



Town Planning

Submitted to
Otley Town Council

Submitted by
AECOM
6-8 Greencoat Place
Victoria, London
SW1P 1PL
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Neighbourhood Plan Housing Policy Advice

Otley Town Council

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Final Draft

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1 Introduction

Housing Needs Assessment in Neighbourhood Planning

1. The 2011 Localism Act introduced Neighbourhood Planning, allowing parishes or neighbourhood forums across England to develop and adopt legally binding development plans for their neighbourhood area.
2. As more and more parishes and forums seek to address housing growth, including tenure and type of new housing, it has become evident that developing policies need to be underpinned by robust, objectively assessed data.
3. In the words of the National Planning Practice Guidance (NPPG), establishing future need for housing is not an exact science, and no single approach will provide a definitive answer. The process involves making balanced judgements, as well as gathering numbers and facts. At a neighbourhood planning level, one important consideration is determining the extent to which the neighbourhood diverges from the local authority average, reflecting the fact that a single town or parish almost never constitutes a housing market on its own and must therefore be assessed in its wider context.
4. The guidance quoted above on housing needs assessment is primarily aimed at local planning authorities preparing SHMAs. However, it helpfully states that those preparing neighbourhood plans can use the guidance to identify specific local needs that may be relevant to a neighbourhood, but that any assessment at such a local level should be proportionate.
5. Our brief was to advise on data at this more local level to help Otley Neighbourhood Plan Steering Group understand, among other matters, the type, tenure and quantity of housing needed to inform neighbourhood plan policies.

Local Study Context

6. Otley is a town in West Yorkshire around eight miles north-east of Bradford city centre and nine miles north-west of Leeds city centre. Its local authority is Leeds City Council (henceforth LCC). The town's main east-west road link is the A660 which follows the Wharfe valley and links Leeds to Skipton via the A65. As the foothills of the Yorkshire Dales lie to the north of the town, north-south road links are more limited. The town has no railway station of its own, with Menston station two miles to the south-west providing a rail link to Leeds. Leeds-Bradford airport at Yeadon is three miles to the southeast of the town.
7. Otley is considered for planning purposes part of the Leeds Strategic Housing Market area, sitting within the SHMA's Outer North West sub-area. Otley's relatively easy access to employment opportunities in Leeds and Bradford city centres, as well as in Harrogate, is a relevant factor in local demand for housing. The Neighbourhood Plan area comprises the entire Town Council area as well as the small additional areas of Throstle Nest Close and the Riverside development, both of which form part of the built-up area of Otley but are in Harrogate Borough Council (HBC)'s area.
8. Throughout this report, Otley Parish has been used as the best available proxy boundary for the Neighbourhood Plan area. This is because statistically, both Throstle Nest Close and the Riverside

development (within the Neighbourhood Plan area but outside the Parish) form part of much larger, more rural output areas¹ within Harrogate Borough (covering the whole of Weston in the case of Throstle Nest Close and the whole of Farnley in the case of the Riverside development). Including data for these rural areas, which cannot be broken down any further, would distort significantly the statistical picture for the town of Otley, and therefore the most robust option available is to base our analysis on the Parish boundary.

9. The Neighbourhood Plan Steering Group has already carried out a Neighbourhood Plan Initial Consultation (NPIC), the results of which were presented in September 2014. The results of the NPIC will be referenced as appropriate throughout this report.

¹ Output Areas (OAs) are the smallest possible statistical division.

2 Approach

NPPG-based assessment

10. This objective and independent housing needs advice note has been agreed with RTPI/Planning Aid England and follows the NPPG approach where relevant. This ensures our findings are appropriately evidenced. The NPPG advises that assessment of development needs should be thorough but proportionate and does not require planners to consider purely hypothetical future scenarios, only future scenarios that could be reasonably expected to occur.

Summary of methodology

11. The Neighbourhood Plan Steering Group is particularly interested in the types of dwelling required. In order to answer this question, we have gathered a wide range of local evidence and summarised it into policy recommendations designed to inform decisions on the characteristics of the housing required.

12. To inform the quantum of housing required, we have calculated a range of four possible housing projections for Otley over the Leeds Core Strategy period based on:

- the Core Strategy housing allocation;
- 2012-based Government household projections (released in February 2015);
- Projection forward of recent dwelling completions; and
- The emerging Leeds Site Allocations document, which includes sites in Otley.

Each of these sources can help planners understand how Otley's housing need translates into a numerical range of dwellings to be planned for.

13. A range of factors relevant to Otley derived from a range of other demographic and economic sources can then be applied to this range to move the recommended figure of housing need up or down. We have summarised these factors in our concluding chapter.

Gathering and using a range of data

14. The NPPG states that:

'no single source of information on needs will be comprehensive in identifying the appropriate assessment area; careful consideration should be given to the appropriateness of each source of information and how they relate to one another. For example, for housing, where there are issues of affordability or low demand, house price or rental level analyses will be particularly important in identifying the assessment area. Where there are relatively high or volatile rates of household movement, migration data will be particularly important. Plan makers will need to consider the usefulness of each source of information and approach for their purposes.'

15. It continues: *'Plan makers should avoid expending significant resources on primary research (information that is collected through surveys, focus groups or interviews etc. and analysed to produce a new set of findings) as this will in many cases be a disproportionate way of establishing an evidence base. They should instead look to rely predominantly on secondary data (e.g. Census, national surveys) to inform their assessment which are identified within the guidance'*.
16. Compared with the 2001 Census, the 2011 Census gathered data in a number of new categories and across a range of geographies that are highly relevant to planning at the neighbourhood level and helpful if an NPPG-based approach is being used.
17. Like much of the data forming the housing policy evidence base, the Census information is quantitative. However, at a local level, qualitative and anecdotal data, if used judiciously, also has an important role to play, to a perhaps greater extent than at local authority level. Our approach has been to gather data from as wide a range of sources as practicable in order to ensure robustness of conclusions and recommendations arising from the analysis of that data.

Focus on demand rather than supply

18. Our approach is to provide advice on the housing required based on need and/or demand rather than supply. This is in line with the NPPG, which states that *'the assessment of development needs should be an objective assessment of need based on facts and unbiased evidence. Plan makers should not apply constraints to the overall assessment of need, such as limitations imposed by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints.'*
19. For this reason, we advise that the conclusions of this report should be assessed against available capacity (including, for example, factors such as transport infrastructure, Green Belt, landscape constraints, flood risk and so on) as a separate and follow-on study².

Study objectives

20. The objectives of this report can be summarised as:

- Collation of a range of data with relevance to housing need in Otley and LCC;
- Analysis of that data to determine patterns of housing demand;
- Setting out recommendations based on our data analysis that can be used to inform the Neighbourhood Plan's housing policies.

21. The remainder of this report is structured around the objectives set out above:

- Chapter 3 sets out the data gathered from all sources; and
- Chapter 4 sets out our conclusions and recommendations based on our data analysis that can be used to inform the Neighbourhood Plan's housing policies.

² Such an approach, clearly separating housing need assessment from dwelling capacity assessment, was recently endorsed by the Government for calculating housing need at local authority level in the ministerial statement and press release 'Councils must protect our precious green belt land' (DCLG, 4 October 2014, available at <https://www.gov.uk/government/news/councils-must-protect-our-precious-green-belt-land>)

3 Relevant Data

Local planning context

Leeds Strategic Housing Market Assessment (SHMA) Update (GVA and Edge Analytics, May 2011)

22. The NPPG states that neighbourhood planners can refer to existing needs assessment prepared by the local planning authority as a starting point. Otley is located within the Leeds Housing Market Area and we therefore turned first to the Leeds SHMA Update (2011) which covers the housing market area, is the most up-to-date Leeds City Council housing needs assessment document, and informs the Core Strategy's housing policies, including its affordable housing policy³.
23. The SHMA draws upon a range of statistics including population projections, housing market transactions and employment scenarios to recommend an objectively-assessed housing need for the City. As such, it contains a number of points of relevance when determining the degree to which the housing needs context of Otley differs from the authority-wide picture. It divides Leeds into a number of sub-market areas for the purpose of analysis.

Tenure and type of local housing offer

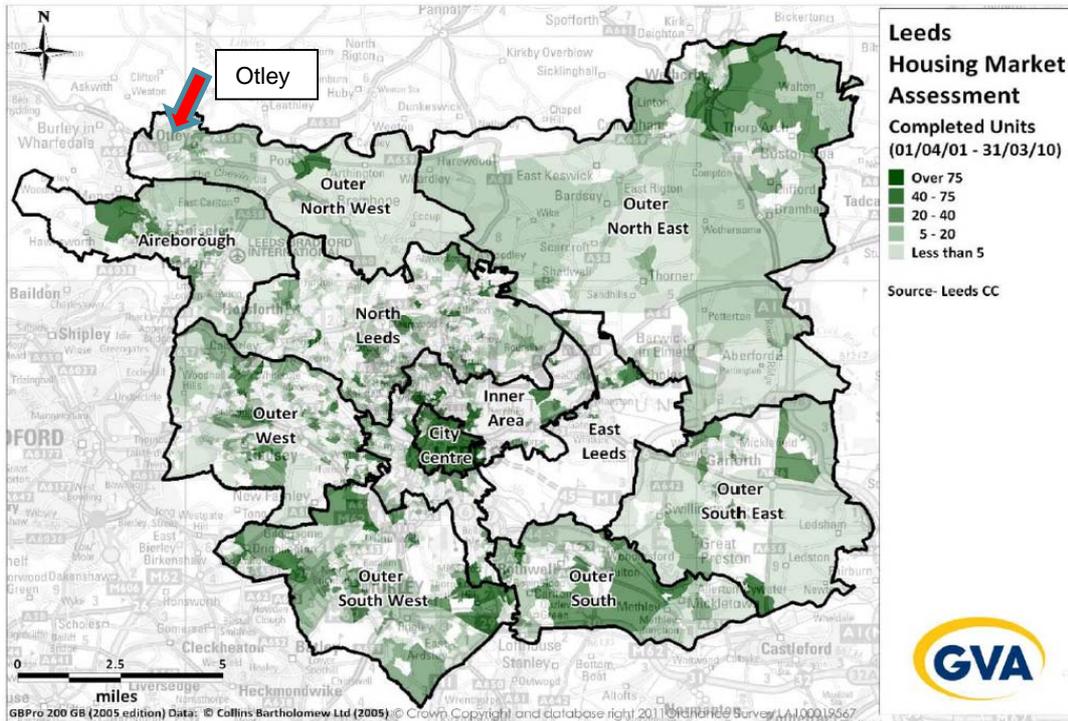
24. Otley parish is located in the Outer North West sub-market area. The SHMA states that a clear arc of high levels of owner occupation is visible to the north and north east of the City area, and that those areas are also characterised as being primarily made up of semi-detached and detached properties.

Recent rates of housing growth

25. The SHMA includes a map showing net housing completions by sub-market area over the period 2001 to 2010, reproduced as **Figure 1** below. Of the total of 27,755, the Outer North West provided 592 units, or 2% of this total. Note that Otley parish is in an area of relatively low completions over this period relative to the rest of the Outer North West sub-market area, in particular Pool. Note also the high rate of growth at nearby Guiseley, to the south-west of Otley. The neighbourhood group has stated that this growth was driven in part by several large former industrial sites being redeveloped.

³ Here and throughout this report, we have defined affordable housing according **only** to the standard definition found in Annex 2 of the National Planning Policy Framework (NPPF), namely: 'Social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market.' We have not defined affordable housing in its colloquial sense of 'relatively cheaper market housing'.

Figure 1: Net housing completions across Leeds City Council area, 2001 to 2010

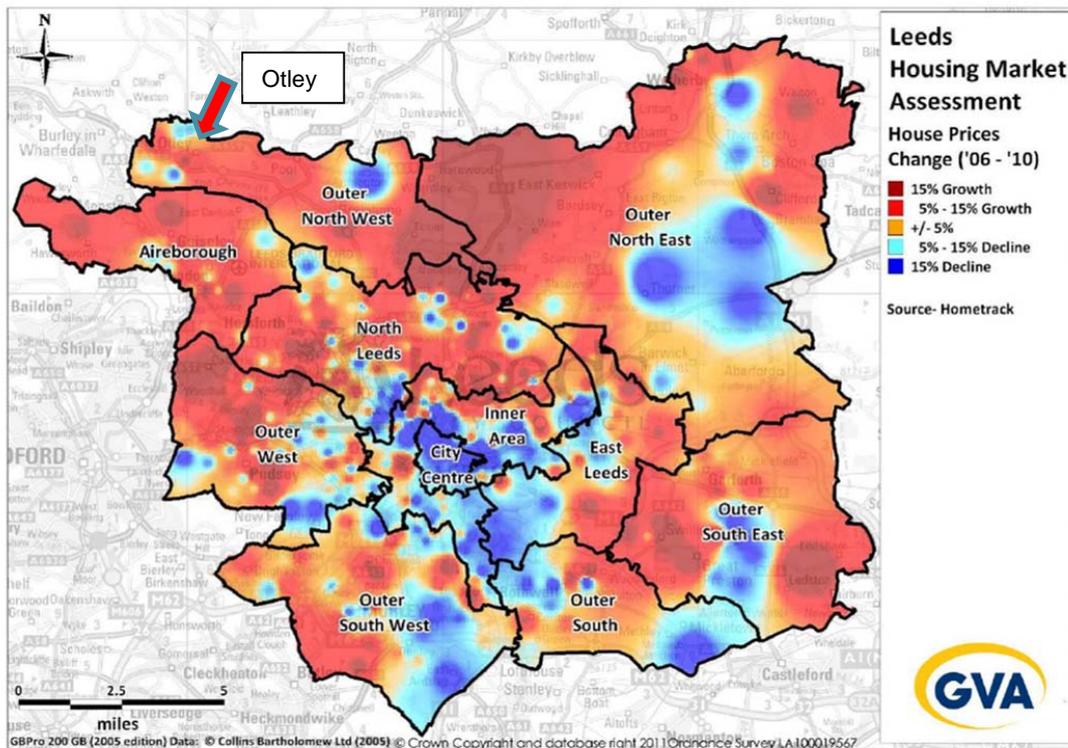


Source: Leeds SHMA Update (GVA and Edge Analytics, May 2011)

26. The SHMA points out that at a sub-market area level the historic development trends have seen new supply concentrated in the city centre in particular. Under the trend-based scenarios this growth is projected to continue over the longer-term. In reality when considering the potential availability and deliverability of supply across the sub-market areas, the SHMA states it is clear that demand will need to be re-balanced. Whilst the city centre and inner areas will clearly continue to grow, other areas will also need to bring forward development in order to ensure a housing offer which matches demand.

Recent rates of housing demand

27. Also presented in the SHMA is a map showing house price change by sub-market area over the period 2006 to 2010, reproduced as **Figure 2** below. **Figure 2** suggests that Otley parish showed relatively high demand over this period, but with some pockets in the north-east and to the south of the town which experienced a 5-15% decline over that period (which, in part, comprised a recession). Note also the strength of demand at Guiseley alongside the previously-noted high levels of housing completions there.

Figure 2: House price change across Leeds City Council area, 2006 to 2010

Source: Leeds SHMA Update (GVA and Edge Analytics, May 2011)

Overall projected rate of new household formation

28. Overall, the SHMA concludes that an employment-led scenario is the most robust projection to use. This results in a forecast of 4,500 new households being formed annually across Leeds over the Core Strategy period (to 2028). This household growth projection has been translated into a net dwelling requirement of approximately 4,680 per annum.

Projected size of new households being formed

29. The SHMA analysis suggests that Leeds is likely to see a continued growth in single person and couple households, with a relatively small rise in family households. The city is projected to increase its working age population significantly and also the number of households aged over 60.

30. The analysis also points to a rising demand for smaller properties based on the projected increase in couple and single person households. In total, it is estimated that 55% of demand for new stock will be for two bedroom properties. However, forecast increases in family households alongside a recognition of the aspirations of households and indeed a desire strategically to retain family households within Leeds (rather than foster a historic trend of out-migration) suggests that a healthy supply of larger three and four bedroom properties will also be required. The analysis suggests that 27% of demand will be generated for three bedroom properties with just under 10% being for properties with four bedrooms or more. Family households appear to prefer three or four bedroom properties.

31. The SHMA goes on to note that trends of out-migration from the main urban area of Leeds have primarily involved family households choosing to re-locate to seek better value for money in surrounding authorities and/or to benefit from the high quality of life demonstrated in markets to the north of the City. Clearly, these trends will have an impact on the types of properties that Leeds will need to develop to match projected household profiles and aspirations.

Projected age of head of households

32. The SHMA highlights growth in absolute and proportional terms of households aged 35 – 44 between 2010 and 2028. This household age group represents the age-band most likely to include families. This has an impact both in terms of the size of the property required and also the importance of functional links between home and employment.

33. The SHMA also notes:

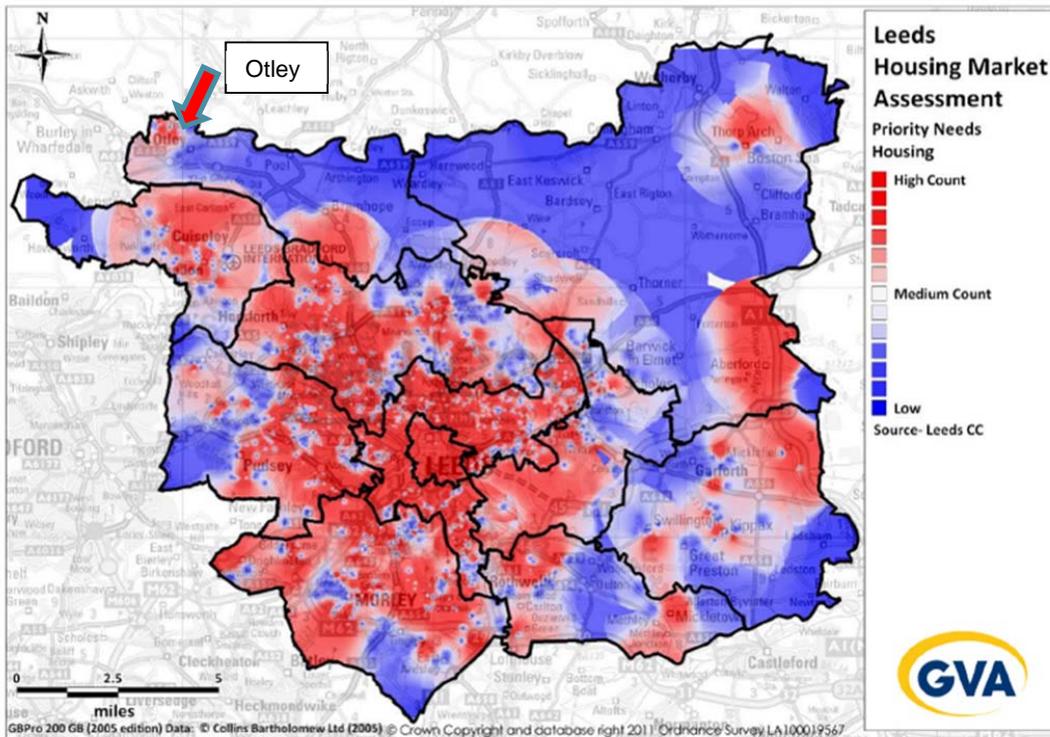
- A projected increase in the number and proportion of households where the head of household is over 65, with over half being couple households, and just under half single person households.
- A continued increase in households with head of household over 85 years old, placing increasing pressure on supported housing, including Extra Care facilities. The SHMA states that delivering these schemes within the authority is becoming increasingly difficult as a result of reduction in public sector subsidy and there is a potential danger that supply will become increasingly out of line with growing demand.

34. The projections suggest that, across Leeds as a whole, whilst there will be an increase in older person households, increasing employment opportunities and the influence of the large universities will continue to ensure a growth in younger households as well.

Households in priority need

35. **Figure 3**, reproduced from the SHMA, shows the spatial distribution of households classified as in priority need, which is Leeds City Council's designation of those households needing new housing as soon as possible. In the Outer North West sub-market area, there are only 33 households in priority need, which is 1% of the Leeds total (of 3,326). However, as indicated in **Figure 3** below, Otley itself is shown to have a relatively higher housing priority need. It suggests that, within the Outer North West area, accommodating households classified as in priority need is a significant housing issue in Otley and Bramhope, but less of an issue in Pool and Arthington.

Figure 3: Households in Priority Need across Leeds City Council Area, 2011



Source: Leeds Homes/Leeds City Council/GVA analysis, February 2011

Vacancy rates

36. The SHMA highlights a 5% vacancy rate across the city, but a rate of 4% in the outer northwest, based on 2010 council tax records. The standard assumption is a market should expect 3% vacancy to enable turnover. This would suggest that long-term vacancy is not a significant housing issue in Otley parish or its surrounding area.

SHMA Caveats

37. The SHMA is based on the data available at the time it was compiled. It points out that:

- Leeds City Council should monitor changes in the housing market and the underlying drivers examined in the SHMA.
- Changes to the assumptions will have an impact on the short and long-term projections of household demand and the requirements for different tenures and sizes of housing.
- There is no single definitive method available to attribute need for new market housing to specific geographical areas within Leeds. The various elements of population growth and household growth cannot be directly attributed to sub-market areas with anything near the same reliability that they can be attributed to Leeds as a district, which benefits from the cohesion of a single travel to work area. The precise geographic distribution of future housing was therefore left as a policy choice for Leeds' Core Strategy.

38. This caveat applies equally for neighbourhood planners within the Leeds City Council Area. As we recommend an approach based on the assessment of need at a local authority level, the Neighbourhood Plan Steering Group should monitor any updates to the assessment of housing need at that level, as well as the release of any relevant new statistics.

Leeds City Council Core Strategy

39. Leeds City Council formally adopted its Core Strategy in November 2014. and is based on, among other evidence, the Strategic Housing Market Assessment assessed above, which is the most recent available. The Core Strategy has been tested through an examination and has been found to be a sound approach to the housing need of the Council area.

40. The Core Strategy distributes the housing requirement across 11 housing market characteristic areas (HMCAs). Otley is in the North West HMCA. However, the Core Strategy does not include a specific housing allocation for Otley. All text quoted below is taken from the adopted document⁴

41. The Core Strategy takes the SHMA conclusions and uses them to inform an overall housing target of 66,000⁵ net new houses over the plan period to 2028. Core Strategy policy H5 sets an affordable housing target for Otley (and the rest of the area to the north of Leeds) of 35% affordable housing to be provided on new developments above a threshold of ten dwellings

42. In the absence of an explicit target for Otley in the Core Strategy, AECOM has analysed available data to generate the proportion of the 66,000 net new houses that might reasonably be expected to be provided by Otley parish. We then go on to add other projections of need to this figure and then test them against more local demographic, economic and housing market data.

43. The 66,000 new houses to be provided within the Core Strategy period have been distributed according to a settlement hierarchy, as illustrated in **Table 1** below.

⁴ In the Proposed Main Modifications Schedule 2 of the Core Strategy, the Inspector noted that the housing target 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. Therefore, as part of the implementation of the Core Strategy, the City Council should continue to monitor the evidence base.

⁵ The Core Strategy also mentions a gross target of 70,000 dwellings but the Neighbourhood Planning team at Leeds City Council have confirmed to AECOM that the target neighbourhoods should rely on is the 66,000 figure as expressed in the Site Allocations Issues and Options document 2013.

Table 1: Settlement types identified in Leeds Core Strategy for the purposes of housing distribution

Settlement Type	Location
Main Urban Area	Leeds City Centre and the surrounding communities and neighbourhoods forming the main urban and suburban areas of the City.
Major Settlements	Garforth Guiseley/Yeadon/Rawdon Morley Otley Rothwell Wetherby
Smaller Settlements	Allerton Bywater Bardsey Barwick-in-Elmet Boston Spa Bramham Bramhope Calverley Collingham Drighlington East Ardsley Gildersome Kippax Lofthouse/ Robin Hood Micklefield Mickletown Methley Pool-in-Wharfedale Scholes Swillington Tingley/West Ardsley
Villages/Rural	All other settlements and locations

Source: Leeds City Council Core Strategy, 2013 (and carried forward into the 2014 version)

44. Leeds City Council area is divided into a non-parished area comprising the more urban part of the local authority and a number of parishes comprising smaller settlements and the villages/rural classification. Otley is designated as one of six Major Settlements.
45. The Core Strategy allocates the Major Settlements 14,300 of the 66,000 dwellings. With six Major Settlements, this gives a nominal figure of 2,383 dwellings per settlement (14,300 divided by six).
46. We have measured the population of each of the Major Settlements using Census data. In so doing, we calculate that each Major Settlement has an average population of 20,006, meaning one new dwelling per 8.4 people (20,006 divided by 2,383).

47. This average figure can then be made more accurate by taking into account the Census 2011 population of each Major Settlement, on the assumption that larger settlements need more housing to meet the needs of a larger population and they offer more services and facilities, thus ensuring development patterns accord with the principles of sustainable development.
48. On this basis, Otley Parish, with a population of 13,668, could be expected reasonably to accommodate an estimated 1,627 units over the Core Strategy period (13,668 divided by 8.4). Of this figure of 1,627, in line with the Core Strategy aspirations for development on previously developed land, 631 are projected to be infill and 996 on previously undeveloped land.
49. The figure of 1,627 accords well with Table 3 of Spatial Policy 7 in the Core Strategy, which states a target of 2,000 new dwellings for the Outer North West. The 373 dwellings provided in the Outer North West outside Otley are likely to be distributed between other settlements such as Bramhope and Pool.
50. It should be emphasised that this figures of 1,627 units for Otley is not an obligation. There is no statutory requirement for the town to deliver any specific amount of new housing, as it is simply one of many locations covered by the Major Settlements housing targets. Rather, these figures have been calculated as the first two of four projections of approximate housing delivery expectation for the Neighbourhood Plan area. The projections take little account of the parish's particular geographic and economic circumstances, which could also reasonably be expected to influence local housing needs, and which will be assessed in more detail later in this report.
51. However, it should be noted that for the Neighbourhood Plan to be found sound at examination, it needs to comply with the seven Basic Conditions of neighbourhood planning⁶ Condition E requires the neighbourhood plan to be in general conformity with the strategic policies contained in the development plan for its area, which strongly suggests that any housing figure in the Otley neighbourhood plan should have regard to the requirements of the adopted Core Strategy and the emerging Site Allocations DPD (covered in more detail below), which together form the development plan for Otley at local authority level.

DCLG Household Projections

52. The Department for Communities and Local Government (DCLG) periodically publishes household projections. The NPPG recommends that these household projections should form the starting point for the assessment of housing need.
53. The most recent (2012-based) household projections were published in February 2015, and extend to 2037. However, the adopted Leeds Core Strategy was based on the earlier 2008-based household projections, and for this reason, we have interrogated both sets of projections.
54. Although population projections are only available at a local authority level, a calculation of the share for Otley is nevertheless possible for both the 2008-based and 2012-based household projections based on the parish's household numbers in 2012 (the Core Strategy base date).
55. In 2012, Leeds City Council had 325,000 households. Based on its proportion of all Leeds households at the 2011 Census (1.921%), Otley would notionally have had 6,243 in that year.

⁶ The Basic Conditions are available online at <http://planningguidance.planningportal.gov.uk/blog/guidance/neighbourhood-planning/the-basic-conditions-that-a-draft-neighbourhood-plan-or-order-must-meet-if-it-is-to-proceed-to-referendum/>

56. The 2008-based household projections (rebased to the actual household numbers in 2012)⁷ projected 413,200 households in Leeds by 2028. On the theoretical assumption that Otley's proportion of the Leeds total remains 1.921%, its new number of households would be 7,937 and therefore 1,694 households would have formed over the Core Strategy period.
57. Turning to the 2012-based household projections, we find a 2028 projection of 367,000 households for Leeds. On this projection Otley's new total number of households would be 7,050 and therefore 807 new households would have formed over the Core Strategy period.
58. In the 2011 Census, Otley parish had 6,340 dwellings and 6,159 households, giving a ratio of 0.97 households per dwelling. If this ratio is applied to the rebased 2008-based projection-derived assumption of 1,694 households in Otley by 2028, it translates to 1,746 dwellings. The 2012-based projection-derived assumption of 807 new households translates, by contrast, to 831 new dwellings.
59. These projections are unconstrained figures comprises a relative proportion of the overall projected increase and thus do not take into account political, economic, demographic or any other drivers that might have influenced the Core Strategy distribution across Leeds and hence the difference between these and the Core Strategy-based figure.
60. Note also the difference between the 2008-based population projections and the 2012-based population projections, attributable mainly to the fact that the former projected forward household formation rates at a time of economic boom (when households tend to form faster than otherwise) and the latter projected forward the rates that included the recession that started in late 2008 (when households tend to form at a slower rate).

Dwelling growth 2001-2011

61. By comparing the number of dwellings in Otley in the Census 2001 against the number in Census 2011, we can project forward the completion rate to 2031. This provides the first of two neighbourhood-specific projections to complement the two projections mentioned above. As completions were relatively low in Otley over this period, this is the lowest of all the projections.
62. In Census 2001, Otley had a total of 6,150 dwellings, and in Census 2011 it had 6,340. This entails a total 10-year growth rate of 190 dwellings, or 19 per year. Projecting this forward to 2028 would give a plan period total of $(19 \times 20=)$ 323 new dwellings.
63. This figure is so much lower than the Core Strategy-derived target, we would advise that adopting it would risk the Neighbourhood Plan not being in strategic conformity with the local plan, which is one of the 'Basic Conditions' of neighbourhood planning. Nevertheless, it is useful as a benchmark to show the extent to which Leeds' Core Strategy is aiming for a step-change in housing delivery rates in Otley and across the entire authority area, and the relatively slow recent rate of growth at Otley relative to other parts of the Leeds City area, as illustrated in Figure 1 above.

Leeds Site Allocations DPD

64. The Site Allocations DPD, although still an emerging document, received City Council Cabinet approval early in 2015 on the dwelling numbers. It allocates sites for housing and mixed-use development across the City Council area. Thirteen of those sites are within Otley parish.

⁷ The rebasing process works as follows: the 2008-based household projections forecast that by 2012, there would be 358,800 households in Leeds, whereas in 2012 there were actually 325,000 households in Leeds, a reduction of 33,800. As such, the difference of 33,800 has been subtracted from the 2008-based household projections figure for 2028 of 447,000 to give a rebased total of 413,200.

65. These thirteen sites have a total capacity of 1,238 dwellings. Of the 1,238, 343 are part of mixed use sites and 895 are for housing only. It is also important to note that 825 dwellings already have current or expired permission or were already allocated in the Unitary Development Plan (the Core Strategy's predecessor), meaning that of the total number of new dwellings, 413 would be on completely new sites.
66. The figure of 1,238 is lower than Core Strategy-derived figure of 1,627 as it includes only those sites suitable and available for development now, but more can be expected to come forward later in the plan period, either as 'windfall' or as sites to be allocated in the future; additionally the figure of 1,627 will allow for some new units through subdivision or redevelopment of existing housing.
67. Most importantly, the figure of 1,238 dwellings is a supply-derived figure so it should not be used directly to inform the overall need total. Rather, it is included here because it is useful for the Neighbourhood Plan Steering Group to use as a benchmark to ensure the conclusions on need can be realistically translated into Neighbourhood Plan housing policy.

Local housing waiting list (Leeds City Council, March 2015)

68. Leeds City Council has provided the housing waiting list for Otley parish as of March 2015. The total number of households on the parish waiting list is 165, of which 23 are in Band A (the most urgent priority, including homeless people and those in medical need), 5 in Band B (medium priority) and 137 in Band C (less urgent need).
69. The Leeds SHMA states that *'waiting lists tend to overestimate demand as households put themselves forward when their level of 'need' for affordable housing is not actually that great. For example, households may put themselves forward for inclusion as a form of insurance in case their circumstances change and are therefore clearly not currently in 'need' in a priority sense.'*
70. To compensate for this, the SHMA defines those households on the waiting list as in priority need only if they fall into Bands A and B, and discounts those in Band C. Discounting the houses on the Otley waiting list that are in Band C gives us a revised total of 28 households in priority need.
71. What is clear is that although the waiting list is just a snapshot in time, neither the discounted figure of 28 households nor the total of 165 households suggest local affordable housing need is significant enough for the Neighbourhood Plan to have to address the issue of affordable housing.
72. The reason for this is that the Leeds City target of 35% affordable dwellings will continue to apply in the parish even after neighbourhood plan adoption, and the adopted neighbourhood plan needs to be in strategic conformity with Leeds policy.
73. Therefore, formulating an affordable housing target for Otley is not recommended as it could risk one of two undesirable results- either a) conflict with or b) restatement of Local Plan policy.
74. AECOM's previous work on housing needs in the Leeds City Council area suggests that in locations such as Otley with lower levels of local affordable housing need, any residual proportion of the 35% not required in Otley itself (based on local affordable need at the time of the application being determined) can be used by the Council to cross-subsidise off-site affordable housing in locations with a higher need, often in urban Leeds.
75. Note that this waiting list information may present a slightly different picture of affordable need from the SHMA as the SHMA dates from May 2011, almost four years earlier.

Local economic context

76. The NPPG states that housing market assessment should take employment trends into account. This is to ensure that any conclusions on housing need take into account the likely change in job numbers based on past trends or economic forecasts as appropriate and also have regard to the growth of the working age population in the housing market area. In this case, we have taken into account the relevant Strategic Economic Plan and Employment Land Review update, both comprising economic forecasts.

Strategic Economic Plan (Leeds City Region Enterprise Partnership, 2014)

77. For purposes of economic planning, Otley parish lies within the Leeds City Region Enterprise Partnership area and is therefore subject to the 2014 Strategic Economic Plan (SEP). However, the SEP is an aspirational document used to bid for funds, and has not been fully tested at examination, so any figures and facts collated from it should be used cautiously. Note that the Leeds City Region includes Harrogate Borough Council's as well as Leeds City Council's area.

78. Like all economic plans and strategies, the Leeds City Region SEP seeks generally to grow and promote the local economy. What is important for the purpose of this housing needs advice, however, is to uncover the specific forecasts and/or projections within this strategic aspiration that are most likely to have an impact on Otley parish and its immediate surroundings.

79. The SEP sees the future arrival of HS2 to Leeds as a key driver of its attractiveness as a business location, significantly enhancing its connectivity to Birmingham and London. However, it recognises that this is currently scheduled as the last phase of HS2, not taking place until 2027 and in the meantime, Birmingham and Manchester will already be connected.

80. It also highlights Leeds' recent strength relative to the rest of the North when it notes that the City Region was the only one in the North to show export growth in 2013.

81. Otley parish also benefits from its proximity to Bradford. Bradford has been listed as a growth centre of regional significance, and large housing developments have been proposed as a result. It also contains the Bradford-Shipley Canal Road Corridor Area north of the city centre which contains 10% of all jobs in the district, with more jobs and homes planned for this area. The SEP states that Bradford has the potential to deliver much-improved international connectivity, benefitting existing businesses and attracting inward investment in the key priority sectors. Bradford has also been identified as an area for new transport infrastructure schemes, which could drive more employment and housing growth.

82. The SEP also notes:

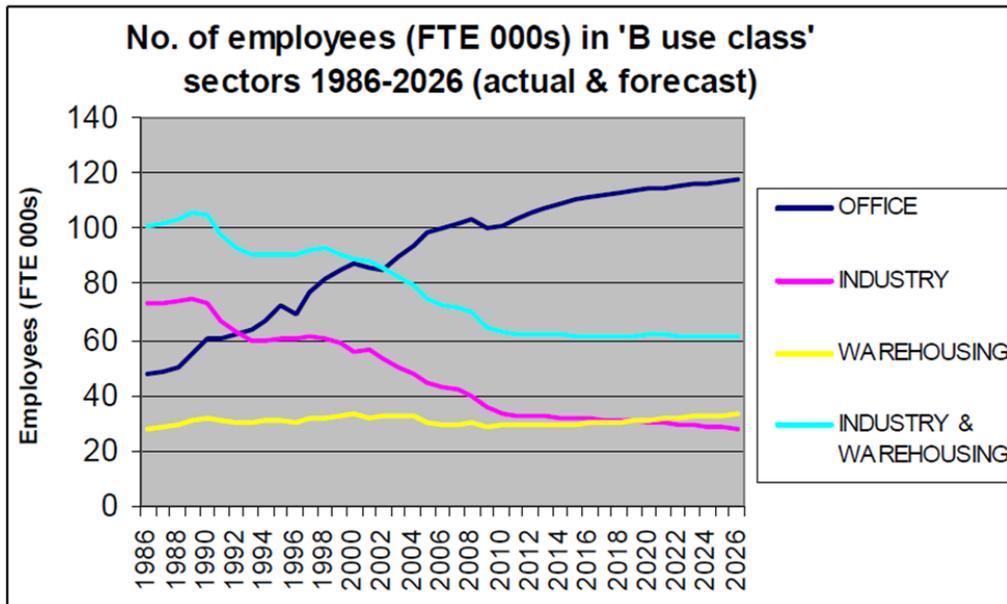
- The working age population is set to grow faster than the national average;
- there is an aspiration for Leeds to become the 'nerve centre for the North's knowledge economy';
- City Region employment has recovered to better than pre-recession levels;
- key industry sectors include financial and professional services, health and life sciences, innovative manufacturing, creative and digital, food and drink and low carbon/environmental;
- there is an aspiration for 62,000 extra jobs by 2021 making the City Region economy 25% larger than it is at present (though current forecasts suggest 50,000 extra jobs); and

- the polycentric nature of the City Region, with York as a strategic growth centre alongside Leeds and Bradford.

Leeds Employment Land Review 2010 Update (Leeds City Council, 2011)

83. The Employment Land Review Update quotes the Yorkshire Futures Regional Econometric Model as showing the five fastest growing sectors of the Leeds economy to be business services, construction, health, retailing and transport.
84. **Figure 4** below is reproduced from the Employment Land Review Update and sets out total employment by the three main sectors of employment land.

Figure 4: Total employment in office, industrial and warehousing sectors, Leeds 1986-2026 (actual and forecast)



Source: Leeds City Council, Leeds Employment Land Review Update (2011)

85. Relevant points for Otley parish from the Employment Land Review include the following:

- From a 2010 base date; office employment will increase by 16,400 by 2026, industrial employment will fall by 3,700 and warehouse employment will increase by 4,300.
- Overall the regional economic model forecasts a net 17,000 increase in full time equivalent employment in the B-class uses (business, industry and distribution) in Leeds by the end of the study period.
- Within the Outer North West (i.e. the location of Otley), 14.43 hectares of employment land is projected to be lost to other uses, with the remaining 29.07 hectares to be carried forward into the future.
- The contribution of Bradford to Leeds’ strategic employment land supply is likely to be significant over the course of the plan period; Table 26a of the Employment Land Review states that Bradford is in need of 88.5 hectares of employment land.

86. To summarise, the Employment Land Review suggests that the parish is geographically and demographically fairly well-situated for forthcoming employment development across Leeds, as well as office development in Bradford. However, note that without a railway station, Otley is less relatively accessible to Leeds city centre by sustainable transport than neighbouring towns such as Guiseley and Menston.

Characteristics of population

87. Through analysis of Census 2011 data, we have investigated how the population of Otley differs from that of the Leeds and the England average. We have been able to use the parish of Otley as the basis for this statistical analysis.

88. **Table 2** gives the population and number of households in Otley, Leeds and England, recorded in the 2011 census. In 2011, the parish had a population of 13,668, and an average household size of 2.2 persons. This is slightly below the local and national averages.

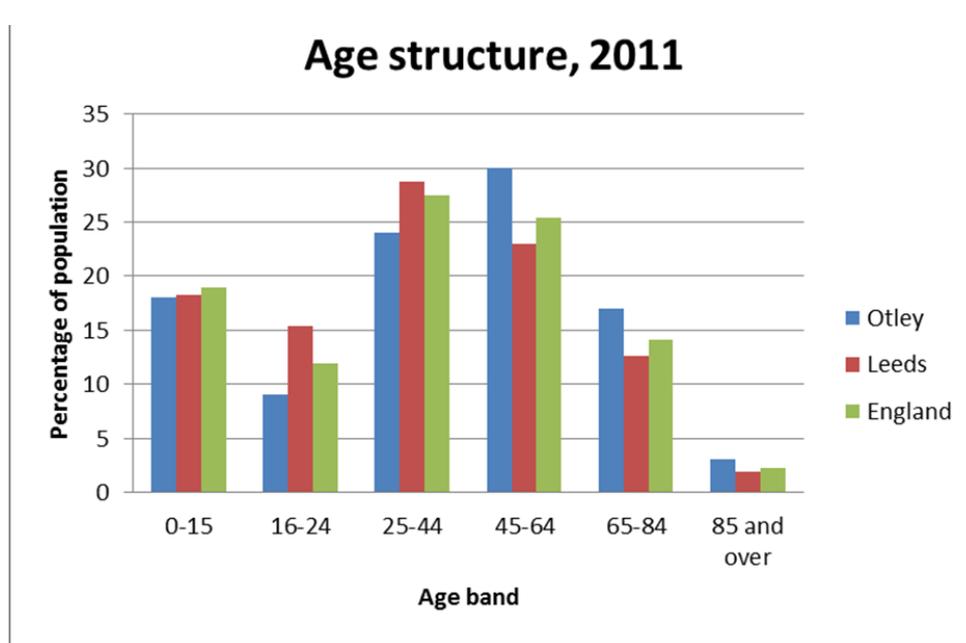
	Otley	Leeds	England
Population	13,668	751,485	53,012,456
Households	6,159	320,596	22,063,368
Household size	2.2	2.3	2.4

Table 2: Population and household size in Otley, 2011

Source: ONS, Census 2011

89. As illustrated in **Figure 5** below, the largest age group in the parish is ages 45-64, at 30.2%. This is notably higher than the figure for Leeds (23.0%) and England (25.4%). The proportion of the population of the parish aged over 65 is also higher than local and national averages, at 20% compared with 14.5% across Leeds and 16.3% across England. The proportion of children aged 0-15 is broadly in line with the figures for Leeds and England, but by contrast, the parish has significantly smaller proportions of people aged 16-24 and 25-44.

Figure 5: Age structure, 2011



Source: ONS, Census 2011, AECOM calculations

- 90. **Table 3** shows the rate of change of the population by age band. It shows that the proportion of people in the three younger age groups (0-15; 26-24; 25-44) fell rapidly in Otley between 2001 and 2011, while the proportion of people in the three older age groups (45-64; 65-84; 85 and over) grew.
- 91. There was a particularly sharp increase – above the national average and significantly above the rate recorded across Leeds – in the proportion of the population aged 85 and over. The decrease in the proportion of children aged under sixteen and of people aged 25-44 is also notable. Although Leeds also experienced a fall in the proportion of children, this was considerably smaller than the decrease seen in Otley, while England, by contrast, saw a small increase.
- 92. Both Leeds and England experienced a marked increase in the proportion of the population aged 25-44, whereas Otley saw a decrease of 18.6%.

Age group	Otley	Leeds	England
0-15	-13%	-4.6%	1.2%
16-24	-5.3%	18.6%	17.2%
25-44	-18.6%	3.6%	1.4%
45-64	14.2%	10.1%	15.2%
65-84	4.5%	-1%	9.1%
85 and over	29.6%	7.4%	23.7%

Table 3: Rate of change in the age structure of the population of Otley, 2001-2011

Source: ONS, Census 2001 and Census 2011, AECOM calculations

93. Taken with the data illustrated in Figure 4, this shows clearly that the parish of Otley has a relatively ageing population, with an increasingly large proportion of its inhabitants aged 65 and over. The decrease in the proportion of children and of people aged 25-44 suggests that fewer families may have moved to or formed within the parish in the period 2001-2011 than may have been the case previously.

Place of birth	Population breakdown		Otley	Leeds	England
Born in the UK	Total		96.0%	88.5%	86.2%
	England		93.6%	86.2%	83.5%
	Rest of UK		2.5%	2.3%	2.7%
Born outside the UK	Total		4.0%	11.5%	13.9%
	EU		1.9%	3.3%	4.5%
	Other		2.0%	8.1%	9.4%
	Length of residence	Less than 2 years	8.3%	14.3%	12.6%
		2-5 years	12.7%	18.2%	16.0%
		5-10 years	15.3%	23.9%	20.7%
		10 years or more	63.7%	43.6%	50.7%

Table 4: Country of birth and length of residence in Otley, 2011

Source: ONS, Census 2011. AECOM calculations

94. **Table 4** shows that Otley is home to significantly fewer migrants, both from the EU and beyond, than the Leeds and England averages. The figures for migration from elsewhere in the UK are comparable with the local and national averages, which suggests that local demand is driven by those born in England to a far greater degree than other population groups.
95. Of the 4% of Otley residents who were born overseas, the majority have lived in the UK for ten years or more. Smaller proportions have lived in the UK for less than 2 or 2-5 years than in Leeds and England, suggesting that recent higher rates of international migration, including from EU 2004 accession countries, have had less impact in Otley than elsewhere.
96. Census 2011 data on ethnic origin shows that Otley's residents are 97.8% white and only 2.2% black and minority ethnic (BME). The sometimes differing housing needs of minority populations, which can play a significant role in housing need assessment in some locations, are therefore not considered to be of particular relevance to Otley.

Household type

	Otley	Leeds	England
1 Room	10.0%	-25.4%	-5.2%
2 Rooms	26.1%	44.0%	24.2%
3 Rooms	9.3%	33.3%	20.4%
4 Rooms	-4.8%	0.8%	3.5%
5 Rooms	-3.1%	-3.2%	-1.8%
6 Rooms	-3.3%	-1.7%	2.1%
7 Rooms	14.9%	14.3%	17.9%
8 Rooms or more	21.5%	29.5%	29.8%

Table 5: Rates of change in number of rooms per household in Otley, 2001-2011

Source: ONS, Census 2001 and Census 2011, AECOM calculations

97. **Table 5** shows that although the number of rooms per household has shown a generally upward trend locally and nationally, this trend is particularly notable in Otley for 7 and 8 room houses. It could be tentatively concluded that the increase in rooms per households is driven by Otley's popularity among more affluent commuters.
98. There has also been a notable increase in households with two rooms, lower than the exceptionally high Leeds rate but slightly higher than the rate across England. However, this was starting from a very low base of only 119 households in 2001, and in 2011 two-room households still only accounted for 2.4% of all households in the parish.
99. The ONS statistics underlying this table, though not tabulated, show that in 2011, the proportion of households in each category in Otley was broadly in line with the national average. However, household spaces in Otley were generally larger than in Leeds; 43% of household spaces in Otley had six rooms or more, compared with 36.6% in Leeds and 42.2% nationally. In Otley, Leeds and England, the most common number of rooms was five. 24.8% of households in Otley had five rooms, 20.9% had six rooms and 20.4% had four rooms. Across Leeds, 25.4% of households had five rooms, 22.3% had four rooms, and 17.9% had six rooms.
100. The NPPG states that factors such as overcrowding, concealed and sharing households, homelessness and the numbers in temporary accommodation demonstrate un-met need for housing. Longer term increase in the number of such households may be a signal to consider increasing planned housing numbers.

Persons per room	Otley	Leeds	England
Up to 0.5 persons per room	7.6%	8.8%	7.9%
Over 0.5 and up to 1.0 persons per room	-12.6%	0.0%	7.0%
Over 1.0 and up to 1.5 persons per room	-1.7%	9.3%	27.3%
Over 1.5 persons per room	-62.5%	8.8%	2.5%

Table 6: Trends in number of persons per room in Otley, 2001-2011

Source: ONS, Census 2001 and Census 2011. AECOM calculations

101. **Table 6** emphasises that overcrowding does not seem to be an issue in Otley's households, and households indeed became significantly less crowded between 2001 and 2011. The number of households with up to 0.5 persons per room has increased in line with the Leeds and England averages, and although nationally there has been an increase in all categories of households with more than 0.5 persons per room, in Otley there has been a decline.
102. This decline is particularly notable for the number of households with over 1.5 persons per room, which fell significantly. Again, however, this is very small in real terms. In 2011, the vast majority of households in the parish (98.9%) had 1.0 persons per room or fewer. This trend appears to be linked to the ageing of the parish population.

Household tenure

103. The NPPG states that housing needs study should investigate household tenure in the current stock and in recent supply, and assess whether continuation of these trends would meet future needs. Plan makers should therefore examine current and future trends in tenure.

Tenure	Otley	Leeds	England
Owned; total	72.4%	58.2%	63.3%
Owned outright	37.0%	26.0%	30.6%
Owned with a mortgage or loan	35.3%	32.2%	32.8%
Shared ownership	0.5%	0.4%	0.8%
Social rented; total	14.9%	22.0%	17.7%
Rented from council/local authority	11.6%	16.9%	9.4%
Other social rented	3.3%	5.1%	8.3%
Private rented; total	10.9%	17.9%	16.8%
Private landlord or letting agency	9.9%	16.7%	15.4%
Employer of household member	0.1%	0.1%	0.3%
Friend or relative of household member	0.8%	0.9%	0.9%
Other	0.1%	0.2%	0.3%
Living rent free	1.4%	1.5%	1.3%

Table 7: Tenure (households) in Otley, 2011

Source: ONS, Census 2011, AECOM calculations

104. **Table 7** shows that the level of owner occupation in Otley significantly exceed the Leeds and England averages, particularly in terms of households that are owned outright without a mortgage or loan. The proportion of social rented housing (rented from the Council or a Registered Social Landlord) is below the national average, and significantly lower than across Leeds, which has a higher than average proportion of social rented housing.
105. There is also a smaller proportion of privately rented units in Otley, particularly compared with Leeds, which has a higher than average proportion of households in the private rented sector.

Tenure	Otley	Leeds	England
Owned; total	-0.7%	-0.6%	-0.6%
Owned outright	20.4%	12.2%	13.0%
Owned with a mortgage or loan	-15.5%	-8.0%	-9.1%
Shared ownership	52.6%	11.6%	30.0%
Social rented; total	-11.5%	-7.5%	-0.9%
Rented from council/local authority	-17.4%	-14.2%	-23.0%
Other social rented	18.1%	25.2%	47.3%
Private rented; total	87.7%	87.8%	82.4%
Private landlord or letting agency	105.1%	111.8%	89.1%
Employer of household member	-53.3%	-6.7%	3.0%
Friend or relative of household member	41.2%	83.3%	60.1%
Other	-33.3%	-79.8%	-1.3%
Living rent free	-42.3%	-33.5%	-29.6%

Table 8: Rate of tenure change in Otley, 2001-2011

Source: ONS, Census 2011. AECOM calculations

106. **Table 8** shows how tenure has changed in Otley between the 2001 and 2011 censuses. Home ownership in the parish has fallen slightly, in line with local and national trends. However, the extent to which outright home ownership has grown, above the rate for Leeds or England, and the contrastingly sharp fall in ownership with a mortgage or loan, is perhaps a further indicator of Otley's ageing population.
107. It can be tentatively concluded that older home-owners may have been able to pay off mortgages over this period, while fewer new home-owner households have been able to access mortgage funding in order to move into or form within the parish.

108. The parish has seen a steeper decline in social rented housing than Leeds or England, although there has been an increase in social housing rented from providers other than the council. The increase in private renting is in line with local and national trends.
109. However, it is notable that the proportion of households that are owned through shared ownership schemes has increased more rapidly in Otley than elsewhere, suggesting the continued demand for owner-occupied properties in the parish.
110. We can analyse the rental sector using data from the home.co.uk website. This provides, for each postcode area and county, data on average price of rented property (adjusted for local range of housing type to enable like-for-like comparison), and data on average time that a rental property has been on the market. It can be assumed that the higher average rental price and shorter the average time on the market, the higher local demand for rental property, and by implication, the higher the local demand for owner-occupied stock as many prospective home-owners will rent if they cannot yet afford to buy.

	Otley	Leeds	Otley difference
Average rent per calendar month (£)	664	1,063	-37.5%
Average time on market (days)	35	168	-79.2%

Table 9: Rental sector statistics in Otley versus Leeds average

Source: home.co.uk market rent summary, calculated daily, accessed February 2015

111. The price of rented property in Otley is over a third lower than the average across Leeds. A more significant indicator of demand is the average time on the market. Properties in Otley rented nearly five times faster than across Leeds, indicating high levels of demand in Otley relative to the wider area. This conflicts with the Census data showing relatively low rates of private renting in the parish, and indicates strong demand for rented properties in Otley. Taken together, these two indicators suggest that Otley is an area of high rental demand.

Housing occupancy rates

112. The Government publishes annual counts of vacant dwellings by local authority across England⁸, but information on vacancy is not available at a lower geography. These figures show that in 2013 (the most recent year available), Leeds City's rate of vacant dwellings was 3.57%.
113. This is slightly, but not significantly, higher than the England average in 2013 of 2.76%. Despite information not being available at a lower level, on the basis of the SHMA, Census and other data that we have sourced and presented above, it seems likely that long-term housing vacancy rates in Otley continue to be lower than the Leeds average.

⁸ Table 615: Vacant Dwellings by Local Authority District, available at www.gov.uk

Local household composition

		Otley	Leeds	England
One person household	Total	33.1%	33.3%	30.2%
	Aged 65 and over	16.5%	12.0%	12.4%
	Other	16.7%	21.3%	17.9%
One family only ⁹	Total	63.7%	58.2%	61.8%
	All aged 65 and over	9.2%	7.0%	8.1%
	With no children	20.6%	17.5%	17.6%
	With dependent children	24.6%	25.3%	26.5%
	All children non-dependent	9.2%	8.4%	9.6%
Other household types	Total	3.2%	8.5%	8.0%

Table 10: Household composition (by household) in Otley, 2011

Source: ONS, Census 2011. AECOM calculations

114. **Table 10** shows that the proportion of single person households in Otley is slightly lower than the Leeds average, but above the average for England. However, the proportion of households with a single family occupancy is higher than both the Leeds and England averages, and considerably higher than the Leeds figure, highlighting relatively low levels of overcrowding and concealment.
115. Otley has both a higher proportion of single person households of people aged 65 and older than the Leeds or England average, and a higher proportion of single family households of people aged 65 and older. By contrast, the proportion of one person households other than those aged 65 and over is low in comparison to Leeds and England, indicating that Otley has a relatively low proportion of younger people living alone.
116. The parish is home to a slightly lower than average proportion of families with dependent children, and a higher than average proportion of families with no children. The proportion of households where all children are non-dependent is higher than the local average, but marginally lower than the average for England. The proportion of other household types is low.

⁹ This includes: married couples, cohabiting couples, same-sex civil partnership couples and lone parents.

Household type		Percentage change, 2001-2011		
		Otley	Leeds	England
One person household	Total	12.5%	11.8%	8.4%
	Aged 65 and over	-1.6%	-11.5%	-7.3%
	Other	31.0%	31.2%	22.7%
One family only	Total	-0.6%	1.9%	5.4%
	All aged 65 and over	-7.9%	-12.6%	-2.0%
	With no children	-4.9%	1.8%	7.1%
	With dependent children	10.2%	9.0%	5.0%
	All children non-dependent	-2.1%	2.7%	10.6%
Other household types	Total	-27.5%	143.8%	28.9%

Table 11: Rates of change in household composition in Otley, 2001-2011

Source: ONS, Census 2011. AECOM calculations

117. **Table 11** shows how household composition changed in the 10 years between the 2001 and 2011 Census. The rate of increase in single person households exceeded the local and national average, and the number of single person households other than those aged 65 and over has grown in both Leeds and Otley at a faster rate than the England average.
118. Correspondingly, Otley saw a decline in the number of over-65 single person households, although this was considerably smaller than the local and national rate. There was also a decline in the number of single-family households of people aged 65 and over.
119. Overall, there was a slight decrease in the number of single-family households, in contrast to an increase locally and nationally. The number of single family households with no children and where all children are non-dependent fell slightly, while there was an above average increase in the number of families with dependent children indicating an increasing population of younger families with school-age children.

Key indicator	Percentage change, 2001-2011		
	Otley	Leeds	England
Population	-3.2%	5.0%	7.9%
Households	2.2%	6.3%	7.9%
Household size	-5.3%	-1.2%	0.0%

Table 12: Change in household numbers and size in Otley, 2001-2011

Source: ONS, Census 2011, AECOM calculations

120. As noted previously, Otley currently has a smaller than average household size. **Table 12** shows that the parish experienced a decrease in its population, but a growth in its number of households over the period from 2001-2011. This is reflected in a 5.3% decrease in average household size, from 2.3 people per household in 2001, to 2.2 in 2011. By contrast, Leeds and England experienced an increase in both population and household numbers. In Leeds, there was a slight decrease in average household size over the period, while across England the average remained unchanged at 2.4 people per household.

Dwelling type		Otley	Leeds	England
Whole house or bungalow	Detached	15.7%	14.7%	22.4%
	Semi-detached	36.7%	37.5%	31.2%
	Terraced	32.9%	26.5%	24.5%
Flat, maisonette or apartment	Purpose-built block of flats or tenement	10.8%	17.5%	16.4%
	Parts of a converted or shared house	1.7%	2.6%	3.8%
	In commercial building	1.7%	0.7%	1.0%
Caravan, mobile home, or other temporary shelter		0.1%	0.1%	0.4%
Shared dwelling ¹⁰		0.1%	0.3%	0.4%

Table 13: Accommodation type (households), 2011

Source: ONS, Census 2011, AECOM calculations

121. **Table 13** shows that the proportion of dwellings in Otley that are detached houses or bungalows is considerably below the national average, although slightly higher than the average across Leeds.
122. By contrast, there is a higher proportion of semi-detached dwellings compared with the national average, but in line with the figure for Leeds. The proportion of terraced dwellings is considerably above both the Leeds and England averages, and there is a smaller proportion of flats than either locally or nationally.
123. **Table 14** below shows how increases in household numbers translate into new dwellings. It is based on Census data showing that, overall, the total number of dwellings in Otley increased from 6,150 in 2001 to 6,340 in 2011, an increase of 190 dwellings over ten years, or 19 dwellings per year.
124. The rate of growth in new dwellings in Otley over this period was less than half of the local and national average. The decrease in shared dwellings was significantly greater than average; however, this relates to very small numbers of dwellings. In 2001 there were six shared dwellings in the parish, and in 2011 there was just one.

¹⁰ A dwelling is shared if not all of the rooms (including kitchen, bathroom and toilet, if any) are behind a door that only that household can use, and there is at least one other such household space at the same address with which it can be combined to form the shared dwelling. A shared dwelling does not mean a care home or sheltered housing schemes with a communal lounge, which are classified instead as communal establishments rather than dwellings. For more details, see 2011 Census Glossary of Terms available online at www.ons.gov.uk

Dwelling category	Percentage change, 2001-2011		
	Otley	Leeds	England
All dwellings	3.1%	7.1%	8.3%
Unshared dwellings	3.2%	7.2%	8.4%
Shared dwellings	-83.3%	-23.5%	-4.1%

Table 14: Change in dwelling numbers in Otley, 2001-2011

Source: ONS, Census 2011, AECOM calculations

125. A 'concealed family' means any group of people who want to form a new household but are unable to do so, typically for economic reasons such as high house prices or a lack of suitable property. **Table 15** shows the low levels of concealed families in the parish; one would normally expect a correlation between lower numbers of people per household and lower numbers of concealed families, and the proportion of concealed families is smaller than in Leeds and considerably smaller than across England.

Concealed families		Otley	Leeds	England
All families: total		4,071	200,943	14,885,145
Concealed families: total		35	3,296	275,954
Concealed families as % of total		0.9%	1.6%	1.9%
Concealed lone parent families	Total	21	1,384	100,705
	Dependent children	19	1,155	78,834
	All children non-dependent	2	229	21,871
Concealed couple families	Total	14	1,912	175,249
	No children	12	1,279	122,951
	Dependent children	2	475	39,534
	All children non-dependent	0	158	12,764

Table 15: Concealed families in Otley, 2011

Source: ONS, Census 2011, AECOM calculations

126. Official statistics do not clarify the overlap, if any, between the Leeds housing waiting list and the stated number of concealed families locally.

Economic activity

Economic category		Otley	Leeds	England
Economically active	Total	73.2%	69.5%	69.9%
	Employee: Full-time	40.0%	38.8%	38.6%
	Employee: Part-time	16.6%	13.1%	13.7%
	Self-employed	14.8%	10.8%	14.0%
	Unemployed	3.2%	4.8%	4.4%
	Full-time student	2.6%	5.3%	3.4%
Economically inactive	Total	26.8%	30.5%	30.1%
	Retired	17.6%	12.4%	13.7%
	Student	3.1%	8.2%	5.8%
	Looking after home or family	2.4%	3.6%	4.4%
	Long-term sick or disabled	2.5%	4.0%	4.0%
	Other	1.2%	2.2%	2.2%

Table 16: Economic activity in Otley, 2011

Source: ONS, Census 2011, AECOM calculations

127. **Table 16** shows that Otley has a higher proportion of economically active residents than both the Leeds and England averages. This includes higher proportions of people working both full and part-time, and a higher than average rate of self-employment. Unemployment is below average and there is a lower than average proportion of full-time students living in the parish.

128. Among economically inactive categories, only the proportion of residents who are retired exceeds local and national averages. The proportion of retired residents, as well as the age profile of the parish, suggests that there may in future be a locally-driven need for specialist housing for older people as well as market homes suitable for independent living.

Extent of activity limitation	Otley	Leeds	England
Day-to-day activities limited a lot	7.3%	7.9%	8.3%
Day-to-day activities limited a little	9.9%	8.9%	9.3%
Day-to-day activities not limited	82.9%	83.3%	82.4%

Table 17: Rates of long-term health problems or disability in Otley, 2011

Source: ONS, Census 2011, AECOM calculations

129. The NPPG advises taking account of the number of people with long-term limiting illness. **Table 17** shows that the proportion of working-age residents of Otley who are long-term sick or disabled is broadly in line with the Leeds and the England averages, despite Otley's relatively older population.

Location of work	Otley	Leeds	England
Less than 10km	39.4%	61.9%	52.2%
10km to less than 30km	38.3%	17.7%	21.0%
30km and over	4.1%	5.1%	7.9%
Work mainly at or from home	10.4%	8.3%	10.4%
Other	7.8%	6.9%	8.5%
Average distance travelled to work	15.2km	13.2km	14.9km

Table 18: Distance travelled to work, 2011

Source: ONS, Census 2011. AECOM calculations

130. **Table 18** shows that Otley residents travel further to work than both the Leeds and England averages. The average distance travelled to work is 15.2 kilometres, and 38.3% of residents travel between 10 and 30km, compared with 17.7% of Leeds residents and 21.0% nationally.

131. The statistics underlying this table indicate that Otley residents are most likely to travel within a radius of 10 and 20km from the parish, an area which includes the city centres of Leeds and Bradford, as well as other major settlements including Harrogate. By contrast, a smaller than average proportion of residents travel distances of 30km and over.

132. This and other data indicates that Otley functions to some extent as a commuter settlement, principally for towns within 20km of the parish. However, there is also a significant proportion of people who work mainly from home, which reflects the high proportion of self-employed residents and may help drive demand for larger dwellings.

Local survey work

133. As discussed in the introduction, the Neighbourhood Plan Steering Group has already carried out work whose findings are relevant to this study. This comprises questions with relevance to housing demand within the housing section of the Otley Household Survey results, which was forwarded to AECOM.
134. Of those who responded, 50% plus stated that more housing was needed, with 43.5% of all respondents stating that ‘a little more’ was needed. 43.45% of respondents wanted to see the average/current provision continuing.
135. However, as noted above, if current rates of provision were to be projected forward, there is a significant risk that this would fail the basic condition of needing to be in strategic conformity with the Core Strategy.
136. In response to the question ‘Is there sufficient housing in the town’, 7.21% stated that a lot more was needed, 43.47% stated that a little more was needed, 39.41% stated that there was enough, and 4.95% each either said there was too much or didn’t answer.
137. Compared with many other household surveys at neighbourhood plan level, AECOM consider that this shows the population of Otley are relatively realistic about and generally accepting of the need for some new housing.
138. In response to the question ‘Is there a lack of a particular type of housing in the town?’ the majority opinion by type is summarised in **Table 19** below. Note that due to the lack of definition of ‘affordable housing’, there may or may not be some overlap between the category ‘Council/Housing Association’ (which is affordable housing in town planning terms) and the category ‘Affordable Housing’.

Type of house	Yes, there is a lack	No, there is no lack	Not sure
Detached houses	13.73%	42.79%	21.74%
Private rented	11.26%	28.28%	37.47%
Council/Housing Association	26.32%	23.80%	31.35%
Elderly housing	29.75%	23.34%	29.29%
Starter homes	48.75%	17.23%	19.73%
Affordable housing	53.5%	17.83%	17.16%

Table 19: Responses to the question ‘Is there a lack of a particular type of housing in Otley?’

Source: Otley Household Survey Results

139. **Table 19** shows that 29.75% of respondents thought housing for the elderly was required and 48.75% want to see ‘starter’ homes.

140. 53.5% of respondents stated that there was a need for affordable housing. However, given that only 26.3% supported social housing, many of the 53.5% may have been referring to market housing that is cheaper than average rather than the National Planning Policy Framework definition of affordable housing (i.e. social, affordable rented and intermediate housing). This too is problematic, as this alternative definition of affordable housing will have some overlap with the category 'starter homes'.
141. In response to the statement 'I would welcome development if it meant that there was an increase in affordable housing', 25.06% completely agreed, 27.31% somewhat agreed, 19.41% were neutral, 10.61% somewhat disagreed and 13.32% completely disagreed (4.29% didn't answer the question).
142. Finally, in response to the statement 'I would not welcome any further development in the town under any circumstances', 10.99% completely agreed, 14.13% somewhat agreed, 19.51% were neutral, 23.54% somewhat disagreed and 24.44% completely disagreed (7.40% didn't answer the question).

Information from local estate agent

143. AECOM undertook a telephone interview with Dale Eddison estate agents. Dale Eddison covers Otley and surrounding villages, so has a strong local knowledge of the local housing market that can be used to test and supplement our conclusions based on Census and local authority level data.
144. Dale Eddison reported that over the period 2001-2011 there was a degree of in-migration to Otley, peaking before the recession, in around 2007-8. At that point there was, as in other locations, a significant reduction in house prices, with a long period of stability, and prices only starting to show signs of recovery over the last 12-18 months.
145. Dale Eddison stated that Otley is part of a wider housing market attractive to commuters covering a number of towns north of Leeds, stretching from Ilkley in the west to Wetherby in the east.
146. The difference between Otley and these other settlements is considered to be that Otley remains a self-sufficient, older market town as well as a commuter settlement- it has a foot in both camps, and this has benefits for house sales as there is often more than a single segment of the market needing housing. By contrast, settlements like Ilkley, Wetherby and Collingham have been transformed into wealthy commuter settlements to a greater extent.
147. Dale Eddison noted that more locally, demand is driven in Guiseley and Menston due to their rail connections to central Leeds, something that Otley lacks. As a result, Otley is a location more suitable for those owning cars.
148. Scepticism was expressed of local economic projections envisioning the growth of Bradford as an office market that would be potentially attractive to commuters from Otley. Instead, Dale Eddison saw Otley and its surrounding area as based now and in the future far more on commuting to Leeds, and to a much lesser extent to the more limited number of jobs in Harrogate. Many of the commuters are families requiring 3/4 bedroom properties, of which there is considered to be a shortage.
149. One of Otley's greatest housing assets is its large stock of older stone terraced houses, which sell well in all markets. These tend to be 2-3 bedrooms and are popular among first-time buyers, downsizers and those seeking to enter the buy-to-let market.

150. The ageing profile of the population is a well-recognised local phenomenon and is likely to lead to problems in future without a significant change in the types of housing available. There are limited numbers of properties suitable for older people who are looking to downsize- for example, there are low levels of either flats or bungalows compared against other housing types.
151. As a result of the ageing population, and thanks to the fact that Otley, being self-sufficient, is a suitable location for them, there is a high level of demand for all forms of retirement property, including apartments and 1-2 bed units for downsizers.
152. Dale Eddison concluded by stating that a problem they see in the Otley market is that there is no natural progression onwards from semi-detached housing, either in terms of those looking to downsize or those looking for larger family housing. As such there is a flow of people who would otherwise choose to live in Otley out to locations including Menston and Ilkley where there is a wider choice of housing types available.

4 Conclusions

Overview

153. This neighbourhood plan housing policy report has interrogated a wide range of data sources, which, taken together, can inform key trends and messages relevant to the Neighbourhood Plan's housing policies.
154. In this first section of our conclusions we make recommendations on the components and characteristics of future housing based on the data analysed.
155. In the second section, we assess, based on the data uncovered, indications of the overall quantum of housing growth required.
156. In line with recommended best practice, our preferred methodology is to present the projections our analysis has produced as a starting point, and then highlight the factors¹¹ that the Neighbourhood Plan Steering Group might wish to take into consideration as they determine the final housing policy text, bearing in mind the requirement to be in general conformity with strategic housing policy at the Leeds level.

Characteristics of housing need

157. **Table 20** summarises the data we have gathered with a potential impact on the housing types and tenures needed in Otley parish. Factors are in alphabetical but no other order. As requested by the Neighbourhood Plan Steering Group, we have also made (non-binding) recommendations for policy text for each factor.

¹¹ These factors are also referred to as 'indicators' in the NPPG.

Table 20: Summary of local factors specific to Otley with a potential impact on neighbourhood plan housing characteristics

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion	Recommendation for policy text
Affordable housing	SHMA, Census, Leeds City Council, Otley Household survey	Existing low levels of social (i.e. affordable) housing, but some evidence of demand, as well as aspiration, for more affordable housing	Deliver affordable housing at higher rate than in past. Leeds Core Strategy requirement for 35% affordable on sites of ten or more units (of which there are many) should result in adequate provision; therefore no specific affordable housing policy required in Neighbourhood Plan, but monitor development permissions to determine if 35% if being delivered, and if so, where	<p>Recommend no quantitative affordable housing policy needed in Neighbourhood Plan due to existing strong policy within adopted Core Strategy.</p> <p>However, potential for Neighbourhood Plan to state that Otley will work with Leeds CC to maximise on-site provision of new affordable housing within Otley neighbourhood plan area, having appropriate regard to the Outer North West housing waiting list at the time of determination.</p>

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion	Recommendation for policy text
Growth in smaller households	SHMA, Census, Otley Household Survey, Dale Eddison	<p>Smaller households likely to need and/or afford smaller dwellings</p> <p>Household space size in Otley is generally larger than the local authority average, the most common number of rooms is five, and 43% of household spaces have six rooms or more. This helps explain the desire in the Otley Household Survey for more starter and/or affordable housing and Dale Eddison's view that there is an undersupply of smaller units</p>	Provide greater range of dwelling sizes, including in particular more smaller dwellings (1-2 bedrooms) for e.g. single person households, first-time buyers, older people wishing to downsize, married couples without children and/or younger people to buy and/or to let	<p>Developments that offer a reasonable proportion of smaller dwellings (1-2 bedrooms), including units suitable for independent living for older people, will be supported.</p> <p>Developments with a housing element consisting primarily of larger dwellings (3 bedrooms and over) will normally be resisted.</p>
Housing type	SHMA, Dale Eddison	Local demand in the parish has in recent years been for terraced, semi-detached and detached properties. However, this could to a great extent reflect what is currently available, as Dale Eddison believe there is unmet demand for flats and smaller properties	On urban extension sites, semi-detached and detached properties most likely to match demand, but some potential for terraced units and flats on urban infill sites.	Developments should provide a range of housing types, including flats, terraced, semi-detached and detached units, respecting and taking into account surrounding types of housing. Flats and terraced housing will be particularly supported for urban infill sites.

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion	Recommendation for policy text
Increase in older person households	SHMA, Census, Otley Household Survey, Dale Eddison	Evidence from Census (increasing numbers of older people but relatively low level of long-term sick/disabled) suggests housing for independent living for older people likely to be in demand ¹² . Anecdotal evidence of high demand for housing suitable for older people from Dale Eddison	Provide range of dwelling sizes, including smaller dwellings (1-2 bedrooms) suitable for older people	As text above, i.e: Developments that can offer a reasonable proportion of smaller dwellings (1-2 bedrooms), including units suitable for independent living for older people, will be supported.
Need for/retention of family households	SHMA, Census, Dale Eddison	Families likely to need and/or afford medium-sized and larger households. Conflicting evidence between SHMA and Census on rate of family housing growth, but some evidence of growth, including from Dale Eddison, so prudent to plan for a proportion of family households	Provide range of dwelling sizes, including medium-sized and larger (3-4 bedroom) dwellings for families and higher than average numbers of people who work from home	Developments will normally be expected to include a reasonable proportion of medium-sized and larger (3-4 + bedroom dwellings) suitable for families ¹³

¹² This is also sometimes referred to as 'intermediate' housing, but this term has not been used to avoid confusion with the intermediate housing forming one component of the NPPF definition of affordable housing.

¹³ This recommended text can be included alongside the recommended text on smaller housing types in a single housing size policy.

Factor	Source(s) (see Chapter 3)	Possible impact on housing needed	Conclusion	Recommendation for policy text
Potential for specialist care housing for the elderly	Census, Otley Household Survey, Dale Eddison	Evidence suggests that specialist facilities for the elderly may be in demand due to the rapidly ageing population. Equally, as a small town with a range of services and facilities, Otley is well-placed as a location for this kind of housing. Anecdotal evidence from Dale Eddison of high demand for retirement housing.	Support the provision of a range of specialist housing for the elderly, ideally in close proximity to services and facilities	Housing developments specifically designed for the elderly, including but not limited to sheltered housing, assisted living, retirement villages and nursing homes will be encouraged in locations within walking distance of services and facilities

Future housing need by age band

158. The Neighbourhood Plan Steering Group asked if it would be possible to provide a proportional split of the housing types required within the policy recommendation text, based on the need projections by demographic age group.

159. However, we do not consider that the projections of future population should be extrapolated into specific percentage splits in this way. This is because demand for housing is driven by a range of factors other than simple demographic change, for example supply-side constraints, and applying a percentage based only on demographic projections could risk inaccuracy as a result.

160. A further disadvantage is that neighbourhood plan policy could become inflexible and overly prescriptive. Most plans, at local authority and neighbourhood level, recognise the benefits of retaining flexibility, given the differing contexts and circumstances of each planning application that will come forward over the plan period, as well as the unpredictable changes, demographic and otherwise, that will occur in Otley and the wider context at the same time.

161. Instead, we present below the detailed results of our research into proportional types of housing and suggest that this data can be used to inform policy on a case-by-case basis as planning applications come in rather than forming part of the policy text itself, which could only be changed through plan review. Housing completions over the plan period can then be monitored by type and the ongoing monitoring information used to inform the approach to the next application.

162. **Table 21** below sets out the projected change by demographic age group in Otley over the Plan period based on the most recent sub-national population projections. Sub-national population projections are used widely in planning at all levels and are considered by the Government and planning inspectors as robust projections of trends into the future.

Table 21: Projected age band change in Otley, 2011-2028

Age band	2011		2028	
	Population	Percentage of total population	Projected population	Percentage of total population
0-15	2,395	17.5%	1,910	14.1%
16-24	1,190	8.7%	1,086	8.0%
25-44	3,232	23.6%	2,276	16.8%
45-64	4,122	30.2%	5,167	38.0%
65-84	2,295	16.8%	2,472	18.2%
85 and over	434	3.2%	674	5.0%

Source: Census 2011, DCLG Sub-National Population Projections, AECOM calculations

163. Like the household projections we interrogated previously, the sub-national population projections are trend-based. They assume that demographic trends observed between 2001 and 2011 will continue, so do not take account of the potential impact of any future political, economic or other changes which might affect the age profile of the parish.
164. In that sense, they are ‘policy-off’- i.e. they show the age bands that would result in the absence of any policy decisions at neighbourhood plan level or local plan level to, for example, try to attract a new age profile.
165. The projections indicate that in the absence of policy decisions of this type, the proportion of older people aged 65 and over is likely to increase, while the proportion of children and young people is likely to fall. The largest growth is likely to be in the proportion of the population aged 45-64, who it is estimated will account for nearly 40% of the total population of the parish by 2028.
166. There is no Census data available to show the breakdown of household number of rooms by age group. However, **Table 22** below sets out number of bedrooms by household composition.

Table 22: Number of bedrooms by household composition in Otley, 2011

		1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms or more
One person household		25.6%	38.3%	30.3%	5.8%
One family household:	Total	3.4%	23.5%	48.9%	24.3%
	All members aged 65 and over	10.4%	27.8%	45.3%	16.5%
	Married, civil partnership or cohabiting couple	2.2%	20.6%	49.7%	27.5%
	Lone parent	1.8%	33.6%	48.7%	15.8%
Other household types		4.6%	25.6%	45.1%	24.6%
Total: all household types		10.8%	28.4%	42.7%	18.2%

Source: Census 2011, AECOM calculations

167. In 2011, single family households where all members are aged 65 and over were slightly more likely than average to live in houses with three bedrooms, and slightly less likely to live in houses with four bedrooms. They were also significantly more likely than other single family households to live in houses with a single bedroom. This could be taken as an indication of a preference among older households for smaller properties.

168. While these figures provide a useful indication of the current situation, it is unfortunately not possible to project them forward. As such, they do not provide a robust basis to calculate a breakdown of future need for housing of different sizes and types. This is because, as noted previously, such a projection would take only demographic change into account as a driver of demand, whereas in reality demand is also driven by supply-side opportunities and constraints in the local housing market.

169. In terms of specialist housing for older people, the Housing Learning and Improvement Network (Housing LIN) provides guidance which can be used to give an indication of the potential future demand for specialist provision in Otley.¹⁴ Using the projected age bands for 2028 above along with Housing LIN's suggested numbers per 1,000 of the 75+ population, we can estimate that Otley would nominally require the following numbers of specialist housing types by 2028:

- 226 leasehold sheltered housing units;

¹⁴ Housing LIN (2011) Strategic Housing for Older People: Planning, designing and delivering housing that older people want, available online at: http://www.housinglin.org.uk/library/Resources/Housing/SHOP/SHOPResourcePack.pdf?bcsi_scan_AB11CAA0E2721250=0&bcsi_scan_filename=SHOPResourcePack.pdf&bcsi_scan_E956BCBE8ADBC89F=0&bcsi_scan_filename=SHOPResourcePack.pdf [accessed April 2015]

- 113 conventional sheltered housing units;
- 38 'enhanced' sheltered units¹⁵, split 50:50 between those for rent and those for sale;
- 86 extra care housing units¹⁶ (including 28 for rent and 56 for sale); and
- 11 specialist dementia care units.

These figures should be taken as indicative only, but can be used to guide any future decision-making regarding provision of specialist housing types for older people in the parish.

Quantity of housing need

170. To recap, we have identified five separate projections of dwelling numbers for Otley based on:
- A figure derived from the adopted Leeds Core Strategy (which gives 1,627 dwellings)
 - The Government's 2008-based household projections, extrapolated to Otley, rebased to actual household numbers in 2012, and translated from households to dwellings (which gives 1,746 dwellings)
 - The Government's 2012-based household projections, extrapolated to Otley and translated from households to dwellings (which gives 831 dwellings)
 - The emerging Leeds Site Allocations document, which when adopted will form part of the Development Plan for the area (which gives 1,238 dwellings); and
 - A projection forward of dwelling completion rates 2001-2011 (which gives 323 dwellings).
171. The Core Strategy-derived figure is based on the Leeds SHMA, and therefore builds in the full range of relevant demographic factors considered by the SHMA at a strategic level, including both natural growth and in-migration.
172. Note, however, that NPPG advice is not to take supply-side considerations (which include both projecting past delivery rates forward and Site Allocations-derived figures) into account when calculating future need.
173. We have illustrated the five dwellings projections together in **Figure 6** below. Note again that it is only the Core Strategy-derived figure and the DCLG household projections that the Government recommends should be taken into account when calculating need, and for this reason the other projections have been italicised.
174. **Figure 6** makes it clear that a range of factors have been uncovered that drive an expected increase in future dwelling delivery rates compared to the 2001-2011 baseline rate of growth.

¹⁵ Enhanced sheltered units are defined as provision with some care needs

¹⁶ Extra care housing comprises developments that comprise self-contained homes with design features and support services available to enable self-care and independent living.

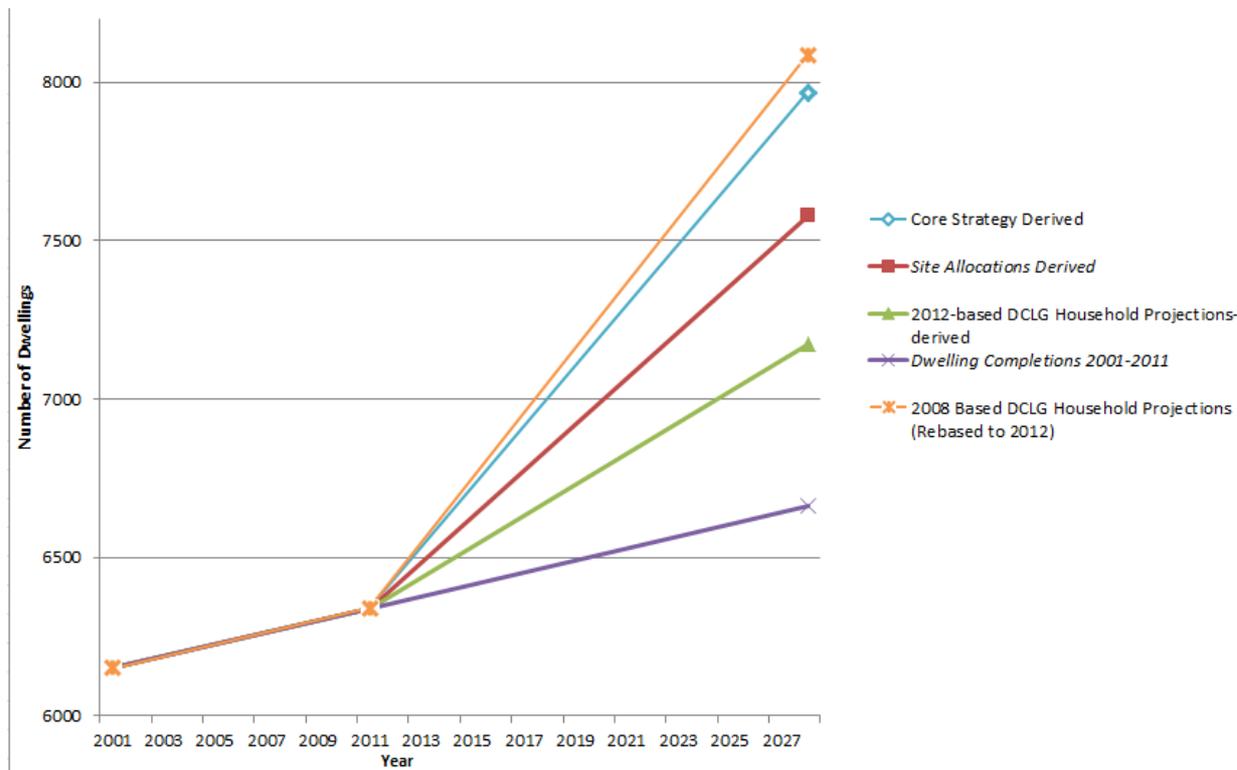


Figure 6: Comparison of dwelling number projections (supply-side projections italicised)

Source: Leeds Core Strategy, Leeds Site Allocations, DCLG 2008-Based Household Projections, DCLG 2012-Based Household Projections, Census 2001, Census 2011, AECOM calculations

175. We have summarised the findings of the data gathered in Chapter 3 above in **Table 23** below. The source for each factor with particular relevance to Otley is shown, and AECOM assessment of whether that factor is more likely to increase (↑), decrease (↓) or have no impact on (↔) Otley’s future housing need. Following NPPG guidance, the factors relate both to housing price and housing quantity.
176. We have applied our professional judgement on the scales of increase and decrease associated with each factor on a scale from one to three, where one arrow indicates ‘some impact’, two arrows ‘stronger impact’ and three arrows indicates an even stronger impact. Factors are in alphabetical but no other order.
177. Note that factors have the potential to contradict one another, due to data being gathered at different times and across differing geographies. The Neighbourhood Plan Steering Group is invited to use its judgement in resolving any conflicts, but we would advise that the more local and more recent data should generally have priority over data gathered at a larger spatial scale or older data.
178. However, our general approach reflects NPPG advice to adjust the housing quantity suggested by household projections to reflect appropriate market signals, as well as other market indicators of the balance between the demand for and supply of dwellings, such as house prices and past build-out rate.
179. The NPPG also advises that market signals are affected by a number of factors, and plan makers should not attempt to estimate the precise impact of an increase in housing supply. Rather

they should increase planned supply by an amount that, on reasonable assumptions and consistent with principles of sustainable development, could be expected to improve affordability, and monitor the response of the market over the plan period.

180. As such, **Table 23** should be used as a basis for qualitative judgement rather than quantitative calculation. They are designed to form the starting point for steering group decisions on housing policy rather than to provide definitive answers. Again, this reflects the NPPG approach- it states that when considering future need for different types of housing, planners have the option to consider whether they plan to attract an age profile that differs from the present situation. They should look at the household types, tenure and size in the current stock and in recent supply, and assess whether continuation of these trends would meet future needs.

181. The NPPG also states that appropriate comparisons of indicators (i.e. factors) should be made and that trends uncovered may necessitate adjustment to planned housing numbers compared to ones based solely on household projections. Where upward adjustment is considered necessary, it should be at a reasonable level and not negatively affect strategic conformity with the adopted Core Strategy.

Table 23: Summary of factors specific to Otley parish with a potential impact on neighbourhood plan housing policy

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
Ageing population	Census, Otley Household Survey, Dale Eddison	↔	Stated preference for more housing suitable for older people backed up by available evidence (population significantly older than average), but on other hand fewer younger people (16-44), so impact balances out
Dwelling completions	SHMA, Census, Dale Eddison	↑	New dwellings 2001-2011 low compared with 2011-2028 projection and with surrounding area more generally, so possibility of some level of pent-up local need as a result- this is also echoed by SHMA Figure 2 and by Dale Eddison
Growth in jobs, particularly office jobs	SHMA, Strategic Economic Plan, Census, Employment Land Review Update, Dale Eddison	↑	Among other roles, Otley appears to function as a commuter settlement for office jobs; it is well positioned for new office jobs in Leeds; SHMA considers employment to be most likely strategic driver of housing growth. We have made an assessment of one arrow to cover the possibility of a recession at some point during the plan period and to account for the fact that the SEP is an untested, aspirational document which may have overstated growth potential of Bradford
House price change relative to surroundings	SHMA	↔	Across Otley as a whole, the SHMA shows that house prices increased 2006-2010 in some places but decreased in others- uniform, rapid rises in house prices as seen in other parts of Leeds did not occur
International migration rate	Census	↓ ↓ ↓	Census shows that recent population growth at Otley is driven to a significantly lower extent by international migration than the local authority average

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
Local housing waiting list/need for affordable housing	Leeds City Council, SHMA, Census	↓ ↓ ↓	Low level of households in priority need locally; therefore, no pressing need to address affordable housing in Neighbourhood Plan policy (which would also help maintain conformity with strategic affordable housing policy) and affordable housing does not act as a driver of housing demand locally
Long-term vacancy rates	SHMA, Vacant Dwellings By Local Authority District	↑	Local vacancy rates are low, suggesting demand for housing
Low level of new supply in local housing market	SHMA, Census, home.co.uk , Dale Eddison	↑ ↑ ↑	Otley's supply of new dwellings has been low in recent years. This has constrained demand and resulted in a lack of choice which could be addressed through providing a range of new units. This factor is illustrated graphically in Figure 6 above.
Overcrowding, including concealed families	Census	↓ ↓ ↓	Otley's households became significantly less crowded in recent years, despite rises across Leeds as a whole. This is linked with an ageing population, and results in one less driver of demand. The rate of concealed families is low.
Rental market relative to wider area	Home.co.uk , Census	↑ ↑	Both private and social rental levels are lower than Leeds average, but evidence of strong demand for rented property in Otley, possibly as a result of low supply, which indirectly suggests evidence of demand for owner-occupied property too.
High levels of owner-occupation	SHMA, Census	↔	This factor applies to majority of settlements in Outer North West area, therefore Otley's nominal requirement is not exceptional in this regard

Factor	Source(s) (detailed in Chapter 3)	Possible impact on future housing need	Rationale for judgement
Wider sub-regional context	SHMA; Dale Eddison	↑	SHMA states that supply needs to rise to meet demand across a wider area than just city centre and inner areas of Leeds; Dale Eddison see commuting as a significant driver of demand. Assessment of single arrow only made to reflect lack of rail connection between Otley and nearby major employment centres.

Recommendations for next steps

182. This neighbourhood plan housing needs advice has aimed to provide the steering group with evidence on housing trends from a range of sources. We recommend that the Neighbourhood Plan Steering Group should, as a next step, discuss the contents and conclusions with Leeds City Council with a view to agreeing and formulating draft housing policies, taking the following into account during the process:

- the contents of this report, including but not limited to **Tables 20 and 23**;
- Neighbourhood Planning Basic Condition E, which is the need for the neighbourhood plan to be in general conformity with the strategic development plan (in this case, the adopted Core Strategy and the emerging Site Allocations DPD);
- the views of Leeds City Council;
- the views of local residents;
- the views of other local stakeholders, including housing developers; and
- supply-side issues, such as location and characteristics of suitable land, and any capacity work carried out by Leeds City Council or other parties

183. Draft housing policies could usefully be informed by, for example, a presentation of this report to local stakeholders by the Neighbourhood Plan steering group, with comments and feedback welcomed.

184. As noted previously, recent changes in the planning system, including the introduction of the National Planning Policy Framework, continue to affect housing policies at a local authority and, by extension, a neighbourhood level.

185. This advice note has been provided in good faith by AECOM consultants on the basis of the local authority housing target, distribution and assessment current at the time of writing (alongside other relevant and available information).

186. Bearing this in mind, we recommend that the steering group should monitor carefully strategies and documents with an impact on housing policy produced by Leeds City Council or any other relevant body and **review the neighbourhood plan accordingly to ensure that general conformity is maintained**. At the same time, monitoring ongoing demographic or other trends in the factors summarised in **Tables 20** and **23** would be particularly valuable.

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Address: 6-8 Greencoat Place , London SW1P 1PL
Phone number +44 (0)20 7798 5000