



Housing Needs Assessment

Troy Planning + Design for:
Hailsham Town Council

Final 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 study

This report presents the Housing Needs Assessment (HNA) prepared on behalf of Hailsham Town Council (HTC) by Troy Planning + Design (TPD). It reviews the implications of housing types, sizes and tenures, population patterns and demographic change on the need for housing across Hailsham over the period to 2042, in line with the emerging Local Plan being prepared by Wealden District Council. It draws on material from the Census and other sources and is very much a data driven approach.

Alongside the HNA a Housing Needs Survey (HNS) has also been prepared, and which seeks to understand the current and future needs of residents. This is presented separately, with a summary report also prepared that combines the key findings and messages from the HNA and HNS.

The HNA and HNS comprise supporting evidence to the Hailsham Neighbourhood Plan, which is currently being reviewed having initially been 'made' in 2021. The HNA and HNS will also help inform the Town Council's response to the new Local Plan being prepared by Wealden District Council.

Context for the study

The Hailsham Neighbourhood Plan was made in July 2021. This was set in the context of growth and evolution: the Plan recognised that new development would take place in and around Hailsham and although it didn't allocate sites for growth it sought to establish policies that influenced the shape and form of this. The first Neighbourhood Plan was made in a policy vacuum: with no up-to-date development management policies in place and work on the Wealden Local Plan having faltered, the Neighbourhood Plan presented the most up-to-date statement of local level planning policy for the area.

Work on a new Neighbourhood Plan has now commenced. This was triggered by the District Council reviewing the Local Plan. Consultation on a 'Regulation 18' version of the new Local Plan took place in Spring 2024. Since then, progress on the Local Plan has slowed down. It is anticipated that consultation on a revised 'Regulation 18' version of the Local Plan will take place in Spring 2026, with submission for examination taking place by the end of 2026. The new Local Plan will cover the period up to 2042 and envisages ongoing growth and development in Hailsham. The 2024 Regulation 18 version of the Local Plan said that, over the Plan

period, 2,959 new homes will be built and delivered in Hailsham. This may increase in the updated version of the Local Plan to be published in 2026. In addition to this, and immediately adjacent to but outside of the Town Council area, significant growth is also expected to take place in Hellingly.

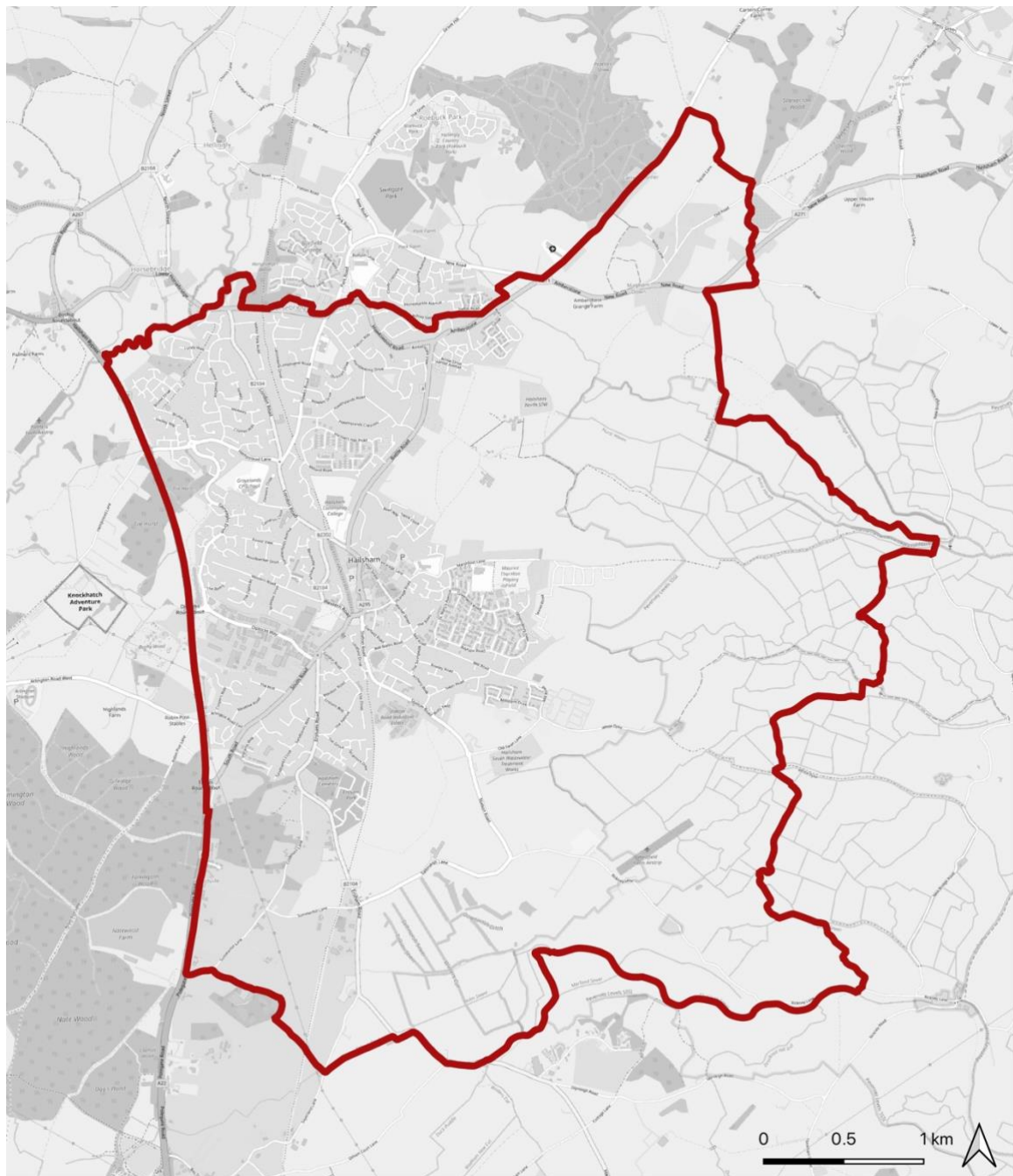
In the meantime, work on the review of the Neighbourhood Plan has continued. Consultation undertaken for this has indicated that there are concerns about the ongoing scale of growth in Hailsham but that where new housing development does take place, it should be well-designed, well-integrated with the existing built area, and provide for a mix of homes that respond to local needs. This is reflected in 'Objective 3' in the review of the Neighbourhood Plan which is:

"To promote well-designed new homes that provide a mix of housing types and tenures to meet local needs, which are well-integrated within the fabric of the town, and deliver high standards of sustainability and energy efficiency."

Draft Policy HaHD 4 of the review of the Neighbourhood Plan expands upon this and says that a mix of homes that meet local housing needs should be provided, including housing that meets the needs of an ageing population. This HNA provides more information on local housing needs to help support this policy. This is important: although the emerging Wealden Local Plan includes a proposed policy on housing type and mix, this is based on district-wide analysis of needs (Wealden Local Housing Needs Assessment, 'WLHNA', August 2021). The Hailsham HNA is more locally specific, reflecting the different dynamics and nuances in the housing market and population patterns that exist at this level.

The study area

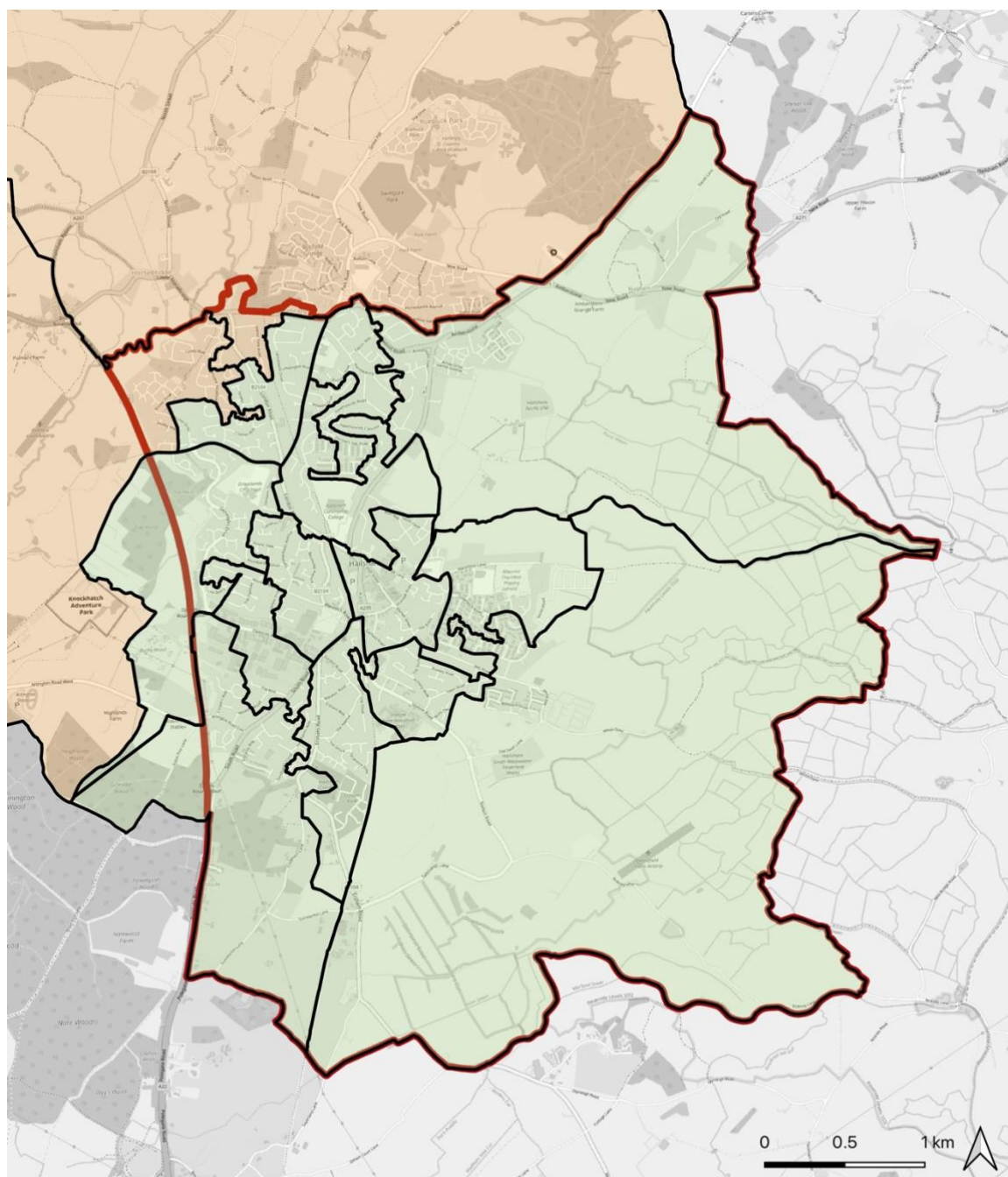
The designated Hailsham Neighbourhood Plan area is based on the Town Council boundary (Figure 1). Datasets published by the Office for National Statistics (ONS) and others which have been utilised in this study do not exactly match the Town Council boundary, typically being presented at 'Lower layer Super Output Area' (LSOA) or 'Middle layer Super Output Area' (MSOA). That data which best-fits the Hailsham Neighbourhood Plan area has been used as far as possible in this HNA. In some cases this report seeks to compare 2011 Census data with that published in 2021. However, the LSOA data upon which this is based has changed between the two census dates, meaning a direct comparison is not possible. In Hailsham, the north western LSOA was previously part of a much larger area that extended into Fletching Parish in 2011, but which has subsequently been redrawn and, as of 2021, follows the Town Council boundary. This area has been excluded from all data where a comparison between 2011 and 2021 is made but has been used where data looks forward from 2021. A small portion of the Hailsham study area is also included within a LSOA that extends into Hellingly. This is excluded from the data used in this study. This geography is illustrated in Figure 2 and Figure 3.



Map data © OpenStreetMap contributors. Contains UK government data licensed under Open Government Licence v3.0.

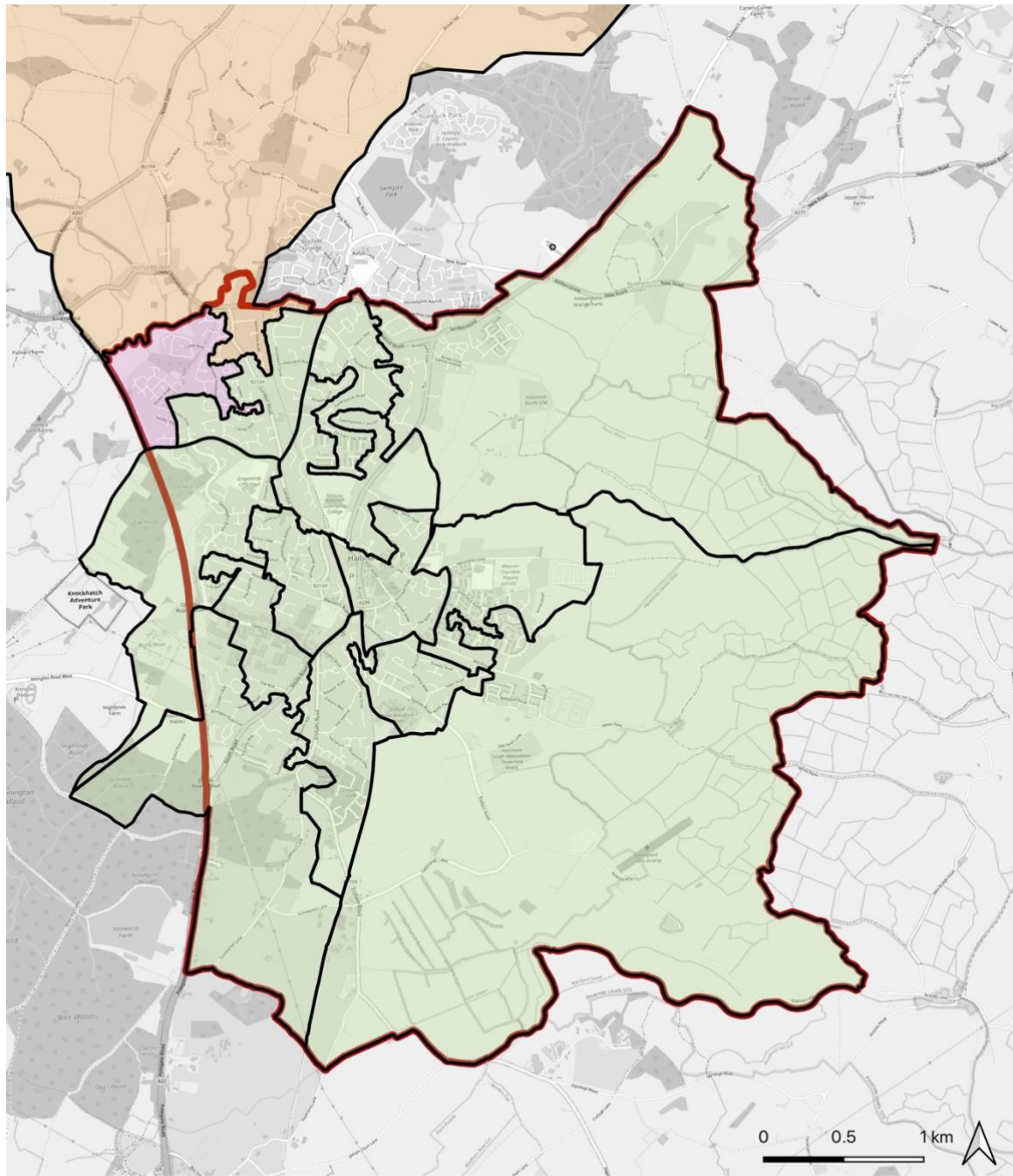
 Hailsham Civil Parish boundary

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



- Hailsham Civil Parish boundary
- Lower Super Output Areas considered in the study
- Lower Super Output Areas not considered in the study

Figure 2: The 'best-fit' area for 2011 Census data at LSOA level and which is used for purposes of comparison between the 2011 and 2021 Census. Note that in 2011 the north western LSOA in Hailsham formed part of a much larger area extending into Fletching Parish.



- Hailsham Civil Parish boundary
- Lower Super Output Areas considered in the study
- Lower Super Output Areas not considered in the study
- Lower Super Output Area included within 2021 base data used in this study, other than where compared with 2011 Census data as the geography and extent of the area changed between the Census dates and does not allow for comparison

Figure 3: The 'best fit' area for 2021 Census data at LSOA level used within this study, and showing how the LSOA for the north western part of Hailsham has been redrawn.

Structure of this report

Following this introductory section the report is presented across five further sections:

- Section 2 which presents the baseline position in respect of the housing need for Hailsham as calculated through application of the Governments Standard Method. It also calculates the population of Hailsham in comparison to the population of Wealden as a whole, and uses these figures to establish the 'Town Share' for new homes over the period of the new Local Plan.
- Section 3 which presents the population profile and existing sizes of homes across Hailsham, and how the balance of homes might need to change to respond to population growth. This is a 'baseline position' based on current patterns, which is explored further in the following sections of the report.
- Section 4 which presents a breakdown of the existing housing types and sizes in Hailsham, as well as the size of the household occupying these.
- Section 5 which presents a breakdown of house prices, tenure types and affordability in Hailsham.
- Section 6 which presents analysis of the potential need for specialist accommodation to meet the needs of an ageing population.
- Section 7 then brings the above together and presents the key findings for Hailsham.

2. Baseline position

Introduction

This section presents the 'baseline position' for new homes in Hailsham, reflecting the approach established in the Government's standard methodology. It also reviews workplace-based affordability ratios to determine whether this has any impact upon the baseline position for new homes in Hailsham. It makes no allowance for wider analysis of the District and what this means for the spatial distribution of growth across Wealden.

This section also presents data on the population of Hailsham and how this has changed between the 2011 and 2021 census. It uses the baseline position for new homes as well as population data to indicate what the 'Hailsham share' of the housing requirement for Wealden as a whole might be.

Housing stock

The first stage in the Government's standard method for assessing housing need is to multiply the existing stock of housing by a factor of 0.8%. This calculation is used to determine the minimum annual local housing need figure for an area.

[Planning Practice Guidance](#) explains that the use of this calculation "ensures all areas, as a minimum, are contributing a share of the national total that is proportionate to the size of their current housing market" (Paragraph: 005 Reference ID: 2a-005-20241212).

Census 2021 data (NOMIS dataset RM204) indicates that there are 9,239 homes in Hailsham, based on Lower layer Super Output Area (LSOA) data. This omits a small part of Hailsham to the north of the built-up area as that forms part of a much larger LSOA that extends into Hellingly Parish. It also includes a small area that extends into Fletching Parish (as shown in Figure 3).

Multiplying the existing stock of homes in Hailsham by a factor of 0.8% generates an annual local housing need figure of 74 homes (rounded). Over a sixteen-year Local Plan period this would equate to a housing need figure of 1,183 homes (rounded). This represents just under 13% of the total housing need figure for Wealden as a whole (Table 1).

Geography	Hailsham (LSOAs)	Wealden District
Existing housing stock	9,239	72,048
Annual housing need (based on 0.8% of existing housing stock)	74	576
Housing need over a 16-year Plan period (2026-42)	1,183	9,222
Housing need expressed as a percentage of Wealden total	12.82%	100%

Table 1: Setting the minimum housing need figure, source: Census 2021 NOMIS dataset RM204 - Number of Dwellings, TPD Calculations. Figures are rounded

As an alternative to the Census dataset used above, use has also been made of the [AddressBase](#) dataset made available by the Ordnance Survey (OS). This draws upon information on current properties and addresses sourced from the Royal Mail, matched to Unique Property Reference Numbers (UPRN). It is updated on a six-week basis and allows address data to be extracted and filtered by type (i.e.: residential or commercial) at the Parish and local authority level.

This data indicates that there are 11,669 residential addresses in Hailsham. Following the calculations outlined above, this would generate an annual local housing need figure of 93 homes (rounded). Over a sixteen-year period this would equate to a housing need figure of 1,494 homes (rounded). This represents around 15% of the total housing need figure for Wealden as a whole (Table 2).

The two datasets utilised above indicate that, over the sixteen-year Plan period, the minimum housing need figure for Hailsham Parish is between 1,183 and 1,494 homes (or a mid-point of 1,339). This approximates to around 14% of the total housing requirement for Wealden.

Geography	Hailsham Parish (AddressBase data)	Wealden District
Existing housing stock	11,669	77,042
Annual housing need (based on 0.8% of existing housing stock)	93	616
Housing need over a 16-year Plan period (2026-42)	1,494	9,861
Housing need expressed as a percentage of Wealden total	15.15%	100%

Table 2: Setting the minimum housing need figure, source: AddressBase, Ordnance Survey / Royal Mail. Figures are rounded.

Affordability adjustment

The second stage in the Government's standard method for assessing housing need is to adjust the minimum housing need figure (as shown in Table 1 and Table 2) based on affordability data. This makes use of ONS [median workplace-based affordability ratios](#), averaged over a five-year period. The lowest level of geography that these are available for is the local authority level (i.e.: Wealden as a whole).

Where affordability ratios are greater than 5, the baseline housing need figure is to be increased. The standard formula developed by the Government says that for every percentage point above an affordability ratio of 5, the baseline housing need figure should be increased by a factor of 0.95%. The equation used to determine the adjustment factor is set out in the standard method as:

$$\text{Adjustment factor} = ((\text{five-year average affordability ratio} - 5) / 5) \times 0.95 + 1$$

For the Wealden area as a whole, the average five-year affordability ratio is 12.54 (which effectively means that the average house price is 12.54 times greater than average incomes). Applying the equation outlined in the standard method generates an adjustment factor of 2.43, as shown below:

$$\text{Adjustment factor} = ((12.54 - 5) / 5) \times 0.95 + 1$$

$$\text{Adjustment factor} = (7.54 / 5) \times 0.95 + 1$$

$$\text{Adjustment factor} = 1.508 \times 0.95 + 1$$

$$\text{Adjustment factor} = 2.43$$

The adjustment factor is applied to the minimum annual local housing need figure and results in this increasing to an annualised housing need figure of 180 homes (based on the LSOA Census data in Table 1) for Hailsham, as shown below:

Minimum annual local housing need figure = (Existing stock x 0.8%) x adjustment factor

Minimum annual local housing need figure = (9,239 x 0.8%) x 2.43

Minimum annual local housing need figure = 180

Over a sixteen-year Plan period this would equate to a rounded housing need figure of 2,874 homes. As above, this represents around 13% of the total housing need figure for Wealden as a whole (Table 3).

Geography	Hailsham (LSOAs)	Wealden District
Existing housing stock	9,239	72,048
Annual housing need (based on 0.8% of existing housing stock)	74	576
Minimum annual housing need with adjustment factor applied	180	1,401
Housing need figure over a 16-year Plan period (2026-2042)	2,874	22,410
Housing need expressed as a percentage of Wealden total	12.82%	100%

Table 3: Setting the minimum housing need figure, incorporating adjustment factor, source: Census 2021 NOMIS dataset RM204 - Number of Dwellings, TPD Calculations. Figures are rounded.

Alternatively, If the minimum housing need figure generated through use of the AddressBase dataset is subject to the adjustment factor instead, the annualised housing need figure for Hailsham Parish is calculated as being 227 homes. Over a sixteen-year Plan period this would equate to a rounded housing need figure of 3,630 homes in Hailsham (Table 4). It represents around 15% of the total requirement for Wealden.

Applying the adjustment factor to the two different datasets utilised generates a minimum housing need figure for Hailsham between 2,874 and 3,630 homes over the sixteen-year Plan period. A mid-point between these is 3,252 homes (which is around 203 homes per year). This equates to around 14% of the total housing requirement for Wealden.

Geography	Hailsham (AddressBase data)	Wealden District
Existing housing stock	11,669	77,042
Annual housing need (based on 0.8% of existing housing stock)	93	616
Minimum annual housing need with adjustment factor applied	227	1,498
Housing need figure over a 16-year Plan period (2026-2042)	3,630	23,963
Housing need expressed as a percentage of Wealden total	15.15%	100%

Table 4: Setting the minimum housing need figure, incorporating adjustment factor, source: AddressBase, Ordnance Survey / Royal Mail, TPD Calculations. Figures are rounded.

Population change since 2011

The population of Wealden, as of the 2021 Census, is 160,150 people. The population of the district grew by around 7.5% in the ten years since the 2011 Census. The population of Hailsham grew by a similar amount in this time period (Table 5).¹

The age structure of the population indicates that, over the ten-year period between the 2011 and 2021 Census, the population of Hailsham has aged, with the proportion of people aged 65 or greater having increased by 40 percentage points. By contrast, the population aged below 25 has fallen by almost nine percentage points. This is shown in Table 5 and Figure 4.

¹ It is to be noted that the population of Hailsham presented in Table 5 is based on LSOA boundaries as of 2011 and thus exclude the north western part of the town. The population for this area as of 2021 is given as 19,257 people. If, however, the redrawn LSOA for this part of Hailsham is included, then the population of the town is given as 21,092 people as of 2021. This equates to around 13.2% of the total population of Wealden District.

Age group	Population 2011 (LSOA data)	% of population 2011	Population 2021 (LSOA data) *	% of population 2021	Change between 2011 and 2021
0 – 14	3,302	18.4%	3,243	16.8%	-1.8%
15 – 24	2,008	11.2%	1,866	9.7%	-7.1%
25 – 44	3,861	21.5%	4,292	22.3%	+11.2%
45 – 64	4,615	25.8%	4,941	25.7%	+7.1%
65 – 84	3,475	19.4%	4,115	21.4%	+18.4%
85 and over	658	3.7%	800	4.1%	+21.6%
Total	17,919	100%	19,257	100%	+7.5%

Table 5: Population breakdown and change in Hailsham (LSOA data), source: Office for National Statistics, Census 2011 and 2021, TPD Calculations (*) Excludes LSOA that extended into Fletching in 2011 and subsequently redrawn for the 2021 Census.

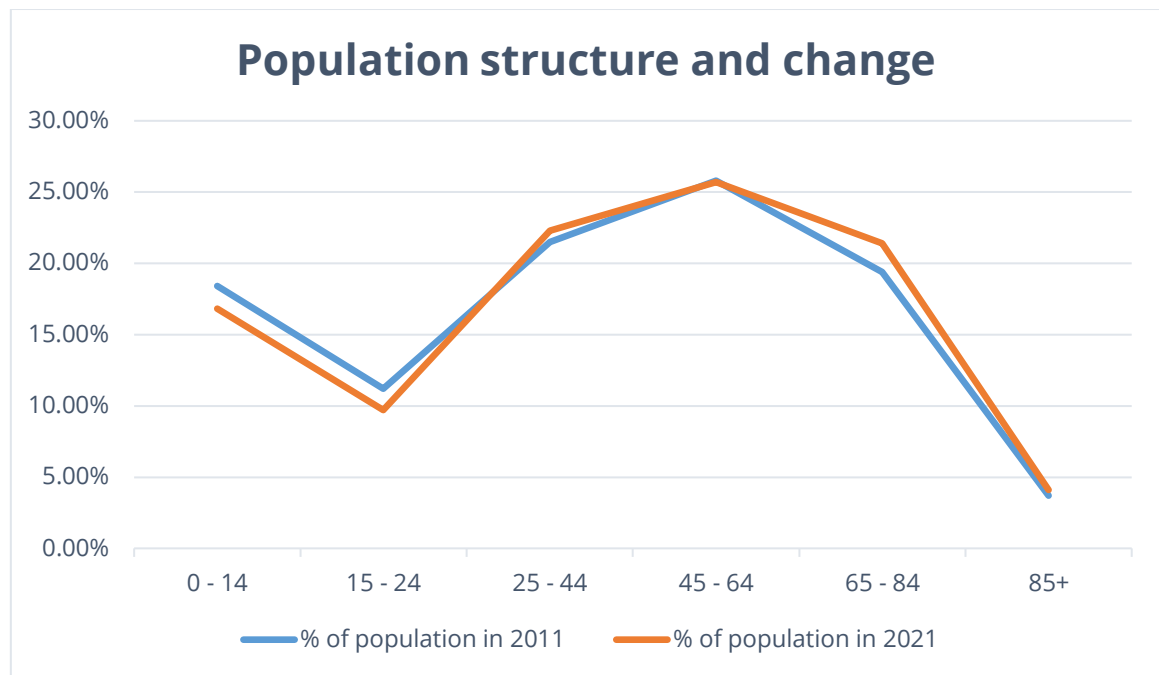


Figure 4: Chart showing population change by age group in Hailsham (LSOA data) between 2011 and 2021, source: Office for National Statistics, Census 2011 and 2021, TPD Calculations

The 'Town Share'

The baseline housing calculations presented in this section of the HNA are based upon the most recent version of the Governments Standard Method to establish the minimum housing requirement for an area. These differ from the figures presented in the WLHNA (which calculates that the annual need figure for the district as a whole is 1,225 homes per annum) as that report makes use of an earlier version of the Standard Method which established a different approach, and which has now been replaced.

Use of different datasets to determine the existing baseline housing stock can result in different outcomes to application of the Standard Method (as demonstrated in the tables contained in this section of the report). Planning Practice Guidance advises that [Live Table 125](#) (Dwelling stock estimates by local authority district) is to be used as the basis for the Standard Method. However, this does not provide any information below local authority level (i.e.: down to Parish or Town Council level) and alternative sources need to be utilised. In light of this, Census data and more recent AddressBase data has been utilised in this HNA.

For Hailsham, the housing need figure is calculated to be between 180 and 227 homes per annum. Over a sixteen-year Plan period this equates to a need for between 2,874 and 3,630 new homes: which is around 14% of the total housing need for Wealden as a whole. For comparison, 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 which does not make use of the most recent approach to the Standard Methodology.

It is to be noted that the figures presented here are not to be interpreted as a housing requirement. Rather, they have been calculated using the standard method and are a start point for informing future growth and the distribution of this, which will need to consider other factors too, including physical and environmental constraints, and infrastructure carrying capacity.

In terms of population, and depending upon the dataset used, Hailsham accounts for around 13% of the total population of Wealden. The population and baseline housing figures are slightly out of alignment, although this is perhaps a factor of the use of AddressBase data to help determine total housing stock. At the LSOA level, the housing stock and population change figures are fairly similar.

3. Future housing stock

Introduction

This section of the report seeks to calculate what the future mix of housing might be in Hailsham (based on bedroom size), using the modelling contained within the WLHNA. Later sections of the report then consider the size and type of home needed in Hailsham in more detail, and how the mix of new homes, by size, should be varied to meet the specific needs of the Hailsham community.

Age structure and population change

Data presented in Table 6 breaks the population down by age structure. This shows that Hailsham's age profile broadly sits between the older tendency of Wealden and the younger national picture. Overall, the pattern is of a relatively balanced town with both family-age households and a significant, growing older population, and a modest shortfall in younger adults compared with the national picture. This is illustrated in Figure 5.

For future housing supply, this potentially points to a need for a diversified mix of homes. The near-national share of children suggests maintaining a pipeline of family homes and ensuring affordability to attract and retain younger families and first-time buyers looking to enter the housing market or those looking to set up home on their own for the first time. The elevated 65+ and higher 85+ cohort may indicate rising demand for age-appropriate options.

Age Group	Hailsham (LSOA)	Wealden	England
0 - 14	17.2%	15.4%	17.3%
15 - 24	9.7%	9.2%	11.7%
25 - 44	22.9%	19.9%	26.6%
45 - 64	25.7%	29.0%	25.8%
65 - 84	20.6%	22.9%	16.0%
85 and over	3.9%	3.6%	2.4%

Table 6: Age structure of Hailsham (LSOA) in comparison to Wealden and England, source: Office for National Statistics, Census 2021, TPD Calculations

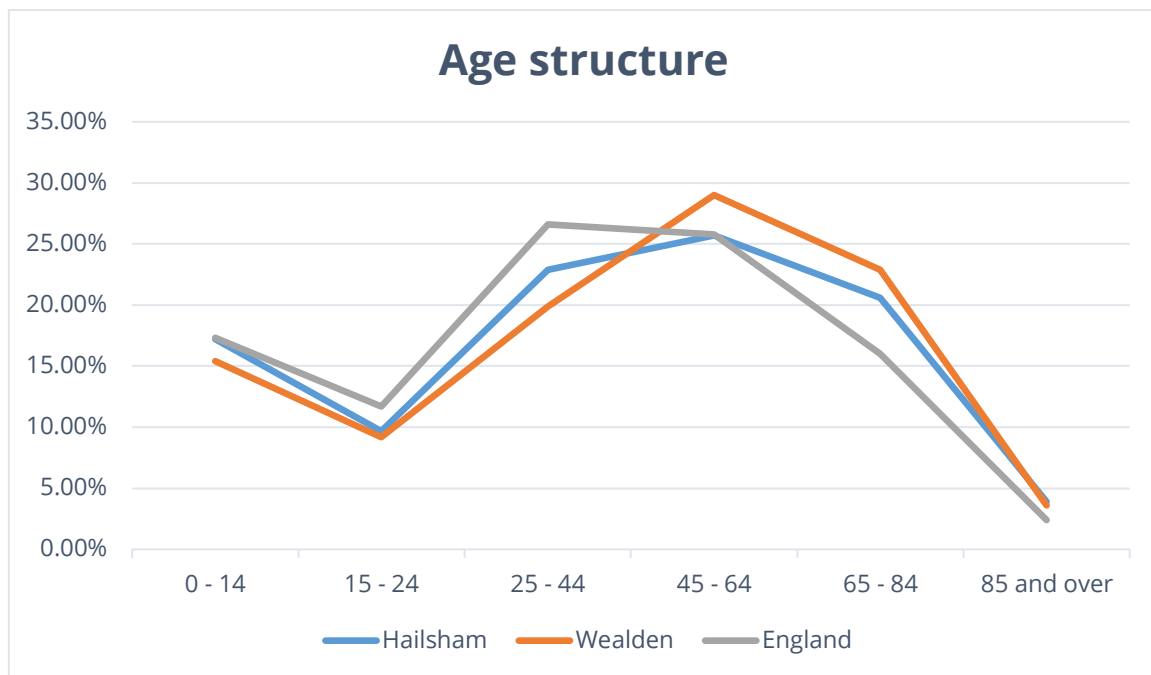


Figure 5: Chart showing the age structure of the resident population of Hailsham (LSOA) in comparison with that for Wealden and England, source: Office for National Statistics, Census 2021, TPD Calculations

It is helpful to understand how the population structure is likely to change over the Plan period as this has implications for the need for different house types and sizes.

The WLHNA models the potential change in population across Wealden as a whole for the period 2019-2039, utilising a combination of 2018-based subnational population projections and assumed population growth associated with delivery of new homes (at a rate of 1,225 new homes per year for the twenty-year period – and thus lower than calculated using the standards methodology, as set out in the previous section of this report).

It assumes that the population of Wealden will grow by 28% over the twenty-year period to 2039, resulting in a total population of 206,680 people living in the district. It finds that the largest growth will be in people aged 65 and over, increasing by 55.5%. It also finds that the population of under 16s and those aged 16-64 will also grow, by 17.6% and 18.5% respectively.

The model is for the Wealden authority area as a whole. Applying this to Hailsham is not an exact science: the population data at the Hailsham level is for a different period to that within the WLHNA model, and the structure of the existing population and how this will change over time will inevitably differ to that for Wealden as a whole. It also assumes a different rate of housing growth. However, and in lieu of other parish or neighbourhood-level models, it is helpful in understanding how the overall structure of the population may change.

Application of the WLHNA model is presented in Table 7. It envisages that the population of the Hailsham will grow by around 21.5%, with the majority of growth in the over 65 age group. This is for the twenty-year period 2019-2039. For Hailsham, and to enable 2021 base data to be used, the percentage growth figures are simply rolled forward for the period 2021 – 2041. This has a different end date to the Local Plan period (2042) but represents the best-fit for the purposes of this study.

Based on an average household size of 2.31 people per household (as calculated in Section 4), the projected growth in Hailsham would result in an additional need for 2,502 homes over a twenty-year period, equating to 125 new homes per annum. This is less than assumed by application of the Standard Method in Section 2 of this report.

Age band	2021 population	% growth assumed in WLHNA model	Estimated 2041 population	Population growth 2021 - 2041
Under 16	3,860	+17.6%	4,539	+679
16 - 64	12,062	+18.5%	14,293	+2,231
65 and over	5,170	+55.5%	8,039	+2,869
Total	21,092	-	26,871	+5,779

Table 7: Population projections for Hailsham, based on application of model in the WLHNA, data sources: Office for National Statistics, Census 2021, and WLHNA

Notes: This table makes use of Parish level population data released by ONS as part of the Census 2021 returns. This is used as the age bands within it align with those used in the WLHNA population growth model. However, the geography for this dataset varies to that for the LSOA data used elsewhere in this report and generates a different population figure. To reconcile these, the proportion of the population within each age group in the Parish level data has been calculated and applied to the total Hailsham population presented in the LSOA data. This allows for comparison with other data in this report.

Housing profile

The outputs of the population growth model described above can be applied to the age bands contained within ONS Household Reference Person (HRP) data to show the proportion of growth within each of these in Hailsham (Table 8). The HRP is generally the person in whose name the home is owned or rented. Where there are joint householders, other factors are used to determine the HRP, including income, economic activity and age. The HRP dataset is used to enable use to be made of data which then maps the age of households (by HRP) with the size of home occupied. Use of the different dataset means that, in absolute terms, the total households recorded in Table 8 differs slightly to other datasets used in this report, albeit they provide a good indication of expected demographic change.

The data in Table 8 indicates that there will be a reprofiling of the age of households by HRP in Hailsham. There is expected to be growth across all age groups, with the most significant change associated with those households where there is a household reference person aged 65 or greater. Growth in younger families (where the HRP is aged 25-34) is also expected to be fairly significant.

	24 and under	25-34	35-54	55-64	65 and over
2021	132	1,104	2,699	1,692	3,310
2041	156	1,484	3,152	1,887	5,147
% change between 2021 and 2041	+17.9%	+34.4%	+16.8%	+11.5%	+55.5%

Table 8: Breakdown of age of household reference person (HRP), in Hailsham, and projected change between 2021 and 2041, data sources: Office for National Statistics, Census 2021, WLHNA, and TPD Calculations. All figures and percentages rounded.

Mapping the population profile with the size of home occupied can be used to determine the mix of homes (by bedroom size) that might need to be provided over the next twenty years. The current population profile and housing sizes occupied by age of household, based on HRP, is available at District level. This is shown in Table 9 and indicates that, across Wealden as a whole, younger households are generally concentrated in smaller homes but that house size then increases with age of HRP before then decreasing again amongst older HRPs.

House size (by number of bedrooms)	24 and under	25-34	35-54	55-64	65 and over
1	25%	10%	5%	6%	9%
2	50%	40%	21%	23%	31%
3	18%	36%	38%	34%	33%
4+	7%	13%	36%	37%	27%

Table 9: House sizes occupied by age of the Household Reference Person at the district level, data sources: ONS, Census 2021, TPD Calculations. Figures are rounded.

Multiplying the data in Table 8 with that in Table 9 indicates the mix of homes that might be needed in Hailsham, broken down by size of home (based on bedroom numbers) and age of the household reference person. This is presented in Table 10.

House size (by number of bedrooms)	24 and under	25-34	35-54	55-64	65 and over	Total	Future suggested housing mix
1	39	150	170	115	463	937	7.9%
2	78	613	646	426	1,570	3,333	28.2%
3	28	533	1,192	640	1,719	4,112	34.8%
4+	11	188	1,144	706	1,395	3,444	29.1%

Table 10: Future suggested mix of homes (by bedroom numbers) based on a combination of housing and population growth, and size of home occupied by different age groups

The next step is to match the current mix of housing with the suggested future mix and to calculate what this implies for the balance of new homes that should be provided to help reprofile the housing stock. This factors in the minimum number of new homes in Hailsham as calculated by the Standard Method (i.e.: 2,874 new homes). This is presented in Table 11. It implies that, within new development, a significant proportion of homes should comprise larger 4+ bedroom properties.

House size (by number of bedrooms)	Current mix (2021)	Suggested mix	Balance of new housing required to meet the suggested mix
1	7.6%	7.9%	8.9%
2	33.0%	28.2%	12.7%
3	39.9%	34.8%	18.4%
4+	19.5%	29.1%	60.0%

Table 11: Balance of new homes to be delivered through new development in Hailsham to achieve the suggested future mix of housing (by size, based on bedroom numbers), reflecting the population growth model, minimum housing figure generated through calculation of the Standard method, and size of home by Household Reference Person, data sources: Office for National Statistics, Census 2021, WLHNA and TPD Calculations. All percentages rounded.

However, it is important to note that the balance of new homes to be provided (by bedroom size) as set out in Table 11 is effectively based on the size of existing homes occupied by people at different ages and assumes this pattern remains constant in the future. It is thus simply a baseline position that shows what might be needed if current patterns were to continue. It does not consider the implication of matters such as under or over occupation of existing homes, affordability, or the desire for people to downsize for example. Further consideration is given to these in the following sections of the report as well as in the separate Housing Needs Survey.

4. Housing type

Type of home

House types in Hailsham are sourced from Census data and thus based on LSOA geography. The breakdown of house types in Hailsham is presented in Table 12, which also shows how the stock of housing has changed between the 2011 and 2021 Census. It indicates that the housing stock is dominated by the presence of detached and semi-detached homes, and that the proportion of these has increased over the ten-year period between the two Census reports. Together, they account for more than two-thirds of the total housing stock.

The housing typology that has seen the largest percentage growth between the two Census periods is flats, albeit this scale of growth is based on a relatively low starting position compared to other house types and, overall, there remain fewer flats than other house types.

House Type	2011	% of total stock at 2011	2021 *	% of total stock at 2021	change between 2011 and 2021
Detached	2,392	31.1%	2,580	31.3%	+7.9%
Semi-detached	2,744	35.7%	3,004	36.5%	+9.5%
Terrace	1,643	21.4%	1,654	20.1%	+0.1%
Flat	761	9.9%	853	10.4%	+12.1%
Caravan or other mobile or temporary structure	148	1.9%	137	1.7%	-7.4%
Total	7,688	100%	8,228	100%	-

Table 12: Breakdown of house types in Hailsham and change in stock between the 2011 and 2021 Census, source: Office for National Statistics, Census 2011 and 2021, TPD Calculations. All percentages rounded. () Excludes LSOA that extended into Fletching in 2011 and subsequently redrawn for the 2021 Census*

The proportion of house types in Hailsham is shown in Table 13 in comparison with the proportion of house types found across Wealden as a whole and nationwide. Hailsham's stock profile sits between the district and national picture. Detached homes are less prevalent than in Wealden but remain above the average for England.

Semi-detached housing is common in Hailsham, and more prevalent than in both Wealden and England. Equally, the presence of terraced homes is more common in Hailsham than they are in Wealden, although less common than across England as a whole. Flats appear to be under-represented in comparison with England, and their presence is also slightly below the Wealden average. Overall, this points to a suburban, family-oriented mix, comprising fewer detached homes than the more rural district picture, but less flatted than the national average. This is illustrated in Figure 6.

House Type	Hailsham (LSOA)	Wealden	England
Detached	31.1%	43.7%	22.9%
Semi-detached	37.0%	31%	31.5%
Terrace	20.2%	12.5%	23%
Flat	10.2%	11.6%	22.2%
Caravan or other mobile or temporary structure	1.5%	1.2%	0.4%

Table 13: Proportion of house types in Hailsham, Wealden and England, source: Office for National Statistics, Census 2021 TPD Calculations. All percentages rounded.

It is to be noted that the Census does not report bungalows as a separate house type. However, and although the 2011 Census does include reference to 'whole house or bungalow' in the breakdown of house type, it does not distinguish between them. The 2021 Census removes all reference to bungalows.

Data prepared by the Valuation Office Agency (VOA) and Council Tax estimates has thus been reviewed to determine the proportion of bungalows as part of the total housing stock (Table 14). This indicates that, in Hailsham, bungalows comprise a significant proportion of the housing stock, accounting for close to one fifth of all homes. This is far in excess of the national average, though only slightly higher than the proportion found across Wealden as a whole.

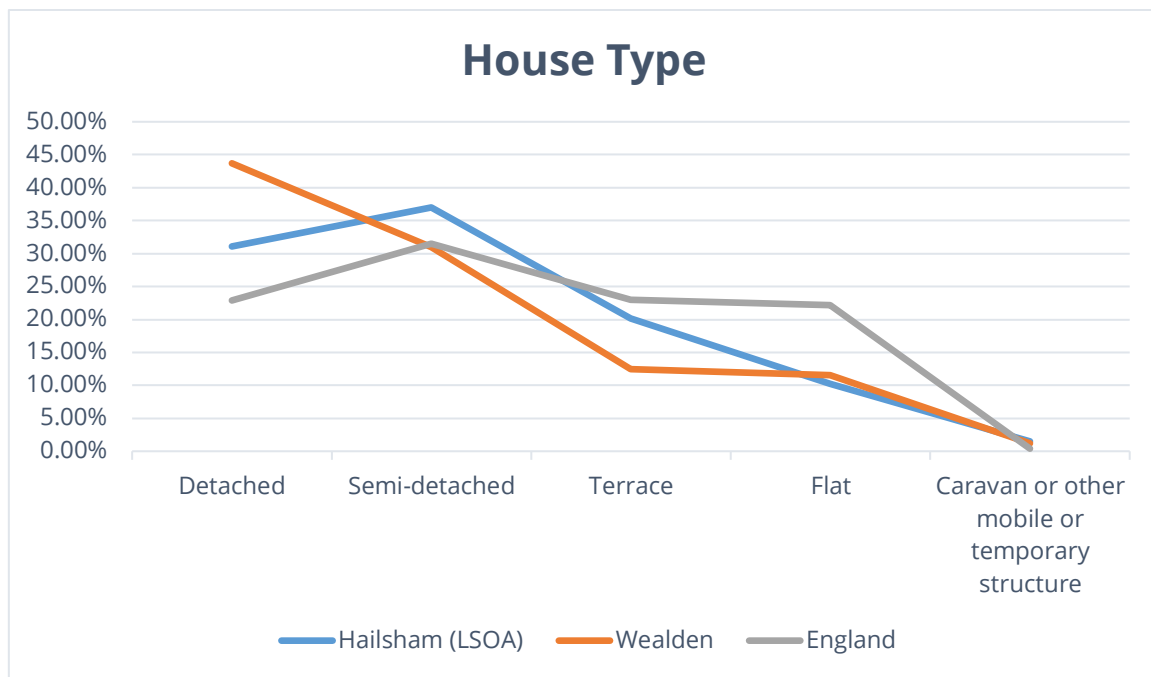


Figure 6: Chart showing house types in in Hailsham, Wealden and England, source: Office for National Statistics, Census 2021

	Hailsham (LSOA)	Wealden	England
Total number of bungalows	1,610	12,330	2,312,680
Bungalows as a % of total housing stock	17.05%	16.63%	9.05%

Table 14: Total number of bungalows as a proportion of the total housing stock, source: Valuation Office Agency (VOA), Council Tax statistics, Table CTSOP3.1 for 2024

Size of home

The high proportion of detached and semi-detached homes in Hailsham is reflected in the size of home, based on bedroom numbers, as presented in Table 15 and which also shows how the stock of homes, by size has changed between the 2011 and 2021 Census. This indicates that the proportion of homes with three or more bedrooms accounts for almost 60% of all properties, and, significantly, that the proportion of larger homes with four or more bedrooms has grown by almost a quarter between the two census reporting periods. Indeed, the combined growth in properties with three or more bedrooms exceeds that associated with one and two bedrooms.

Number of bedrooms	2011	% of total stock at 2011	2021 *	% of total stock at 2021	change between 2011 and 2021
1	549	7.3%	641	7.8%	+16.8%
2	2,711	36.2%	2,797	34%	+3.2%
3	2,994	40%	3,274	39.7%	+9.4%
4+	1,233	16.5%	1,522	18.5%	+23.4%

Table 15: Breakdown of house sizes, by bedroom number, in Hailsham, and change in stock between the 2011 and 2021 Census, source: Office for National Statistics, Census 2011 and 2021, TPD Calculations. All percentages rounded. () Excludes LSOA that extended into Fletching in 2011 and subsequently redrawn for the 2021 Census*

The breakdown of house sizes in Hailsham is shown in Table 16 in comparison with the breakdown for Wealden as a whole and nationwide. This shows that across all three geographies, three-bed homes are the most common and one-bed homes the least.

Hailsham's bedroom mix is weighted towards mid-sized homes. It has a notably higher share of 2-bed homes than both Wealden and England and although its share of 3-bed homes is similar to the national average, it is well above the position across Wealden. However, and despite the increase in provision of larger four bed homes in Hailsham between the 2011 and 2021 Census, Hailsham still has fewer 4+ bed homes than Wealden and slightly fewer than England. The provision of one bed homes is similar to that across Wealden, but below the national average. Overall, this points to a suburban, family-oriented housing stock. This is illustrated in Figure 7.

Number of bedrooms	Hailsham (LSOA)	Wealden	England
1	7.6%	7.6%	11.6%
2	33.0%	26.9%	27.3%
3	39.9%	34.9%	40%
4+	19.5%	30.6%	21.1%

Table 16: Breakdown of house sizes, by bedroom number, in Hailsham, Wealden and England, source: Office for National Statistics, Census 2021, TPD Calculations. All percentages rounded.

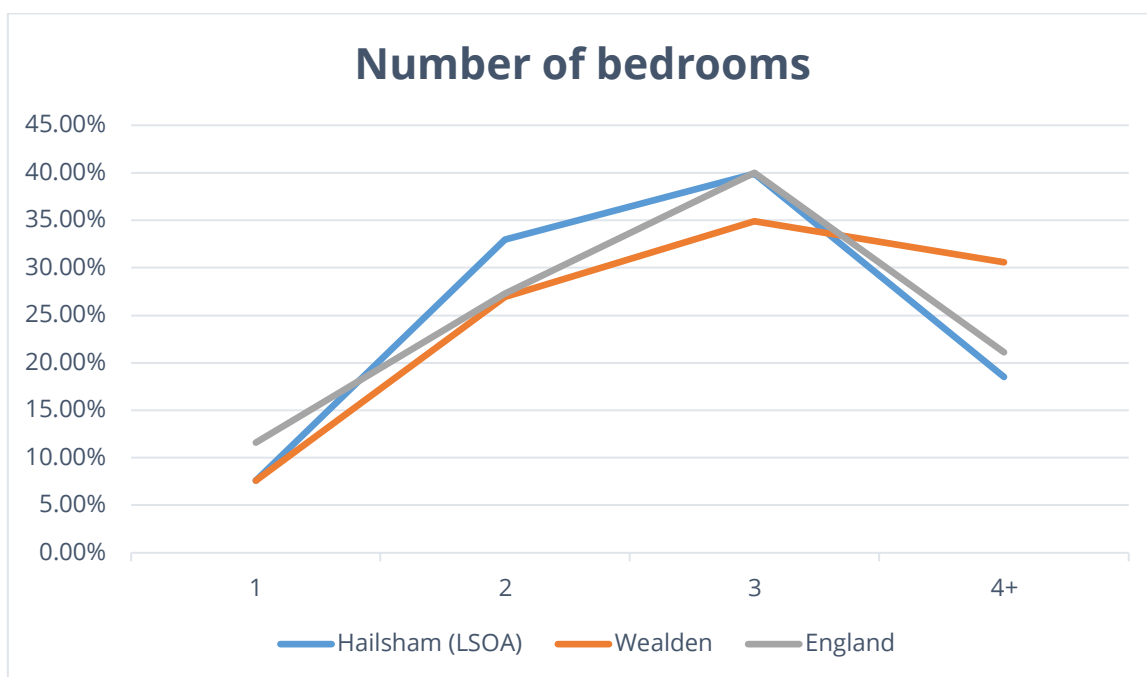


Figure 7: Chart showing house size, by bedroom number, in Hailsham, Wealden and England, source: Office for National Statistics, Census 2021, TPD Calculations

Household composition and occupancy

Household size in Hailsham, measured by people per household, is broken down in Table 17. Equivalent figures for Wealden as a whole, and nationally, are shown for purposes of comparison. This indicates that household size across all three geographies is closely matched. However, there are slightly more one person households in Hailsham than there are in Wealden, which is off-set by a slightly higher share of two-person households in Wealden than in Hailsham. In both cases, the proportion of two-person households is highly than nationally. This is illustrated in Figure 8.

People per household	Hailsham (LSOA)	Wealden	England
1	28.5%	27.5%	30.1%
2	36.9%	39.5%	34%
3	15.6%	15%	16%
4	12.8%	12.6%	12.9%
5	4.5%	4%	4.5%
6+	1.7%	1.5%	2.4%

Table 17: Household size, measured based on people for household, in Hailsham, Wealden and England, source: Office for National Statistics, Census 2021, TPD Calculations. All percentages rounded.

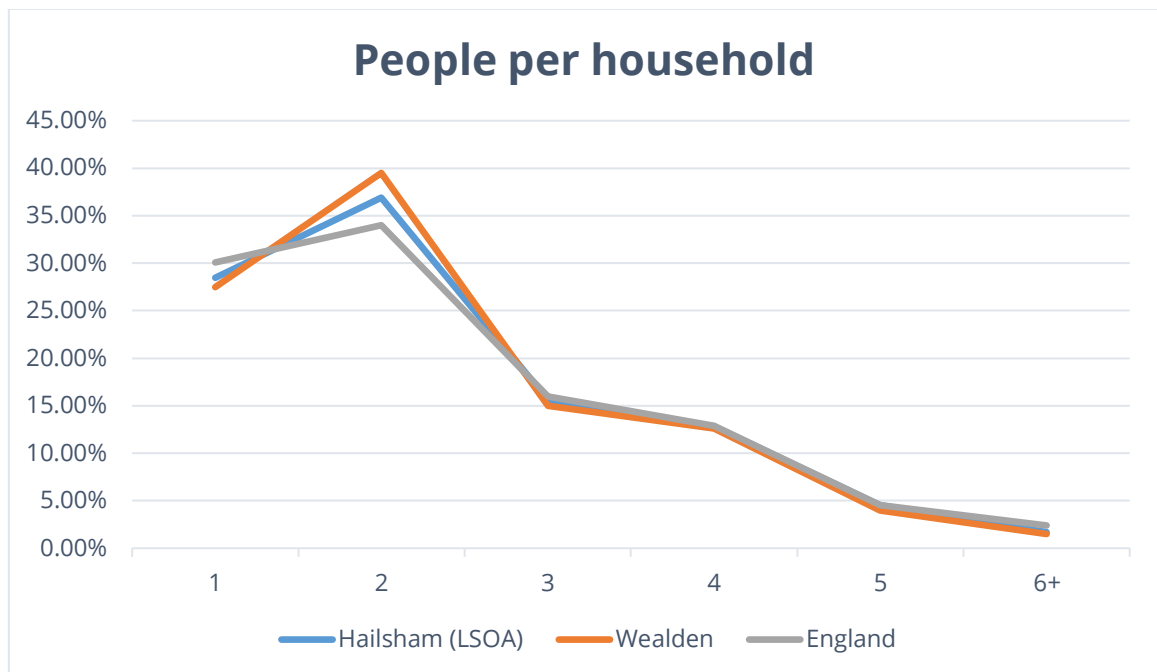


Figure 8: Chart showing household size, measured based on people per household, in Hailsham, Wealden and England, source: Office for National Statistics, Census 2021, TPD Calculations.

The average household size in Hailsham is around 2.31 people per home. This is broken down further in Table 18, to show the composition of households. The average household size is similar to that for Wealden, although slightly lower than the national average (2.35 people per home).

There are slightly fewer one-person households in Hailsham than across England, although the proportion is close to that for Wealden as a whole. However, Hailsham does have a slightly higher share of older single-person households than Wealden and England. In contrast, the proportion of “other” one-person households is well below England, but almost identical to the Wealden average. This suggests that, in Hailsham (and Wealden), there are fewer younger singles living alone than there are nationally.

Within “one family only” households, Hailsham’s total is slightly below Wealden but clearly above the average for England as a whole. Hailsham has more older couple households than England but fewer than Wealden, and sits between Wealden and England for families without children. Families with dependent children are also “in-between”. Notably, Hailsham has a higher share of families with non-dependent children (11.0%) than both Wealden (10.5%) and England (9.6%), indicating more households where adult children remain at home.

Information on household size and housing type is also revealed through analysis of occupancy ratings reported in the Census 2021.

An occupancy rating of ‘0’ means that the number of bedrooms in the home matches the family size and composition. For example, a family of 4 people, including 2 adults and 2 children, occupying a 3-bed home, would have an occupancy rating of ‘0’. An occupancy rating of +1 or +2 means that families are under-occupying their home and have more rooms available in their home than they may need. Where the occupancy rating is reported as ‘+2’, this means that there are two spare bedrooms in the home.

Household Type	Breakdown of household type	Hailsham (LSOA)	Wealden	England
One person household	Aged 66 and over	16.86%	16.02%	12.35%
One person household	Other	11.65%	11.44%	17.87%
One person household	Total	28.51%	27.46%	30.22%
One family only	All aged 66 and older	12.44%	14.63%	8.11%
One family only	With no children	17.93%	19.25%	17.64%
One family only	With dependent children	25.21%	23.3%	26.47%
One family only	With non-dependent children ⁽¹⁾	11.04%	10.53%	9.56%
One family only	Total	66.62%	67.71%	61.78%
All other household types	Total	4.87%	4.83%	8.0%

Table 18: Breakdown of household composition in Hailsham in comparison with Wealden and England, course: Office for National Statistics, Census 2021, TPD Calculations

Notes to table:

(1) Refers to households containing children who are older than 18 e.g.: students or young working people living at home.

Occupancy ratings for Hailsham (at the LSOA level) are presented in Table 19. This shows that, in Hailsham, most households have more bedrooms than they need, with three-quarters of all homes being under-occupied (i.e.: they have at least one spare bedroom).

Under-occupation is most pronounced among older households and families without children. Younger singles also commonly under-occupy homes. By contrast, overcrowding is concentrated among families with children, albeit that more than half of all households in this category benefit from additional space.

This suggests that Hailsham's housing stock is skewed toward larger homes occupied by older households, with plentiful spare bedrooms among older residents, and a potential mismatch between family housing needs and available/affordable stock for households with children.

Household type	+2 rating	+1 rating	0 rating	-1 rating
Family 66+	65.92%	31.20%	2.88%	0.0%
Single person 66+	41.27%	43.06%	13.87%	1.8%
Family under 66 – no children	63.12%	32.09%	4.54%	0.25%
Family under 66 – dependent children	24.27%	27.91%	38.58%	9.24%
Family under 66 – adult children	31.16%	33.87%	31.06%	3.91%
Single person under 66	40.04%	36.97%	21.07%	1.92%
All households	42.04%	33.47%	20.39%	4.1%

Table 19: Occupancy rating by household type in Hailsham (LSOA), source: Office for National Statistics, Census 2021, TPD Calculations

Summary

The data within this section of the report shows that:

Housing stock and type

- The stock of homes in Hailsham increased between the 2011 and 2021 Census, with the largest growth being in larger 4+ bedroom homes, albeit the stock of these still falls below the Wealden average.
- Detached and semi-detached homes dominate Hailsham's housing stock (over two-thirds combined).
- The stock of flats in Hailsham has grown fastest between the 2011 and 2021 Census, but remains a relatively small share, and which is well below the national average.
- Bungalows form a fairly significant part of the total housing stock, accounting for 17% of all property types, exceeding the proportion nationally and at District-level.

Household composition

- The average household size in Hailsham is 2.31 people, which is similar to that for Wealden as a whole and slightly below the national average.
- One-person households make up 29.2%, which includes a relatively high share of people aged 66+ living on their own.
- The proportion of families with dependent and non-dependent children living in Hailsham is slightly higher than found across Wealden as a whole.

Occupancy patterns

- Around three-quarters of homes are under-occupied, with 42% having two or more spare bedrooms.
- Under-occupation is most pronounced among older households and families without children; younger singles also under-occupy.
- Overcrowding is concentrated among families with dependent children (9.2%), though most still have some spare space.
- This indicates a potential mismatch between housing size and household needs, with large homes often occupied by smaller, older households.

Implications for housing needs

- The data may suggest that the high proportion of spare bedrooms in homes occupied by older households reveals a need for the provision of smaller and accessible homes that would enable households to downsize. However, the two do not always correlate as larger homes may be required for family members to visit and for the provision of care at home. Equally, emotional attachment to the home and social ties that have been formed mean that many people may not wish to downsize.
- The ageing population coupled with the high proportion of bungalows in the area may though indicate that there is a desire for age-friendly housing and services to be provided in Hailsham.
- Despite the points above, the pressure on space for families with children points to a demand for affordable mid-sized homes (3 bedrooms). Although the stock of larger 4+ bedroom homes has been growing, it sits below the Wealden average and could benefit from increasing further to help resolve space issues that families may face. However, should opportunities for downsizing exist for older households, this could free up larger homes for younger families to move into.
- The proportion of flats in Hailsham is low compared to the national average, and although this stock of house type has grown, there may be scope for ongoing delivery of smaller units, particularly for younger households and first-time buyers.

5. Affordability

Tenure types

This section of the report considers tenure type and the affordability of homes in Hailsham.

Unless otherwise stated, the data presented in this section is taken from a combination of the 2011 and 2021 Census and, as before, is therefore based on LSOA geography for Hailsham.

It is also to be noted that the categories reported in the Census changed between 2011 and 2021. The key difference is that the 2021 Census no longer reports 'shared ownership' as a separate category but instead merges that with homes reported as being 'owned with a mortgage'. To allow for a like for like comparison between the 2011 and 2021 Census data, the 2011 categories have been merged to match those used in 2021, as presented in Table 20.

2011 Census categories	Category that 2011 Census data is merged with for consistency with 2021 Census data
Owned outright	Owned outright
Owned with a mortgage or loan	Owned with a mortgage or loan or shared ownership
Shared ownership (part owned and part rented)	Owned with a mortgage or loan or shared ownership
Social rented	Social rented
Private rented	Private rented or lives rent free
Living rent free	Private rented or lives rent free

Table 20: Tenure categories in 2011 Census matched with categories reported in the 2021 Census

The breakdown of houses in Hailsham, by tenure type, and how this has changed between the 2011 and 2021 Census, is presented in Table 21. This indicates that, over the ten-year period, the proportion of homes owned outright has remained relatively stable, but that the proportion of those owned with a mortgage has decreased, being partially offset by those living in rented accommodation.

Tenure Type	2011	2021 *	Change between 2011 and 2021
Owned outright	39.1%	40.9%	+1.8%
Owned with a mortgage or loan or shared ownership	36.1%	32.4%	-3.7%
Social rented	14.4%	14.7%	+0.3%
Private rented or lives rent free	10.4%	12.0%	+1.6%

Table 21: Proportion of tenure types in Hailsham and change in stock between the 2011 and 2021 Census, source: Office for National Statistics, Census 2011 and 2021. All percentages rounded. () Excludes LSOA that extended into Fletching in 2011 and subsequently redrawn for the 2021 Census*

For comparison purposes, Table 22 shows the breakdown of tenure types in Hailsham, Wealden and nationwide.

This shows that overall, in Hailsham, homeownership is high. Although below Wealden levels it is well above the national average. The proportion of homes owned outright is lower than in Wealden but those with a mortgage is on a par with the Wealden average. The proportion of households in socially rented accommodation is correspondingly lower than the national average, and broadly mid-way between the Wealden and national levels. Within the rented sector, the housing stock in Hailsham is weighted toward social rent than in Wealden, and less reliant on the private rented sector than nationally. This is illustrated in Figure 9.

Tenure Type	Hailsham (LSOA)	Wealden	England
Owned outright	40.1%	44.7%	32.5%
Owned with a mortgage or loan or shared ownership	33.4%	33.4%	29.8%
Social rented	14.6%	8.4%	17.1%
Private rented or lives rent free	11.9%	13.5%	20.6%

Table 22: Proportion of tenure types in Hailsham, Wealden and England, source: Office for National Statistics, Census 2021. All percentages rounded.

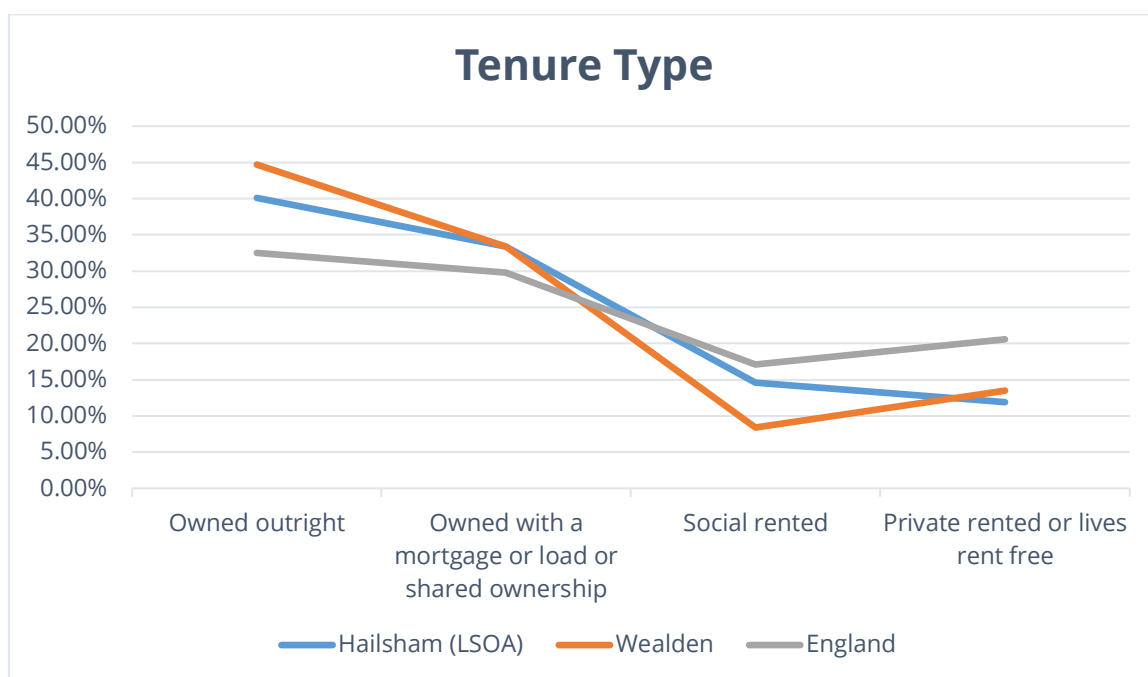


Figure 9: Chart showing proportion of tenure types in Hailsham, Wealden and England, source: Office for National Statistics, Census 2021

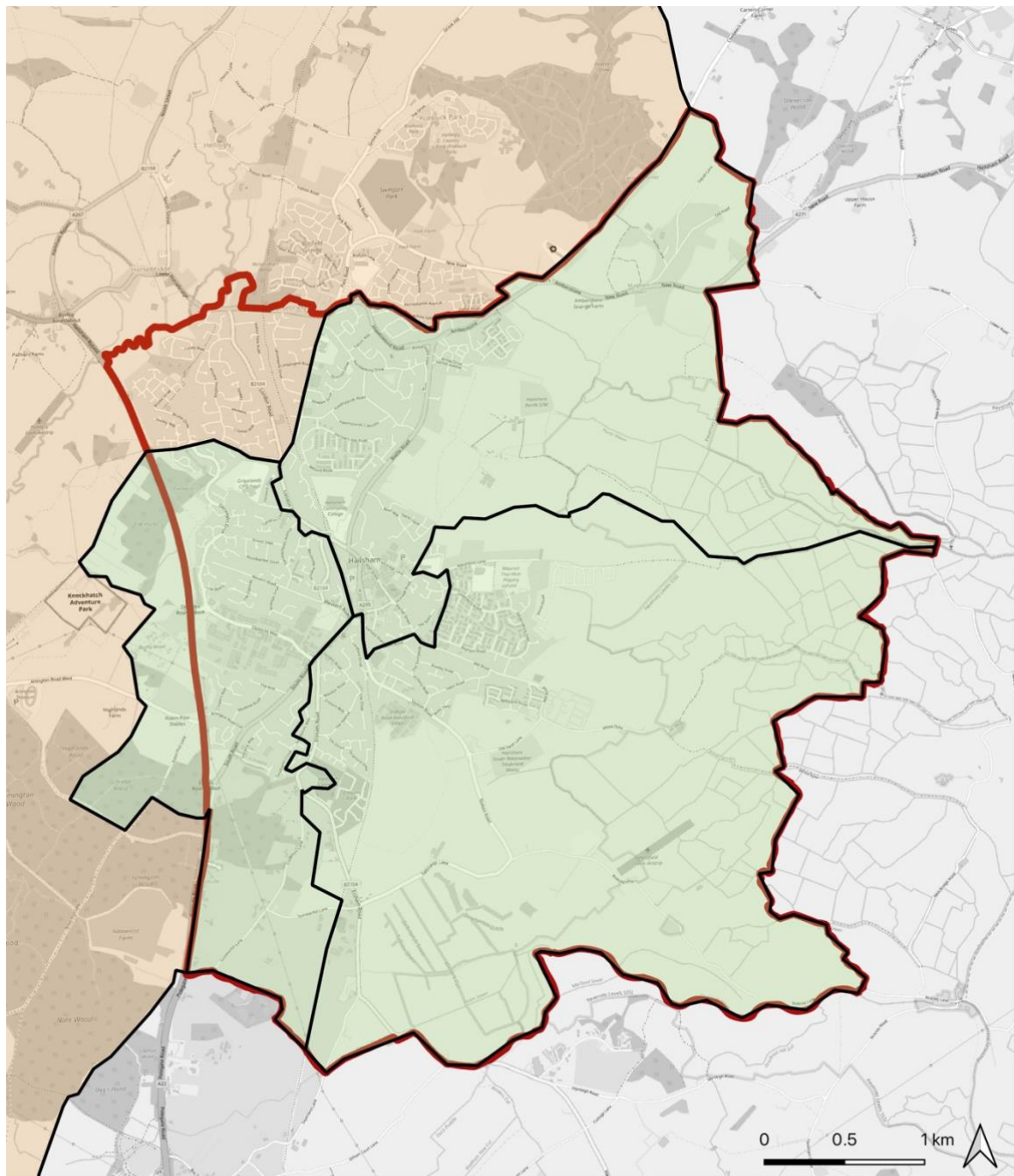
House prices

Median house price data for Hailsham is shown in Table 23 and Table 24. This is based on Land Registry Open Data using the Price Paid Data Report Builder for the period 2015 – 2023 and filtering by location (this period has been used rather than reviewing data up to 2025, allowing for the figures to be compared with information compiled by the ONS: see below).

The Paid Price Data shown in Table 23 and Table 25 is also compared with prices for the same house types as recorded at the MSOA level for Hailsham (Figure 10) and for Wealden as a whole. The MSOA data for Hailsham excludes the north western part of the built-up area of the town. This is because the MSOA for that area is extensive, covering large parts of Hellingly and Fletching parishes. It thus represents the best fit for Hailsham. Use of MSOA data is important because it allows for comparison with information on household incomes which are available at this level and considered further in the next section. Data for Wealden is taken from ONS data for geographies.

Between 2015 and 2023 median prices for all property types in both Hailsham and Wealden rose steadily, with the sharpest uplift through the Covid-19 pandemic years (roughly 2020–2022). Detached homes show the largest absolute gains, with semi-detached and terraced properties also following similar upward paths. Flats and maisonettes remain the lowest-priced housing type, experiencing lower rates of growth.

Property prices in Hailsham are consistently lower than across Wealden. The gap is most pronounced for detached houses, moderate for semi-detached and terraced homes, and narrowest for flats and maisonettes, where Hailsham tracks close to district averages. In short: prices have climbed in both places, but Hailsham offers a discount relative to Wealden (mainly in respect of larger family houses) while the difference for smaller homes is relatively modest. This is illustrated in Figure 11.



Map data © OpenStreetMap contributors. Contains UK government data licensed under Open Government Licence v3.0.

- Hailsham Civil Parish boundary
- Middle Super Output Areas considered in the study
- Middle Super Output Area not considered in the study

Figure 10: The Middle Super Output Areas (MSOA) considered in the study in comparison with the Civil Parish boundary

Year	Detached properties Hailsham (Town)	Detached properties Hailsham (MSOA)	Detached properties Wealden	Semi-detached properties Hailsham (Town)	Semi-detached properties Hailsham (MSOA)	Semi-detached properties Wealden
2015	£282,217	£270,317	£365,000	£214,026	£200,492	£241,000
2016	£313,715	£296,667	£385,000	£231,615	£227,483	£257,500
2017	£321,067	£314,000	£410,000	£242,931	£233,750	£270,000
2018	£351,374	£336,417	£425,000	£258,632	£245,500	£280,000
2019	£345,996	£347,167	£430,000	£253,908	£253,333	£290,000
2020	£344,867	£330,000	£429,995	£256,591	£248,333	£296,500
2021	£368,941	£339,000	£495,000	£270,602	£261,000	£320,000
2022	£402,353	£371,650	£500,000	£289,787	£286,000	£335,000
2023	£434,870	£405,733	£575,000	£320,236	£308,000	£356,250
Growth 15-23	+54.1%	+50.1%	+57.5%	+49.6%	+53.6%	+47.8%

Table 23: Median house prices for detached and semi-detached properties in Hailsham and Wealden as a whole over the period 2015 - 2023, source: Land Registry Paid Price Data / ONS Median House Prices for Administrative Geographies, HPSSA Dataset 9 and HPSSA Dataset 2

Year	Terraced properties Hailsham (Town)	Terraced properties Hailsham (MSOA)	Terraced properties Wealden	Flats / Maisonettes Hailsham (Town)	Flats / Maisonettes Hailsham (MSOA)	Flats / Maisonettes Wealden
2015	£188,439	£178,150	£215,000	£109,407	£106,667	£142,748
2016	£202,542	£193,833	£242,000	£132,337	£128,317	£159,950
2017	£216,426	£208,492	£250,000	£193,409	£150,150	£170,000
2018	£220,756	£214,167	£262,000	£135,060	£124,667	£176,000
2019	£224,551	£228,583	£265,000	£155,709	£143,483	£175,000
2020	£228,156	£223,417	£260,000	£140,046	£120,125	£173,500
2021	£231,574	£222,917	£275,500	£140,386	£150,600	£175,000
2022	£240,689	£230,333	£292,250	£159,664	£159,825	£188,000
2023	£282,405	£272,000	£325,000	£165,379	£176,992	£197,000
Growth 15-23	+49.9%	+52.7%	+51.2%	+51.2%	+65.9%	+38.0%

Table 24: Median house prices for terraced properties, flats and maisonettes in Hailsham and Wealden as a whole over the period 2015 - 2023, source: Land Registry Paid Price Data / ONS Median House Prices for Administrative Geographies, HPSSA Dataset 9 and HPSSA Dataset 2

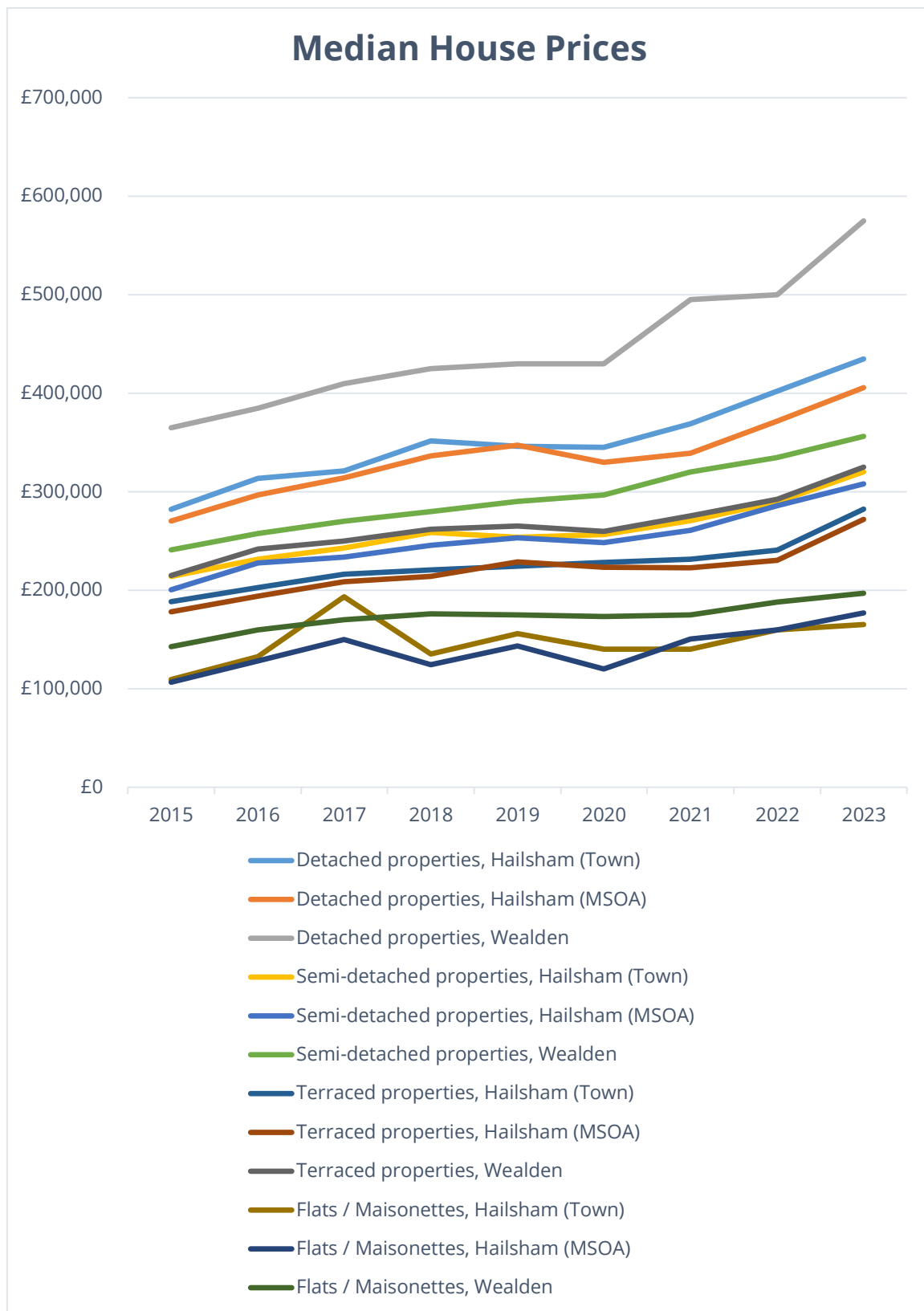


Figure 11: Chart showing median house prices by house type and year in Hailsham and Wealden as a whole over the period 2015 - 2023, source: Land Registry Paid Price Data / ONS Median House Prices for Administrative Geographies, HPSSA Dataset 9 and HPSSA Dataset 2

Affordability: ownership

Open Market

Household incomes determine the ability of households to exercise choice in the housing market, and, consequently, the need for different housing products in an area.

Household income data published by ONS is available at the Middle Super Output Area (MSOA), of which there are three that cover Hailsham (as shown in Figure 10). The average gross annual income for all households in each of the MSOAs area is £36,100, £40,500 and £36,100. This gives a combined average across the three MSOAs of £39,233 as of the financial year ending 2020 (published in October 2023).

The total gross annual income figure is typically used by mortgage lenders to assesses the ability of a household to afford to borrow money. An income multiple of 3.5 is used by The Financial Conduct Authority (FCA) as the standard assumption for single mortgage applicants. Higher multipliers are available, but it is good practice to be conservative. This multiple is commonly applied to 90% of the transaction price.

Application of this calculation to properties in Hailsham is presented in Table 25, which takes paid price data for MSOAs presented (Table 23 and Table 24) and compares this with the average gross household income for the same geography. Paid price data for houses has been recalibrated to 2020 values, adjusting for inflation, and allowing comparison with average incomes reported in 2020. The price adjustments are based on use of the [Bank of England Inflation Calculator](#). The adjusted median house price in Hailsham (across the MSOAs) for a detached home is £329,600 at 2020 prices, falling to £137,840 for a flat or maisonette.

The calculations presented in Table 25 indicate that, for a household to be able to afford to buy a detached property of average price in Hailsham, they would need to be earning more than twice the average annual income (based on an income multiple of 3.5). This reduces for semi-detached and terraced properties, although the incomes required would still exceed the average household income. The only properties that are affordable on average incomes are flats and maisonettes.

This suggests that the average house is unaffordable in Hailsham. However, many house buyers are likely to have access to some equity which they are able to put towards the purchase price and thus reduce the mortgage loan to value. This may not though apply to non-dependent children living at home but looking to move to their own home, and whose income levels and savings are likely to be below the average for the area, potentially putting the cost of a property in Hailsham (other than a flat or maisonette) out of their reach.

	Detached properties	Semi-detached properties	Terraced properties	Flats / Maisonettes
Median price, adjusted to 2020 values	£329,600	£247,640	£215,890	£137,840
Mortgage value (90% of property)	£296,640	£222,880	£194,300	£124,060
Income required (mortgage value / 3.5)	£84,750	£63,680	£55,510	£35,450
Affordable on average income of £39,233 (at 2020)	No	No	No	Yes
Income required (mortgage value / 4.5)	£65,920	£49,530	£43,180	£27,570
Affordable on average income of £39,233 (at 2020)	No	No	No	Yes

Table 25: Affordability of homes in Hailsham based on house sales prices (adjusted to 2020), household incomes (at 2020) and mortgage values, source: Land Registry Paid Price data, ONS

Shared ownership

Shared ownership gives households the option to buy a portion of a home while paying rent on the remaining share held by the provider. The initial equity share can vary, with current rules allowing purchases from as little as 10% and up to 75%, although many buyers traditionally start between 25% and 75%.

Over time, households can increase the share they own, gradually moving towards full ownership if their circumstances allow. The rent charged on the unsold equity and the size of the share purchased are both set through the agreement with the provider, meaning the arrangement can be tailored to different financial situations.

In certain situations, such as when a household is experiencing financial strain and risks losing the home, providers may allow the owner to reduce the share they hold, effectively moving to a smaller ownership share.

Shared ownership is open to first-time buyers, former homeowners who cannot currently afford to buy on the open market, existing shared owners, and eligible social housing tenants. To be eligible for shared ownership the household income of the applicant must not exceed £80,000 and they must meet standard credit and affordability assessments.

To assess the affordability of shared ownership in Hailsham, the following calculations use the median prices for flats, terraced and semi-detached homes shown in Table 23 and Table 24 of this report. The assessment is carried out for three initial equity shares of 10%, 25% and 50%. A 10% deposit is assumed, and the income needed for the mortgage element is based on a loan to income ratio of 3.5. Rent on the unsold share is calculated at 2.5% of its value, with the income requirement for this component assessed using the assumption that no more than 30% of gross income is spent on rent. Combining these two elements provides an estimate of the annual income needed to access shared ownership in Hailsham. These calculations are shown in Table 26 – Table 28.

Based on the average household income of £39,233 in Hailsham, shared ownership appears to provide a viable route into home ownership for certain property types. The income required to purchase a 10%, 25% or 50% share of a flat falls well below the local average, indicating that all three options are broadly affordable to households on typical earnings, subject to the share of the property that is purchased. For flats and maisonettes, shares of up to 50% appear to be affordable (based on average gross household incomes), falling to 25% for terraced and semi-detached properties. This suggests that shared ownership can offer an accessible pathway into home ownership in Hailsham, particularly for smaller properties or lower initial equity shares.

Shared ownership affordability for a flat / maisonette (median price £137,840)	10% share	25% share	50% share
Equity share value	£13,784	£34,460	£68,920
Deposit (10% of share value)	£1,378	£3,446	£6,892
Mortgage required	£12,406	£31,014	£62,028
Income needed for mortgage	£3,545	£8,861	£17,722
Unsold share value	£124,056	£103,308	£68,920
Annual rent (2.5% of unsold share)	£3,101	£2,585	£1,723
Annual income needed for rent	£10,326	£8,608	£5,738
Total annual income required	£13,871	£17,469	£23,460

Table 26: Shared ownership affordability for a flat/maisonette (median price £137,840), Hailsham Source: Land Registry Paid Price data, ONS, TPD Calculations

Shared ownership affordability for a terraced property (median price £215,890)	10% share	25% share	50% share
Equity share value	£21,589	£53,973	£107,945
Deposit (10% of share value)	£2,159	£5,397	£10,795
Mortgage required	£19,430	£48,576	£97,150
Income needed for mortgage	£5,551	£13,879	£27,757
Unsold share value	£194,301	£161,918	£107,945
Annual rent (2.5% of unsold share)	£4,858	£4,048	£2,699
Annual income needed for rent	£16,180	£13,477	£8,992
Total annual income required	£21,731	£27,356	£36,749

Table 27: Shared ownership affordability for a terraced property (median price £215,890), Hailsham Source: Land Registry Paid Price data, ONS, TPD Calculations

Shared ownership affordability for a semi-detached property (median price £247,640)	10% share	25% share	50% share
Equity share value	£24,764	£61,910	£123,820
Deposit (10% of share value)	£2,476	£6,191	£12,382
Mortgage required	£22,288	£55,719	£111,438
Income needed for mortgage	£6,368	£15,920	£31,839
Unsold share value	£222,876	£185,730	£123,820
Annual rent (2.5% of unsold share)	£5,572	£4,643	£3,096
Annual income needed for rent	£18,548	£15,463	£10,309
Total annual income required	£24,916	£31,383	£42,148

*Table 28: Shared ownership affordability for a semi-detached property (median price £247,640), Hailsham
Source: Land Registry Paid Price data, ONS, TPD Calculations*

Affordability: Rental market

Private rental market

A review of available rental properties in Hailsham was undertaken using the property website <http://home.co.uk/>. At the time of the review in January 2026 a total of 34 properties with an average of 2.65 bedrooms per home were available on the rental market, with an average monthly rental price of £1,274. Of the total available rental properties twelve comprised 2-bed homes, with an average monthly rental price of £1,440.

To allow for comparison with average incomes (as of 2020) and thus determine affordability levels, the prices have been reset to 2020 using the Bank of England inflation calculator. This results in a rental price of £1,023 for a two-bed property and an average of £1,156 across all property sizes.

The ONS deems rental properties to be affordable 'if a private-renting household would spend the equivalent of 30% or less of their gross income on rent', albeit that [ONS data](#) indicates that, across England, the average price of a private rented property comprises 34% of gross income. This reflects the reality that some households may choose (or, indeed, be compelled) to spend more than 30% of their income on renting. Based on this, a 2-bed private rented property in Hailsham would require a gross annual income of £40,920. This increases to £46,240 for an

average private rented property in Hailsham. This is based on the following calculation (example based on 2-bed property):

- A monthly rent of £1,023 equates to £12,276 per year
- If £12,276 equates to 30% of income, then the total income is $(£12,276/30) \times 100 = £40,920$

The average gross household income in Hailsham is £39,233. An entry level style two-bed private rented property would thus be unaffordable based on the ONS definition. However, given the ONS reports that the average cost of a private rented property comprises 34% of gross income in England, a monthly rental price of £1,111 (at 2020 prices) may be within the means of residents. However, larger properties may remain unaffordable to rent privately.

Affordable rented property

The Government has directed that the costs of affordable rented housing (including service charges) must not exceed 80% of gross market rents and, at the same time, must not be lower than would be charged as social rent (see section below).

Affordable rented properties are owned and managed by a registered provider who, in reality, may often charge less than the 80% thresholds, particularly where households rely on Universal Credit and must remain within the benefit cap. Larger homes are particularly affected, as higher market rents would otherwise make them unaffordable for families on low incomes.

Affordable rent levels are available at the local authority level (i.e.: Wealden) are taken from the [Regulator of Social Housing's Statistical Data Return](#) and are used in this report in lieu of more local level data being available for Hailsham. The standard assumption that housing costs should not exceed 30% of gross household income is used to estimate the income required to access this tenure type, as shown in Table 29 for different property sizes. This indicates that affordable rent levels in Wealden vary substantially by property size, with weekly rents ranging from £150.75 for a one-bedroom home to £275.61 for a four-bedroom property. When converted to annual costs and assessed against the 30% affordability threshold, the income required to access this tenure ranges from £26,130 for a one-bedroom home to £47,773 for a four-bedroom home. The overall average rent across all property sizes results in an indicative income requirement of £33,377. All except 4-bed homes are considered affordable based on average household incomes in Hailsham.

	1 bed	2 bed	3 bed	4 bed	Average
Average affordable rent per week	£150.75	£181.16	£220.52	£275.61	£192.56
Annual average affordable rent	£7,839	£9,680	£11,467	£14,332	£10,013
Income required	£26,130	£32,267	£38,223	£47,773	£33,377

Table 29: Affordable rent levels (£) in Wealden, Source: Regulator of Social Housing, TPD Calculations

Social rented property

Socially rented housing is typically the most affordable form of housing. The cost of social rent is based on a formula established by the Government (known as the 'Formula Rent') which is based on a combination of the sales value and size of the home, and local income levels. This is intended to result in rental levels that are significantly lower than those in the private rented sector.

Information on social rent levels is taken from the [Regulator of Social Housing's Annual Statistical Data Return](#), which reports average rents and stock characteristics for housing associations at local authority level. For the purposes of the calculations in this report the data for Wealden as a whole is used as a proxy for Hailsham.

To estimate the income required to afford social rent, the assessment assumes that housing costs should not exceed 30% of gross household income (as per the ONS definitions). Applying this threshold to the overall average rent across different property sizes in Table 32 provides an estimate of the income needed to access social rented housing. For Wealden, and consequently Hailsham, this means that a minimum annual income of £21,903 is required to afford social rented housing across all property sizes. For smaller homes with one or two bedrooms, the minimum income needed starts at £17,500. This indicates that, based on average gross household incomes, social rented properties, of all sizes, are affordable in Hailsham.

	1 bed	2 bed	3 bed	4 bed	Average
Average social rent per week	£100.96	£121.50	£136.75	£162.56	£126.36
Annual average social rent	£5,250	£6,318	£7,101	£8,453	£6,571
Income required	£17,500	£21,060	£23,670	£28,177	£21,903

Table 30: Social rent levels (£) in Wealden, Source: Regulator of Social Housing, TPD Calculations

Summary

Affordability analysis for Hailsham shows that private rental properties are generally beyond the reach of households on average incomes. A 2-bed home in the private market would require an annual income of around £40,920 to meet the 30% affordability threshold, compared to gross average incomes of £39,233 in Hailsham. While some households may stretch to the national average of 34% of income spent on rent, larger homes remain unaffordable for most.

Affordable rented housing, typically capped at 80% of market rents, offers better accessibility. 1- to 3-bed homes fall within reach for households earning the local average income, but 4-bedroom properties remain out of scope without additional subsidy. Social rented housing is the most affordable option, with all property sizes accessible to Hailsham households, requiring incomes starting at £17,500 for smaller homes.

These findings suggest that future housing delivery should focus on smaller units and a higher proportion of affordable and social rented homes. Mixed-tenure developments prioritising 1- to 2-bedroom properties will be essential to meet local needs and address affordability gaps.

Summary

The data within this section of the report shows that:

- Around 73% of homes in Hailsham are owner-occupied, which is slightly below Wealden but well above the national average. However, the share of homes owned with a mortgage fell by 3.7% between 2011 and 2021, while private renting increased by 1.6%, suggesting a growing demand for rental property which may be linked to and exacerbate affordability pressures for buyers.
- Median prices for all property types increased by around 50–55% between 2015 and 2023, with detached homes now averaging £434,870 and terraced houses

£282,405. Flats remain the most affordable housing type but have also seen significant growth (over 50%).

- House prices are generally lower in Hailsham than they are across Wealden as a whole, particularly for larger homes, but the gap is narrowing for smaller properties. This suggests that Hailsham is relatively more affordable within the district, which may attract households priced out of other areas.
- In terms of open market housing, and based on average household incomes (£39,233) and standard lending multiples, detached, semi-detached, and terraced homes are unaffordable for the average household. It is only flats and maisonettes that are affordable for the average household, albeit many households have access to equity which will enable them to purchase a larger property. The affordability challenge is thus most likely to affect first-time buyers and younger residents who, without significant savings or equity, are likely to struggle to access anything other than flats, increasing pressure on affordable housing and starter homes. Shared ownership options significantly improve affordability, depending on the shared purchased, and is this a viable and important route into home ownership in Hailsham, particularly for smaller homes and or low initial shares of ownership.
- The cost of private renting is not dissimilar to that across the country as a whole, with households needing to spend, on average, just over 30% of their income of renting. This may make private renting marginally unaffordable. Affordable rent provides a more viable alternative, with 1-3 bed homes being within reach of households on average incomes. The rent on a 4-bed home requires higher than average household incomes. Social rent is the most affordable housing option, with all house sizes appearing affordable to households.

6. Specialist accommodation

Introduction

This section of the report utilises modelling set out in the WHLNA to estimate the future population of Hailsham that might be aged 65 or over, and what this means in terms of the provision of specialist accommodation to meet the housing needs of this age group.

Population projections

The WHLNA model indicates that it is the 65 and over age band that will grow most over the next twenty years. It is helpful to break this down further to better understand what this means for potential future housing needs. Again, the WLHNA models this and suggests that:

- The population of those aged under 65 will grow by 18.3%
- The population of those aged 65 – 74 will grow by 37.2%
- The population of those aged 75 – 84 will grow by 68.8%
- The population of those aged 85 and over will grow by 92.8%

These figures are for the period 2019 – 2039 and so not an exact fit with the data available for Hailsham. They are also predicated on delivery of 1,225 new homes across Wealden per annum (which is lower than application of the Standard method would imply). Application of the WLHNA is thus not an exact science but is used in lieu of a town or parish level mode. The growth figures generated through use of the model are presented in Table 31.

Application of the model shows that the population of all older residents will grow significantly, with those aged 75+ representing a fairly high proportion of the total population growth.

Age band	2021 population	% growth assumed in WHLNA model	Estimated 2041 population	Population growth 2021 - 2041
Under 65	15,922	18.3%	18,836	+2,914
65 - 74	2,528	37.2%	3,468	+940
75 - 84	1,825	68.8%	3,081	+1,256
85 and over	817	92.8%	1,575	+758
Total 75+	2,642	-	4,656	2,014

Table 31: Population projections for older persons Hailsham (LSOA level), based on application of model in the WLHNA, data sources: Office for National Statistics, Census 2021, and WLHNA

Housing need

The implications of a growing and ageing population are likely to have a bearing on the type of homes that are required to meet the different needs of the population in the future. There are a range of different housing types that may be suitable, including bungalows which currently comprise a fairly large proportion of the housing stock. Other typologies include specialist housing and care, as well as accessible and adaptable homes, including those which are wheelchair accessible (under category M4(2) and M4(3) of the Building Regulations).

The Housing Local Improvement Network (LIN), in their [Strategic Housing for Older People \(SHOP\) Toolkit](#), has established a series of thresholds for different forms of housing to meet the needs of the population aged 75+. The recommendations and the implications for Hailsham are shown in Table 32.

It implies that 1,170 homes will be required by 2041 to meet the housing needs of those aged 75+. Having said this, it is to be noted that the recommendations are just that and do not necessarily translate into a need for new homes. It may, for example, be that existing homes can be adapted to meet needs, or that the size of the existing home means that other family members could move in and care for their parents, should that be necessary.

In terms of where specialist accommodation should be provided, [Planning Practice Guidance](#) makes clear such that housing should be designed and built with inclusion and accessibility in mind. It recommends, for example, that housing for people with disabilities and reduced mobility should be located in close proximity to services and facilities. This might mean that sites and opportunities within or in

close proximity to Hailsham town centre might be considered appropriate for this type of housing, being close to services, facilities and public transport provision.

Consideration should also be given to the building of new homes which are designed with adaptability and flexibility in mind. This recognises that many people prefer to stay living in their own home for as long as possible and where existing homes can be adapted to support the changing requirements of an ageing population. This is reflected in [Planning Practice Guidance](#) which advises that flexible and adaptable housing should be built from the outset, enabling owners to modify these as needed, saving on health and social costs, and thus the overall need for provision of new specialist housing. Flexibility in building form would also cater for a range of scenarios, include the ability for people to work at home separate from the main living space as well as opportunities for multi-generation homes that enable part of the home to be subdivided as a separate stand-alone unit with its own entrance, allowing older children and elderly family members to live independently.

Form of provision	Estimate of demand per thousand of the population aged 75+	Potential level of provision of specialist housing needed in Hailsham
Conventional sheltered housing to rent	60	280
Leasehold sheltered housing	120	559
Enhanced sheltered housing (divided 50:50 between that for rent and that for sale)	20	93
Extra care housing for rent	15	70
Extra care housing for sale	30	140
Housing based provision for dementia	6	28

Table 32: Potential level of provision of specialist housing needed for older people in Hailsham by 2041 based on recommendations set out in the Housing LIN SHOP Toolkit.

Summary

The data within this section of the report shows that:

- By 2041, the population aged 75+ in Hailsham is projected to increase by over 76% (from 2,642 to 4,656), with the 85+ age group nearly doubling (+92.8%). This demographic change has implications for housing needs.
- Based on the calculations, and use of the SHOP Toolkit, around 1,170 specialist homes will be needed by 2041 for residents aged 75+, including sheltered housing (both rental and leasehold), enhanced sheltered housing, extra care housing, and dementia-specific provision.
- The delivery of new homes for older people should prioritise accessibility and proximity to services, ideally near Hailsham town centre.
- However, families may wish to remain living in their existing homes and adapt these to changing circumstances. Equally, flexibility in new housing design should be encouraged to support changing demographic and lifestyle patterns, with adaptable layouts helping to meet future housing needs, reducing the need for extensive new specialist provision.

7. Conclusions

Findings

The headline findings from this study are:

- a. 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.
- b. The base requirement calculated through the Standard Method (based on a 0.8% increase over the existing housing stock) is significantly increased by application of the affordability adjustment, with the affordability gap (house price to income ratio) being a figure of 12.54 in Wealden.
- c. The population of Hailsham has grown and is expected to continue growing, particularly in the older age groups (i.e.: 65 and over). At the same time, there is expected to be fairly large growth in younger families in Hailsham (those with a household reference person aged 25-34).
- d. Use of the Standard Method implies that between 180 and 227 new homes are required on a per annum basis in Hailsham. However, mapping average household sizes in Hailsham against expected population growth would suggest a lower figure of 125 homes per annum.
- e. Application of population and household modelling would suggest that the supply of new homes should focus on delivery of larger properties. However, this gives a false impression as it simply continues existing patterns of accommodation and does not account for matters such as affordability, under and over occupancy, and the potential desire for older households to downsize.
- f. The Housing stock is currently dominated by detached and semi-detached homes. Although the stock of larger 4+ bedroom homes in Hailsham is below the district average, the total number of this size of home has increased and, proportionally, has seen the greatest increase in all house sizes in Hailsham between the 2011 and 2021 Census. The stock of flats is under-represented in terms of national averages.
- g. The size of home is reflected in data on occupancy levels, which indicates that three-quarters of all homes in Hailsham have spare bedrooms (and are thus under-occupied). This is particularly noticeable amongst older households. A

smaller proportion of households live in overcrowded homes, mainly affecting families with dependent children.

- h. Home ownership is high but fell slightly between 2011 and 2021. At the same time house prices increased. The cost of detached, semi-detached and terraced homes is out of reach for those households on average incomes. In reality, the level of home ownership in Hailsham (either with or without a mortgage) indicates that many households will have access to some form of equity and will be able to use this to contribute towards the cost of a new home, particularly older households who may be looking to downsize.
- i. Home ownership is increasingly difficult for first-time buyers, with rising prices and relatively modest local incomes meaning that detached, semi-detached and terraced homes are out of reach of average earners. Young adults and those looking to form new households are least able to access ownership and may depend on higher-than-average incomes or benefit from parental / family help.
- j. Flats and maisonettes are the only accessible open-market point for many people, although the supply of smaller homes in Hailsham is more limited. Shared ownership options thus fill an important gap, offering a realistic route to ownership particularly for younger households.
- k. The affordability pressures may place increasing reliance on renting. However, the private rented market also has affordability challenges, with affordable rent and social rent being a more viable and important option for many.
- l. The population of Hailsham is growing and, at the same time, ageing. In particular, the population aged 75+ will grow by around three quarters. This will have an implication on the housing stock, potentially requiring delivery of age-appropriate housing, including accessible and adaptable housing types that help support ageing in place.

Recommendations

The following recommendations are presented based on the above:

- a. The data suggests that there are a high proportion of spare bedrooms in homes occupied by older households, and that the provision of smaller homes may provide opportunities for downsizing. Although there may be no desire for some people to downsize for various reasons, increasing the stock of smaller homes (including bungalows, which are already fairly well-represented in Hailsham) may provide this opportunity.

- b. Should opportunities for downsizing be provided this may 'free-up' larger properties for those households looking for additional space, including families with dependent children who are currently living in crowded properties. However, the proportion of households in crowded properties is small compared to those living in under occupied homes. Whilst provision of larger homes may be needed to help resolve this, it needs balancing with provision of smaller and mid-size properties that are affordable and which are also suitable for household sizes.
- c. Provision of age-appropriate housing, including specialist accommodation, is likely to be needed in Hailsham to meet the needs of the ageing population. This can also help to free-up properties for families looking to move to a larger property. Where specialist accommodation is to be provided it should be in locations that are in good proximity to services and facilities (e.g.: in or in close proximity to the town centre). Alongside this, new homes should be built with accessibility and adaptability in mind, allowing people to adapt their homes and to age in place. Where specialist housing is provided, secure tenures should be offered.
- d. Equally, it is only flats and maisonettes that are affordable to those households earning average incomes (and who have limited access to some form of equity). However, the stock of flats and maisonettes in Hailsham is under-represented. Increasing the supply of this housing type may help first-time buyers and younger households to enter the housing market.
- e. The delivery of market housing alone will not address affordability barriers in Hailsham. Provision of shared ownership, affordable rent and social rented housing is essential.
- f. The emerging Wealden Local Plan will set thresholds in terms of the level of affordable housing to be provided as part of new developments. As far as possible, the highest viable proportions should be pushed for. In addition to 'traditional' affordable housing products, other products may also be supported to help address the affordability gap in Hailsham. This includes promotion of self and custom build homes as well as support for community land trusts to bring forward homes that remain affordable in perpetuity. However, this does not come without complexity as delivery of homes through community land trusts requires access to land and finance in the first instance.

The preferred mix of homes to be delivered through new development in Hailsham is compared with the findings deriving from the Housing Needs Survey undertaken alongside this assessment and presented in the combined summary report of the two.

HAILSHAM TOWN COUNCIL
Housing Needs Assessment

Final Report
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