secondary schools, and GP surgeries, which was a slight fall compared to the 2016/17 figure of 96%. Over 63% of all new housing developments were within a 30 minute bus journey to the nearest Hospital, and college or university. Less than 2% of all new dwellings had a low accessibility level (greater than 60min).

Table 45: Accessibility of new dwellings to key services by public transport

| Key Local Services | High Accessibility (< 15min) | | Medium Accessibility (<30min) | | Low Accessibility (>60min) | |
|--------------------|------------------------------|---------|-------------------------------|---------|----------------------------|---------|
| | 2017/18 | 2016/17 | 2017/18 | 2016/17 | 2017/18 | 2016/17 |
| Employment | 86% | 91% | 99% | 98% | 6% | 2% |
| Hospitals | 33% | 48% | 63% | 76% | 19% | 2% |
| GP surgeries | 93% | 99% | 95% | 99% | 5% | 1% |
| Primary Schools | 94% | 98% | 96% | 98% | 4% | 1% |
| Secondary Schools | 68% | 65% | 92% | 96% | 4% | 1% |
| Higher Education | 38% | 30% | 69% | 50% | 20% | 2% |

Against this measure of sustainability, development is being delivered in sustainable locations.

Indicator 33: Public transport accessibility of new employment, health, education, leisure and retail developments.

Relevant Core Strategy Policies:

Policy SP8 Economic Development Priorities
 Policy SP9 Provision for Offices, Industry & Warehouse Employment Land and Premises
 Policy SP11 Transport Infrastructure Investment Priorities
 Policy CC1 City Centre Development
 Policy EC1 General Employment Land
 Policy P4: Shopping Parades & Small Scale Stand Alone Food Stores Serving Local Neighbourhoods and Communities
 Policy P5: Approach to Accommodating New Food Stores Across Leeds
 Policy P6: Approach to Accommodating New Comparison Shopping in Town and Local Centres
 Policy P7: The Creation of New Centres
 Policy P8: Sequential and Impact Assessments for Town Centre Uses
 Policy P9: Community Facilities and Other Services
 Policy T1: Transport Management
 Policy T2: Accessibility Requirements and New Development

Measuring the accessibility of new employment, health, education, culture, leisure, and retail uses to the public transport network provides an indication of the sustainability of these new locations.

In order to have access to the public transport network, a location must be within a 5 minute (400m) walking distance to the nearest bus stop. Over 90% of all non-residential developments in 2017/18 were located within 400m of a bus stop and therefore meet the criteria of being accessible to the public transport network. Developments which did not meet the public transport accessibility criteria were on sites which currently have limited public transport infrastructure nearby.

Table 46: Accessibility of new employment, health, education, culture, leisure, and retail uses to the public transport network.

| Development Type | Accessible | | Not Accessible | |
|------------------|------------|---------|----------------|---------|
| | 2017/18 | 2016/17 | 2017/18 | 2016/17 |
| Employment | 95% | 100% | 5% | 0% |
| Health | 100% | 100% | 0% | 0% |
| Education | 100% | 100% | 0% | 0% |
| Culture | 90% | 100% | 10% | 0% |
| Leisure | 95% | 100% | 5% | 0% |
| Retail | 95% | 100% | 5% | 0% |

Against this measure of sustainability, development is being delivered in sustainable locations.

Indicator 34: The delivery of transport management priorities

Relevant Core Strategy Policies:

Policy SP3 Role of Leeds City Centre
 Policy SP11 Transport Infrastructure Investment Priorities
 Policy SP12: Managing the Growth of Leeds Bradford International Airport,
 Policy CC3 Improving Connectivity between the City Centre and Neighbouring Communities
 Policy T1: Transport Management
 Policy T2 Accessibility Requirements and New Development

A number of transport schemes have been delivered across Leeds since April 2012 and work is ongoing to progress further major interventions (See Appendix 2). Table 47 lists the more significant interventions that have been completed.

| Table 47: Delivery of significant transport interventions | | |
|--|---|--------------------|
| Scheme | Description | Completion |
| A647 bus lane | Outbound bus lane and bus gate on Canal Street, Armley | Open Apr 2012 |
| A65 Quality bus scheme | Bus priority, facilities for pedestrians and cyclists, new shelters, pre-signals | Open Aug 2012 |
| Leeds Core Cycle Network route 10 | Route 10 – Armley to City Centre | Open Sep 2012 |
| Leeds Core Cycle Network route 12 | Route 12 – Garforth to City Centre | Open Sep 2012 |
| M621 Jn 2 | Full signalisation of roundabout | Completed May 2013 |
| M62 Smart Motorway | M62 Jn 25-30 Managed Motorway | Completed Sep 2013 |
| Roundhay Rd Integrated Transport scheme | Roundhay Road (Bayswater Rd – Harehills Lane). Am and pm peak outbound bus lane and signalisation of Shepherd's Lane junction | Open Dec 2013 |
| New Pudsey station car park | Extension of station parking by 176 spaces from existing 267 and improved access onto Dawson's Corner. | Open Jan 2014 |
| Elland Rd Park and Ride | Park and ride with 800 parking spaces | Open June 2014 |
| M1 Jn 44 pinch point scheme | Signalisation of M1 Jn 44 | Open Apr 2015 |
| Thornbury Barracks | Signalisation scheme. | Open May 2015 |
| Leeds Core Cycle Network route 9 | Route 9 – Chapel Allerton to City Centre (Regent Street) | Open May 2015 |
| Rodley roundabout | Signalisation scheme. | Open Aug 2015 |
| Horsforth roundabout | Signalisation scheme. | Open Oct 2015 |
| Apperley Bridge station | New station with 300 space parking | Open Dec 2015 |

Table 47: Delivery of significant transport interventions

| Scheme | Description | Completion |
|--|--|------------------------|
| M1 Smart Motorway | M1 Jn 39-42 Smart motorway | Open Dec 2015/Jan 2016 |
| Leeds station southern entrance | New entrance to south of river | Open Jan 2016. |
| A61 Stourton bus lane | A61 outbound bus lane | Open Apr 2016. |
| City Connect towpath upgrade | Upgrade of Leeds-Liverpool canal towpath between Shipley and Leeds | Complete May 2016 |
| Kirkstall Forge station | New station with 122 space parking | Open June 2016 |
| City Connect 1 Cycle superhighway | Seacroft-Leeds City Centre-Bradford 22km cycle superhighway | Open June/Oct 2016 |
| Elland Rd Park and Ride Phase 2 | New visitor facility and resurfacing of overflow car park. | Open Oct/Dec 2016 |
| Aire Valley Park and Ride (Temple Green) | 1000 space park and ride on A63 west of M1 Jn 45 | Open June 2017 |
| Northern St / Whitehall Rd | Junction improvement with enhanced pedestrian and cycling facilities | Open Dec 2017 |
| M1 Jn 45 improvement | Provision of additional lanes and enhanced northbound slip road. | Complete March 2018 |
| Woodhouse La / Clay Pit La | Junction improvement with enhanced pedestrian facilities | Open June 2018 |

Plans for a New Generation Transport (NGT) trolleybus system have now been abandoned following the Secretary of State's decision in May 2016 not to approve the powers for the 14.8km scheme following a public inquiry. Nevertheless, the DfT have allocated their planned £173.5M contribution to NGT towards public transport schemes in Leeds and the Council submitted a strategic case for the Leeds Public Transport Investment Programme to DfT in December 2016. This was approved in April 2017 and work has commenced on developing schemes, consultation and engagement. The package includes an additional private sector investment of up to £100M and comprises proposals for:

- A new high frequency bus network
- A comprehensive package of bus priority measures across the city to improve journey times on some of the most congested corridors

- Investment by First Group in 284 environmentally clean buses
- Provision of real time information at 1000 more bus stops
- Three new rail stations serving Leeds Bradford airport, Thorpe Park and White Rose and the provision of additional parking at New Pudsey station
- Two additional park and ride sites at Stourton and the north of the city together with further expansion of the existing Elland Rd site
- Accessibility improvements at Cross Gates, Morley and Horsforth stations
- New improved bus hub interchange facilities in the city centre and district centres

The outcomes sought from these proposals are to double bus patronage from 2016 levels in 10 years; significantly improve air quality and reduce carbon emissions; support economic growth and job creation; reduce congestion; and work towards all stations in Leeds being accessible.

A Planning permission was granted for the East Leeds Orbital Route (ELOR) in December 2017 and a Public Inquiry is to take place in February 2019. The Council will deliver this key element of infrastructure to facilitate the delivery of the major housing sites that make up East Leeds Extension (ELE). The developers of the housing sites within ELE will contribute to the cost of the road through S106 payments raised by a roof tax on each property. Construction of advanced junction works on the A6120 commenced in August 2018 and the first phase of the new ring road (Manston Lane Link Road, which is being provided by the developer of Thorpe Park) is due to be open in early 2019. Construction of ELOR itself is currently programmed to start in autumn 2019 with completion by the end of 2021.

In August 2017 WYCA adopted a new West Yorkshire Transport Strategy and an associated Bus Strategy for West Yorkshire. This strategy covers the period up to 2040 and sets out a step change in the quality and performance of the transport system within West Yorkshire and our connections with the rest of the UK. It takes into account the opportunities that HS2 and the planned Northern Powerhouse Rail represent and sets out measures to ensure their benefits are felt throughout the City Region. The strategy also recognises the need to upgrade key local and regional roads and motorway system and identifies the huge potential for growth in active travel through cycling and walking, which is already underway.

Indicator 35: Mode of travel to work

Relevant Core Strategy Policies:

Policy SP11 Transport Infrastructure Investment Priorities

Policy T1: Transport Management

Policy T2: Accessibility Requirements and New Development

| Mode | 2012 | | 2013 | | 2014 | | 2015 | | 2016 | | 2017 | |
|--------------|------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| | Baseline Persons | Mode share (%) | Persons | mode share (%) | Persons | mode share (%) | Persons | mode share (%) | Persons | mode share (%) | Persons | mode share (%) |
| Rail | 17,879 | 13.6 | 18,530 | 13.2 | 20,205 | 13.8 | 20,628 | 13.6 | 21,937 | 15.3 | 21,112 | 15.3 |
| Bus | 27,931 | 21.3 | 32,983 | 23.5 | 36,031 | 24.6 | 39,435 | 26.0 | 32,650 | 22.8 | 31,993 | 23.2 |
| Car | 77,352 | 59.0 | 80,769 | 57.6 | 80,790 | 55.2 | 82,531 | 54.3 | 78,727 | 55.1 | 76,82 | 55.7 |
| Motorcycle | 629 | 0.5 | 578 | 0.4 | 610 | 0.4 | 655 | 0.4 | 577 | 0.4 | 517 | 0.4 |
| Cycle | 1,614 | 1.2 | 1,731 | 1.2 | 2,038 | 1.4 | 2,157 | 1.4 | 2,003 | 1.4 | 1,881 | 1.4 |
| Walk | 5,748 | 4.4 | 5,555 | 4.0 | 6,787 | 4.6 | 6,457 | 4.3 | 7,035 | 4.9 | 5,531 | 4.0 |
| Total | 131,153 | 100 | 140,146 | 100 | 146,461 | 100 | 151,863 | 100 | 142,929 | 100 | 137,858 | 100 |

Table 48 shows the results of the annual mode share survey undertaken each spring on radial routes approaching the city centre during the morning peak period (0700 – 0930). This reveals a downward trend in car mode share between 2012-15 and increased use of more sustainable modes. Since then car mode share has risen again but remains below the levels in 2012 and 2013 reflecting a continued need to encourage the use of more sustainable modes of transport.

Indicator 36: Expansion of the Leeds Core Cycle Network

Relevant Core Strategy Policies:

Policy SP11 Transport Infrastructure Investment Priorities
 Policy SP13 Strategic Green Infrastructure
 Policy CC2 City Centre South
 Policy CC3 Improving Connectivity between the City Centre and Neighbouring Communities
 Policy T2: Accessibility Requirements and New Development

Leeds City Council, in partnership with businesses, charities and the West Yorkshire Combined Authority has developed a cycling strategy and action plan and this was endorsed by Executive Board in June 2017. Building on the £35 million investment in the City Connect cycle superhighways, the Leeds Cycling Starts Here Strategy consolidates this and the previous investments into a reinvigorated approach to developing Leeds as a city that embraces cycling as an everyday normalised activity for all, whether that is going about one’s daily business, cycling for fun or leisure, or pursuing it as a sporting activity.

The 22km City Connect cycle superhighway between Bradford, Leeds city centre and Seacroft has been in active use since 2016. Construction of further elements of the City Connect project have commenced on the western and eastern entries to the city centre and are due to be completed in the summer of 2019. In addition, funding has been secured through the National Productivity Investment Fund to provide a further cycle superhighway on the A6120 between King Lane and the planned East Leeds Orbital Route. Construction is planned to commence in 2019.

Public Transport Improvements and Developer Contributions Supplementary Planning Document (SPD)

The Public Transport Improvements and Developer Contributions SPD includes a mechanism for securing section 106 contributions and details range of public transport infrastructure improvements and enhancements within Appendix 1 for which secured contributions can be utilised for. The schemes included with Appendix 1 have been identified from the Leeds City Region Transport Vision, the Local Transport Plan 2 and the emerging documents of the Local Development Framework (including the Site Allocations Plan). The SPD dictates that Appendix 1 is updated via this AMR to reflect completed schemes (detailed in Indicator 34) and the requirements for new schemes and enhancements arising from future developments and transport initiatives included in the updated Appendix 2 below.

Conclusions and Trends:

Accessibility

Access to services and facilities is important in assessing sustainability of development sites. Over 92% of all new housing developments were within a 30 minute bus journey of key local services and less than 2% of all new dwellings had an accessibility level of greater than 60min. Over 90% of all non-residential developments were located within 400m of a bus stop. This shows a high proportion of development occurred on sustainably located sites.

Delivery of transport management priorities

Further schemes were completed during 2017/18 and the Council's strategic case for the Leeds Public Transport Investment Programme was approved by the DfT for the spending of the £173.5M allocated for public transport schemes in Leeds. Scheme development, consultation and engagement were undertaken during 2017/18. The suite of schemes will help to improve air quality, reduce carbon emissions, support economic growth and job creation and reduce congestion, thereby helping to meet the provisions of a number of policies.

Travel to Work

There was an increase in the car mode share however this was below the levels in 2012/13. Reductions have been made however the most recent increase shows clearly that there is still a need to encourage and facilitate more sustainable modes of transport.

Leeds Core Cycle Network

The Council's cycling strategy (Leeds Cycling Starts Here Strategy) and action plan was endorsed by Executive Board in June 2017. It builds on previous investment in the City Connect cycle superhighways, focusing on developing Leeds as a city that embraces everyday cycling. Extensions to the superhighway were started and funding was secured to provide a further superhighway on the A6120 between King Lane and the planned East Leeds Orbital Route.

Environment

Managing environmental resources

Indicator 37: Quality of existing Sites of Special Scientific Interest in Leeds

Relevant Core Strategy Policies:

Policy CC2 City Centre South
Policy H1: Managed Release of Sites
Policy P12: Landscape
Policy G1: Enhancing and Extending Green Infrastructure
Policy G7: Protection of Important Species and Habitats
Policy G8: Biodiversity Improvements

Natural England assesses the condition of SSSIs in England against standard categories used across England, Scotland, Wales, and Northern Ireland. There are six reportable condition categories: favourable; unfavourable recovering; unfavourable no change; unfavourable declining; part destroyed and destroyed.

There are 17 different SSSI sites within the Leeds boundary, many of which have more than one entry to recognise the different habitats within the site and their differing conditions. Most sites/habitats are in a “favourable” or “unfavourable – recovering” condition though East Keswick Fitts, Linton Common and Mickletown Ings are “unfavourable – declining” and Roach Lime Hills (Calcareous Grassland – lowland) is “destroyed.”

This shows that SSSIs are generally being protected under Core Strategy Policy G8: Protection of Important Species and Habitats however ongoing careful management is required to ensure they are in good condition.

Indicator 38: Increase in the amount of tree cover in the District

Relevant Core Strategy Policies:

Policy G2: Creation of New Tree Cover

Relevant Natural Resources and Waste Local Plan Policies:

LAND 2: Development and Trees

Core Strategy Policy G2: Creation of New Tree Cover resists development which would harm or lead to the loss of Ancient Woodland and Veteran Trees. It also supports the increase of native and appropriate tree cover and sets out the Council’s intention to achieve this through its own initiative, working in partnerships and through the development process.

Leeds has over 3,660 hectares of woodland, around one third of which is owned and managed by the Council. 95% of this is broadleaved woodland and 20% is ancient semi-natural woodland, which means that it has remained wooded since at least 1600 AD. The largest piece of ancient woodland

in West Yorkshire is Middleton Woods in south Leeds. The sites varied in size from large wooded estates such as Chevin Forest Park, Temple Newsam Estate, Middleton Park, Roundhay Park etc, down to small, local amenity woodlands in urban areas, such as Churwell Urban Woodlands which are managed in partnership with local people.

In 2017/18 3 ha of woodland was created by the Council at Old Run Road, Belle Isle, with the planting of 13,333 trees. The Council also planted 60 fruit trees at Water Haigh Woodland Park, Woodlesford and 15x street trees on Wykebeck alley Road. The Council aims to create 3.00 ha of new woodland/year.

The University of Leeds undertook a survey of tree canopy cover in Leeds city centre in the summer of 2017. It was a follow up to an earlier survey undertaken in 2010 and showed that in 7 years 2 ha (over 6%) of tree canopy had been lost.

Indicator 39: Planning permissions granted contrary to Environment Agency advice on flood risk and water quality

Relevant Core Strategy Policies:

Policy SP3 Role of Leeds City Centre
Policy SP6 The Housing Requirement and Allocation of Housing Land
Policy SP7 Distribution of Housing Land and Allocations
Policy SP10 Green Belt
Policy SP13 Strategic Green Infrastructure
Policy EN5: Managing Flood risk

Relevant Natural Resources and Waste Local Plan Policies:

Policy WATER 2: PROTECTION OF WATER QUALITY
Policy WATER 3: FUNCTIONAL FLOOD PLAIN
Policy WATER 4: DEVELOPMENT IN FLOOD RISK AREAS
Policy WATER 5: ZONES OF RAPID INUNDATION
Policy WATER 6: FLOOD RISK ASSESSMENTS

Leeds has produced a Strategic Flood Risk Assessment (SFRA) which defines the four flood zones:

- zone 1 is areas of low flood probability;
- zone 2 is areas of medium flood probability;
- zone 3a is areas of high flood probability; and
- zone 3b is the functional floodplain.

The SFRA shows that there is a considerable amount of land within the District, which falls within zone 3a and therefore there is a serious potential flooding problem. The NRWLP therefore resists development in any functional floodplain (Policy Water 3) and requires evidence to show a proposed development can pass the Sequential Test and possibly the Exceptions Test set out in the NPPF (Policy Water 4).

The Environment Agency are a key consultee on issues relating to flood risk and water quality. In 2017/18, it made 20 objections to planning applications on the basis of flood risk in Leeds. Of these 20 objections, 4 applications were refused, 3 were withdrawn and 9 were approved following further information being obtained and the Environment Agency removing their objection. 4 applications have

not been determined yet and are awaiting further information. Again, no applications were approved with outstanding flood risk objections from the Environment Agency. This indicates that consultation procedures are working well between the Environment Agency and Leeds City Council. Environment Agency advice is crucial in helping the authority to manage flood risk and where flood risk cannot be mitigated to a satisfactory level the application will be refused.

Again the Environment Agency did not have any objections relating to water quality.

Indicator 40: Delivery of the Leeds Flood Alleviation Scheme

Relevant Core Strategy Policies:

Policy SP3 Role of Leeds City Centre
Policy EN5: Managing Flood risk

Phase 1 of the award-winning Leeds Flood Alleviation Scheme (FAS) was completed in October 2017 and is one of the largest river flood alleviation schemes in the country using state-of-the-art flood defence engineering techniques. Led by Leeds City Council in partnership with the Environment Agency, the scheme provides more than 3,000 homes, 500 businesses and 300 acres of development land with increased protection against flooding from the River Aire and Hol Beck. It will help to safeguard more than 22,000 jobs over the next 10 years due to the increased level of protection and through the scheme's development and construction 150 jobs and apprenticeships were created.

The FAS Phase 1 consists of 3 main elements:

- Moveable weirs – this is the first time moveable weir technology has been used for flood risk reduction purposes in the UK. The weirs are located at Crown Point and further downstream at Knostrop and they will be lowered to create more room for flood water, with the potential of reducing flood levels by up to 1 metre.
- Removal of the Knostrop Cut to merge the river and canal – the removal of 600m of land has created additional capacity for flood water, helping to lower levels in flood conditions.
- Flood walls, glazed panels and embankments stretching more than 4.5km - defences along the River Aire, a length of Hol Beck and low level embankments at Woodlesford have increased protection.

Phase 2 of the FAS focuses on a combination of Natural Flood Management (NFM) and engineered measures to help slow the flow and catch water further up the catchment so that flood peaks are reduced further downstream. NFM will primarily involve the creation of new woodland areas which will more than double canopy coverage in the River Aire catchment, active land management to reduce run off and the restoration of meanders. Engineered measures include a large water storage area at Calverley which will be operated by a control gate system meaning water can be held and then released back slowly into the river when safe to do so. Flood walls are also proposed, in particular along the Kirkstall Road corridor as well as the removal of existing obstructions along the river to help reduce water levels. An advanced works package has also been completed to locally reduce flood risk. This includes a 700m flood defence at Stourton.

The FAS2 appraisal work was completed in September 2017. The business case for 'Advanced works' was approved by the Environment Agency in January 2018. When completed, the FAS will reduce flooding to 370 businesses and 1048 residential properties across the whole of the scheme.

Indicator 41: Air quality in Leeds

Relevant Core Strategy Policies:

Policy EN1: Climate Change – Carbon Dioxide Reduction

Relevant Natural Resources and Waste Local Plan Policies:

AIR 1 THE MANAGEMENT OF AIR QUALITY THROUGH DEVELOPMENT

Leeds currently meets EU Air Quality Directive Standards for particulate matter. Both PM2.5 and PM10 targets are comfortably achieved, with Leeds also coming close to achieving its aspiration of meeting the PM2.5 annual mean target of 10 µg/m³ set by the World Health Organisation.

There are two objectives to be achieved for Nitrogen Dioxide (NO₂) specified in the UK Air Quality Regulations: an annual mean not to be exceeded of 40 µg/m³, and an hourly mean of 200 µg/m³ not to be exceeded on more than 18 occasions per year. Leeds continues to meet the regulatory limits for the hourly average, however NO₂ concentrations at some specific locations across Leeds are exceeding the annual average limit of 40 µg/m³, making Leeds non-compliant with the UK and EU objectives.

The UK Strategy requires Air Quality Management Areas (AQMA) to be designated where there is relevant exposure to homes and schools. Leeds has designated AQMAs where public exposure is a concern and monitoring data shows that concentrations of NO₂ exceed the annual mean objective.

The EU Air Quality Directive requires member states to meet the objective level where there is public access within 15m of the kerb for at least 100m of the relevant road network (essentially A roads and Motorways) but excludes within 25m of a junction. It is predicted that a small number of road links are at risk of failing this objective beyond 2020 unless action is taken. For this reason, Leeds has been directed by Government to design and implement a Charging Clean Air Zone which will address this concern. The Clean Air Zone (CAZ) is expected to improve air quality generally across urban Leeds with some benefits extending beyond the actual CAZ boundary.

Three of the six AQMAs recorded annual mean nitrogen dioxide concentrations exceeding the objective of 40µg/m³ contained in the UK AQ Regulations, However, the other three recorded annual averages well below the annual mean objective of 40µg/m³. The information set out below for 2017 shows annual average concentrations recorded at each of the AQMAs.

Table 49: Declared Air Quality Management Areas (2018)

| AQMA Name | Pollutants and Air Quality Objectives | City / Town | One Line Description |
|---------------------|--|-------------|---|
| AQMA 1 Ebor Gardens | Exceeded NO ₂ limit of 40µg/m ³ (42µg/m ³) | Leeds | Residential properties on Burmantofts St. and Haslewood Close. Originally declared in 2001, it was extended in 2010 to include Burmantofts St. and York Road. |

Table 49: Declared Air Quality Management Areas (2018)

| AQMA Name | Pollutants and Air Quality Objectives | City / Town | One Line Description |
|----------------------------|---|--------------------|---|
| AQMA 2 Caspar Apartments | Has not exceeded NO2 limit of 40µg/m3 (31µg/m3) | Leeds | Caspar Apartments. Originally declared in 2001, it was extended in 2010 to include North Street and the slip road onto the A58(M) |
| AQMA 3 The Normans | Exceeded NO2 limit of 40µg/m3 (45µg/m3) | Kirkstall, Leeds | Residential properties in the 'Normans' in the immediate vicinity of, and including, Abbey Road. |
| AQMA 4 The Tilburys | Has not exceeded NO2 limit of 40µg/m3 (34µg/m3) | Leeds | Residential properties in the 'Tilburys' and 'Eustons' in the vicinity of, and including, the M621 together with on and off slip roads. |
| AQMA 5 Pool in Wharfedale | Exceeded NO2 limit of 40µg/m3 (55µg/m3) | Pool in Wharfedale | Residential properties, particularly at the back of the footpath adjacent to the A658 (Main Street) through the village. |
| AQMA 6 Chapel Hill, Morley | Has not exceeded NO2 limit of 40µg/m3 (35µg/m3) | Morley | Residential properties with a frontage on Chapel Hill in the 'Morley Bottoms' area of the town. |

Climate Emissions

The table below shows the trend of CO2 reductions across the whole of Leeds since 2005, when the first quality data was available. 2017/18 has seen continued reductions in CO2 emissions. This gives the overall % figure, then breaks this down by the relative contribution of the three main sectors which tend to fluctuate. Note that figures are released with a two year lag.

Table 50: Carbon Dioxide emissions reduction in Leeds District by major emitter

| Year | CO2 emissions (m tonnes) | Per capita % reduction | Absolute % reduction | Absolute CO2 reduction | Industry | Domestic | Road Transport |
|------|--------------------------|------------------------|----------------------|------------------------|----------|----------|----------------|
| 2005 | 5.007 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2006 | 4.991 | 0.5 | 0.3 | 16.0 | -1.3 | 1.3 | 1.7 |
| 2007 | 4.848 | 3.6 | 3.2 | 158.5 | 3.1 | 5.2 | -0.1 |
| 2008 | 4.768 | 5.6 | 4.8 | 239.0 | 4.2 | 5.6 | 4.6 |
| 2009 | 4.318 | 14.8 | 13.8 | 688.7 | 16.2 | 14.2 | 8.6 |
| 2010 | 4.495 | 11.7 | 10.2 | 511.9 | 12.0 | 8.2 | 10.4 |
| 2011 | 4.080 | 20.2 | 18.5 | 926.9 | 21.2 | 19.3 | 12.4 |

| Table 50: Carbon Dioxide emissions reduction in Leeds District by major emitter | | | | | | | |
|---|--------------------------|------------------------|----------------------|------------------------|----------|----------|----------------|
| Year | CO2 emissions (m tonnes) | Per capita % reduction | Absolute % reduction | Absolute CO2 reduction | Industry | Domestic | Road Transport |
| 2012 | 4.305 | 16.6 | 14.0 | 702.1 | 14.7 | 13.5 | 13.7 |
| 2013 | 4.167 | 19.6 | 16.8 | 840.1 | 17.8 | 16.5 | 15.3 |
| 2014 | 3.610 | 30.8 | 27.9 | 1396.9 | 33.5 | 30.0 | 14.6 |
| 2015 | 3.454 | 34.4 | 31.0 | 1553.1 | 39.4 | 31.7 | 14.9 |
| 2016 | 3.277 | 38.4 | 34.6 | 1730.0x | 45.3 | 35.7 | 13.5 |

The figures for previous years are slightly different to those previous AMR's. This is because the government constantly updates past figures as the science improves or as different evidence emerges. It is considered more appropriate to use the revised information rather than fixing early years in the AMR.

Leeds has targets to reduce absolute carbon emissions across the city from a 2005 baseline of c5 million tonnes by

- 40% by 2020 (c3m tonnes)
- 60% by 2030 (c2m tonnes)
- 80% by 2050 (c1m tonnes)

The Council's Supplementary Planning Document on Sustainable Construction. 'Building for Tomorrow, Today' is available on <https://www.leeds.gov.uk>.

Several developments in Leeds have achieved high standards of sustainable construction (e.g. BREEAM "excellent" rating) and have contributed to achieving carbon reductions in the city. Examples are available on the Leeds Climate Commission website <http://leeds.candocities.org/success-stories>, however some examples are

- the Leeds Mail Centre (Royal Mail) where measures such as LED lighting, a temperature 'dead-band' in the Air Handling Units (AHUs) to ensure they stop operating when not needed, turning lights off, keeping doors closed etc were introduced. In 2016/17 this led to a 15.5% reduction in total energy consumption and a 21.11% reduction in the associated carbon footprint compared to the previous year.
- Harewood House is heated by a biomass plant powered by thinning from the estate's woodlands which provides various benefits including cost and carbon savings. It cost over £2 million to install however Renewable Heat Incentive payments will help to offset this over 20 years and a fixed rate service charge to commercial and residential tenants has provided a new income stream for the estate. Overall the project is estimated to give in the region of a 5% annual return and save 441 tonnes of CO2 in comparison to using oil boilers. Timber from woodland thinnings used to be taken to Newark or Durham for processing so it is estimated that over a 20 year cycle of the estate's woodland strategy, approximately 840 wagon

movements, around 126,000 total road miles and approximately 195 tonnes of CO2 will be saved.

- Social Business Brokers helped to set up Leeds Community Homes which aims to take a community-led approach to creating 1000 permanently affordable homes in Leeds over the next ten years. A community share offer in 2016 raised over £360,000 from 275 people to invest in the creation of 16 “People Powered Homes” within Citu's Climate Innovation District development on the South Bank.
- Over 100 churches in the Leeds area have joined the “Green Journey”, a supply switching and energy efficiency service provided by a consultancy in partnership with the Anglican Diocese of Leeds. Switching supplier to renewably generated electricity or carbon neutral gas has, on average, cut each church’s annual carbon emissions by 1.6 tonnes. Church House, the Diocesan office in Leeds, and all vacant vicarages have been switched to renewable electricity.

The Council runs a number of projects aimed at improving domestic energy efficiency, such as the installation of larger scale energy efficiency measures such as heating improvements and insulation by Better Homes Yorkshire (LCC’s main contractor). Better Homes Yorkshire had a target of installing measures in 237 households in Leeds and actually assisted 284 households, including external wall insulation in 22 social homes. This included:

- Able to pay boiler scheme available to any private sector household who wants to replace their heating boiler with an energy efficiency one. The Council uses its tendered pricing structure. 47 boilers were installed in private sector able to pay households in 2017-18.
- Installation of external wall insulation in 153 back to back properties in Holbeck, many of which are low income, private renting households who are at a much greater risk of fuel poverty by Better Homes Yorkshire and part funded through the Local Growth Fund
- Installation of large scale heating/energy efficiency improvements such as central heating and boiler replacements in the homes of 70 low income residents suffering from a cold related illness.

The Council also worked closely with public health and the Clinical Commissioning Groups on the Warmth for Wellbeing scheme (managed by Groundwork Leeds and Care & Repair Leeds) to provide smaller scale measures such as draft proofing as well as heating servicing and repairs and fuel bill and energy advice to low income households. This scheme provided small scale assistance and advice to 1727 households who were fuel poor or at risk of fuel poverty.

Conclusions and Trends:

Natural environment

The 17 SSSIs within Leeds are generally being protected however ongoing careful management is required to ensure they are in good condition. Leeds has over 3,660 hectares of woodland, 95% broadleaved woodland and 20% ancient semi-natural woodland. 2017/18 saw continued tree planting including 13,333 trees (3 ha) planted by the Council at Old Run Road, Belle Isle. The Council aims to create 3.00 ha of new woodland/year. A study of tree canopy in the city centre undertaken by The University of Leeds showed that in 7 years 2 ha (over 6%) of tree canopy had been lost.

Flooding

Consultation procedures with the Environment Agency continued to work well as no applications were approved with outstanding flood risk objections from the Environment Agency. Phase 1 of the Leeds Flood Alleviation Scheme (FAS) was completed in October 2017 and now gives increased protection against flooding from the River Aire and Hol Beck. It is one of the largest river flood alleviation schemes in the country using state-of-the art flood defence engineering techniques. The appraisal work for Phase 2 was completed in September 2017 and the business case for 'Advanced works' was approved by the Environment Agency in January 2018.

Air Quality

Leeds met the EU Air Quality Directive Standards for particulate matter and the regulatory limits for the hourly average of Nitrogen Dioxide (NO₂) as specified in the UK Air Quality Regulations however some specific locations exceeded the annual average limit of 40 µg/m³ therefore the city didn't comply with the UK and EU objectives.

Climate Emissions

2017/18 saw a continued reduction in CO₂ emissions and a number of key projects delivered reductions in energy consumption and carbon generation, increased renewable energy generation and use and improved energy efficiency. This shows measures and initiatives are delivering real improvements however further improvements are required.

Renewable Energy

Indicator 42: Renewable energy generation

Relevant Core Strategy Policies:

Policy EN3: Low Carbon Energy
Policy EN4 District Heating

Relevant Natural Resources and Waste Local Plan Policies:

ENERGY 1: LARGE SCALE WIND ENERGY GENERATION
ENERGY 2: MICRO-GENERATION DEVELOPMENT
ENERGY 3: HEAT AND POWER ENERGY RECOVERY

The target for Leeds is to produce at least 75MW of installed grid-connected renewable energy capacity by 2021. The Natural Resources and Waste Local Plan (2013) sets out the potential contribution (MW) of different renewable energy generation types to meet this target.

Table 51 below shows that consented capacity, extrapolated from renewable energy capacity in extant planning permissions, exceeds the 75MW target by some 2.90MW. This shows an increase on the previous year (61.6MW) and demonstrates the Council's commitment to delivering high-quality and commercial-scale renewable energy schemes in Leeds. Further planning applications for grid-connected renewable energy development are expected between now and 2021 therefore it is likely the target will be further exceeded.

That said, the difference between consented capacity and installed capacity (i.e. development built, operating and grid connected) is quite considerable, at some 29.60MW. Approximately 26MW of this difference is because the consented Energy Recovery Facility at Skelton Grange Road has not yet been built. Nevertheless the scheme has commenced so it is expected to operate in future years.

The difference between consented and installed capacity highlights the frequent time lag between the granting of planning permission and the implementation, building and operation of consented renewable energy development. This happens for a number of reasons, however the main factor is market forces which significantly affect the timing of implementation, particularly those developments of a strategic nature.

| Table 51: Total installed grid-connected Renewable Energy Capacity (MW) in Leeds for 2017/18 | | | | | |
|--|---|--|-------------------------|-------------------------|--|
| Installation Type | Potential Contribution (MW) by 2021 (from Table 5.1 of NRWLP) | Location | Consented Capacity (MW) | Installed Capacity (MW) | Total Installed Capacity (MW) by Installation Type |
| Landfill Gas | 12 | Skelton Grange Landfill, Pontefract Lane, Newsam Green | 5.00 | 5.00 | 9.78 |
| | | Peckfield Landfill, Ridge Road, Micklefield | 4.23 | 4.23 | |
| | | Former Howden Clough Road Landfill, Morley | 1.00 | 0.33 | |
| | | Former Gamblethorpe Landfill, Newsam Green Road | 0.40 | 0.22 | |
| Wind | 20 | Hook Moor, Collier Lane, Micklefield | 10.00 | 10.00 | 12.00 |
| | | Knostop WWtW, Knowsthorpe Lane, Cross Green | 2.00 | 2.00 | |
| Solar | 10 | Haigh Hall Farm, Batley Road, Tingley | 7.50 | 7.50 | 7.50 |
| | | Two Hoots Farm, Harewood Avenue, Harewood | 0.15 | 0.00 | |
| Energy from Waste | 35 | Newmarket Approach, Cross Green | 11.00 | 11.00 | 11.00 |
| | | Skelton Grange Road, Cross Green | 26.00 | 0.00 | |
| | | Knowsthorpe Road, Cross Green | 2.60 | 0.00 | |
| Energy from Biomass | 2 | Wothersome Grange Farm, Thorner Lane, Bramham | 1.00 | 1.00 | 7.70 |
| | | Ridge Road, Micklefield | 2.70 | 2.70 | |
| | | Knostrop WWtW, Knowsthorpe Lane, Cross Green | 4.00 | 4.00 | |
| Hydro | 2 | Former Garnett Paper Mills, Mill Lane, Otley | 0.32 | 0.32 | 0.32 |
| Total | 81MW | | 77.90MW | 48.30MW | |
| Total (2016/17) | | | 61.6 MW | | |

Landfill gas

Volumes of landfill gas are depleting and reducing therefore energy generation is dropping, below the 12MW target in 2017/18. Furthermore, the Council continued to reduce its reliance on landfill as a method of waste management therefore it is unlikely that the current capacity of installed gas infrastructure will increase. The 12MW target is not considered achievable in perpetuity.

Wind

There have been no planning application for wind energy development in Leeds since 2015. This follows the Government's 2015 changes to planning policy relating to onshore wind development, combined with the withdrawal of subsidies. It is therefore unlikely that the target for wind will be met.

Solar

It is expected that micro-generation solar developments installed on roofs will go a long way to meeting the 2.50MW difference between installed grid-connected solar capacity and the 10MW target for solar power. It is however difficult to monitor its contribution with certainty given that micro-generation solar development (in some cases) benefits from Permitted Development Rights.

Hydro

Even with a number of drop/head (typically at weirs) along the River Wharfe and River Aire providing viable locations for hydroelectric turbines, hydroelectric power development has not been as popular as initially envisaged though it is not clear why. There are currently only two installed turbines at Otley Weir. The OblinArk Hydrokinetic Power Barge development at Lemonroyd Weir in Oulton was the last hydroelectric development sought and approved in 2012 however it was temporary and has since been removed.

Leeds District Heating Network

Relevant Core Strategy Policies:

Policy EN1: Climate Change – Carbon Dioxide Reduction
Policy EN2 (Sustainable Construction
Policy EN4 District Heating

Relevant Natural Resources and Waste Local Plan Policies:

ENERGY 3: HEAT AND POWER ENERGY RECOVERY
ENERGY 4: HEAT DISTRIBUTION INFRASTRUCTURE

The NRWLP supports in principle proposals for low carbon energy recovery methods, including Combined Heat and Power applications, and promotes and supports heat distribution infrastructure subject to an assessment of environmental effects and heat source(s) and heat use.

Phase 1 of the Council's flagship District Heating Network (DHN) neared completion. It will use heat generated by processing waste at the council's Recycling and Energy Recovery Facility (RERF) and deliver low carbon heat in the form of hot water through super insulated underground pipes to public, commercial and domestic customers in and around the city centre. The Council appointed Vital Energi Utilities to design, construct and operate the heating network, ensuring the design of the network is optimised, the build is of a high quality, and the operations are efficient. Contracts to

design, build, operate and maintain a new spine district heating network and to connect council apartments in Saxton Gardens, Ebor Gardens and Lincoln Green were awarded to Vital Energi in mid-2017. Furthermore, the Council developed and adopted Local Development Order 3, removing the need for planning permission for underground heating pipes and associated infrastructure over large parts of the city.

This project will play a key role in the city's plans to cut carbon emissions, reduce energy bills and improve air quality in the city. It will provide secure, reliable and low carbon heat provision, lower utility costs and enhanced sustainability credentials and help developments to comply with Planning Policies EN1 (Carbon reduction), EN2 (Sustainable Construction) and EN4 (District Heating), removes the need for on-site heat generation and reduces capital costs associated with enhanced building fabrics or low carbon technologies. Policy EN4 has informed and guided developers in the design and planning stages to ensure compliance with carbon savings and renewable energy consumption.

The Council invested £15m to connect over 1,900 council flats to provide an 'anchor load'. There is significant capacity to grow the network; additional future customers have expressed interest and some have signed up however there will still be significant capacity. Funding is being sought through the Heat Networks Investment Project (HNIP) to extend the network into the city centre to link key council-owned buildings and more commercial customers.

Indicator 43: Production of primary land won aggregates

Relevant Core Strategy Policies:

Policy EN7 Minerals

Relevant Natural Resources and Waste Local Plan:

MINERALS 1: PROVISION OF AGGREGATES

MINERALS 2: MINERAL SAFEGUARDING AREAS (MSA) – SAND AND GRAVEL

MINERALS 5: MINERAL EXTRACTION – SAND AND GRAVEL

MINERALS 6: LIMITING SAND AND GRAVEL EXTRACTION IN THE WHARFE VALLEY

Policy Minerals 1 of the Natural Resources and Waste Local Plan (NRWLP) sets out the targets for aggregate extraction in Leeds:

- Sand and gravel = 146,000 tonnes per annum
- Crushed rock = 440,000 tonnes per annum.

In West Yorkshire, the landbank (stock of planning permissions) for crushed rock has sufficient capacity to satisfy estimates of demand for a period of 28.3 years. In Leeds, the existing safeguarded site at Howley Park has significant reserves which are likely to outlast the NRWLP period and it is expected to continue.

In 2017/18, the following amounts of minerals aggregate were extracted which shows the target of 440,000 tones set in Policy MIN1 was exceeded.

| Table 52: Production of primary land won aggregates | |
|--|------------------------|
| Type | Amount (tonnes) |
| Crushed Rock Reserves | 25,400,000 |
| Crushed Rock Sales | 496,276 |

The significant increase in crushed rock reserve is a result of an error last year whereby a large part of the reserves were not reported.

Indicator 44: Capacity of new waste management facilities

Relevant Core Strategy Policies:

Policy EN6 Strategic Waste Management

Relevant Natural Resources and Waste Local Plan Policies:

Policy WASTE 3: A CITY WIDE NETWORK OF WASTE MANAGEMENT SITES AND FACILITIES

Policy WASTE 4: WASTE MANAGEMENT FACILITIES - PERMANENT USES

Policy WASTE 5 WASTE USES WITHIN EXISTING INDUSTRIAL AREAS

Policy WASTE 6 STRATEGIC WASTE MANAGEMENT SITES

Policy WASTE 7 WASTE ALLOCATION

Policy WASTE 8: WASTE PROPOSALS AT OTHER LOCATIONS

The NRWLP identifies existing industrial areas as the preferred locations for waste management facilities in accordance with National Planning Policy, including Cross Green Industrial Estate, Grangefield Industrial Estate, Stanningley and Limewood Industrial Estate, Seacroft. It goes on to identify specific waste management sites and to allocate a site at Cinder Oven Bridge for waste management purposes to meet the need for Construction, Demolition and Excavation waste operations. In order for Leeds to be self-sufficient and meet re-use, recycling and compost targets, it must re-use, recycle and compost:

- 192,000 tonnes/annum of municipal solid waste
- 850,000 tonnes/annum of commercial & industrial waste
- 1,089,000 – 1,275,000 tonnes/annum of construction, demolition and excavation waste.

Furthermore to meet treatment and recovery requirements, the City needs to treat and recover

- 135,000 -175,000 tonnes/annum of municipal solid waste
- 350,000 – 500,000 tonnes/annum of commercial & industrial waste
- approximately 75,000 tonnes/annum of construction, demolition and excavation waste
- 103,000 tonnes/annum of hazardous waste.

During 2017/18, planning permission was granted for a temporary waste recycling facility at the Former Filter Beds, Knowsthorpe Lane, Cross Green, in one of the identified preferred areas for waste management where recovered waste material will be recycled into building aggregate.

| Application | Description | Company | Address | Capacity |
|-------------|--|---------|--|--|
| 17/07672/FU | Temporary waste recycling facility including the demolition of sewage works infrastructure | | Former Filter Beds, Knowsthorpe Lane, Cross Green, Leeds | Recovery of approximately 286,000t of waste material from 3 filter beds and recycled on site into building aggregate for direct sales to market. |

Indicator 45: Amount of municipal waste arising and managed by waste stream

Relevant Core Strategy Policies:

Policy EN6 Strategic Waste Management

Relevant Natural Resources and Waste Local Plan Policies:

Policy WASTE 2: SAFEGUARDING EXISTING WASTE MANAGEMENT CAPACITY

Policy WASTE 3: A CITY WIDE NETWORK OF WASTE MANAGEMENT SITES AND FACILITIES

“A zero waste, high recycling society” is part of the NRWLP’s vision which will be achieved through reducing waste produced, maximising reuse, maximise recycling and composting waste, recovering energy from waste and providing sufficient management facilities in appropriate and accessible locations to minimise the amount of waste going to landfill.

Table 54 sets out the data for the last 5 years and shows after 4 years of increasing waste generation, 2017/18 saw a drop of nearly 9,000 tonnes in household waste and nearly 11,000 tonnes in municipal waste. The results are again somewhat varied, with a slight overall decrease in recycling/reuse and composting in 2017/18 compared to 2016/17. The amount of waste sent for energy recovery continued to rise though this was due to an increase in household waste (183,500 tonnes) as the amount of trade waste sent actually decreased (1,473 tonnes). The amount of waste sent to landfill significantly fell from 34,771 tonnes to 10,744 tonnes due to a change in contractor with much higher landfill diversion.

| | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 |
|--|---------|---------|---------|---------|---------|
| Recycling/Reuse | | | | | |
| Household Waste Recycling/Reuse | 91,268 | 88,472 | 77,675 | 78,652 | 77,538 |
| *Trade Waste Recycling/Reuse | 1,227 | 1,307 | 1,467 | 3,569 | 4,453 |
| Total Municipal Waste Recycling/Reuse | 92,495 | 89,779 | 79,142 | 82,221 | 81,991 |
| Composting (includes Plaster board) | | | | | |
| Household Waste Composted | 42,107 | 42,561 | 41,153 | 43,576 | 40,570 |
| Trade Waste Composted | 1,211 | 1,145 | 1,020 | 1,014 | 722 |
| Total Municipal Waste Composted | 43,318 | 43,706 | 42,173 | 44,590 | 41,292 |

| | | | | | |
|---|---------|---------|---------|---------|---------|
| Energy Recovery | | | | | |
| Household Waste sent for Energy Recovery | 30,668 | 41,670 | 124,141 | 178,930 | 183,500 |
| Trade Waste sent for Energy Recovery | 234 | 85 | 120 | 1,931 | 1,473 |
| Total Municipal Waste sent for Energy Recovery | 30,902 | 41,755 | 124,261 | 180,861 | 184,973 |
| **Landfill | | | | | |
| Household Waste Landfilled | 141,700 | 132,914 | 66,194 | 14,787 | 5,150 |
| Trade Waste Landfilled | 18,487 | 16,956 | 20,287 | 19,984 | 5,594 |
| Total Municipal Waste Landfilled | 160,187 | 149,870 | 86,481 | 34,771 | 10,744 |
| Recycling/Reuse and Composting | | | | | |
| Total Household Waste sent for Recycling/Reuse/Composting | 133,375 | 131,033 | 118,828 | 121,215 | 117,374 |
| Total Trade waste sent for Recycling/Reuse/Composting | 2,438 | 2,452 | 2,487 | 4,583 | 5,175 |
| Total Municipal waste sent for Recycling/Reuse/Composting | 135,813 | 133,485 | 121,315 | 125,798 | 122,549 |
| Total Waste | | | | | |
| Total Household Waste | 305,359 | 305,618 | 309,163 | 314,931 | 306,024 |
| Total Municipal Waste | 325,572 | 323,967 | 331,710 | 340,490 | 329,892 |
| Households | | | | | |
| No. of Households | 342,150 | 342,150 | 343,710 | 346,490 | 349,659 |

Conclusions and trends:

Renewable energy generation

The capacity of schemes with extant planning permission exceeded the target of at least 75MW of installed grid-connected renewable energy capacity by 2021 which demonstrates the Council's continued commitment to delivering high-quality and commercial-scale renewable energy schemes. Indeed this amount is expected to increase in the future. Nevertheless, installed capacity is approximately 29.60MW less, mainly due to the fact the Energy Recovery Facility at Skelton Grange Road has not yet been built. This highlights the frequent time lag between the granting of planning permission and delivery, due to mainly market forces. Some sources of energy are not delivering as much as is anticipated.

District Heating Network

Phase 1 of the District Heating Network (DHN) neared completion in 2017/18. Contracts to design, build, operate and maintain a new spine district heating network and to connect council apartments in Saxton Gardens, Ebor Gardens and Lincoln Green were awarded to Vital Energi in mid-2017. £15m was invested to connect over 1,900 council flats though additional customers are being sought. The Council adopted Local Development Order 3, removing the need for planning permission for underground heating pipes and associated infrastructure over large parts of the city. This project will play a key role in cutting carbon emissions, reducing energy bills and improving air quality in the city, in line with environment policies in the Core Strategy.

Capacity of new waste management facilities

Planning permission was granted for a temporary waste recycling facility at the Former Filter Beds, Knowsthorpe Lane, Cross Green where recovered waste material will be recycled into building aggregate.

Amount of municipal waste arising and managed by waste stream

2017/18 saw a drop of nearly 9,000 tonnes in household waste and nearly 11,000 tonnes in municipal waste generation after 4 years of increased waste generation. Overall the amount of waste sent for energy recovery continued to rise whilst the amount sent to landfill significantly fell from 34,771 tonnes to 10,744 tonnes due to a change in contractor with much higher landfill diversion. This shows improvements were made in waste reduction and treatment, diverting waste from landfill.

Key Facts For 2017/18

The main issues arising from the 2017/18 AMR are set out as follows:

City Centre

- 28,129 sqm of new office space completed, 2,254 sqm south of the River Aire
- 294 homes delivered
- 500 sqm of A1 retail delivered, all south of the River Aire
- Over 1 million sqft of office accommodation let
- Footfall fell in line with national trends of increased online shopping
- South Bank Leeds Regeneration Framework Supplementary Planning Document (SPD) finalised
- The Leeds Integrated Station Masterplan also went out to consultation
- In October 2017 City Plans Panel approved in principle an outline planning application by Vastint, (owners of the former Tetley Brewery site) to deliver 850 homes, 85,000 sqm offices, a hotel and the majority of the proposed City Park.
- Despite the ineligibility of UK cities to bid for 2023 European Capital of Culture, Full Council agreed to continue with the intentions of the bid and host Leeds' own 'Year of Culture' by 2023 to showcase the cultural heritage of Leeds, deliver exciting events and projects and highlight Leeds as a thriving and successful city capable of delivering its own cultural showpiece
- The City Centre remained a popular destination for a range of visitors with high satisfaction rates

Housing

- Delivery of new dwellings fell by nearly 1000 to 2,333 as the Core Strategy annual target rose from 3,660 to 4,700 units, therefore only 49.64% of the target was delivered.
- 62% of new homes were in the Main Urban Area (including City Centre) though 1% were in locations outside the hierarchy.
- As in 2016/17, the Inner Area delivered the most housing (610 units (26.7% of the total))
- East Leeds saw a fall to deliver the least, just 48 units (2% of the total)
- 152 units were delivered in the Aire Valley
- On 31st March 2018, 21,618 units had planning permission with a further 12,711 units available to gain planning permission on allocated land
- The number of permissions on greenfield land fell
- 75% of dwellings were on previously developed land (PDL)
- The Council's published five year housing land supply is 30,492 units and 4.79 years against Core Strategy policy, however against the MHCLG requirement, the supply is 16.52 years and against the Core Strategy Selective Review requirement, the supply is 8.94 years.
- New development continued to exceed minimum densities in all parts of Leeds, except in rural areas where densities dropped below the minimum standard of 30 dwellings/hectare
- 46% of new homes were flats or maisonettes
- 239 affordable housing units were completed in 2017/18, with 88 through Section 106 Agreements and 115 through grant assisted schemes
- 37 purpose built older persons units were completed

Employment

- Total new floorspace delivered in 2017/18 (92,899 sqm) was at a similar level to 2015/16 and 2016/17 and 44% more than the average for the last 5 years (64,175 sqm) indicating a continuation of pick up in development activity since 2015/16.
- Net gain in developed employment land during 2017/18 (2.2 ha) which was marginally lower than the net gain of 3.3 ha in 2016/17 though higher than the net overall losses of employment land in 2015/16 (-6.67 ha) and 2014/15 (-27.71 ha). Losses were mainly due to employment land being reused for housing.
- The development of land for general employment uses (research & development, industry and warehousing/distribution) and waste management (22.17 ha) was at its highest level over the last

5 years and over 70% more than the five year average (12.8 ha). Completions in the past three years have picked up significantly partly due to development within the Leeds Enterprise Zone.

- 2017/18 was the second highest year for office development (44,193 sqm) which was more than 50% higher than the 5 year average (29,071 sqm.) Office development has exceeded that anticipated in the Core Strategy since the start of 2015/2016. This is indicative of a strongly growing local economy across a number of economic/employment sectors.
- Employment development has been concentrated in locations identified and promoted in the Core Strategy and allocation documents (the AVLAAP and SAP) and wider Council economic development strategies and programmes.

Retail and Leisure

- A1 Retail development decreased from 30,929 sqm (2016/17) to 15,798sqm (2017/18) but was still above the 5 year average (12,667 sqm) and the 2015/16 figure of 3,025sqm.
- The majority of A1 retail development (15,298 sqm) was outside the City Centre
- Leisure developments (D2) were at a similar level to 2016/17 and were mainly change of use from vacant retail and industrial units to uses such as gymnasiums and fitness centres.
- The majority of new A1-A5 and B1a development in 2017/18 occurred within and on the edge of town and local centres, however A1 Food development including supermarkets was more evenly spread in contrast to 2016/17 when all A1 Food development was located in centre

Infrastructure

- Following the DfT's allocation of £173.5m to public transport schemes, the Council submitted a strategic case to the DfT for the Leeds Public Transport Investment Programme which was approved in April 2017. Since then work has commenced on developing schemes, consultation and engagement to improve the bus service, provide new stations and park and ride facilities and improve existing stations and interchange facilities.
- £4,151,410.86 was received through the Community Infrastructure Levy in 2017/18
- £2,118,691.58 was received for green space in S106 payments, £1,319,083.55 was spent.
- Aire Valley Park and Ride (Temple Green) opened in June 2017
- M1 Jn 45 improvements were completed in March 2018
- Leeds Cycling Starts Here Strategy and action plan was endorsed by Executive Board in June 2017

Transport and Accessibility

- Nearly 138,000 people travelled into the City Centre during the morning peak during 2017/18, approximately 5,000 fewer than last year
- The modal share shows a reduction across all modes though the greatest % share reduction was in walking and the greatest % share increase was the bus.
- The accessibility of new housing remained good with 92% within a 30 minutes bus journey to key local services though this was a drop from 96% in 2016/17.
- Over 90% of all non-residential developments in 2017/18 were located within 400m of a bus stop and therefore meet the criteria of being accessible to the public transport network.

Environment

- Nitrogen dioxide concentrations were greater than 40ug/m³ in 3 air quality management areas designated.
- CO₂ emissions continued to fall, with a reduction of 1.730 m tonnes since 2005
- Consented renewable energy capacity, extrapolated from extant planning permissions, exceeds the 75MW target by some 2.90MW
- The contracts to design, build, operate and maintain a new spine district heating network and to connect council apartments in Saxton Gardens, Ebor Gardens and Lincoln Green were awarded to Vital Energi. The Council adopted Local Development Order 3 which removed the need for

planning permission for underground district heating pipes and associated infrastructure over large parts of the city.

- The amount of waste (household and municipal) fell, as did the amount sent for Recycling/Reuse/Composting and to landfill. The amount sent for Energy Recovery increased.

Appendix 1 –Key Facts about the City Centre

VISITOR ECONOMY IMPACT FOR LEEDS



OVER TWO-THIRDS OF THE LEEDS DISTRICT IS OPEN SPACE, PUBLIC PARKS, GARDENS AND GREEN BELT LAND, AND THE CITY CENTRE IS LESS THAN 20 MILES FROM THE YORKSHIRE DALES NATIONAL PARK

77%
AVERAGE HOTEL OCCUPANCY IN 2017

77 HOTELS
AND
6,809 ROOMS

£69
AVERAGE ROOM RATE WHICH EQUATES TO
£53
REVENUE PER AVAILABLE ROOM IN 2016

28 HOTEL DEVELOPMENTS IN THE PIPELINE, SUPPLYING A FURTHER 3,265 ROOMS

ACCOMMODATION



LEEDS WELCOMED
294,000
INTERNATIONAL VISITORS IN 2017

2ND HIGHEST SUPPLY OF BRANDED CASUAL DINING RESTAURANTS OUTSIDE OF LONDON



LEEDS HAS
4 MAJOR THEATRES



PURPLE FLAG STATUS FOR THE EVENING & NIGHT TIME ECONOMY



THE OFFER

TOP 5

COUNTRIES OF ORIGIN POLAND, GERMANY, USA, IRELAND AND FRANCE.



5TH LARGEST UK SHOPPING DESTINATION

3RD BEST PLACE TO SHOP IN THE UK OUTSIDE OF LONDON



LEEDS HAS
OVER 16
MUSEUMS AND GALLERIES

LEEDS IS ONE OF THE ONLY ENGLISH CITIES OUTSIDE LONDON WITH ITS OWN REPERTORY THEATRE, OPERA HOUSE AND BALLET COMPANIES

LEEDS WELCOMED
3.7 MILLION
DELEGATES IN 2017

4TH MOST POPULAR CONFERENCE DESTINATION IN THE UK

BUSINESS TOURISM IS WORTH
£577.7 MILLION
TO THE ECONOMY

14
AIM ACCREDITED VENUES INCLUDING 2 GOLD AWARDS

51,400
MEETINGS, CONFERENCES AND EVENTS HOSTED IN 2016

BUSINESS TOURISM



26.6 MILLION
DAY VISITORS IN 2017 WORTH
£1.19 BILLION
TO THE LOCAL ECONOMY

THE CITY WELCOMED
29.01 MILLION
DAY AND NIGHT VISITORS IN 2017 WORTH
£1.75 BILLION
TO THE LOCAL ECONOMY

ECONOMIC IMPACT
+16.6%
BETWEEN 2013 AND 2017



VISITORS TO LEEDS SUPPORT
20,030
FULL-TIME JOBS

VISITOR NUMBERS
+6.3%
BETWEEN 2015 AND 2016

2.35 MILLION
PEOPLE STAYED IN LEEDS AS PART OF A HOLIDAY OR SHORT BREAK IN 2017
ACCOUNTING FOR 5.52 MILLION NIGHTS IN LOCAL ACCOMMODATION WITH AN ECONOMIC IMPACT OF **£550 MILLION**

LEISURE VISITORS



LEEDS AT THE CROSSROADS OF THE M62, M1 AND A1M

200 MILES FROM LONDON AND EDINBURGH

MANCHESTER
43 MILES
50 MINS BY TRAIN AND ROAD

LONDON
175 MILES
TRAIN: 2HR
1 HR BY AIR

GENERAL

APPENDIX 2: PUBLIC TRANSPORT AND DEVELOPER CONTRIBUTIONS SPD - APPENDIX 1 UPDATE 2018

| Scheme | Purpose | Proposals | Estimated cost £000 | Timescale |
|--|---|--|---------------------|--|
| CITY WIDE | | | | |
| Bus lane enforcement cameras | Measures to enforce existing bus priority measures to safeguard bus priority and service reliability. | Supports ongoing development of the Bus Lane Enforcement project with investment in fixed and mobile cameras at sites. Further New cameras will be required as part of the LPTIP corridor and city centre gateways. | * | These works are on-going, where demand has been evidenced. |
| Traffic light priority for buses | Measures to provide improved bus priority at traffic lights across the Leeds district | Further development of traffic light priority for buses across the Leeds District | * | 2018 -2026 |
| Leeds Public Transport Investment Programme - Corridor Works | Measures to improve reliability of bus journey times, including bus priority at traffic lights and bus priority measures. | Proposals are in development for the A647, A61N, A61S, A660 and A58N corridors. A range of bus priority measures are proposed, including new bus lanes, priority at junctions as well as environmental improvements including but not limited cycle lane and footway widening. | ** | LPTIP 2019-2021 |
| Transpennine Route Upgrade | Increased capacity, upgrade and renewal of rail line | Route enhancements and service improvements between Leeds and Huddersfield and Leeds -York/Selby. Forecast delivery by 2025. | ** | Expected delivery by 2025. |
| CITY CENTRE | | | | |

| | | | | |
|--|---|---|---------|---|
| Leeds Public Transport Investment Programme - City Centre Gateways | To enhance public transport accessibility, movement and service connectivity in the city centre and city centre bus stops | Proposals are currently in development but will include a series of key gateways with improved bus stops and bus priority measures. Also included are widening of footways and improved pedestrian and cycling facilities. | * | LPTIP 2019-2021 |
| WEST | | | | |
| Leeds - Bradford Corridor connectivity schemes | To improve connectivity between Leeds and Bradford and intermediate communities | Development of a package of public transport measures for both rail and bus corridors. | ** | LCR Transport Vision & Transport Strategy (2026) |
| Leeds Public Transport Investment Programme - Corridor Works | Measures to improve reliability of bus journey times, including bus priority at traffic lights and bus priority measures. | Proposals are in development for the A647 corridor. A range of bus priority measures are proposed, including new bus lanes, priority at junctions as well as environmental improvements including but not limited cycle lane and footway widening. | ** | LPTIP 2019-2021 |
| Armley Gyratory improvement scheme | Measures to ease congestion and to alleviate delays to buses | Key element of a future city centre transport strategy and delivering a vision for the city centre. Increased capacity will facilitate re-routing and reduction of through traffic in the city centre and support improved movement for buses supporting the Leeds Bus Partnership. | £40,000 | Major scheme to be completed within the LTP3 period (2011-26) |
| Extension to Park and Ride provision at New Pudsey Station | To increase parking capacity to meet potential park and ride demand. | Provision of additional parking spaces at New Pudsey Rail Station | ** | LPTIP 2019-2021 |
| NORTH WEST | | | | |

| | | | | |
|--|---|--|----|-----------------|
| A65 Quality bus corridor extension (SCOOT UTC System) | Measures to extend the Quality Bus Corridor to Aireborough | Bus priority and traffic signal improvement package. | * | Major scheme |
| NORTH | | | | |
| A660 Park and Ride | Development of park and ride strategy for Leeds city centre | Provision of new park and site and associated bus priority measures and services. | ** | 2021 -2026 |
| Leeds Public Transport Investment Programme - Corridor Works | Measures to improve reliability of bus journey times, including bus priority at traffic lights and bus priority measures. | Proposals are in development for the A660 corridor. A range of bus priority measures are proposed, including new bus lanes, priority at junctions as well as environmental improvements including but not limited cycle lane and footway widening. | ** | LPTIP 2019-2021 |
| A61 Alwoodley Gate Bus Park and Ride | Development of park and ride strategy for Leeds city centre. | Provision of new park and site and associated bus priority measures and services. | ** | LPTIP 2019-2021 |
| Leeds Bradford Airport Parkway Station | Better public transport access to Leeds Bradford Airport and forms part of Park and Ride Strategy. | New LBA Parkway Rail Station on Harrogate Rail Line. To include 350 space park and ride car park. | * | 2023 |
| NORTH EAST | | | | |
| EAST | | | | |
| A64 Grimes Dyke bus Park and Ride | Development of park and ride strategy for Leeds city centre | Provision of new park and site and associated bus priority measures and services. | ** | 2018 -2026 |
| Leeds Public Transport Investment Programme - Corridor Works | Measures to improve reliability of bus journey times, including bus priority at traffic lights and bus priority measures. | Proposals are in development for the A61N corridor. A range of bus priority measures are proposed, including new bus lanes, priority at junctions as well as environmental improvements including | ** | LPTIP 2019-2021 |

| | | | | |
|--|--|--|----|-----------------|
| | | but not limited cycle lane and footway widening. | | |
| Leeds Public Transport Investment Programme - Corridor Works | Measures to improve reliability of bus journey times, including bus priority at traffic lights and bus priority measures. | Proposals are in development for the A58N corridor. A range of bus priority measures are proposed, including new bus lanes, priority at junctions as well as environmental improvements including but not limited cycle lane and footway widening. | ** | LPTIP 2019-2021 |
| East Leeds Parkway new rail station (Thorpe Park) | Development of park and ride strategy for Leeds and City Region. | Provision of new regional rail station and park and site. | * | LPTIP 2023 |
| SOUTH EAST | | | | |
| Aire Valley Leeds access package and transport strategy | To provide public transport accessibility into the Aire Valley Leeds regeneration area. Forms a component of the draft Aire Valley Leeds Area Action Plan. | Package of public transport improvements comprising new infrastructure and services with options for park and ride. | * | 2018 -2026 |
| Aire Valley Leeds (East Leeds Link) Park and Ride (Temple Green) | Further maintenance of park and ride facilities. | Provision of park and site and associated bus priority measures and services adjacent to East Leeds Link. Further expansion of existing proposals under consideration. | * | 2018-2021 |
| Leeds Public Transport Investment Programme - Corridor Works | Measures to improve reliability of bus journey times, including bus priority at traffic lights and bus priority measures. | Proposals are in development for the A61S corridor. A range of bus priority measures are proposed, including new bus lanes, priority at junctions as well as environmental improvements including | ** | LPTIP 2019-2021 |

| | | | | |
|--|---|---|---------|--|
| | | but not limited cycle lane and footway widening. | | |
| Leeds - Wakefield Bus Corridor improvements | To improve connectivity between Leeds and Wakefield and intermediate communities. | Development of a package of measures to enhance bus corridors between Leeds and Wakefield including consideration of the M1 corridor. | ** | LCR Transport Vision & Transport Strategy (2026) |
| SOUTH | | | | |
| Leeds Public Transport Investment Programme - Stourton Park and Ride | Reduce number of vehicles travelling into the city centre and improve bus patronage. | New park and ride site located at Stourton, M621 Junction 7. | * | LPTIP 2019-2021 |
| Aire Valley Leeds rail links | Measures to improve accessibility to Aire Valley Leeds area | Enhancements to Castleford Rail Corridor and consideration of Tram Train links with Aire Valley | ** | |
| SOUTH WEST | | | | |
| A653 Dewsbury Road (City Centre to Kirklees Border) Corridor | Measures to provide improved bus priority and accessibility | Targeted bus priority measures and localised bus | * | 2018-2021 |
| White Rose Rail Station | To improve access to the White Rose Office Park and Shopping Centre. | New rail Station on the Huddersfield Line to serve White Rose Business and Shopping parks. | * | 2021-2023 |
| M62 Corridor Gildersome / Tingley Bus Park and Ride | Development of park and ride strategy for Leeds city centre | Provision of new park and site and associated bus priority measures and services. | * | 2018-2026 |
| A6110 Outer Ring Road Improvements | Orbital capacity enhancement of key junctions including radial bus infrastructure measures. | Provision of radial bus infrastructure measures. | £12,000 | Post 2021 |

| | | | | |
|---|--|---|---|-----------|
| Leeds Public Transport Investment Programme - Elland Road Park and Ride Phase 3 | Reduce number of vehicles travelling into the city centre and improve bus patronage. Expand current facilities to meet demand. | Expansion of Elland Road Park and Ride with additional spaces, bus priority measures including an access off M621 Junction 2. | * | 2018-2021 |
|---|--|---|---|-----------|

* Scheme in preparation

** Scheme identified but preparatory work not yet started