



Housing Needs Survey and Assessment

Troy Planning + Design for:
Hailsham Town Council

Summary Combined Report
February 2026



HAILSHAM TOWN COUNCIL

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Front cover: Photographs of a selection of homes in Hailsham

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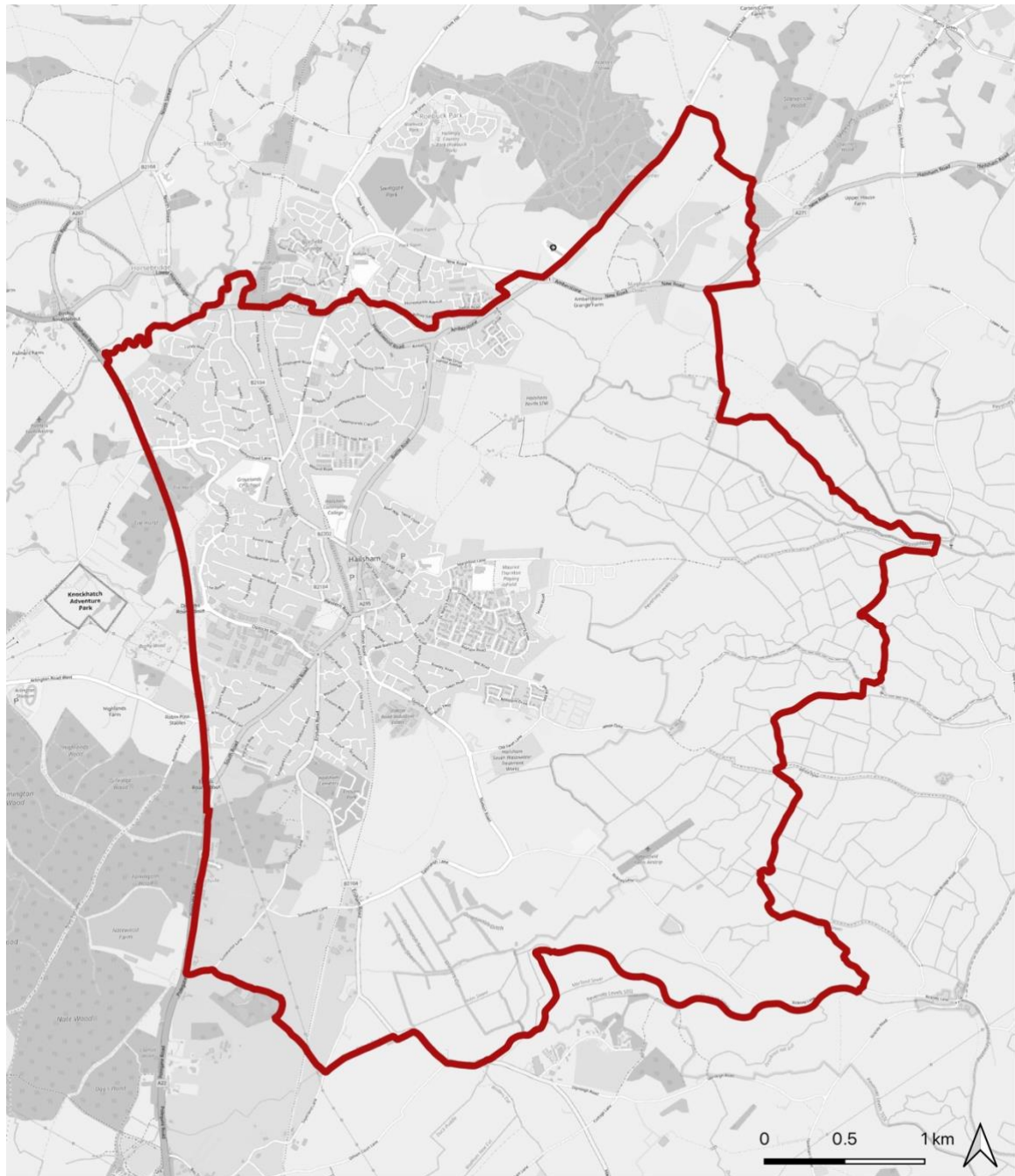
1. Introduction

This report presents a combined summary of the Housing Needs Assessment (HNA) and Housing Needs Survey (HNS) prepared on behalf of Hailsham Town Council by Troy Planning + Design. The extent of the study area is shown in Figure 1.

The reports are set in the context of (a) the new Local Plan being prepared by Wealden District Council, which was subject to Regulation 18 consultation in 2024 with a focussed update of this being published for consultation in February 2026, and (b) the review of the Hailsham Neighbourhood Plan, with consultation feedback on that indicating a need for the delivery of new homes to meet local needs.

The HNA is very much a data-driven report, utilising data from the Census and other information sources to review demographic and housing patterns, and makes use of the Government's Standard Method to estimate the need for new homes in Hailsham. The HNS takes a different approach, seeking to understand the actual needs of residents and how this might translate into a locally responsive breakdown of housing types to be delivered in the area. This summary report draws the findings of both together. In particular, it:

- presents the key messages emerging from the reports; and
- considers what this might mean in terms of the balance of housing that might be delivered in the future (in terms of size and tenure).



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 Hailsham Civil Parish boundary

Figure 1: Hailsham Civil Parish boundary – the study area for this HNA.

2. Key messages

Scale of growth

Use of the Standard Method implies that between 2,874 and 3,630 new homes might be required in Hailsham over the period 2026 – 2042, depending upon the dataset used. This equates to around 14% of the total housing requirement for the district as a whole.

This figure differs from those presented in the district-wide Housing Needs Assessment undertaken for Wealden (the WHLNA) (and which supports the emerging Local Plan) as that report makes use of an earlier version of the Standard Method which established a different approach, and which has now been replaced.

The draft Regulation 18 version of the Wealden Local Plan that was published for consultation in Spring 2024 included allocations that amounted to approximately 2,960 new homes in Hailsham over the Plan period, albeit this is linked to the WLHNA. The more recent focussed consultation version of the Regulation 18 Local Plan (February 2026) increases the housing figure for Hailsham slightly and also introduces a series of 'option sites' which may result in further growth being allocated around the town, and thus resulting in a scale of growth more aligned with the standard method.

However, the figures generated through use of the Standard Method are not to be interpreted as a strict housing requirement and are instead a start point to be considered alongside wider factors, including physical and environmental constraints, and infrastructure carrying capacity.

Demographic change

The population of Hailsham has grown by about 7.5% between the 2011 and 2021 Census returns, which is broadly aligned with the scale of growth that has taken place across Wealden as a whole. Looking forward, the studies show that Hailsham's population is undergoing substantial demographic change. The most significant population growth over the next 15–20 years will be amongst those aged 65 and over, especially the 75-84 and 85+ cohorts. This has implications in terms of a need for age-appropriate housing in Hailsham.

Growth is also expected among younger households, indicating sustained need for entry-level housing and first-time buyer products.

The reports also indicate that there is a relatively high presence of older

single-person households and families with adult children still at home.

The combined effect of this is a need for:

- Smaller homes for older and younger households, including accessible and adaptable housing; and
- Mid-sized family homes for growing households.

Housing preferences

Across both reports, the clearest and most consistent message is the demand for provision of 2–3 bedroom homes. However, the ability to access preferred housing choices is not without challenge:

- Some families seeking 3-bed homes face affordability barriers, with many reporting that suitable homes (when combined with the wider cost of living) are either too expensive or unavailable.
- However, and although most homes in Hailsham (almost 60%) have 3 or more bedrooms, a large proportion of these are under-occupied, particularly amongst older households. Providing opportunities to downsize – for those who have said they would like to – may provide for movement in the market and increase availability of mid-sized and larger homes for families.
- Younger adults, newly forming households, and single-income households overwhelmingly seek 1–2 bed homes but struggle to afford these at market prices.

Together, the evidence shows a need to rebalance delivery toward smaller and mid-sized homes, while ensuring affordability.

Affordability

Both reports highlight affordability pressures as a barrier to housing in Hailsham.

The HNS indicates that more than half of all households who said they were looking to move had not done so yet because their preferred home was too expensive. This affected all income groups and all house sizes. This issue is accentuated when focussing on the needs of younger adults seeking to move, with around two-thirds of respondents indicating that 1- and 2- bed homes were too expensive for them. This is reflected in data on incomes which tend to be below the district average and where many have little or no savings which they can draw on.

This issue is emphasised in the HNA which shows that unless households have

access to existing equity (and which tends to be the case for many given high ownership levels across Hailsham, and many of whom are mortgage free) that average incomes cannot support the purchase of detached, semi-detached, or terraced homes. Equally, private rents are similarly unaffordable for many households, with even a 2-bed rental requiring incomes above Hailsham's average. This creates a strong need for:

- affordable rented homes;
- shared ownership schemes; and
- appropriately priced smaller homes.

Without intervention, younger households are at risk of being priced out entirely.

Downsizing

The reports indicate that, amongst older households, there is a desire to downsize, with preference expressed for single level homes (i.e.: bungalows) and accessible or adaptable housing that can meet / respond to mobility needs and long-term health issues.

However, and although many older households own their home outright, their ability to move is stifled by the ability to find suitable housing options locally. This leads to a high level of under occupation of existing housing in Hailsham, with more than 65% of all households in the older age brackets having two or more spare bedrooms in their home.

The evidence thus suggests:

- increasing the supply of 1–2 bed bungalows, accessible homes, and adaptable homes (M4(2)/M4(3)); and
- supporting ageing-in-place through better-designed new homes and adaptation of existing homes.

This would also help release family-sized homes into the market, easing pressure elsewhere.

Rental market

The stock of rental properties in Hailsham is relatively small (accounting for around 12% of all homes), with the cost of private rents being in excess of what can be supported on an average income.

Affordable rent and social rent options are more accessible for local households

and, as indicated in the HNS, were preferred by those seeking rental housing. However, and although younger adults seeking independence may look to rent the HNS indicates that such options are often too expensive or unavailable.

The reports thus suggest delivery of a higher proportion of affordable rented homes alongside other products, including social rent and shared ownership.

Quality of development

Many residents expressed dissatisfaction with the design and quality of recent new developments, citing concerns with the size of home, garden and overall density of development. Combined with perceived issues as to the over-development of Hailsham this may contribute to a reluctance to move into a new home, even when moving so would meet their practical needs.

There is thus a need for new development to be of a high-quality, well-integrated with the existing built form and reflecting local character. This points to the importance of establishing design and space standards, and more coherent forms of development.

Housing mix

The reports indicate that the district-wide housing mix (as set out in the emerging Wealden Local Plan) does not reflect Hailsham's local needs. The evidence supports a need for:

- more 1–2 bed homes (particularly affordable homes);
- a strong core of 2–3 bed market homes;
- fewer 4+ bed homes than the district-wide mix would suggest;
- greater provision of accessible, age-friendly housing; and
- more affordable tenures of all kinds, including opportunities that might exist for alternative housing models and products, including those delivered by Community Land Trusts and similar.

Summary

Bringing the reports together indicates that:

- Hailsham needs more smaller and mid-sized homes, especially 1–2 beds (affordable) and 2–3 beds (market).
- Affordability is a key issue, particularly for young households and first-time

buyers.

- Older households need better downsizing options, including bungalows and accessible/adaptable homes.
- Larger homes should be delivered only in modest proportions, as there is no evidence of shortage.
- Affordable rent, social rent, and shared ownership are essential to meeting genuine local need.
- New development must meet high standards of design, meet space standards and be well-integrated with the town.
- A Hailsham-specific housing mix (as distinct from the not the Wealden district-wide breakdown) is necessary.

3. Recommended housing mix

Combined mix across all tenures

The emerging Wealden Local Plan presents a target mix for the delivery of new homes, broken down by market and affordable housing. This is based on a district-wide assessment and does not reflect the different housing needs and market dynamics present in different locations.

For Hailsham, the evidence presented in the HNA and HNS suggests that the district-wide mix should be recalibrated, supporting increased delivery of smaller homes (1- and 2-beds) and a consequent reduction in 4+ bedroom homes.

Modelling in the HNA implies that a high share of 4+ bed homes is required, but at the same time recognises that this represents an inflated position as it effectively rolls current patterns of occupation forward based on demographic change. This creates a false impression as it does not account for matters such as affordability, under/over-occupation, the needs of younger households or the intention of older households to downsize, nor the composition of the existing housing stock and whether this caters for the needs of residents. It significantly over-inflates the requirement for larger homes. A revised mix of homes is thus recommended and presented below, combining data in the HNA with findings from the HNS. This indicates that, locally, the mix of homes, by size, should be based on the following:

- Increase provision of 2–3 bed homes: This reflects preferences expressed in the HNS for these house sizes and reflecting the higher cost of larger properties, restricting access to these.
- Increase provision of smaller homes: Younger households report a need for smaller 1- and 2-bed homes whilst also reporting that, given low incomes and savings, these often remain unaffordable. An uplift in the delivery of smaller homes may help increase supply and access to housing.
- Amend housing mix to reflect ageing and under-occupation: The HNA shows that three-quarters of homes are under-occupied and that the 65+ and 75+ age cohorts are set to grow strongly, supporting a need for more smaller, accessible homes (often 1–2 bed bungalows and with level-access) that can also release larger family homes back to the market.
- Reflecting the profile of the existing housing stock: Hailsham already has

good supply of mid-sized family homes, although the stock of larger 4+ bed homes is slightly below the equivalent share across Wealden as a whole. Rather than increasing the supply of larger homes the reports suggest consolidating the supply of 2- and 3- bed homes and supporting modest growth in supply of 1-bed homes to meet affordability and downsizing needs.

The recommended mix of homes to be delivered through new development in Hailsham, by bedroom size, is presented in Table 1. This is based on percentage ranges for each, allowing for some flexibility depending upon the site location and context. This is the headline housing mix for all tenure types combined.

Property size	Range	Rationale for difference to emerging Local Plan
1-bedroom	10 - 15%	Addresses affordability barriers for single adults and first-time households, while supporting downsizing into smaller, accessible homes; current stock share is around 7.6%, so a modest uplift is justified.
2-bedroom	35 - 40%	Strong, cross-generational demand (younger adults and older downsizers); aligns with survey preferences and provides the main 'entry-level' and 'rightsizing' product.
3-bedroom	30 - 40%	Most popular home size in the HNS (c.40%) and essential for families; the upper end can be used where schemes can clearly demonstrate affordability and demand.
4+ bedroom	10 - 15%	Maintains a smaller but consistent supply for larger families while avoiding over-provision, given high under-occupation in the existing stock and affordability constraints.

Table 1: Recommended mix of housing, by bedroom size, across all tenure types, for new homes in Hailsham

In terms of applying this in the review of the Hailsham Neighbourhood Plan, proposed developments should provide a mix of homes broadly distributed across the ranges indicated in Table 1. Breaking this down:

- Affordable housing should be skewed toward 1–2 bed homes, reflecting

affordability evidence and the needs of younger households, responding to findings that smaller homes and shared ownership/affordable rent are the only feasible routes into the market for many.

- Market housing should prioritise 2–3 bed homes, with a modest proportion of 4+ bed homes aligned to overall mix ranges.
- Specialist and age-friendly homes (including accessible/ adaptable units and bungalows) should be incorporated within the supply of 1- and 2- bed homes where appropriate, helping older residents downsize and improving turnover of family housing.

This is broken down further in the sections that follow.

Applications will be expected to justify any deviation from the percentage ranges above through:

- Clear evidence of unmet local need.
- Demonstration that site-specific constraints or opportunities justify adjustment.
- Up-to-date market intelligence or waiting list data.
- Capacity to deliver accessible and specialist homes where appropriate.

A 'tenure split' housing mix matrix

The section above presents an overall combined preferred housing mix across all tenures. However, it is recognised that there should be some variation in the mix for different tenure types. This approach is also taken in the emerging Wealden Local Plan.

Affordable housing mix

A combination of the HNA and HNS suggests that around 60-80% of all affordable homes should comprise 1- or 2-bed properties, recognising that:

- Younger adults forming new households overwhelmingly need smaller homes (1–2 bed) and struggle to afford market options.
- Larger affordable units (3–4 bed) are still required but represent a smaller share reflecting expressed housing preferences and income eligibility criteria.
- Average household incomes and savings in Hailsham significantly restrict access to 3–4 bed units in any tenure.

The recommended breakdown of house sizes for affordable homes is presented in Table 2.

Property size	Range	Rationale for difference to emerging Local Plan
1-bedroom	20 - 30%	Supports younger single workers, newly forming households, and downsizers; only size affordable to many households in need.
2-bedroom	40 - 50%	Strongest need for small family homes and shared ownership; aligns with affordability constraints and survey preference for 2-beds.
3-bedroom	20 - 30%	Needed for families but constrained by income levels; balanced share ensures viability and meets family needs.
4+ bedroom	0 - 5%	More limited 'need'; these homes are expensive and difficult to deliver/allocate at affordable rent.

Table 2: Recommended mix of housing, by bedroom size, for affordable tenures, for new homes in Hailsham

Market housing mix

The recommended mix of market homes, as shown in Table 3, is reflective of the following:

- Most households looking to move home reported that their preference would be for a 2- or 3- bed home.
- Older owner-occupiers seeking to downsize have expressed a preference for 1- and 2- bed homes.
- House price data indicates affordability issues extend across market sectors, with 4+ bed homes being inaccessible for many households on average incomes.

Property size	Range	Rationale for difference to emerging Local Plan
1-bedroom	5 - 10%	Represents a small share of market demand; critical for first-time buyers but not the bulk of market interest.
2-bedroom	30 - 40%	Reflects strong demand for those looking to downsize, as well as young households looking to grow; aligns with affordability and moving patterns.
3-bedroom	40 - 50%	Preferred home size for most movers and families; central to market dynamics.
4+ bedroom	10 - 15%	Meets some demand for larger homes without over-provision; recognises high under-occupation among older residents in existing 4-beds.

Table 3: Recommended mix of housing, by bedroom size, for open market housing, for new homes in Hailsham

Combined housing mix matrix

The matrix below (Table 4) brings the recommended mix of tenure types together, aligning with the headline combined range for all tenure types, meeting needs in terms of affordability and demographics, and providing a basis for flexibility subject to site location, size and character. This is based on 35% of all homes on qualifying developments (i.e. those of ten or more homes) comprising affordable homes.

Property Size	Affordable Housing %	Market Housing %	Overall Target Mix %
1-bedroom	20 - 30%	5 - 10%	10 - 15%
2-bedrooms	40 - 50%	30 - 40%	35 - 40%
3-bedrooms	20 - 30%	40 - 50%	30 - 40%
4+ bedrooms	0 - 5%	10 - 15%	10 - 15%

Table 4: Recommended mix of housing, by bedroom size, broken down by tenure type

Breakdown of affordable housing tenures

Based on the findings of the HNS and HNA, the recommended breakdown of affordable housing by tenure type is presented in Table 5.

Affordable housing tenure type	Recommended range %
Affordable rent	35 – 45%
Social rent	35 – 45%
Shared ownership	15 – 25%

Table 5: Recommended mix of affordable housing tenure types

This mix is reflective of the following factors:

1. High affordability pressures indicate a strong need for social and affordable rent

The studies show that:

- Many younger adults and newly forming households cannot afford even 1–2 bed market homes.
- Private rents are generally unaffordable for average earners.
- Shared ownership becomes viable only for smaller homes or low equity shares.
- A large proportion of households looking to move cite cost as the primary barrier.
- Affordable rent levels (80% of market rent) are typically viable for 1–3 bed homes but not for larger units.

This evidence supports at least 70–80% of affordable homes being rented products, split equally between affordable and social rented products. Social rent is needed for the lowest-income households and those priced out entirely, whereas affordable rent provides flexibility and serves moderate income households who still cannot buy. Together, these two categories serve the full spectrum of rental need in Hailsham.

2. Shared ownership remains necessary, but should be a minority

The studies indicate that shared ownership is important because:

- It is the only realistic home ownership route for many younger households.

- It supports aspiration and mobility among lower-income working households.
- It helps diversify options for mid-income groups unable to buy outright.

However, many younger adults reported through the HNS that they have incomes below £20,000 and little or no savings, but that the cost of shared ownership schemes requires, particularly for larger properties, higher than average incomes. It is thus only flats and some terraced homes that are considered affordable under standard lending assumptions. Shared ownership schemes will not therefore meet needs and thus a more limited allowance in the range of 15-25% is appropriate.

3. This mix is more appropriate than the district-wide figures

The emerging Wealden Local Plan is based upon district-wide assumptions which do not reflect the challenges in Hailsham. An amended mix that reflects local circumstances is appropriate. The Local Plan suggests that the mix should comprise 40% affordable rent, 35% social rent and 25% shared ownership. The HNA and HNS demonstrate that Hailsham:

- Has more pronounced affordability pressures than much of the district.
- Has a high proportion of low-income younger households needing affordable housing options.
- Has a strong need for rented affordable homes.
- Requires a greater proportion of smaller, accessible and mid-sized homes.

As such, it is recommended that the proportion of social rented homes is increased above the levels set in the emerging Local Plan and the proportion of shared ownership reduced accordingly.

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