Housing Market Assessment for Inner North West Leeds 2016

1.0 Introduction

1.1 This paper analyses the characteristics of the housing market, and the local populations, of the areas comprising Inner North West Leeds. It will aim to make observations about the prospects for housing market change that will alter the stability of the various areas concerned. It will consider

- The nature of the local housing stock, current housing market activity and how well that lends itself to securing a change in residence patterns;
- The nature of the local population and the prospects for demand for housing arising from within the area
- The nature of underlying demand for housing from households not currently living in the areas concerned, and the prospects for any replacement of demand from students and other 'short-term' residents by demand from home owners and others seeking longer periods of residence;
- What barriers there may be to securing a shift towards more long term residents living in the area including affordability of housing and availability of appropriate properties for sale or longer term renting

2.0 Housing and demographic composition

2.1 Nature of the housing stock

2.1.1 The tenure patterns across the inner North West Leeds area vary, unsurprisingly. Analysis has been undertaken of the tenure balance and the nature of the housing stock in terms of size and type in each of the five main areas comprising Inner North West Leeds area. The analysis aims to give an indication of the prospects of success for securing a shift from a predominance of private renting towards home ownership and the attraction of home owning families and other residents likely to live in the area for longer periods of time. The five main areas are as follows:

- ***Far Headingley*** including Far Headingley, the Moor Road area, Becketts Park, Weetwood and West Park
- ***Burley, Burley Park and Kirkstall*** including Burley, Burley Village and Burley Park and the Kirkstall area
- ***Headingley*** including Central Headingley, the Cardigan Triangle, South Headingley and Headingley Hill
- **Hyde Park** including Hyde Park, the Harolds and Burley Lodge
- ***Woodhouse, the University Campus and City Centre*** including Woodhouse, Little London, the areas on and around the University campuses (Blenheims, Blandfords, Clarendon Road/Hyde Terrace area) and the parts of the City Centre accommodating students.

Table 1 Housing Tenure in Inner North West Leeds

	Owner Occupied	Private Rented	Social Rented
Far Headingley area	56.5%	28.4%	13.8%
Burley, Burley Park, Kirkstall area	39.2%	31.8%	27.4%
Headingley area	20.8%	64.6%	13.1%
Hyde Park area	14.4%	67.1%	17.5%
University Campus, Woodhouse and City Centre area	14.8%	48.6%	35.2%
LEEDS AVERAGE	***58.6%***	***17.9%***	***22.0%***

(Source: Compiled from 2011 Census data presented in ONS Neighbourhood Statistics 2017)

Table 2 Size of housing stock in Inner North West Leeds

	1 Bed	2 Bed	*1 & 2 Bed*	3 bed	4+ Bed	*3 Beds or more*
Far Headingley area	15.5%	31.4%	***46.9%***	24.4%	28.7%	***53.1%***
Burley, Burley Park, Kirkstall area	15.3%	33.6%	***48.9%***	34.6%	16.5%	***51.1%***
Headingley area	23.1%	22.5%	***45.5%***	15.8%	38.6%	***54.5%***
Hyde Park area	17.6%	26.8%	***44.4%***	16.0%	39.6%	***55.6%***
University Campus, Woodhouse and City Centre	33.8%	31.1%	***64.9%***	17.8%	17.3%	***35.1%***
LEEDS AVERAGE	***12.6%***	***30.3%***	***42.9%***	***39.3%***	***17.8%***	***57.1%***

(Source: Compiled from 2011 Census data presented in ONS Neighbourhood Statistics 2017)

Table 3 Types of housing in Inner North West Leeds

	Detached	Semi	*Detached or Semi detached*	Terrace	Flat	Terrace or Flat
Far Headingley area	9.9%	32.0%	***41.9%***	22.0%	36.1%	***58.1%***
Burley, Burley Park, Kirkstall area	4.1%	30.0%	***34.0%***	42.1%	23.8%	***65.9%***
Headingley area	3.5%	19.9%	***23.5%***	35.6%	40.9%	***76.5%***
Hyde Park area	2.3%	8.7%	***10.9%***	68.6%	20.5%	***89.1%***
University Campus, Woodhouse, City Centre	1.9%	8.1%	***10.0%***	27.5%	62.5%	***90.0%***
LEEDS AVERAGE	***14.7%***	***37.5%***	***52.2%***	***26.5%***	***21.3%***	***47.8%***

(Source: Compiled from 2011 Census data presented in ONS Neighbourhood Statistics 2017)

2.1.2 Table 1 above summarises 2011 Census data for five key sub areas of Inner North West Leeds; Table 2 below shows the size of the housing stock, and Table 3 shows the types of homes in those areas. A full breakdown of the individual areas within each of these is contained in Appendix A.

a. In the Far Headingley area, levels of home ownership and rented housing are much closer to the city average. While the size of the private rented sector is higher than the city average, it is significantly lower than in areas closer to the Universities. In these areas securing a shift in the tenure balance towards ownership will be easier to achieve. The balance between smaller and larger homes is also more balanced (49% with 1 or 2 Bedrooms and 51% with 3 bedrooms or more) while two thirds of homes are detached, semi-detached or terraced houses. This would indicate that the housing stock in the area is more geared towards accommodating residential family households but with capacity also to house smaller working 'family building' households, in terraced homes let as shared housing or in converted or purpose built flats.

b. In the Burley, Burley Park and Kirkstall area, levels of home ownership are closer to the city average and there is a clear mix of tenures, which broadly reflects the historical composition of these areas.
   There is more of a balance between smaller and larger homes (49% with 1 or 2 Bedrooms and 51% with 3 bedrooms or more) and between houses and flats. This would indicate that the housing stock is geared towards supporting a mixture of smaller households living independently or in shared housing, and family households. It is most likely that the current mix of tenures will continue as it is currently for the foreseeable future.

c. In the Headingley area, levels of home ownership are half the city average, levels of private renting are almost 4 times the city average, and the social housing stock (where residence lengths are longer) is minimal. Accordingly shifting the tenure balance towards home ownership and longer term residence while possible, will be challenging.

   The balance between smaller and larger properties, and between property types would suggest that the stock is more geared to accommodating smaller households (in self-contained small terraced homes and flats or in larger homes let as shared housing. However, with almost 25% of homes being detached or semi-detached, the stock could attract some mature family households, although the chances of changing the balance between longer term and more transient households therefore would depend on the availability of larger homes, and their level of amenity for family living.

d. In Hyde Park area, the proportion of households renting privately are five times the proportion of home owners and levels of home ownership are up to a quarter of the city average. Here, the prospects of securing a shift in tenure balance from predominantly private rented towards a greater proportion of homeowners will be very difficult.

   With 56% being homes with over 3 bedrooms and 44% being with 1 or 2 bedrooms There is less of an imbalance in terms of size of housing stock. However, 69% of homes are terraced houses and 21% are flats, which would tend to indicate that the stock is more geared to accommodating single people, couples and other starter households, whether in self-contained flats or small terraced houses, or in larger terraced houses let as shared housing. With only 11% being detached or semi-detached homes, this would indicate that the stock is less geared towards attracting and accommodating more mature family households.

e. In Woodhouse, the areas around the University Campus and the City Centre, levels of home ownership are very low and the area is dominated by rented housing. It is highly likely that this position will remain for the foreseeable future.

   There is an imbalance between smaller and larger housing stock with 65% of housing having 1 or 2 bedrooms. This would point to the stock being more geared to accommodating single people, couples and other starter households. The larger properties are most likely to be shared houses, given the low levels of home ownership. This is further illustrated by 62.5% of properties in the area being flats, 27.5% being terraced houses and only 11% being detached or semi-detached homes.

2.1.4 The capacity of the housing stock base to accommodate a change in the housing tenure balance across the area and to meet potential demand from a range of households including older people downsizing, young single working households, young 'family builder' couples and 'ready-made families' varies across the inner North West Leeds area.

The areas closer to the University would appear to be more geared towards accommodating smaller, and probably younger households, although this could include the 'family builder' households who may become the long staying family households of the future. Larger homes are largely let as shared housing and securing a change in the tenure of these will be extremely difficult given demand from both students and young working households for shared housing in the area.

Further from the Universities, the stock base would appear to be more geared towards accommodating a mix of smaller, 'family builder' households, single working people, older people needing smaller accommodation and mature families. The opportunities for creating a 'critical mass' necessary to engender change are better and, especially in the areas farthest from the Universities, the properties more attractive to longer term residents.

2.2 Nature of the local population

2.2.1 Table 4 below shows the ages of people living in the 5 key parts of Inner North West Leeds, while Table 5 shows the types of household living in those areas, and Table 6 shows their ethnicity. A full breakdown of the individual areas within each of these is contained in Appendix A.

Table 4 Ages of people resident in Inner North West Leeds

	Under 16	16 - 25	25 - 44	45 - 64	65+
Far Headingley area	11.4%	27.9%	29.9%	19.5%	11.4%
Burley, Burley Park, Kirkstall area	13.7%	27.1%	33.7%	15.9%	9.7%
Headingley area	4.0%	64.8%	18.5%	7.0%	5.7%
Hyde Park area	6.7%	65.8%	18.8%	5.8%	2.9%
University Campus, Woodhouse and City Centre	7.2%	56.6%	25.4%	7.2%	3.6%
LEEDS AVERAGE	***18.3%***	***15.5%***	***28.7%***	***23.0%***	***14.6%***

(Source: Compiled from 2011 Census data presented in ONS Neighbourhood Statistics 2017)

Table 5 Types of Household resident in Inner North West Leeds

	Families with dependent children	Families with non-dependent chidlren	Couples without children	Single people under 65	Single People or Couples over 65
Far Headingley area	19.3%	8.7%	21.5%	33.4%	16.8%
Burley, Burley Park, Kirkstall area	19.6%	8.6%	17.5%	40.4%	14.0%
Headingley area	7.6%	6.2%	14.6%	60.9%	10.7%
Hyde Park area	10.4%	6.8%	11.5%	67.1%	4.2%
University Campus, Woodhouse, City Centre	13.2%	4.9%	15.1%	57.9%	8.7%
LEEDS AVERAGE	***27.6%***	***8.4%***	***17.4%***	***22.8%***	***19.2%***

(Source: Compiled from 2011 Census data presented in ONS Neighbourhood Statistics 2017)

Table 6 Ethnic origin of people resident in Inner North West Leeds

	White British	White European/ Other	Black or Minority Ethnic	Mixed ethnic origin
Far Headingley area	83.2%	5.3%	8.4%	3.1%
Burley, Burley Park, Kirkstall area	72.9%	5.%	17.1%	4.3%
Headingley area	81.9%	5.7%	9.0%	3.4%
Hyde Park area	71.9%	5.7%	18.1%	4.3%
University Campus, Woodhouse, City Centre	61.8%	7.3%	26.1%	4.8%
LEEDS AVERAGE	***81.1%***	***4.7%***	***11.5%***	***2.7%***

(Source: Compiled from 2011 Census data presented in ONS Neighbourhood Statistics 2017)

2.2.2 In the Far Headingley area, the age balance is in line with the city average, but with a higher proportion of people aged 16 to 25 reflecting the numbers of students living in Halls of Residence in the area, and the number of older children living in the family home. The proportion of children in the population is lower than the city average but significantly higher than in the areas closer to the Universities, indicating a sound 'family base'.

In addition to this, about half the population are aged 25 to 44 (family builders) or 45 – 64 (family raisers) - in line with the city average. The proportion of older people is slightly smaller than the city average but significantly higher than the areas close of the University. The proportion of people from Black and Ethnic Minorities or mixed origin is lower than the city average but there has been evidence from estate agents of aspirant BME households moving up to the area from Hyde Park.

The proportion of families with dependent children (under 16) is lower than the city average but considerably higher than the areas closest to the Universities, while the proportion with non-dependent 'grown up' children is slightly higher than the city average. The proportion of couples without children living in the area is significantly higher than in other areas, reinforcing the presence of 'family building' households in the area. The proportion of single people while higher than the city average is lower than in the areas closer to the universities while the proportion of older households is the highest of the 5 key areas but still lower than the city average.

2.2.3 In the Burley, Burley Park and Kirkstall area, almost half the population is aged either between 25 and 44 (family builders) or between 45 and 64 (family raisers), in line with the city average and the proportion of children while lower, is significantly higher than in the areas closer to the Universities. The proportion of people aged between 16 and 25 (young and mobile) is higher than the city average but lower than in areas closer to the Universities. The proportion of older people is also smaller than the city average but again significantly higher than the areas close of the University. The proportion of people from Black and Ethnic Minorities or mixed origin is higher than the city average and there is evidence of continuing demand from BME households in the area.

28% of households are either families with dependent children (under 16) or non-dependent 'grown up' children slightly lower than the city average but higher than in other areas. The proportion of couples without children living in the area is in line with the city average reinforcing the presence of demand from existing families or 'family building' households in the area.

The proportion of single people while higher than the city average is lower than in the areas closer to the universities while the proportion of older households is higher than the areas closer to the Universities but still lower than the city average.

2.2.4 In the Headingley area, only a quarter of the proportion is aged either between 25 and 44 (family builders) or aged 45 to 64 (family person) while the proportion of children aged under 16 is almost five times lower than the city average. The proportion of older people is slightly lower than the city average but higher than the areas closer to the University. The proportion of people aged between 16 and 25 (young and mobile) however, is around 4 times the city average. The ethnic composition of the area is in line with the city average, and there has been evidence from estate agents of aspirant BME households moving up to the area from Hyde Park.

The proportion of families with dependent children (under 16) is almost four times lower than the city average and the proportion with non-dependent 'grown up' children and the proportion of couples without children living in the area are also lower than the city average. The proportion of single people however, is almost three times the city average while the proportion of older households is half the city average.

2.2.5 In the Hyde park area, the proportion of people aged between 16 and 25 (young and mobile) is over four times the city average while the proportion between 25 and 44 (family builders) is 50% lower than the city average; the proportion of people aged 45 to 64 (family raisers) is four times lower than the city average and the proportion of children aged under 16 is three times lower than the city average. The proportion of older people is almost five times lower than the city average. The proportion of people from BME communities or of mixed origin is significantly higher than the city average, and there has been evidence from estate agents of continuing demand from BME households for housing in the area linked to the presence of the mosque and other facilities.

In combination, the proportion of families with dependent children (under 16) or-dependent 'grown up' children are half the city average and the proportions of couples without children living in the area is also significantly lower. The proportion of single people however, is almost three times the city average while the proportion of older households is almost 5 times lower than the city average.

2.2.6 In Woodhouse, the areas around the University Campus and the City Centre, a third of people are aged either between 25 and 44 (family builders) or 45 to 64 (family raisers), significantly lower than the city average, while the proportion of children aged under 16 is three times lower than the city average. The proportion of people aged between 16 and 25 (young and mobile) however, is three times the city average while the proportion of older people is almost half the city average. The proportion of people from BME communities or of mixed origin is twice the city average, and there has been evidence from estate agents of continuing demand from BME households for housing in the area.

In combination, the proportion of families with dependent children (under 16) or-dependent 'grown up' children are half the city average but the proportion of couples without children is in line with the city average. The proportion of single people however, is 2.5 times the city average while the proportion of older households is almost 5 times lower than the city average.

2.3 Employment activity and occupation

2.3.1 Table 7 below shows the economic activity of people living in the 5 key parts of Inner North West Leeds, while Table 8 shows the occupations of people living in those areas. A full breakdown of the individual areas within each of these is contained in Appendix A.

Table 7 Employment activity in Inner North West Leeds

	Full time work	Self Employed	Part time work	*In Work*	Retired	Full time students
Far Headingley area	35.6%	7.5%	8.6%	51.7%	6.9%	20.5%
Burley, Burley Park, Kirkstall area	37.2%	5.4%	11.0%	53.6%	7.3%	18.5%
Headingley area	18.5%	3.0%	4.8%	26.3%	2.9%	59.0%
Hyde Park area	15.2%	2.4%	6.6%	24.2%	2.0%	58.7%
University Campus, Woodhouse, City Centre	19.1%	2.7%	5.1%	26.9%	2.5%	57.3%
LEEDS AVERAGE	***38.8%***	***13.1%***	***9.5%***	***61.4%***	***12.4%***	***8.2%***

(Source: Compiled from 2011 Census data presented in ONS Neighbourhood Statistics 2017)

Table 8 Occupations of people in Inner North West Leeds

	Professional/ Managerial	Intermediate Occupations	Routine Occupations
Far Headingley area	60.0%	28.8%	11.2%
Burley, Burley Park, Kirkstall area	41.8%	39.8%	18.4%
Headingley area	40.8%	36.1%	23.1%
Hyde Park area	32.2%	39.4%	28.4%
University Campus, Woodhouse, City Centre	35.0%	40.5%	24.5%
LEEDS AVERAGE	***41.1%***	***40.6%***	***18.2%***

(Source: Compiled from 2011 Census data presented in ONS Neighbourhood Statistics 2017)

2.3.2 In the Far Headingley area, almost 52% of people are in work; 42% in full time employment or self-employment and 10% in part-time work. Of those in work, 60% are in professional or managerial occupations and a further 29% are in intermediate occupations. This indicates the presence of households with incomes sufficient to take up home ownership opportunities in the area, or move to larger properties, and the presence of households with average incomes who could become potential first time buyers. The remaining 11% are in low paid work who may be catered for by existing social housing (around Queenswood Drive) and the shared private rented housing in the area, whose children may present a future need for affordable housing.

21% are full time students, twice the city average but significantly less than in areas closer to the city centre, many of whom will be living in the Oxley and Carnegie Halls of Residence located in the area.

2.3.3 In the Burley, Burley Park and Kirkstall area, 54% of people are in work, 38% in full time employment or self-employment and 16% in part-time work. Of those in work, 42% are in professional or managerial occupations; a further 40% are in intermediate occupations. This indicates the presence of households with incomes sufficient to take up home ownership opportunities in the area, or move to larger properties, and the presence of households with incomes, at slightly below the average who could become potential first time buyers.

The remaining 18% are in low paid work who may be catered for by existing social housing (around Kirkstall centre and Burley Road), and some of the shared private rented housing, whose children may present a future need for affordable housing.

19% are full time students, twice the city average but significantly less than in areas closer to the city centre, a proportion of whom may be living in the Kirkstall Brewery Halls of Residence.

2.3.4 In the Headingley area, 26% of people are in work (less than half the city average); 21.5% in full time employment or self-employment and 4.5% in part-time work. Of those in work, 41% are in professional or managerial occupations, a further 36% are in intermediate occupations. This indicates that the proportion of households with incomes sufficient to take up home ownership opportunities in the area, or move to larger properties, or may become first time buyers, is significantly lower than in the Burley/Kirkstall and Far Headingley areas, and may not be enough to engender a significant shift in tenure patterns. The remaining 23% are in low paid work, who may be catered for by the existing, but limited social housing, and some of the shared private rented housing in the area, whose children may well present a future need for affordable housing.

59% are full time students, seven times the city average, a proportion of whom will be living in Lupton Residences in Central Headingley, and the James Baillie, Devonshire Hall and other smaller halls of residence off Headingley Lane.

2.3.5 In the Hyde Park area, 24% of people are in work (less than half the city average); 17.5% in full time employment or self-employment and 6.5% in part-time work. Of those in work, 32% are in professional or managerial occupations, a further 39% are in intermediate occupations. This indicates that the proportion of households with incomes sufficient to take up home ownership opportunities in the area, or move to larger properties, or who could become first time buyers is significantly lower than in the Burley/Kirkstall and far Headingley areas. The remaining 29% are in low paid work, and may be catered for by the existing social housing (between Hyde Park Road and Queens Road), and the stock of shared private rented housing in the area, whose children may well present a future need for affordable housing.

59% are full time students, seven times the city average, the most of whom will be living in flats and shared houses in the area.

2.3.6 In Woodhouse, the areas around the University Campus and the City Centre, 27% of people are in work (less than half the city average), 22% in full time employment or self-employment and 5% in part-time work. Of those in work, 35% are in professional or managerial occupations, a further 40.5% are in intermediate occupations. This indicates that the proportion of households with incomes sufficient to take up home ownership opportunities in the area, or move to larger properties, or who could become first time buyers is significantly lower than in the Burley/Kirkstall and Far Headingley areas.

The remaining 24.5% are in low paid work, and may be catered for by the existing social housing (In Little London, Woodhouse and Little Woodhouse), and some of the shared private rented housing, whose children may well present a future need for affordable housing.

57% are full time students, seven times the city average, living predominantly in the numerous PBSA located in the area.

3.0 Housing Market characteristics and implications

3.1 Home ownership market

3.1.1 Table 9 below shows the average price for properties of different sizes in the Inner North West Leeds; Table 10 shows the household income needed to afford mortgage payments; Table 11 shows the average deposit required to secure a mortgage for those properties at current Loan to Value Ratios (LVRs) of 85%, and Table 12 shows movement in prices between 2011 and 2016.

Table 9 Average house prices in Inner North West Leeds

	1 Bed	2 bed	*Entry Level*	3 Bed	4 Bed	*Average*
Far Headingley area	£121,671	£194,150	***£157,911***	£226,218	£387,471	***£290,665***
Burley, Burley Park, Kirkstall area	£97,987	£117,102	***£107,545***	£151,293	£169,985	***£144,557***
Headingley area	£107,836	£157,020	***£132,428***	£213,468	£268,722	***£227,197***
Hyde Park area	£88,885	£108,578	***£98,731***	£140,347	£188,152	***£155,405***
University Campus, Woodhouse, City Centre	£75,840	£130,427	***£103,133***	£165,735	£185,185	***£167,583***
LEEDS AVERAGE	**£98,512**	**£131,247**	**£116,880**	**£165,165**	**£354,849**	**£198,844**

(Source: www.rightmove.co.uk November 2016)

Table 10 Household income needed to afford mortgage

Household income needed to afford mortgage	1 Bed	2 bed	*Entry Level Price*	3 Bed	4 Bed	*Average Price*
Far Headingley area	£38,022	£60,672	***£49,347***	£70,693	£121,085	***£90,833***
Burley, Burley Park, Kirkstall area	£30,621	£36,594	***£33,608***	£47,279	£53,120	***£45,174***
Headingley area	£33,699	£49,069	***£41,384***	£66,709	£83,976	***£70,999***
Hyde Park area	£27,777	£33,931	***£30,854***	£43,859	£58,797	***£48,564***
University Campus, Woodhouse, City Centre	£23,700	£40,758	***£32,229***	£51,792	£57,870	***£52,370***
LEEDS AVERAGE	***£30,785***	***£41,015***	***£35,900***	***£51,614***	***110,778***	***£62,139***

(Source: www.rightmove.co.uk November 2016)

Table 11 Deposit needed to secure a mortgage in Inner North West Leeds

Area	1 Bed	2 bed	Entry Level	3 Bed	4 Bed	*Average Price*
Far Headingley area	£18,251	£29,123	***£23,687***	£33,933	£58,121	***£43,600***
Burley, Burley Park, Kirkstall area	£14,698	£17,565	***£16,132***	£22,694	£25,498	***£21,684***
Headingley area	£16,175	£23,553	***£19,864***	£32,020	£40,308	***£34,080***
Hyde Park area	£13,333	£16,287	***£14,810***	£21,052	£28,223	***£23,311***
University Campus, Woodhouse, City Centre	£11,376	£19,564	***£15,470***	£24,860	£27,778	***£25,137***
LEEDS AVERAGE	***£14,777***	***£19,687***	***£17,532***	***£24,775***	***£53,227***	***£29,827***

(Source: www.rightmove.co.uk November 2016)

Table 12 Movement in house prices: 2011 – 2016

	Entry Level	*3 Bed*	*4+ Bed*	*Average Price*
Far Headingley area	14.2%	5.3%	36.6%	***15.7%***
Burley, Burley Park, Kirkstall area	0.6%	7.9%	13.7%	***10.8%***
Headingley area	12.5%	10.4%	38.7%	***29.1%***
Hyde Park area	-8.7%	18.2%	73.9%	***49.0%***
University Campus, Woodhouse, City Centre	-2.7%	26.2%	11.7%	***30.6%***
LEEDS AVERAGE	***11.0%***	***20.1%***	***23.0%***	***16.6%***

(Source: www.rightmove.co.uk November 2016)

a. In the Far Headingley area, the average entry level house price (1 or 2 bedroom properties) was £158,000 as at November 2016, higher than the city average. This would require a household income of £49,347 (or 2 average incomes) to afford mortgage payments, and a deposit of just under £23,700 to secure a mortgage at an LVR of 85%.

   While the mortgage payments would be affordable to an average earning household, unless financial support were to be forthcoming from family, the deposit might take 15 to 20 years to accumulate[1]. Larger properties in the area would require a significantly higher household income to afford mortgages unless significant equity were available to the purchaser. They would be out of reach for first time buyers as they would require a household income of between 3 and 5 times an average income to be affordable.

   The average house price in the area has increased by 16% since 2011: entry level prices have increased by 14%, suggesting some underlying demand from first time buyers. Prices of 3 bedroom homes have increased by 5% and of 4 bedroom homes by 83%, suggesting either continuing demand from investors or from households trading up to larger properties.

b. In the Burley, Burley Park and Kirkstall area, the average entry level house price (1 or 2 bedroom properties) was £107,500 as at November 2016, below the city average. This would require a household income of £33,600 (or one to 1.5 average incomes) to afford mortgage payments, and a deposit of just under £16,200 to secure a mortgage at an LVR of 85%. While mortgage payments may be affordable to first time buyers on average incomes or thereabouts, again, however, unless financial support were to be forthcoming from family, the deposit may provide a barrier taking potentially over 10 years to accumulate.

   Larger properties in the area may not be affordable to first time buyers as a household income of between 2 and 2.5 average incomes to be affordable and again the deposit required would take a considerable time to accumulate without equity being available, or financial assistance from family.

   The average house price has increased by 10.8% since 2011: entry level prices have remained static suggesting weak demand from first time buyers; however, prices of 3 bedroom homes have increased by 8% and of 4 bedroom homes by 14%, suggesting either continuing demand from investors or from households trading up to larger properties.

c. In the Headingley area, the average entry level house price (1 or 2 bedroom properties) was £132,428 as at November 2016, above the city average. This would require a household income of £41,400 (or 1.7 average incomes) to afford mortgage payments, and a deposit of just under £20,000 to secure a mortgage at an LVR of 85%. Again, however, unless financial support were to be forthcoming from family, the deposit may take up to 15 years to accumulate. Larger properties in the area may not be affordable to first time buyers as a household income of between 2.7 to 3.5 average incomes to be affordable and again the deposit required would take a considerable time to accumulate without considerable equity being available, or financial assistance from family.

[1] The Generation Rent Report for the Halifax found that households in Yorks1hire and the Humber managed to save around £25.73 per week 9https://static.halifax.co.uk/assets/pdf/mortgages/pdf/Generation-Rent-2015-Dont-stop-believing-full-report-7th-April-2015-Housing-Release.pdf Page 9)

Securing wider tenure change therefore would require either demand from more affluent single people or couples, existing homeowners in the area trading up, or incoming homeowners with equity.

The average house price has increased by 29.1% since 2011: entry level prices have increased by 12.5% suggesting some underlying demand from first time buyers; prices of 3 bedroom homes have increased by 10.4% and of 4 bedroom homes by 38.7%, %, suggesting either continuing demand from investors or from households trading up to larger properties.

d. In the Hyde Park area, the average entry level house price (1 or 2 bedroom properties) was £98,731 as at November 2016, below the city average. This would require a household income of £30,854 (or 1.23 average incomes) to afford mortgage payments, and a deposit of just under £15,000 to secure a mortgage at an LVR of 85%. Again, however, unless financial support were to be forthcoming from family, the deposit may take 10 to 15 years to accumulate. Larger properties in the area may not be affordable to first time buyers as a household income of between 1.7 to 2.5 average incomes to be affordable, and again the deposit required would take a considerable time to accumulate without considerable equity being available, or financial assistance from family.

   In the Hyde Park area, the average house price has increased by 49% since 2011: however entry level prices have reduced by 8.7% suggesting a shortage of demand for available properties from first time buyers; prices of 3 bedroom homes however, have increased by 8% and of 4 bedroom homes by 14% also suggesting either continuing demand from investors, or from households trading up to larger properties.

e. In Woodhouse, the areas around the University Campus and the City Centre, the average entry level house price (1 or 2 bedroom properties) was £103,133 as at November 2016, below the city average. This would require a household income of £32,229 (or 1.3 average incomes) to afford mortgage payments, and a deposit of just over £15,000 to secure a mortgage at an LVR of 85%. Again, however, unless financial support were to be forthcoming from family, the deposit may take 10 to 15 years to accumulate. Larger properties in the area may not be affordable to first time buyers as a household income of between 2 and 2.5 average incomes to be affordable, and again the deposit required would take a considerable time to accumulate without considerable equity being available, or financial assistance from family.

   The average house price has increased by 31% since 2011: however entry level prices have reduced by 2.7% suggesting a shortage of demand for available properties from first time buyers; prices of 3 bedroom homes have increased by 26.2% and of 4 bedroom homes by 11.7%, also suggesting either continuing demand from investors, or from households trading up to larger properties.

3.1.2 In all five areas, the level of house prices, probably inflated by the student housing market; the incomes needed to afford repayments, and the levels of deposit required under current mortgage lending practices, would imply that securing tenure change therefore would require either demand from more affluent single people or couples, existing homeowners in the area trading up, or incoming homeowners with equity. Were prices to continue to increase, then while this could build confidence among potential buyers of the continuing value of homes in the area, it could also have implications for affordability.

3.1.3 In addition, if the areas comprising Inner North West Leeds are to attract incoming homeowners then they will need to be attractive to those households and be affordable to them while providing confidence regarding their future value. Table B4 in Appendix B shows that

a. House prices in Far Headingley are lower but more affordable than in comparable nearby areas like Alwoodley, Adel, Moortown and Horsforth.

b. House prices in Central Headingley are in line with those in the nearby, and popular, areas of Chapel Allerton, Cookridge and Meanwood.

c. House prices in South Headingley, Hyde Park, Woodhouse are higher but less affordable than in nearby Armley and Bramley.

3.1.4 Table 12 shows a breakdown of the properties advertised for sale in the five areas comprising Inner North West Leeds. This shows that across the area while 40% of homes had 1 or 2 bedrooms and would be accessible to first time buyers, most properties for sale had 3 or 4 bedrooms and would either be bought by investors, or would have to attract demand from existing or incoming family households.

Table 12 Balance of sizes of properties for sale

	1 Bed	2 bed	1 & 2 Bed		*3 bed*	4 + bed	3+ bed		ALL
Far Headingley area	10	31	**41**	**36.9%**	28	42	**70**	**63.1%**	**111**
Burley, Burley Park, Kirkstall area	6	14	**20**	**41.7%**	19	10	**29**	**58.3%**	**49**
Headingley area	5	18	**23**	**24.0%**	20	53	**73**	**76.0%**	**96**
Hyde Park area	6	18	**24**	**33.3%**	18	30	**48**	**66.7%**	**72**
University Campus, Woodhouse, City Centre	15	11	**26**	**40.6%**	17	21	**38**	**59.4%**	**64**

(Source: Compiled from 2011 Census data presented in ONS Neighbourhood Statistics 2017)

a. In the Far Headingley area, just over a third of homes for sale had 1or two bedrooms indicating potential for purchase by first time buyers, however, almost two-thirds of homes for sale were 3 or 4 bedrooms (with most of those having 4 bedrooms). Estate agents suggest that these types of properties are attracting interest from, and being bought by existing, or incoming family households.

b. In the Burley, Burley Park and Kirkstall area, 42% of homes for sale have 1 or 2 bedrooms, and would be accessible to first time buyers with 1 to 1.5 average incomes (see section 3.1.1 b above). 58% have 3 bedrooms or more, with most having 3 bedrooms. These would be affordable to some first-time buyers with 2 average, or slightly above average, incomes, and to existing or incoming families with equity. They also would be of interest to investors.

c. In the Headingley area, a quarter of properties for sale had 1 or 2 bedrooms (mostly 2 bedrooms) which would be accessible to first time buyers with two average incomes (see section 3.1.1 c above). However, three quarters of homes for sale have 3 or 4 bedrooms, most of which had 4 bedrooms. This may reflect landlords selling properties in the context of falling student demand, or family households seeking to leave the area. Their sale will depend on whether they are attractive to existing or incoming family households.[2] Alternatively, the properties may be of interest to other investors seeking to provide shared housing for young professionals.

d. In the Hyde Park area, a third of properties for sale had 1 or 2 bedrooms (most having 2 bedrooms) and would be accessible to first-time buyers with two average incomes (see section 3.1.1 d above). However, two thirds of homes for sale have 3 or 4 bedrooms. Again, this may reflect landlords selling properties, or family households seeking to leave the area. Their sale will depend on whether they are attractive to existing or incoming family households. Alternatively, the properties may be of interest to other investors seeking to provide shared housing for students or young workers.

e. In Woodhouse, the areas around the University Campus and the City Centre, 41% of properties for sale had 1 or 2 bedrooms and would be accessible to first-time buyers with one to 1.5 average incomes (see section 3.1.1 d above). However, almost 60% of homes for sale have 3 or 4 bedrooms (most of which had 4 bedrooms).

Again, this may reflect landlords selling properties, or family households seeking to leave the area. Their sale will depend on whether they are attractive to existing or incoming family households. Alternatively, the properties may be of interest to other investors seeking to provide shared housing for students.

3.2 The Rental Market

3.2.1 This section presents data on the rental market across Inner North West Leeds and the five key areas identified above. Table 13 shows rental levels and incomes needed to afford them; Table 14 shows the difference between market rent levels and the Local Housing Allowance rate and Table 15 shows the target demand for advertised private rented lettings and Table 16 shows the balance of sizes of property advertised for letting. Full breakdowns of the individual areas comprising Inner North West Leeds is shown in Appendix C.

Rent Levels and affordability

3.2.2 Table 13 shows the rent levels and income levels needed to afford them across Inner North West Leeds. It shows that rents for entry level housing in general (rooms in shared house and 1 or 2 bedroom properties) range from £490 per month (£113 per week in Hyde Park to £564 (£130 per week) in Far Headingley. These are generally affordable to all single people or couples on average incomes, and in some areas to single people or couples with quartile household incomes.

[2] *See discussion of this in Assessment of Housing Market Conditions and Demand Trends in Inner North West Leeds: Unipol/Renew 2012:*

Table 13 Rental levels and affordability for self-contained households

	Woodhouse, University Campus, City Centre	Hyde Park area	Headingley area	Burley, Burley Park, Kirkstall	Far Headingley area
Entry Level (1 or 2 Bed)					
Average Monthly Rent	*£542*	*£490*	*£535*	*£506*	*£564*
Income needed to afford rent	£20,153	£18,240	£19,883	£18,823	£20,993
Multiples of single average income	0.8	0.7	0.8	0.8	0.8
Multiples of single bottom quartile income	1.6	1.4	1.5	1.4	1.6
3 Bed					
Average Monthly Rent	*£944*	*£738*	*£846*	*£803*	*£1,038*
Income needed to afford rent	£35,108	£27,441	£31,471	£29,853	£38,601
Multiples of single average income	1.4	1.1	1.3	1.2	1.5
Multiples of single bottom quartile income	2.7	2.1	2.4	2.3	3.0
4+ Bed					
Average Monthly Rent	*£984*	*£896*	*£1,053*	*£1,136*	*£1,269*
Income needed to afford rent	£36,592	£33,331	£39,172	£42,241	£47,219
Multiples of single average income	1.5	1.3	1.6	1.7	1.9
Multiples of single bottom quartile income	2.8	2.6	3.0	3.2	3.6

(Source: www.rightmove .co.uk November 2016)

3.2.3 However, rents would be at the limits of affordability, or in some areas unaffordable, for households on very low incomes. Rents for self-contained 3 bedroom properties are less affordable requiring an income above the average, or 2 bottom quartile incomes to afford the rents. Rents for properties with 4 bedrooms or more would require between 1.5 average incomes (in Hyde Park) and 2 average incomes (in Far Headingley) to afford the rents. Generally, 'family sized' housing would be unaffordable to those on low or very low incomes.

a. In Far Headingley, 'entry level' market rents (shared housing, 1 and 2 bed properties) are between £361 per month (£83 per week) for shared housing and £768 per month (£177 per week) for 2 bed properties, and are broadly affordable to households with a single average income, or 1.5 bottom quartile incomes. Average market rents for 3 bed homes are £1,038 per month (£239 per week) and are affordable to households with an income of 1.5 average incomes or 2 bottom quartile incomes. Average rents for properties with 4 bedrooms or more are £1,269 per month (£293 per week) and are affordable to households with 2 average incomes but would be unaffordable to households with below average household incomes.

b. In the Burley, Burley Park and Kirkstall area, 'entry level' market rents (shared housing, 1 and 2 bed properties) are between £329 per month (£76 per week) for shared housing and £653 per month (£151 per week) for 2 bed properties, and are broadly affordable to households with incomes between the bottom quartile and the average. Average market rents for 3 bed homes are £803 per month (£185 per week) and are affordable to households with 1.25 average incomes, but may not be affordable to households with bottom quartile incomes. Average rents for properties with 4 bedrooms or more are £1,136 per month (£262 per week) and are affordable to households with 1.7 average incomes, or one average income and one bottom quartile income, but may also be unaffordable to households with below average household incomes. Most properties would be unaffordable to those on very low incomes (bottom 10%)

c. In the Headingley area, 'entry level' market rents (shared housing, 1 and 2 bed properties) are between £347 per month (£80 per week) for shared housing and £722 per month (£167 per week) for 2 bed properties, and are broadly affordable to households with a single average income, or 1.5 bottom quartile incomes. Average market rents for 3 bed homes are £846 per month (£195 per week) and would require at least 1.3 average incomes, or one average income and a part-time bottom quartile income to make them affordable, and may not be affordable to households wholly on bottom quartile incomes. Average rents for properties with 4 bedrooms or more are £1,043 per month (£262 per week) and are affordable to households with an income of 1.6 average incomes but maybe unaffordable to households with below average household incomes. All properties would be completely unaffordable to those on very low incomes (bottom 10%)

d. In the Hyde Park area, 'entry level' market rents (shared housing, 1 and 2 bed properties) are between £334 per month (£77 per week) for shared housing and £636 per month (£147 per week) for 2 bed properties, and are broadly affordable to households with a single average income, or 1.5 bottom quartile incomes. Average market rents for 3 bed homes are £738 per month (£170 per week) and would require at least one average incomes, 1.5 bottom quartile incomes to make them affordable.

   Average rents for properties with 4 bedrooms or more are £896 per month (£207 per week) and are affordable to households with an income of up to 1.3 average incomes but maybe unaffordable to households with below average household incomes. Larger properties would be completely unaffordable to those on very low incomes (bottom 10%).

e. In Woodhouse, the areas around the University Campus and the City Centre, 'entry level' market rents (shared housing, 1 and 2 bed properties) are between £361 per month (£83 per week) for shared housing and £702 per month (£162 per week) for 2 bed properties, and are broadly affordable to households with a single average income, or 1.6 bottom quartile incomes. Average market rents for 3 bed homes are £944 per month (£218 per week) and would be affordable to households with 1.4 average incomes, but may not be affordable to households with bottom quartile incomes. Average rents for properties with 4 bedrooms or more are £984 per month (£207 per week) and are affordable to households with 1.5 average incomes but maybe unaffordable to households with below average household incomes. Larger properties would be completely unaffordable to those on very low incomes (bottom 10%)

Table 14 Difference between Local Housing Allowance (LHA) rate and average weekly rent for different property sizes in Inner NW Leeds

	Room	1 Bed	2 Bed	3 Bed	4+ Bed
Far Headingley area	£20.83	£30.03	£54.87	£89.87	£97.30
Burley, Burley Park, Kirkstall area	£13.44	£23.76	£28.22	£35.60	£66.42
Headingley area	£17.54	£23.35	£44.31	£45.64	£47.38

Hyde Park area	£14.52	£15.64	£24.33	£20.64	£11.15
University Campus, Woodhouse, City Centre	£20.83	£29.18	£40.27	£68.20	£31.38

(Source: www.rightmove.co.uk November 2016)

3.2.4 Table 14 shows a summary of the difference between market rents in the area and the Local Housing Allowance (LHA) rate. It shows that for

a. The market rent for a room in a shared house is between £13.44 per week more than the LHA rate in Burley, Burley Park and Kirkstall and £20.83 more in the Far Headingley area, and the area around Woodhouse, the University Campus and the City Centre.

b. The market rent for property with 1 bedroom is between £15.64 per week more than the LHA rate in Hyde Park to £30.03 more in the Far Headingley area.

c. The market rent for a property with 2 bedrooms is between £24.33 more than the LHA rate in Hyde Park to £54,87 in Far Headingley.

d. The market rent for a property with 3 bedrooms is between £20.64 more than the LHA rate in Hyde Park to £89.87 per week more in Far Headingley.

e. The rent for a property with 4 bedrooms or more is between £11.15 per week more than the LHA rate in Hyde park to £97.30 more in Far Headingley.

3.2.5 This would indicate that the rental market is largely unaffordable to households in receipt of benefit as the level of Local Housing Allowance payable in relation to market rents in the area would leave households having to find a significant proportion of the rent from their benefit payments. This would be unattractive to claimant tenants and would be unattractive to landlords as they would have little certainty that their tenants would be able to pay their rent.

3.2.6 Demand for rented housing from households applying to the housing offices covering the Inner North West Leeds area through the Leeds Housing Register (Leeds Homes) is shown in Table C8 in Appendix C. This shows that 86% of applications for social housing in the Inner North West Leeds area were registered as having a need for housing with 1 or 2 bedrooms and 14% were registered as having a need for housing with 3 bedrooms or more, and that this balance is consistent across the areas closer to the Universities, and those areas farther away. This indicates that households seeking social housing tend to be smaller and younger [3]and may be more transient in their living patterns.

3.2.7 The type and size of properties being advertised on www.rightmove.co.uk in November 2016 is shown in Table 15. It gives an impression of the balance of the private rented market across Inner North West Leeds.

Table 15 Size of properties being advertised for letting: November 2016

	Shared Houses/Flats		Studios/1 Bed		2 bed		3 Bed		4+ bed		ALL
Far Headingley area	15	19.0%	11	13.9%	21	26.6%	19	24.1%	13	16.5%	**79**
Burley, Burley Park, Kirkstall area	99	49.0%	39	19.3%	23	11.4%	25	12.4%	16	7.9%	**202**
Headingley area	77	33.9%	73	32.2%	53	23.3%	15	6.6%	9	4.0%	**227**
Hyde Park area	68	45.3%	22	14.7%	49	32.7%	9	6.0%	2	1.3%	**150**

[3] *Leeds City Council Registration system usually assesses single people and childless couples as having a need for 1 bed housing, households with one child has having a need for a 2-bedroom property; households with 2 children as having a need for a 3-bedroom property, and so on.*

Woodhouse, University Campus	95	47.3%	63	31.3%	24	11.9%	14	7.0%	5	2.5%	**201**
City Centre	0	0.0%	161	38.9%	226	54.6%	27	6.5%	0	0.0%	**414**

(Source: www.rightmove.co.uk November 2016)

a. In Far Headingley, two-thirds of advertised lettings were 2,3 and 4 bed properties aimed at families or young couples seeking rented housing, and a further 14% were 1 bedroomed flats aimed at working young couples and single people. 20% of advertised lettings were rooms in shared houses and were aimed at young working people rather than students (see below)

b. In Burley, Burley Park and Kirkstall, almost half of advertised lettings were rooms in shared houses aimed at both young working people and students (see below), and half were self-contained 1,2,3 and 4 bed properties aimed at young couples and families.

c. In the Headingley area, advertised lettings were mainly rooms in shared houses aimed at both young workers and students (34%) (see below) and 1 and 2 properties, mainly flats, (56%) aimed at young couples. The remaining 10% of properties were properties with 3 or 4 bedrooms aimed at families.

d. In the Hyde Park area, advertised lettings were mainly rooms in shared houses aimed at both young workers and students (45%) (see below) and 1 and 2 properties, mainly flats, (47%) aimed at students and young couples. The remaining 7% of properties were properties with 3 or 4 bedrooms aimed at families.

e. In the Hyde Park area, advertised lettings were mainly rooms in shared houses aimed at both young workers and students (45%) (see below) and 1 and 2 properties, mainly flats, (47%) aimed at students and young couples. The remaining 7% of properties were properties with 3 or 4 bedrooms aimed at families.

f. In Woodhouse, the areas around the University Campus and the City Centre, advertised lettings were mainly rooms in shared houses aimed at both young workers and students (47%) (see below) and 1 and 2 properties, mainly flats, (43%) aimed at students and young couples. The remaining 10% of properties were properties with 3 or 4 bedrooms aimed at families.

3.2.8 There is some evidence of a shift in the way that landlords are marketing properties. In 2012, most shared housing was targeted at students, whereas Table 16 shows that there has a been a shift with many more landlords and agents targeting either solely young professional households or showing a willingness to let either to young professionals or students.

Table 16 Target demand for advertised lettings

	Students only	Students or Professionals	Professionals only	ALL
Far Headingley area	0.0%	28.8%	71.3%	**80**
Burley, Burley Park, Kirkstall area	7.8%	57.4%	34.8%	**204**
Headingley area	6.7%	74.5%	18.8%	**149**
Hyde Park area	27.8%	63.6%	8.6%	**151**
University Campus, Woodhouse, City Centre	28.6%	67.0%	4.4%	**203**
INNER NW LEEDS	**16.0%**	**61.4%**	**22.6%**	**787**

(Source: www.rightmove.co.uk November 2016)

3.2.9 Across the Inner North West Leeds area only 16% of properties advertised for letting were aimed at students only, less than the 23% targeted at young professionals only. Most landlords advertising lettings clearly were willing to let either to young professionals or students, and recognised that the balance of demand for shared housing in the area has shifted.

a. In the Far Headingley area, 71% of the advertised lettings were specifically aimed at 'young professionals', and 29% were aimed at either young professionals or students. None were specifically aimed at students;

b. In the Burley, Burley Park and Kirkstall area, most advertised lettings (57%) were aimed at either young professionals or students, with 35% aimed specifically at young professionals, and only 8% specifically aimed at students;

c. In the Headingley area, 75% of advertised lettings were aimed either at young professionals or students, with 19% aimed specifically at young professionals and only 7% specifically aimed at students.

d. In the Hyde Park area, a much higher proportion of advertised lettings (28%) were aimed specifically at students, however, most advertised lettings (64%) were aimed either at young professionals or students, with 8% were aimed specifically at young professionals.

e. In Woodhouse, the areas around the University Campus and the City Centre, again a much higher proportion of advertised lettings (29%) were aimed specifically at students, however, most advertised lettings (67%) were aimed either at young professionals or students, with only 4% aimed specifically at young professionals.

[TO ADD FINDINGS FROM INTERVIEWS WITH ESTATE AGENTS]

4.0 Summary of findings

4.1 Overview

4.1.1 The areas comprising Inner North West Leeds vary in terms of their housing stock, demographic composition and housing markets, but there are aspects in common: the existence of a 'young' population comprising not only students, but also other young single people, and young couples with and without children; a large supply of older, terraced housing of varying sizes; a higher than average proportion of private rented housing, and a relatively high proportion of people in professional, managerial or intermediate associated occupations.

4.1.2 Housing, demographic and housing market characteristics are polarised between the areas closer to the universities and those areas farther away. The findings relating to prices, rents, affordability and availability of properties and the current demographic balance in the area, suggest that altering the balance between home ownership and private renting, and between students and households likely to be more 'residential' will be a challenge.

4.2 Housing Stock

4.2.1 Tenure mix varies across Inner North West Leeds with levels of home ownership higher in the areas farther from the Universities and the proportion of households living in private rented housing is higher than the city average in all parts of the area

4.2.2 The size of the existing stock suggests that it is not best suited to encouraging existing, mature families into the area, and in most areas excepting those farthest from the Universities, the property types most popular with such households, are not plentiful and do not become available very often. Much of the available housing stock does not have garden space, and will require significant investment to restore them to being appropriate for family living.

4.2.3 The areas closer to the University would appear to be more geared towards accommodating smaller, and probably younger households, although this could include the 'family builder' households who may become the long-staying family households of the future. Larger homes are largely let as shared housing and securing a change in the tenure of these will be extremely difficult given demand from both students and young working households.

4.2.4 Further from the Universities, the stock base would appear to be more geared towards accommodating a mix of smaller, 'family builder' households, single working people, older people needing smaller accommodation and mature families. The opportunities for creating a 'critical mass' necessary to engender change are better and the properties may be more attractive to longer term residents.

4.3 Demographic characteristics

4.3.1 There is a preponderance of people aged under 25 in the local populations across the area, students and young working people living independently. Many of these, especially those currently working, may well remain in the area and gradually become more longer term residents.

4.3.2 There are also significant proportions of people aged 25 to 44, the 'family building age' who may provide the 'residential households of the future.

4.3.3 Currently, family households are in a minority and there appears to be little evidence (apart from in the Far Headingley area) of any major movement of families back into the various parts of the area as student demand shifts closer to the Universities.

4.3.4 In some parts of the area there are large and growing BME communities who may provide a significant proportion of future housing demand, and may offer longer term residence.

4.3.5 While the economic activity across the area is distorted by the numbers of students, many people living in the various parts of the area are working in professional, managerial or intermediate occupations, (often graduate students from the Universities) who could afford entry level prices and rents, and may have the mixture of income and equity necessary to afford to 'trade up' to larger properties.

4.4 Housing market characteristics

4.4.1 In all five areas, the level of house prices, probably inflated by the student housing market; the incomes needed to afford repayments, and the levels of deposit required under current mortgage lending practices, would imply that securing tenure change therefore would require either demand from more affluent single people or couples, existing homeowners in the area trading up, or incoming homeowners with equity.

4.4.2 House prices have been increasing apart for smaller properties in the areas closest to the Universities which may provide confidence in the value of properties in the area but will worsen affordability issues for first time buyers.

4.4.3 If the areas comprising Inner North West Leeds are to attract incoming homeowners then they will need to be attractive to those households, and be affordable to them while providing confidence regarding their future value

4.4.4 Mortgage payments for homes in the area are within reach of average earners, and in some parts, for two bottom quartile earners, but the level of deposit required continues to provide a significant barrier to those would be first time buyers without recourse to financial assistance from family.

4.4.5 Market rents are generally affordable to households with one or 1 and a half average incomes, but are less affordable to households on bottom quartile incomes and are completely unaffordable for those on the lowest levels of income. Benefit claimants would struggle to take up market rented housing in the area as rent levels are considerably higher than Local Housing Allowance rates meaning that claimant households would have to meet the gap between rent and LHA from their benefit.

4.4.6 Available private rented lettings are shifting in terms of target markets, with shared housing being aimed as much at young working people as at students, and there is clearly a market aiming to respond to demand from young 'family builder' households.

4.4.7 Current levels of demand for social rented housing suggest that there is no indication of significant demand from families for rented social housing in the area. Turnover rates in council housing are very low at present and there appears to be no indication that will change for the foreseeable future.

5.0 Changing the balance of housing in Inner NW Leeds

5.1 There has been considerable discussion over the last 10 years or more of the issues facing Inner North West Leeds. There have been severe concerns expressed about, and the replacement of a long-standing residential population often characterised as ‘families’ by a young, ‘transient’, population characterised as ‘students’, which has given rise to what was described as ‘studentification’ of the area, giving rise to endemic crime and anti-social behaviour, noise nuisance and a loss of social capital.

5.2 This was accompanied by strong local activism aimed at securing a shit in the nature of the area which had as a central belief that if students were to move out of the area, then the numbers of HMOs would reduce, and would return to being ‘family homes’ bought by local families squeezed out by landlords buying up family homes for conversion to HMOs.

5.3 There is still a strong intent amongst residents in Inner North West Leeds and their elected Councillors and MPs to secure such a change. However, the research undertaken in 2007 and 2012 now updated has raised questions arise as to whether this is achievable, and if it is how it can be achieved.

5.4 Moving from private renting to home ownership

5.4.1 If the tenure balance is going to change from a predominance of private rented housing to a more balanced tenure mix with an increase in home ownership, the following may need to take place:

5.4.2 Students will need to be encouraged to change from current patterns of residence, in terms of what they live in and where. While most new students are now accommodated in PBSA in the city centre or nearby, returning students will need to be encouraged to move away from living in off-street shared housing in HMOs, into other forms of accommodation.

5.4.3 Existing tenants in the area will need to be encouraged and supported to become first time buyers, and incoming residential households attracted to buying housing in the area. However, this may not be straightforward as house prices are relatively high (generating the need for a substantial deposit), while much housing that may become available will require substantial investment to restore them to being ‘family friendly’;

5.4.4 There will be a need to address the perceived Image of area, and probably a marketing campaign aimed counteracting negative publicity connected to noise, crime and environmental conditions, and at promoting the positive aspects of life in the area;

5.4.5 There may be a need to consider how investment can be secured to provide communal greenspace to overcome the lack of private garden space in the area;

5.4.6 There needs to be less of a pre-occupation with 'families' and 'family housing' as providing the characterisation of stable and long standing residence. Young working single people and couples should be encouraged to live in the area as they have the potential to become the 'family building' households of the future;

5.4.7 There will be a need to identify potential properties for purchase by first time buyers and actions identified that could help overcome any barriers to purchase;

5.4.8 Existing residential households wanting to move need to be encouraged and supported to sell to other residential households. However, it is far from certain either that incoming households will be willing to meet vendors price expectations, or that there will be sufficient demand from incoming households given the nature of the areas concerned, the likely refurbishment costs and the lack of garden space;

5.4.9 Application of the Article 4 direction across the area needs to be careful and not result in the unintended consequence of existing homeowners becoming 'trapped' in the area should they need, or want, to move;

5.4.10 Private landlords would need to be encouraged to, wherever possible, to sell their properties to residential households rather than other investors, but there may be price issues, competition between landlords and 'families', and the amenity and cost issues identified above.

5.5 Supporting changes in the rental market

5.5.1 If students are to be encouraged to live in other settings than shared housing in inner North West Leeds, then there may be a need to create new forms of student accommodation to attract demand. This will probably require developing forms of accommodation that provides the levels of independence associated with shared housing in residential areas, with the levels of amenity and security offered by PBSA. This could involve smaller forms of PBSA, aimed at returning students and located either in the city centre and its environs, or within some of the areas of 'traditional residence'.

5.5.2 Accommodation for students could be considered as a part of the proposed Leeds South Bank development. This could deploy new forms of construction and design to attract students as has been developed in some European and North American cities [4];

5.5.3 Encouraging demand from young professional renters sharing (move over time to independent living in area)]

5.5.4 Encouraging demand from young 'family builder' households in work – may start in shared housing but move on to independent longer term living or home purchase. Young working single people and couples should be encouraged and supported to live in the area through

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[4] *See such schemes as the Central Village, Winnipeg*; *the Wenckehof, Amsterdam and the Urban Rigger, scheme in Copenhagen Harbour; MyPad in Walthamstow; the Urban Splash developments in New Islington in Manchester and others.*

conversion of larger properties to self-contained flats and through recognising that housing aimed at those households needs to be encouraged and supported;

Appendix A

Census Indicators – nature of the local housing stock and the age and ethnic origin, employment status and occupation of local populations

Housing Stock

Table A1 Housing Tenure in Inner North West Leeds 2011

	Owner Occupied	Private Rented	Social Rented
West Park	48.5%	18.3%	32.1%
Far Headingley/Weetwood	68.3%	26.0%	4.2%
Becketts Park/Queenswood Drive	53.1%	31.4%	14.1%
Meanwood-Headingley	56.3%	38.1%	5.0%
	56.5%	***28.4%***	***13.8%***
Burley/Burley Park	29.1%	45.5%	24.0%
Kirkstall	49.3%	18.1%	30.8%
	39.2%	***31.8%***	***27.4%***
Central Headingley	18.7%	71.4%	9.5%
Cardigan Triangle	24.8%	59.2%	14.9%
South Headingley	19.7%	64.4%	13.7%
Headingley Hill	20.1%	63.3%	14.4%
	20.8%	***64.6%***	***13.1%***
Hyde Park	11.4%	75.3%	12.8%
Harolds	16.6%	59.7%	22.1%
Burley Lodge	15.3%	66.2%	17.5%
	14.4%	***67.1%***	***17.5%***
Woodhouse	18.5%	38.2%	41.5%
Little Woodhouse	13.4%	48.4%	37.2%
University area	12.1%	44.7%	41.9%
City Centre	15.2%	63.2%	20.1%
	14.8%	***48.6%***	***35.2%***

(Source: 2011 Census data in ONS Neighbourhood Statistics 2016)

Table A2 Size of housing stock in Inner North West Leeds 2011

	1 Bed	2 Bed	*1 & 2 Bed*	3 bed	4+ Bed	*3 Beds +*
West Park	19.6%	35.3%	*54.9%*	25.1%	19.9%	*45.1%*
Far Headingley area	11.7%	25.6%	*37.2%*	25.0%	37.8%	*62.8%*
Becketts Park area	15.1%	30.1%	*45.2%*	23.7%	31.2%	*54.8%*
Meanwood-Headingley	15.8%	34.6%	*50.4%*	23.7%	25.9%	*49.6%*
	15.5%	***31.4%***	***46.9%***	***24.4%***	***28.7%***	***53.1%***
Burley/Burley Park	18.5%	35.5%	*54.0%*	22.9%	23.1%	*46.0%*
Kirkstall	12.1%	31.6%	*43.8%*	46.4%	9.9%	*56.3%*
	15.3%	***33.6%***	***48.9%***	***34.6%***	***16.5%***	***51.1%***
Central Headingley	15.1%	19.1%	*34.2%*	16.8%	49.0%	*65.8%*
Cardigan Triangle	19.1%	15.3%	*34.4%*	23.1%	42.5%	*65.6%*
South Headingley	27.1%	28.1%	*55.2%*	12.3%	32.6%	*44.8%*
Headingley Hill	30.9%	27.4%	*58.3%*	11.2%	30.5%	*41.7%*
	23.1%	***22.5%***	***45.5%***	***15.8%***	***38.6%***	***54.5%***
Hyde Park	21.4%	17.1%	*38.5%*	13.9%	47.6%	*61.5%*
Harolds	16.3%	49.3%	*65.5%*	15.0%	19.4%	*34.5%*
Burley Lodge	15.3%	13.8%	*29.1%*	19.3%	51.6%	*70.9%*
	17.6%	***26.8%***	***44.4%***	***16.0%***	***39.6%***	***55.6%***
Woodhouse	21.0%	32.3%	*53.3%*	23.3%	23.4%	*46.7%*
Little Woodhouse	37.5%	21.9%	*59.4%*	21.0%	19.6%	*40.6%*
University area	36.5%	22.3%	*58.8%*	20.0%	21.2%	*41.2%*
City Centre	40.3%	47.9%	*88.2%*	7.0%	4.8%	*11.8%*
	33.8%	***31.1%***	***64.9%***	***17.8%***	***17.3%***	***35.1%***

(Source: 2011 Census data in ONS Neighbourhood Statistics 2016)

Table A3 Size of housing stock in Inner North West Leeds 2011

	Detached	Semi	*Detached or Semi detached*	Terraced	Flats
West Park area	8.9%	29.5%	***38.4%***	14.9%	46.7%
Far Headingley area	17.1%	36.9%	***54.0%***	11.0%	35.0%
Becketts Park area	9.1%	36.5%	***45.6%***	18.3%	36.1%
Meanwood-Headingley	4.6%	24.9%	***29.5%***	43.9%	26.5%
	9.9%	***32.0%***	***41.9%***	***22.0%***	***36.1%***
Burley/Burley Park	2.4%	12.5%	***14.9%***	63.4%	21.7%
Kirkstall	5.7%	47.5%	***53.2%***	20.9%	25.9%
	4.1%	***30.0%***	***34.0%***	***42.1%***	***23.8%***
Central Headingley	2.6%	28.5%	***31.1%***	38.5%	30.4%
Cardigan Triangle	1.8%	22.8%	***24.7%***	46.4%	29.0%
South Headingley	4.8%	15.3%	***20.1%***	30.8%	49.1%
Headingley Hill	4.9%	13.1%	***18.0%***	26.9%	55.1%
	3.5%	***19.9%***	***23.5%***	***35.6%***	***40.9%***
Hyde Park	2.0%	7.8%	***9.8%***	57.3%	32.9%
Harolds	3.0%	6.7%	***9.7%***	80.9%	9.4%
Burley Lodge	1.7%	11.6%	***13.3%***	67.4%	19.3%
	2.3%	***8.7%***	***10.9%***	***68.6%***	***20.5%***
Woodhouse	4.1%	15.1%	***19.2%***	46.3%	34.5%
Little Woodhouse	1.0%	6.7%	***7.7%***	28.3%	64.0%

University area	1.7%	7.8%	***9.5%***	27.9%	62.6%
City Centre	0.8%	2.7%	***3.6%***	7.6%	88.8%
	1.9%	***8.1%***	***10.0%***	***27.5%***	***62.5%***

(Source: 2011 Census data in ONS Neighbourhood Statistics 2016)

Table A4 Age Composition of population in Inner North West Leeds 2011

	Under 16	16 - 25	25 - 44	45 - 64	65+
West Park	13.3%	24.0%	27.3%	22.0%	13.5%
Far Headingley/Weetwood	10.8%	36.6%	22.1%	19.0%	11.6%
Becketts Park/Queenswood Drive	12.0%	28.2%	30.8%	18.3%	10.8%
Meanwood-Headingley	9.7%	22.8%	39.3%	18.7%	9.5%
	11.4%	**27.9%**	**29.9%**	**19.5%**	**11.4%**
Burley/Burley Park	10.5%	38.2%	34.4%	10.6%	6.4%
Kirkstall	16.9%	16.0%	33.0%	21.2%	12.9%
	13.7%	**27.1%**	**33.7%**	**15.9%**	**9.7%**
Central Headingley	2.1%	73.7%	14.5%	5.5%	4.3%
Cardigan Triangle	5.9%	60.7%	19.3%	10.2%	3.8%
South Headingley	3.8%	62.7%	20.4%	5.9%	7.1%
Headingley Hill	4.1%	61.9%	20.0%	6.3%	7.6%
	4.0%	**64.8%**	**18.5%**	**7.0%**	**5.7%**
Hyde Park	4.3%	74.0%	15.0%	4.5%	2.1%
Harolds	11.3%	50.9%	26.7%	7.7%	3.5%
Burley Lodge	4.6%	72.6%	14.6%	5.3%	3.0%
	6.7%	**65.8%**	**18.8%**	**5.8%**	**2.9%**
Woodhouse	12.4%	45.8%	25.5%	10.5%	5.7%
Little Woodhouse	5.5%	68.1%	17.9%	5.5%	3.0%
University area	6.0%	65.7%	19.4%	6.2%	2.8%
City Centre	4.9%	47.0%	38.6%	6.6%	2.8%
	7.2%	**56.6%**	**25.4%**	**7.2%**	**3.6%**

(Source: 2011 Census data in ONS Neighbourhood Statistics 2016)

Table A5 Household Types in Inner North West Leeds 2011

	Families with Children	Childless Couples	Single people under 65	People over 65	Couples over 65
West Park	31.0%	17.9%	31.4%	6.0%	13.7%
Far Headingley/Weetwood	30.8%	21.7%	27.2%	8.7%	11.6%
Becketts Park/Queenswood Drive	29.2%	21.4%	33.5%	5.2%	10.7%
Meanwood-Headingley	22.1%	25.2%	41.3%	3.5%	7.8%
	28.3%	**21.5%**	**33.4%**	**5.9%**	**10.9%**
Burley/Burley Park	22.4%	16.4%	51.7%	1.8%	7.6%
Kirkstall	34.0%	18.5%	29.1%	6.9%	11.5%
	28.2%	**17.5%**	**40.4%**	**4.4%**	**9.6%**
Central Headingley	11.5%	12.0%	68.6%	1.8%	6.2%
Cardigan Triangle	18.8%	12.0%	63.5%	1.1%	4.6%
South Headingley	13.1%	18.1%	54.7%	2.6%	11.4%
Headingley Hill	11.9%	16.5%	56.6%	2.6%	12.4%
	13.8%	**14.6%**	**60.9%**	**2.0%**	**8.7%**
Hyde Park	13.8%	11.9%	71.4%	0.5%	2.4%
Harolds	21.6%	14.1%	59.5%	1.2%	3.5%
Burley Lodge	16.0%	8.6%	70.4%	1.5%	3.5%
	17.1%	**11.6%**	**67.1%**	**1.1%**	**3.1%**
Woodhouse	29.3%	11.8%	49.4%	2.6%	6.9%

Little Woodhouse	18.9%	14.1%	59.0%	1.7%	6.3%
University area	20.1%	12.9%	59.6%	1.4%	6.1%
City Centre	10.0%	21.8%	63.8%	6.0%	3.8%
	19.6%	**15.1%**	**58.0%**	**2.9%**	**5.8%**

(Source: 2011 Census data in ONS Neighbourhood Statistics 2016)

Table A6 Ethnic Origin of population in Inner North West Leeds 2011

	White British	White European/Other	BME	Mixed heritage
West Park	82.9%	4.3%	9.8%	3.1%
Far Headingley/Weetwood	82.7%	4.7%	9.7%	3.0%
Becketts Park/Queenswood Drive	82.9%	5.5%	8.8%	2.8%
Meanwood-Headingley	84.2%	6.8%	5.3%	3.7%
	83.2%	**5.3%**	**8.4%**	**3.1%**
Burley/Burley Park	70.6%	5.5%	19.1%	4.9%
Kirkstall	75.3%	5.9%	15.1%	3.7%
	72.9%	**5.7%**	**17.1%**	**4.3%**
Central Headingley	88.4%	4.1%	4.6%	2.9%
Cardigan Triangle	79.5%	4.8%	12.1%	3.6%
South Headingley	80.3%	6.9%	9.1%	3.8%
Headingley Hill	79.5%	7.1%	10.0%	3.3%
	81.9%	**5.7%**	**9.0%**	**3.4%**
Hyde Park	77.1%	5.5%	13.0%	4.4%
Harolds	65.2%	6.4%	23.8%	4.6%
Burley Lodge	73.3%	5.1%	17.6%	4.0%
	71.9%	**5.7%**	**18.1%**	**4.3%**
Woodhouse	59.4%	7.2%	26.9%	6.5%
Little Woodhouse	66.6%	6.2%	22.9%	4.3%
University area	60.7%	6.4%	28.5%	4.4%
City Centre	60.3%	9.5%	26.1%	4.0%
	61.8%	**7.3%**	**26.1%**	**4.8%**

(Source: 2011 Census data in ONS Neighbourhood Statistics 2016)

Table A7 Employment Activity of people living in Inner North West Leeds 2011

	Full time Employment	Self Employed	Part time work	*In Work*	Retired	Full time students
West Park	37.0%	7.7%	10.9%	*55.5%*	8.5%	16.7%
Far Headingley/Weetwood	31.3%	7.5%	8.2%	*46.9%*	7.9%	31.3%
Becketts Park/Queenswood Drive	35.8%	7.4%	8.3%	*51.6%*	6.1%	20.4%
Meanwood-Headingley	38.4%	7.3%	7.1%	*52.7%*	5.0%	13.6%
	35.6%	**7.5%**	**8.6%**	**51.7%**	**6.9%**	**20.5%**
Burley/Burley Park	33.3%	4.5%	9.1%	*46.9%*	4.2%	29.1%
Kirkstall	41.1%	6.2%	13.0%	*60.3%*	10.4%	8.0%
	37.2%	**5.4%**	**11.0%**	**53.6%**	**7.3%**	**18.5%**
Central Headingley	16.0%	2.3%	4.2%	*22.5%*	2.3%	67.4%
Cardigan Triangle	19.6%	2.9%	6.7%	*29.1%*	3.3%	52.5%
South Headingley	19.6%	3.3%	4.2%	*27.1%*	2.9%	58.1%
Headingley Hill	18.8%	3.4%	4.2%	*26.4%*	3.0%	58.2%
	18.5%	**3.0%**	**4.8%**	**26.3%**	**2.9%**	**59.0%**
Hyde Park	11.7%	2.3%	4.0%	*18.0%*	1.4%	69.0%
Harolds	22.2%	3.2%	9.2%	*34.6%*	2.6%	42.4%
Burley Lodge	11.7%	1.6%	6.7%	*20.0%*	2.1%	64.7%
	15.2%	**2.4%**	**6.6%**	**24.2%**	**2.0%**	**58.7%**
Woodhouse	18.2%	3.0%	8.8%	*29.9%*	4.3%	42.6%

Little Woodhouse	10.7%	2.0%	3.5%	*16.3%*	1.8%	68.1%
University area	10.1%	2.0%	3.7%	*15.8%*	1.8%	69.7%
City Centre	37.5%	3.7%	4.5%	*45.7%*	2.1%	48.8%
	19.1%	**2.7%**	**5.1%**	**26.9%**	**2.5%**	**57.3%**

(Source: 2011 Census data in ONS Neighbourhood Statistics 2016)

Table A8 Occupations of people living in Inner North West Leeds 2011

	Professional/ Managerial	Intermediate Occupations	Routine Occupations
West Park	52.3%	33.5%	14.2%
Far Headingley/Weetwood	61.9%	27.2%	10.9%
Becketts Park/Queenswood Drive	60.4%	28.1%	11.5%
Meanwood-Headingley	65.2%	26.3%	8.4%
	60.0%	**28.8%**	**11.2%**
Burley/Burley Park	41.3%	40.1%	18.7%
Kirkstall	42.4%	39.6%	18.1%
	41.8%	**39.8%**	**18.4%**
Central Headingley	33.2%	39.1%	27.7%
Cardigan Triangle	38.8%	35.6%	25.7%
South Headingley	44.4%	35.4%	20.2%
Headingley Hill	46.8%	34.4%	18.8%
	40.8%	**36.1%**	**23.1%**
Hyde Park	32.5%	40.0%	27.5%
Harolds	35.5%	38.5%	26.0%
Burley Lodge	28.5%	39.7%	31.8%
	32.2%	**39.4%**	**28.4%**
Woodhouse	31.2%	44.2%	24.6%
Little Woodhouse	27.2%	43.5%	29.2%
University area	26.6%	43.6%	29.8%
City Centre	55.0%	30.6%	14.4%
	35.0%	**40.5%**	**24.5%**

(Source: 2011 Census data in ONS Neighbourhood Statistics 2016)

Appendix B House Prices

Table B1 House Prices in Inner North West Leeds 2016

Average House Prices	**1 Bed**	**2 bed**	***Entry Level***	**3 Bed**	**4 Bed**	**5+ bed**	***ALL***
Woodhouse	£72,624	£108,080	***£90,352***	£127,271	£155,606	£169,991	***£116,055***
University area	£77,395	£123,725	***£100,560***	£174,950	£195,000	£299,500	***£200,800***
Little Woodhouse	£77,500	£159,475	***£118,488***	£194,983	£204,950	£229,983	***£185,894***
	£75,840	***£130,427***	***£103,133***	***£165,735***	***£185,185***	***£233,158***	***£167,583***
Hyde Park	£97,830	£110,983	***£104,407***	£148,094	£255,767	£332,564	***£206,888***
Harolds	£89,975	£112,392	***£101,184***	£137,968	£144,963		***£121,667***
Burley Lodge	£78,850	£102,358	***£90,604***	£134,980	£163,725	£240,000	***£137,660***
	£88,885	***£108,578***	***£98,731***	***£140,347***	***£188,152***	***£286,282***	***£155,405***
South Headingley	£94,475	£142,475	***£118,475***	£225,000	£239,960	£293,322	***£245,723***
Headingley Hill/Woodhouse Cliff	£101,872	£151,078	***£126,475***	£205,188	£324,975		***£188,216***
Headingley	£114,995	£159,526	***£137,261***	£223,733	£275,002	£332,289	***£263,738***
Cardigan Triangle	£120,000	£175,000	***£147,500***	£199,950	£234,950	£325,650	***£211,110***
	£107,836	***£157,020***	***£132,428***	***£213,468***	***£268,722***	***£317,087***	***£227,197***
Far Headingley/Becketts Park/QD	£101,478	£191,302	***£146,390***	£224,784	£301,056	£424,999	***£237,555***
West Park	£98,536	£159,148	***£128,842***	£210,572	£425,808	£492,932	***£268,987***
Weetwood	£165,000	£232,000	***£198,500***	£243,298	£435,550	£686,667	***£365,454***
	£121,671	***£194,150***	***£157,911***	***£226,218***	***£387,471***	***£534,866***	***£290,665***

(Source: www.Rightmove.co.uk November 2016)

Table B2 Income needed to afford mortgage payments for properties in Inner North west Leeds 2016

Income needed	**1 Bed**	**2 bed**	***Entry Level***	**3 Bed**	**4 Bed**	**5+ bed**	***ALL***
Woodhouse	£22,695	£33,775	***£28,235***	£39,772	£48,627	£53,122	***£36,267***
University area	£24,186	£38,664	***£31,425***	£54,672	£60,938	£93,594	***£62,750***
Little Woodhouse	£24,219	£49,836	***£37,027***	£60,932	£64,047	£71,870	***£58,092***
	£23,700	***£40,758***	***£32,229***	***£51,792***	***£57,870***	***£72,862***	***£52,370***
Hyde Park	£30,572	£34,682	***£32,627***	£46,279	£79,927	£103,926	***£64,653***
Harolds	£28,117	£35,123	***£31,620***	£43,115	£45,301		***£38,021***
Burley Lodge	£24,641	£31,987	***£28,314***	£42,181	£51,164	£75,000	***£43,019***
	£27,777	***£33,931***	***£30,854***	***£43,859***	***£58,797***	***£89,463***	***£48,564***
South Headingley	£29,523	£44,523	***£37,023***	£70,313	£74,988	£91,663	***£76,788***
Headingley Hill/Woodhouse Cliff	£31,835	£47,212	***£39,523***	£64,121	£101,555		***£58,818***
Headingley	£35,936	£49,852	***£42,894***	£69,917	£85,938	£103,840	***£82,418***
Cardigan Triangle	£37,500	£54,688	***£46,094***	£62,484	£73,422	£101,766	***£65,972***
	£33,699	***£49,069***	***£41,384***	***£66,709***	***£83,976***	***£99,090***	***£70,999***
Far Headingley/Becketts Park	£31,712	£59,782	***£45,747***	£70,245	£94,080	£132,812	***£74,236***
West Park	£30,793	£49,734	***£40,263***	£65,804	£133,065	£154,041	***£84,058***
Weetwood	£51,563	£72,500	***£62,031***	£76,031	£136,109	£214,583	***£114,204***
	£38,022	***£60,672***	***£49,347***	***£70,693***	***£121,085***	***£167,146***	***£90,833***

(Source: www.Rightmove.co.uk November 2016)

Table B3 Deposit required to secure mortgage

Deposit needed	1 Bed	2 bed	*Entry Level*	3 Bed	4 Bed	5+ bed	*ALL*
Woodhouse	£10,894	£16,212	***£13,553***	£19,091	£23,341	£25,499	***£17,408***
University area	£11,609	£18,559	***£15,084***	£26,243	£29,250	£44,925	***£30,120***
Little Woodhouse	£11,625	£23,921	***£17,773***	£29,247	£30,743	£34,497	***£27,884***
	£11,376	***£19,564***	***£15,470***	***£24,860***	***£27,778***	***£34,974***	***£25,137***
Hyde Park	£14,675	£16,647	***£15,661***	£22,214	£38,365	£49,885	***£31,033***
Harolds	£13,496	£16,859	***£15,178***	£20,695	£21,744		***£18,250***
Burley Lodge	£11,828	£15,354	***£13,591***	£20,247	£24,559	£36,000	***£20,649***
	£13,333	***£16,287***	***£14,810***	***£21,052***	***£28,223***	***£42,942***	***£23,311***
South Headingley	£14,171	£21,371	***£17,771***	£33,750	£35,994	£43,998	***£36,858***
Headingley Hill/Woodhouse Cliff	£15,281	£22,662	***£18,971***	£30,778	£48,746		***£28,232***
Headingley	£17,249	£23,929	***£20,589***	£33,560	£41,250	£49,843	***£39,561***
Cardigan Triangle	£18,000	£26,250	***£22,125***	£29,993	£35,243	£48,848	***£31,667***
	£16,175	***£23,553***	***£19,864***	***£32,020***	***£40,308***	***£47,563***	***£34,080***
Far Headingley/Becketts Park	£15,222	£28,695	***£21,959***	£33,718	£45,158	£63,750	***£35,633***
West Park	£14,780	£23,872	***£19,326***	£31,586	£63,871	£73,940	***£40,348***
Weetwood	£24,750	£34,800	***£29,775***	£36,495	£65,333	£103,000	***£54,818***
	£18,251	***£29,123***	***£23,687***	***£33,933***	***£58,121***	***£80,230***	***£43,600***

(Source: www.Rightmove.co.uk November 2016)

Table B4 House Prices in surrounding areas

	1 Bed	2 bed	*Entry Level*	3 Bed	4 Bed	5+ bed	ALL
Alwoodley	£127,499	£225,000	*£176,250*	£282,500	£479,975	£587,497	**£500,625**
Adel	£101,975	£202,785	*£152,380*	£242,475	£439,998	£504,598	**£426,700**
Moortown	£103,975	£144,498	*£124,237*	£257,499	£297,250	£349,950	**£415,750**
Horsforth	£132,780	£191,390	*£162,085*	£262,247	£399,632	£574,988	**£297,742**
Far Headingley, Weetwood	***£121,795***	***£197,005***	***£159,400***	***£233,331***	***£369,112***	***£534,866***	***£293,345***
Chapel Allerton	£115,000	£182,250	*£148,625*	£258,750	£272,500	£424,927	**£281,250**
Cookridge	£87,475	£155,975	*£121,725*	£218,500	£352,475	£425,500	**£276,942**
Central Headingley	***£114,995***	***£159,526***	***£137,261***	***£223,733***	***£275,002***	***£332,289***	***£263,738***
Meanwood	£117,789	£151,825	*£134,807*	£218,145	£300,949	£191,236	**£209,101**
Leeds City Centre	£135,985	£191,504	*£163,745*	£214,986			***£205,090***
Kirkstall	***£100,500***	***£118,129***	***£109,315***	***£131,650***	***£219,950***	***£300,000***	***£189,500***
Hyde Par, /South Headingley area	***£87,726***	***£125,537***	***£106,632***	***£168,205***	***£187,723***	***£273,967***	***£177,307***
Burley	***£87,475***	***£116,075***	***£101,775***	***£170,935***	***£169,985***	***£199,950***	***£159,936***
Woodhouse	***£75,062***	***£115,902***	***£95,482***	***£151,111***	***£175,303***	***£234,736***	***£158,428***
Armley	£90,587	£107,092	*£98,840*	£145,016	£219,117	£204,166	***£137,364***

(Source: www.Rightmove.co.uk November 2016)

Table B5 Movement in house prices across Inner North West Leeds between 2011 and 2016

	1Bed Flat		**2 Bed House/Flat**		***Entry Level***		**3 Bed House**		**4+ Bed House**		***ALL***		**% increase**
	2011	**2016**	**2011**	**2016**	**2011**	**2016**	**2011**	**2016**	**2011**	**2016**	**2011**	**2016**	
Far Headingley area	£113,475	£121,795	£184,063	£197,005	*£148,769*	*£159,400*	£245,430	£233,331	£308,470	£469,241	***£243,663***	***£293,345***	20.4%
West Park	£98,988	£111,829	£143,298	£174,081	*£121,143*	*£142,955*	£243,969	£212,920	£333,272	£501,825	***£253,109***	***£284,086***	12.2%
Becketts Park area	£94,950	£99,995	£114,950	£151,331	*£104,950*	*£125,663*	£155,113	£168,789	£214,850	£198,000	***£142,900***	***£162,563***	13.8%
	£102,471	**£111,206**	**£147,437**	**£174,139**	**£124,954**	**£142,673**	**£214,837**	**£205,013**	**£285,531**	**£389,689**	**£213,224**	**£246,665**	**15.7%**
Central Headingley	£82,950	£114,995	£138,607	£159,526	*£110,779*	*£137,261*	£191,512	£223,733	£205,919	£303,605	***£180,241***	***£263,738***	46.3%
South Headingley	£88,650	£94,475	£120,808	£142,475	*£104,729*	*£118,475*	£200,960	£225,000	£196,570	£274,264	***£179,931***	***£234,428***	30.3%
Cardigan Triangle	£89,950	£120,000	£137,450	£175,000	*£113,700*	*£147,500*	£170,700	£199,350	£253,970	£280,300	***£190,973***	***£211,110***	10.5%
Headingley Hill	£88,650	£101,872	£194,973	£151,074	*£141,812*	*£126,473*	£209,950	£205,188	£196,570	£324,975	***£144,308***	***£188,216***	30.4%
	£87,550	**£107,836**	**£147,960**	**£157,019**	**£117,755**	**£132,427**	**£193,281**	**£213,318**	**£213,257**	**£295,786**	**£173,863**	**£224,373**	**29.1%**
Hyde Park area	**£122,500**	**£97,830**	**£106,239**	**£110,983**	***£114,370***	***£104,407***	**£125,277**	**£148,094**	**£169,129**	**£294,166**	***£138,881***	***£206,888***	**49.0%**
Woodhouse area	£79,950	£75,062	£120,168	£115,902	*£100,059*	*£95,482*	£116,980	£151,011	£128,170	£205,020	***£122,933***	***£158,428***	28.9%
University area	£83,389	£77,395	£143,519	£123,725	*£113,454*	*£100,560*	£152,473	£174,950	£209,158	£247,250	***£162,399***	***£200,800***	23.6%
Little Woodhouse	£98,725	£77,500	£121,032	£159,475	*£109,879*	*£118,488*	£143,313	£194,983	£262,475	£217,466	***£132,098***	***£185,894***	40.7%
	£87,355	**£76,652**	**£128,240**	**£133,034**	**£107,797**	**£104,843**	**£137,589**	**£173,648**	**£199,934**	**£223,245**	**£139,143**	**£181,707**	**30.6%**

Table B6 Size of properties for sale 2016

	1 Bed	2 bed	1 & 2 Bed		*3 bed*	4 bed	5+ bed	*3+ bed*		ALL
West Park	4	14	*18*	***36.00%***	10	11	11	***32***	*64.00%*	**50**
Weetwood	1	3	*4*	***33.33%***	3	2	3	***8***	*66.67%*	**12**
Far Headingley/Becketts Park	4	11	*15*	***39.47%***	9	8	6	***23***	*60.53%*	**38**
Queenswood Drive	1	3	*4*	***36.36%***	6	1	0	***7***	*63.64%*	**11**
	10	**31**	**41**	***36.94%***	**28**	**22**	**20**	***70***	***63.06%***	**111**
Hyde Park	3	3	*6*	***17.14%***	8	14	7	***29***	*82.86%*	**35**
Harolds	2	12	*14*	***60.87%***	5	4	0	***9***	*39.13%*	**23**
Burley Lodge	1	3	*4*	***28.57%***	5	4	1	***10***	*71.43%*	**14**
	6	**18**	**24**	***33.33%***	**18**	**22**	**8**	**48**	***66.67%***	**72**
Headingley	1	10	*11*	***18.97%***	12	9	26	***47***	*81.03%*	**58**
Cardigan Triangle	1	1	*2*	***40.00%***	1	1	1	***3***	*60.00%*	**5**
South Headingley	1	2	*3*	***15.79%***	2	5	9	***16***	*84.21%*	**19**
Headingley Hill/Woodhouse Cliff	2	5	*7*	***50.00%***	5	2	0	***7***	*50.00%*	**14**
	5	**18**	**23**	***23.96%***	**20**	**17**	**36**	***73***	***76.04%***	**96**
Little Woodhouse	1	4	*5*	***29.41%***	9	1	2	***12***	*70.59%*	**17**
University area	1	2	*3*	***33.33%***	1	3	2	***6***	*66.67%*	**9**
Woodhouse	13	5	*18*	***47.37%***	7	7	6	***20***	*52.63%*	**38**
	15	**11**	**26**	***40.63%***	**17**	**11**	**10**	**38**	***59.38%***	**64**

Appendix C Rental Market

Table C1 *Monthly market rents and income needed to afford them*

	University Campus, City Centre	Hyde Park area	Headingley area	Burley, Burley Park, Kirkstall	Far Headingley area
Room in shared house					
Average Monthly Rent	*£361*	*£334*	*£347*	*£329*	*£361*
Income needed to afford rent	£15,162	£14,014	£14,564	£13,818	£15,162
Multiples of single average income	0.6	0.6	0.6	0.6	0.6
Multiples of single bottom quartile income	1.2	1.1	1.1	1.1	1.2
1 Bed					
Average Monthly Rent	*£560*	*£501*	*£535*	*£537*	*£564*
Income needed to afford rent	£23,520	£21,056	£22,460	£22,533	£23,674
Multiples of single average income	0.9	0.8	0.9	0.9	0.9
Multiples of single bottom quartile income	1.8	1.6	1.7	1.7	1.8
2 Bed					
Average Monthly Rent	*£705*	*£636*	*£722*	*£653*	*£768*
Income needed to afford rent	£26,217	£23,647	£26,868	£24,273	£28,570
Multiples of single average income	1.0	0.9	1.1	1.0	1.1
Multiples of single bottom quartile income	2.0	1.8	2.1	1.9	2.2
Entry Level (1 or 2 Bed)					
Average Monthly Rent	*£542*	*£490*	*£535*	*£506*	*£564*
Income needed to afford rent	£20,153	£18,240	£19,883	£18,823	£20,993
Multiples of single average income	0.8	0.7	0.8	0.8	0.8
Multiples of single bottom quartile income	1.6	1.4	1.5	1.4	1.6
3 Bed					
Average Monthly Rent	*£944*	*£738*	*£846*	*£803*	*£1,038*
Income needed to afford rent	£35,108	£27,441	£31,471	£29,853	£38,601
Multiples of single average income	1.4	1.1	1.3	1.2	1.5
Multiples of single bottom quartile income	2.7	2.1	2.4	2.3	3.0
4+ Bed					
Average Monthly Rent	*£984*	*£896*	*£1,053*	*£1,136*	*£1,269*
Income needed to afford rent	£36,592	£33,331	£39,172	£42,241	£47,219
Multiples of single average income	1.5	1.3	1.6	1.7	1.9
Multiples of single bottom quartile income	2.8	2.6	3.0	3.2	3.6

Table C2 Average monthly market rents in Inner North West Leeds 2016

Monthly Rents	Room in shared house	1 Bed	2 Bed	Entry Level	3 Bed	4 + Bed	ALL
West Park	£375	£475	£844	***£565***	£1,266	£1,518	**£896**
Far Headingley area	£358	£571	£770	***£566***	£932	£1,250	**£776**
Becketts Park area	£350	£645	£690	***£562***	£915	£1,040	**£728**
	£361	***£564***	***£768***	***£564***	***£1,038***	***£1,269***	***£800***
Burley, Burley Park	*£325*	*£498*	*£635*	*£486*	*£790*	*£1,132*	***£676***
Kirkstall	£333	£575	£670	£526	£815	£1,139	***£706***
	£329	***£537***	***£653***	***£506***	***£803***	***£1,136***	***£691***
Central Headingley	£317	£550	£711	***£526***	£977	£1,111	**£733**
Cardigan Triangle	£368	£538	£775	***£560***	£845	£1,000	**£705**
South Headingley	£340	£499	£682	***£507***	£782	£977	**£656**
Headingley Hill	£362	£552	£721	***£545***	£780	£1,124	**£708**
	£347	***£535***	***£722***	***£535***	***£846***	***£1,053***	***£701***
Hyde Park	£336	£495	£680	***£504***	£755	£869	**£627**
Harolds	£356	£479	£599	***£478***	£730	£953	**£623**
Burley Lodge	£309	£530	£628	***£489***	£728	£866	**£612**
	£334	***£501***	***£636***	***£490***	***£738***	***£896***	***£621***
Little Woodhouse	£338	£575	£669	***£527***	£760	£1,087	**£686**
University area	£361	£512	£681	***£518***	£885	£952	**£678**
Woodhouse	£347	£530	£576	***£484***	£768	£912	**£627**
City Centre	£398	£623	£893	***£638***	£1,362		**£958**
	£361	***£560***	***£705***	***£542***	***£944***	***£984***	***£737***

(Source: www.Rightmove.co.uk November 2016)

Table C3 *Average weekly market rents in Inner North West Leeds 2016*

Weekly Rents	Room in shared house	1 Bed	2 Bed	*Entry Level*	3 Bed	4 + Bed	*ALL*
West Park	£87	£110	£195	***£130***	£292	£350	***£207***
Far Headingley area	£83	£132	£178	***£131***	£215	£288	***£179***
Becketts Park area	£81	£149	£159	***£130***	£211	£240	***£168***
	£83	***£130***	***£177***	***£130***	***£239***	***£293***	***£185***
Burley, Burley Park	£75	£115	£147	£112	£182	£261	***£156***
Kirkstall	£77	£133	£155	£121	£188	£263	***£163***
	£76	***£124***	***£151***	***£117***	***£185***	***£262***	***£159***
Central Headingley	£73	£127	£164	***£121***	£225	£256	***£169***
Cardigan Triangle	£85	£124	£179	***£129***	£195	£231	***£163***
South Headingley	£78	£115	£157	***£117***	£180	£225	***£151***
Headingley Hill/Woodhouse Cliff	£84	£127	£166	***£126***	£180	£259	***£163***
	£80	***£123***	***£167***	***£123***	***£195***	***£243***	***£162***
Hyde Park	£78	£114	£157	***£116***	£174	£201	***£145***
Harolds	£82	£111	£138	***£110***	£168	£220	***£144***
Burley Lodge	£71	£122	£145	***£113***	£168	£200	***£141***
	£77	***£116***	***£147***	***£113***	***£170***	***£207***	***£143***
Little Woodhouse	£78	£133	£154	***£122***	£175	£251	***£158***
University area	£83	£118	£157	***£120***	£204	£220	***£156***
Woodhouse	£80	£122	£133	***£112***	£177	£210	***£145***
City Centre	£92	£144	£206	***£147***	£314	£0	***£221***
	£83	***£129***	***£163***	***£125***	***£218***	***£227***	***£170***

(Source: www.Rightmove.co.uk November 2016)

Table C4 Income needed to afford market rents in Inner North West Leeds 2016

Income needed to afford market rents	Room in shared house	1 Bed	2 Bed	Entry Level	3 Bed	4 + Bed	ALL
West Park	£15,750	£19,950	£31,397	£21,018	£47,095	£56,470	£33,331
Far Headingley area	£15,036	£23,982	£28,644	£21,055	£34,670	£46,500	£28,867
Becketts Park area	£14,700	£27,090	£25,668	£20,906	£34,038	£38,688	£27,082
	£15,162	***£23,674***	***£28,570***	***£20,993***	***£38,601***	***£47,219***	***£29,760***
Burley, Burley Park	£13,650	£20,916	£23,622	£18,079	£29,388	£42,110	£25,147
Kirkstall	£13,986	£24,150	£24,924	£19,567	£30,318	£42,371	£26,263
	£13,818	***£22,533***	***£24,273***	***£18,823***	***£29,853***	***£42,241***	***£25,705***
Central Headingley	£13,314	£23,100	£26,449	£19,567	£36,344	£41,329	£27,268
Cardigan Triangle	£15,456	£22,596	£28,830	£20,832	£31,434	£37,200	£26,226
South Headingley	£14,280	£20,958	£25,370	£18,860	£29,090	£36,344	£24,403
Headingley Hill	£15,204	£23,184	£26,821	£20,274	£29,016	£41,813	£26,338
	£14,564	***£22,460***	***£26,868***	***£19,883***	***£31,471***	***£39,172***	***£26,059***
Hyde Park	£14,112	£20,790	£25,296	£18,749	£28,086	£32,327	£23,324
Harolds	£14,952	£20,118	£22,283	£17,782	£27,156	£35,452	£23,176
Burley Lodge	£12,978	£22,260	£23,362	£18,191	£27,082	£32,215	£22,766
	£14,014	***£21,056***	***£23,647***	***£18,240***	***£27,441***	***£33,331***	***£23,089***
Little Woodhouse	£14,196	£24,150	£24,887	£19,604	£28,272	£40,436	£25,519
University area	£15,162	£21,504	£25,333	£19,270	£32,922	£35,414	£25,222
Woodhouse	£14,574	£22,260	£21,427	£18,005	£28,570	£33,926	£23,324
City Centre	£16,716	£26,166	£33,220	£23,734	£50,666	£0	£35,638
	£15,162	***£23,520***	***£26,217***	***£20,153***	***£35,108***	***£36,592***	***£27,426***

(Source: www.Rightmove.co.uk November 2016)

Table C5 Difference between average weekly rents and the Local Housing Allowance rate for different property sizes in Inner North West Leeds 2016

	Room in shared house	Diff to LHA rate	1 Bed	Diff to LHA rate	2 Bed	Diff to LHA rate	3 Bed	Diff to LHA rate	4 + Bed	Diff to LHA rate
West Park	£86.54	£24.06	£109.62	£9.57	£194.77	£72.41	£292.15	£142.56	£350.31	£154.69
Far Headingley area	£82.62	£20.14	£131.77	£31.72	£177.69	£55.33	£215.08	£65.49	£288.46	£92.84
Becketts Park area	£80.77	£18.29	£148.85	£48.80	£159.23	£36.87	£211.15	£61.56	£240.00	£44.38
	£83.31	**£20.83**	**£130.08**	**£30.03**	**£177.23**	**£54.87**	**£239.46**	**£89.87**	**£292.92**	**£97.30**
Burley, Burley Park	£75.00	£12.52	£114.92	£14.87	£146.54	£24.18	£182.31	£32.72	£261.23	£65.61
Kirkstall	£76.85	£14.37	£132.69	£32.64	£154.62	£32.26	£188.08	£38.49	£262.85	£67.23
	£75.92	**£13.44**	**£123.81**	**£23.76**	**£150.58**	**£28.22**	**£185.19**	**£35.60**	**£262.04**	**£66.42**
Central Headingley	£73.15	£10.67	£126.92	£26.87	£164.08	£41.72	£225.46	£75.87	£256.38	£60.76
Cardigan Triangle	£84.92	£22.44	£124.15	£24.10	£178.85	£56.49	£195.00	£45.41	£230.77	£35.15
South Headingley	£78.46	£15.98	£115.15	£15.10	£157.38	£35.02	£180.46	£30.87	£225.46	£29.84
Headingley Hill	£83.54	£21.06	£127.38	£27.33	£166.38	£44.02	£180.00	£30.41	£259.38	£63.76
	£80.02	**£17.54**	**£123.40**	**£23.35**	**£166.67**	**£44.31**	**£195.23**	**£45.64**	**£243.00**	**£47.38**
Hyde Park	£77.54	£15.06	£114.23	£14.18	£156.92	£34.56	£174.23	£24.64	£200.54	£4.92
Harolds	£82.15	£19.67	£110.54	£10.49	£138.23	£15.87	£168.46	£18.87	£219.92	£24.30
Burley Lodge	£71.31	£8.83	£122.31	£22.26	£144.92	£22.56	£168.00	£18.41	£199.85	£4.23

	£77.00	**£14.52**	**£115.69**	**£15.64**	**£146.69**	**£24.33**	**£170.23**	**£20.64**	**£206.77**	**£11.15**
Little Woodhouse	£78.00	£15.52	£132.69	£32.64	£154.38	£32.02	£175.38	£25.79	£250.85	£55.23
University area	£83.31	£20.83	£118.15	£18.10	£157.15	£34.79	£204.23	£54.64	£219.69	£24.07
Woodhouse	£80.08	£17.60	£122.31	£22.26	£132.92	£10.56	£177.23	£27.64	£210.46	£14.84
City Centre	£91.85	£29.37	£143.77	£43.72	£206.08	£83.72	£314.31	£164.72		
	£83.31	**£20.83**	**£129.23**	**£29.18**	**£162.63**	**£40.27**	**£217.79**	**£68.20**	**£227.00**	**£31.38**

(Sources: www.rightmove,co,uk November 2016 and www.gov.uk/government/publications/local-housing-allowance-lha-rates-applicable-from-april-2017-march-2018)

Table C6 Distribution of sizes of properties in Inner North West Leeds advertised for rent 2016

	Shared Houses/Flats		Studios/1 Bed		2 bed		3 Bed		4+ bed		ALL
West Park area	4	17.4%	3	13.0%	8	34.8%	5	21.7%	3	13.0%	**23**
Far Headingley area	6	15.4%	7	17.9%	10	25.6%	8	20.5%	8	20.5%	**39**
Becketts Park area	5	29.4%	1	5.9%	3	17.6%	6	35.3%	2	11.8%	**17**
	15	**19.0%**	**11**	**13.9%**	**21**	**26.6%**	**19**	**24.1%**	**13**	**16.5%**	**79**
Burley, Burley Park	89	58.6%	31	20.4%	2	1.3%	19	12.5%	11	7.2%	**152**
Kirkstall	10	20.0%	8	16.0%	21	42.0%	6	12.0%	5	10.0%	**50**
	99	**49.0%**	**39**	**19.3%**	**23**	**11.4%**	**25**	**12.4%**	**16**	**7.9%**	**202**
Central Headingley	45	43.3%	22	21.2%	23	22.1%	10	9.6%	4	3.8%	**104**
Cardigan Triangle	4	14.3%	5	17.9%	15	53.6%	2	7.1%	2	7.1%	**28**
South Headingley	24	37.5%	29	45.3%	7	10.9%	2	3.1%	2	3.1%	**64**
Headingley Hill	4	12.9%	17	54.8%	8	25.8%	1	3.2%	1	3.2%	**31**
	77	**33.9%**	**73**	**32.2%**	**53**	**23.3%**	**15**	**6.6%**	**9**	**4.0%**	**227**
Hyde Park	38	45.8%	20	24.1%	21	25.3%	3	3.6%	1	1.2%	**83**
Harolds	24	51.1%	0	0.0%	21	44.7%	2	4.3%	0	0.0%	**47**
Burley Lodge	6	30.0%	2	10.0%	7	35.0%	4	20.0%	1	5.0%	**20**
	68	**45.3%**	**22**	**14.7%**	**49**	**32.7%**	**9**	**6.0%**	**2**	**1.3%**	**150**
Little Woodhouse	44	53.0%	24	28.9%	12	14.5%	3	3.6%	0	0.0%	**83**
University area	39	42.4%	37	40.2%	8	8.7%	7	7.6%	1	1.1%	**92**
Woodhouse	12	46.2%	2	7.7%	4	15.4%	4	15.4%	4	15.4%	**26**
	95	**47.3%**	**63**	**31.3%**	**24**	**11.9%**	**14**	**7.0%**	**5**	**2.5%**	**201**
City Centre		0.0%	161	38.9%	226	54.6%	27	6.5%			**414**

(Source: www.Rightmove.co.uk November 2016)

Table C7 Target groups for advertised properties for rent in Inner North West Leeds 2016

	Students only		Students or Professionals		Professionals only		ALL
West Park	0	0.0%	0	0.0%	23	100.0%	**23**
Far Headingley area	0	0.0%	11	27.5%	29	72.5%	**40**
Beckett Park area	0	0.0%	12	70.6%	5	29.4%	**17**
	0	**0.0%**	**23**	**28.8%**	**57**	**71.3%**	**80**
Burley	16	10.5%	94	61.4%	43	28.1%	**153**
Kirkstall	0	0.0%	23	45.1%	28	54.9%	**51**
	16	**7.8%**	**117**	**57.4%**	**71**	**34.8%**	**204**
South Headingley	10	16.1%	42	67.7%	10	16.1%	**62**
Headingley Hill	7	30.4%	8	34.8%	8	34.8%	**23**
Central Headingley	10	8.8%	83	73.5%	20	17.7%	**113**
Cardigan Triangle	0	0.0%	28	77.8%	8	22.2%	**36**

	10	**6.7%**	**111**	**74.5%**	**28**	**18.8%**	**149**
Hyde Park	31	37.3%	46	55.4%	6	7.2%	**83**
Harolds	10	20.8%	32	66.7%	6	12.5%	**48**
Burley Lodge	1	5.0%	18	90.0%	1	5.0%	**20**
	42	**27.8%**	**96**	**63.6%**	**13**	**8.6%**	**151**
Little Woodhouse	7	8.3%	75	89.3%	2	2.4%	**84**
University	43	46.7%	45	48.9%	4	4.3%	**92**
Woodhouse	8	29.6%	16	59.3%	3	11.1%	**27**
	58	**28.6%**	**136**	**67.0%**	**9**	**4.4%**	**203**

(Source: www.Rightmove.co.uk November 2016)

Table C8 Demand from waiting list for 'family housing' for rent in Inner North West Leeds 2015

	Kirkstall NHO area (1)		Little London NHO area (2)		ALL INNER NORTH WEST LEEDS	
1 bed	868	60.7%	1147	66.4%	**2015**	**63.8%**
2 Bed	353	24.7%	350	20.3%	**703**	**22.3%**
	1221	**85.4%**	**1497**	**86.7%**	**2718**	**86.1%**
3 Bed	151	10.6%	157	9.1%	**308**	**9.8%**
4+ bed	57	4.0%	73	4.2%	**130**	**4.1%**
	208	**14.6%**	**230**	**13.3%**	**438**	**13.9%**
ALL	**1429**	**100.0%**	**1727**	**100.0%**	**3156**	**100.0%**

(1) KIRKSTALL NHO area covers Burley Park, Burley, Kirkstall area, Headingley, Becketts Park, Far Headingley, Weetwood, West Park,

(2) LITTLE LONDON NHO area covers Hyde Park, the Harolds, Burley Lodge, Little Woodhouse, Woodhouse, Woodhouse Ridge, Little London, University Campus area

(Source: Leeds Housing Register Annual Report 2015/16)