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Wealden Local Housing Needs Assessment

Final Report

Iceni Projects Limited on behalf of
Wealden District Council

January 2026

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DISTRICT COUNCIL

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Assessment
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1. Executive Summary

Functional Geographies

- 1.1 Overall, this assessment concludes that the boundaries of the Wealden Housing Market Area (HMA) and sub-areas within the district remain the same as in the previous Local Housing Needs Assessment (LHNA).
- 1.2 The district has very clear links to Eastbourne as well as areas which closely relate to surrounding local authorities such as Tunbridge Wells, Lewes, Hastings & Rother and Crawley/Mid Sussex.

Housing Stock

- 1.3 As of 2024, Wealden had 65,159 dwellings and had increased its housing stock since 2011 at a faster rate than the South East region and nationally.
- 1.4 Housing delivery in Wealden has varied, although it is broadly in an upward trajectory. Completions peaked in 2023 when 1,138 additional dwellings were added to the housing stock.
- 1.5 Owner occupation is dominant in Wealden, with social renters proportionate to East Sussex, and private renting lower than the regional and national levels.
- 1.6 The housing stock in Wealden is dominated by detached and semi-detached homes, higher than the East Sussex and national averages.
- 1.7 Linked to this, there is a relatively higher proportion of three-bedroom and four-plus-bedroom properties in Wealden.

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- 1.8 Occupancy data shows 44.8% of Wealden households live in under-occupied properties, with overcrowding relatively low at 1.7%. This relates to the stock of larger homes and the ageing population.

Housing Market Dynamics

- 1.9 As of 2024, the median house price in Wealden was £375,000. Over time, house prices in Wealden have shown strong growth. In the last five years alone, prices have risen by 21.6%.
- 1.10 Affordability remains a significant challenge in Wealden. The workplace-based median affordability ratio (house price-to-income) in 2024 was 11.62.
- 1.11 However, the average private rent in Wealden is £1,237 per month, which is lower than the South East (£1,373) and England (£1,390) averages.
- 1.12 Rental prices have also increased steadily, with a 2.7% rise over the past year.
- 1.13 Despite being relatively more affordable than regional averages, rents remain high in absolute terms, contributing to affordability pressures.

Overall Housing Need

- 1.14 We have calculated the overall housing need set against the Standard Method. This shows a need for 1,457 dwellings per annum.
- 1.15 This calculation is based on an annual increase of 0.8% of the current stock of 74,857 (599), with an affordability uplift of 143%.
- 1.16 Our bespoke demographic projections suggest that the population might increase by 47,900 people over the 17-year plan period (a 28% increase) should the level of housing be delivered.

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- 1.17 As well as notable increases in the 'working-age' population (16-64) this would also contribute to a continued ageing of the population.
- 1.18 It was further estimated that population growth might be able to support between 18,900 and 28,300 additional jobs, depending on the assumptions made about commuting and economic activity, with higher economic activity likely to result in more job growth.

Affordable Housing Need

- 1.19 The evidence indicates that there is an acute need for affordable housing in the district (754 per annum).
- 1.20 The majority of affordable housing need is from households who are unable to buy OR rent (72%). This therefore points towards a need for rented affordable housing rather than affordable home ownership.
- 1.21 Despite the level of affordable housing need being high, it does not justify the Council increasing the overall Local Plan housing target.
- 1.22 The link between affordable need and overall need (of all tenures) is complex, and in trying to make a link, it must be remembered that many of those picked up as having an affordable need are already in housing (and therefore do not generate a net additional need for a home).
- 1.23 In addition, the private rented sector is providing benefit-supported accommodation for many households.
- 1.24 Overall, the analysis identifies a notable need for affordable housing, and it is clear that the provision of new affordable housing is an important and pressing issue in the area.

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- 1.25 It does, however, need to be stressed that this report does not provide an affordable housing target; the amount of affordable housing delivered will be limited to the amount that can viably be provided.
- 1.26 The evidence does, however, suggest that affordable housing delivery should be maximised where opportunities arise and the focus of that need should be rental accommodation and particularly social rental.

Affordable Housing Mix

- 1.27 The analysis suggests there will be a need for both social and affordable rented housing – the latter will be suitable particularly for households who are close to being able to afford to rent privately and possibly also for some households who claim full Housing Benefit.
- 1.28 It is, however, clear that social rents are more affordable and could benefit a wider range of households – social rents could therefore be prioritised where delivery does not prejudice the overall delivery of affordable homes.
- 1.29 The study also considers different types of Affordable Home Ownership (AHO) products (notably First Homes and shared ownership) as each may have a role to play.
- 1.30 Shared ownership is likely to be suitable for households with more marginal affordability (those only just able to afford to rent privately) as it has the advantage of a lower deposit and subsidised rent.
- 1.31 However, there was no evidence of a significant need for First Homes or discounted market housing more generally.
- 1.32 In deciding what types of affordable housing to provide, including a split between rented and home ownership products, the Council will need to consider the relative levels of need and viability issues.

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- 1.33 The Council should recognise, for example, that providing more AHO products may be more viable and therefore allow more units to be delivered, but at the same time noting that households with a need for rented housing are likely to have more acute needs and fewer housing options.

Housing Mix

- 1.34 The analysis of the future mix of housing is required to take account of demographic change, including potential changes to the number of family households and the ageing of the population.
- 1.35 The proportion of households with dependent children in Wealden is below the national average of 28% with around 25% of all households containing dependent children in 2021.
- 1.36 There are notable differences between different types of households, with married couples (with dependent children) seeing a high level of owner-occupation, whereas as lone parents are particularly likely to live in social and private rented accommodation.
- 1.37 There are a range of factors which will influence demand for different sizes of homes, including demographic changes; future growth in real earnings and households' ability to save; economic performance and housing affordability.
- 1.38 The analysis linked to future demographic change concludes that the following table represents an appropriate mix of affordable and market homes.

Table 1.1 Suggested size mix of housing by tenure – Wealden

	Market	Affordable home ownership	Rented affordable housing
1-bedroom	5%	20%	35%
2-bedrooms	35%	40%	30%
3-bedrooms	40%	30%	25%
4+-bedrooms	20%	10%	10%

Source: Iceni analysis

- 1.39 This takes account of both household changes and the ageing of the population as well as seeking to make more efficient use of new stock by not fully projecting forward levels of under-occupancy (which is notable in the market sector).
- 1.40 In all sectors, the analysis points to a particular need for 2- and 3-bedroom accommodation, with varying proportions of 1- and 4+-bedroom homes.
- 1.41 For rented affordable housing there is a clear need for a range of different sizes of homes, including 35% to have at least 3-bedrooms of which 10% should have at least 4-bedrooms.
- 1.42 The conclusions in the affordable sector recognise the role which the delivery of larger family homes can play in releasing a supply of smaller properties for other households.
- 1.43 It is also recognised that there is limited flexibility for 1-bedroom properties in terms of changing household circumstances, which feed through into higher turnover and management issues for these types of properties.
- 1.44 The conclusions also take account of the current mix of housing by tenure and the size requirements shown on the Housing Register.

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- 1.45 The housing mix identified above could inform strategic planning policies, although a flexible approach should be adopted. For example, in some areas affordable housing registered providers find difficulties selling 1-bedroom AHO homes and therefore the 1-bedroom elements of AHO might be better provided as 2-bedroom accommodation.
- 1.46 That said, given current house prices, there are potential difficulties in making AHO genuinely affordable (particularly for larger homes).
- 1.47 Additionally, in applying the mix to individual development sites, regard should be had to the nature of the site and character of the area, and to up-to-date evidence of need, as well as the existing mix and turnover of properties at the local level.
- 1.48 The Council should also monitor the mix of housing delivered and respond accordingly.

Private Rental Sector

- 1.49 Rental costs in Wealden are high in the national sense and growing and the sector is becoming an increasingly important part of the districts housing offer including HMOs and providing affordable housing solutions.
- 1.50 However, due to increased regulation, the number of landlords leaving the market has increased significantly despite the growing and significant interest in rental properties in Wealden, particularly for smaller homes.
- 1.51 The lack of supply and increased demand have helped support growth in the rental costs.
- 1.52 There are 18 registered large Houses in Multiple Occupation (HMOs) in Wealden, primarily located in Coastal West Sussex and Tunbridge Wells sub-areas.

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- 1.53 These properties range from detached houses to converted commercial buildings, typically housing 5 to 10 occupants with an average of 6.
- 1.54 Currently, there are no existing Build-to-Rent (BTR) schemes in Wealden, although the sector is growing nationally, particularly in major cities.
- 1.55 If demand for BTR does materialise, Wealden is considered to be more suitable for “single-family” BTR developments, which are suburban in nature and can be integrated into larger housing sites.
- 1.56 Given the growing demand nationally, the Council is encouraged to consider a specific policy for BTR in order to ensure that this sector of the market is covered in the case of any proposals coming forward. If brought forward, this policy should consider elements such as design standards, tenancy lengths, and affordable housing contributions.
- 1.57 National guidance suggests that 20% of BTR units should be offered as Affordable Private Rent at a 20% discount to market rents.

Second and Holiday Homes

- 1.58 Although there is a proportion of properties in Wealden which are second and/or holiday homes it is not to the degree that it is a district-wide issue.
- 1.59 According to Council Data, as of 2025, there are 484 second homes in Wealden, representing 0.6% of the housing stock. However, this is potentially an undercount.
- 1.60 The 2021 Census also identified 1,567 holiday homes in the district. These properties are more common in rural and tourism-oriented areas. Some parishes, such as Cuckmere Valley (14%) and Alciston (7%) have notably high concentrations, although it should be noted that both

parishes lie wholly or partly in the National Park and therefore are either outside the plan area or partly outside the plan area.

- 1.61 Although typically 20% of households in second home usage is the “tipping point” for adverse impact.
- 1.62 Therefore, the Council may wish to monitor the situation and consider the impacts these may have on local economies and/or services if the rate continues to rise.

Older and Disabled People

- 1.63 Wealden has an older age structure than is seen regionally and nationally, but generally lower age-specific levels of disability compared with other areas.
- 1.64 The older person population shows high proportions of owner-occupation, and particularly outright owners who may have significant equity in their homes (81% of all older person households are outright owners).
- 1.65 The older person population is projected to increase notably. An ageing population means that the number of people with disabilities is also likely to increase.
- 1.66 The key findings for the 2025-42 period include:
- a 37% increase in the population aged 65+ (potentially accounting for 36% of total population growth);
 - a 57% increase in the number of people aged 65+ with dementia and a 49% increase in those aged 65+ with mobility problems;
 - a need for around 2,000 additional housing units with support (sheltered/retirement housing) – 56% in the market sector;

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- a need for around 1,100 additional housing units with care (e.g. extra-care) – around three-quarters in the market sector;
 - a need for additional nursing and residential care bedspaces (around 1,100 in the period); and
 - a need for around 600 dwellings to be for wheelchair users (meeting technical standard M4(3)).

1.67 Engagement with the East Sussex County Council's (ESCC) Adult Social Care team suggests that there may be scope to shift some of the need identified above away from residential care and sheltered towards extra-care.

1.68 This would also suggest that there is a clear need to increase the supply of accessible and adaptable dwellings and wheelchair-user dwellings, as well as providing specific provision of older persons' housing.

1.69 Given the evidence, the Council could consider (as a starting point) requiring all dwellings (in all tenures) to meet the M4(2) standards and around 3% of homes meeting M4(3) – wheelchair user dwellings in the market sector (a higher proportion of around 10% in the affordable sector).

1.70 Where the authority has nomination rights, the supply of M4(3) dwellings would be wheelchair-accessible dwellings (constructed for immediate occupation).

1.71 In the market sector, they should be wheelchair-user adaptable dwellings (constructed to be adjustable for occupation by a wheelchair user).

1.72 It should, however, be noted that there will be cases where this may not be possible (e.g. due to viability or site-specific circumstances). Therefore, any policy should be applied flexibly.

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- 1.73 In framing policies for the provision of specialist older persons' accommodation, the Council will need to consider a range of issues. This will include the different use classes of accommodation (i.e., C2 vs. C3) and the requirements for affordable housing contributions (linked to this, the viability of the provision).
- 1.74 There may also be some practical issues to consider, such as the ability of any individual development being mixed tenure, given the way care and support services are paid for.

Other Specific Groups

Self and Custom Build

- 1.75 The Council is currently meeting the need for self and custom build housing in Wealden.
- 1.76 They should however, plan to permit around 30 plots per annum based on past trends. Although, the actual number to be planned for should reflect entries onto the register.
- 1.77 The Council may also wish to consider how the supply of permissions is recorded in more detail. For example, they may wish to start requiring all relevant planning applications to submit a Self-Build Delivery Statement prior to the decision being made. This statement should contain confirmation from the applicant that the scheme meets all the requirements as set out by the 2015 Act to constitute as a self and custom build development.
- 1.78 The Council could also seek to introduce specific policies on self and custom housebuilding. These policies typically express support for self-build and custom housebuilding, require that a minimum proportion of plots within development schemes (often over a certain size) be offered to self-builders or as custom-build plots and/or allocation of sites solely for their use.

Children in Care

- 1.79 There are 96 looked after children in Wealden most of which are in Foster Care (82). There are eight individual children in Children's Homes and two in a Secure Unit (Lansdowne).
- 1.80 There are local authority provided Children's Homes in Wealden. However, Ofsted data indicates that there are 39 privately provided spaces (within the Sussex Weald Constituency)
- 1.81 ESCC are due to update the Children's Social Care Sufficiency Strategy in late autumn 2025. This will provide guidance on the overall strategy for accommodation for children in care in East Sussex. As of December 2025, the strategy had not yet been published.

Students

- 1.82 There are no higher education establishments in Wealden although there is a further education campus.
- 1.83 Census data suggests that of the 2,690 students over the age of 18 living in Wealden, 74% live with their parents.
- 1.84 Given the limited scale of students requiring their own home, there is currently no justification for a specific policy relating to student housing in Wealden.

Service Personnel

- 1.85 According to Ministry of Defence (MOD) data there are no military personnel based in Wealden district.
- 1.86 Crowborough Training Camp is the only military establishment within Wealden district. While the camp hosts a number of youth Cadet groups (Army Cadet Force, Air Training Corps and Royal Marines Cadets) no regular military forces are stationed here.

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- 1.87 Given the limited presence of armed forces in the district, it is not considered that a specific policy is required.

Gypsies and Travellers

- 1.88 Wealden District Council (WDC) has previously undertaken a Gypsy, Traveller and Travelling Showpeople Accommodation Needs Assessment (GTAA) that was published in 2022. This was undertaken with all other local planning authorities in East Sussex, as well as ESCC. This showed an identified need for 51 pitches (ethnic definition) and 32 pitches under Planning Policy for Traveller Sites (PPTS) definition at that time. The Council is in the process of updating this GTAA with all other local authority partners.

2. Introduction

- 2.1 Wealden District Council (WDC) has commissioned a consultancy team led by Icení Projects Limited (“Icení”) to prepare a new Local Housing Needs Assessment (“LHNA”) for the District.
- 2.2 The LHNA is intended to provide a robust evidence base regarding the need for housing to allow the Council to develop policies to create balanced communities, create relevant housing pathways of choice and to support economic regeneration in both urban and rural parts of Wealden.
- 2.3 The assessment considers the current housing stock, the future need and demand for housing, and gaps in housing provision – both for market rent, sale and affordable housing.
- 2.4 It also considers the housing needs of different groups within the population – including older persons, those with disabilities, those wishing to build their own home and current or former armed forces personnel.
- 2.5 However, the report **does not in itself set policies**: this is for the Council to do in bringing together this report and wider evidence when drafting the Local Plan.
- 2.6 This report updates and replaces the previous Wealden Local Housing Needs Assessment (LHNA), which was prepared in 2021. It takes into account more recent housing market conditions, demographic dynamics, and policy changes at both the national and local levels.
- 2.7 This includes the changes to the National Planning Policy Framework (NPPF) in December 2024. The changes include a revision to the ‘standard method’ for calculating housing need (see Section 6) and a greater focus on social rented housing (see section 7).

Sub-area Geographies

- 2.8 As well as providing outputs across the district, where applicable, we also provide outputs for sub-areas as well as the Plan Area (i.e. the part of the district that lies outside of the South Downs National Park (SDNP)). These are defined in the following chapter.

Report Status and Structure

- 2.9 The remainder of this report is structured as follows:
- Section 3: Functional Geographies;
 - Section 4: Housing Stock and Market Dynamics
 - Section 5: Overall Housing Need;
 - Section 6: Affordable Housing Need;
 - Section 7: Private Rented Sector;
 - Section 8: Housing Mix;
 - Section 9: Older & Disabled People; and
 - Section 10: Specific Groups.

3. Functional Geographies

- 3.1 The 2021 Local Housing Needs Assessment made a detailed assessment of the Housing Market Area (HMA) within Wealden. It concluded that there are different HMAs across Wealden.
- 3.2 The south of the district, including Hailsham and Polegate, fell within an Eastbourne-focused HMA. The northern part of the district, including Heathfield and Crowborough, are linked to Tunbridge Wells.
- 3.3 The small rural area around Ninfield and Hooe is consistently related to the Hastings and Rother HMA. The rural parts to the northwest of the district, around Forest Row and Ashdown Forest, are related to East Grinstead and more widely to the Horsham-Crawley HMA.
- 3.4 The area where there was less consistency is around Uckfield, with the data suggesting that the town and its surrounding area are in a zone of transition between HMAs but ultimately most closely linked to the Sussex Coast HMA than anywhere else.
- 3.5 Much of the data that underpins the assessment made in the 2021 LHNA remains the same; however, there is new data available on migration and commuting patterns from the 2021 Census, which this section considers.

Migration and Self-Containment

- 3.6 Initially, we have examined gross migration per head from the 2021 Census, as this, in our opinion, is the best way to measure the two-way relationship between areas of different sizes.
- 3.7 Gross migration per head is the aggregate number of flows in either direction weighted to reflect the size of the combined population in both the origin and destination, with larger areas expected to have larger flows.

3.8 It should be noted that the 2021 Census was conducted during the Covid-19 pandemic; therefore, migration figures should be treated with a degree of caution, as movement was restricted during periods of lockdown.

3.9 As the table below illustrates, Wealden's closest relationship is with Eastbourne and, to a lesser degree, Tunbridge Wells, Rother, Lewes and Mid Sussex. With the exception of Rother, all the other key relationships show net migration to Wealden.

Table 3.1 Gross Migration Per Head with Wealden (2021)

	Out From Wealden	In To Wealden	Gross Migration	Gross Migration Per 1,000
Eastbourne	1048	1396	2,444	9.33
Tunbridge Wells	493	862	1,355	4.93
Rother	470	429	899	3.55
Lewes	374	536	910	3.50
Mid Sussex	366	513	879	2.81
Brighton and Hove	283	359	642	1.47
Hastings	106	178	284	1.13
Tandridge	48	165	213	0.86
Sevenoaks	39	173	212	0.76
Tonbridge and Malling	63	136	199	0.68

Source: Icenl based on ONS Census 2021

Self-Containment Rate

3.10 A further measure to consider when examining HMAs is the self-containment rate. This is the percentage of moves from an area whose destination is elsewhere in the same area or the percentage of moves to an area whose origin was from the same area.

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- 3.11 While this is no longer part of the Planning Practice Guidance (PPG), previous guidance provides a target benchmark of over 70% when long-distance moves (the PPG does not define this, but it relates to student movements and people moving long distances to retire to the country/coast) are removed.
- 3.12 As shown in the table below, Wealden has a self-containment rate of between 45% and 50%. However, when long-distance¹ moves are excluded, the self-containment rates increase to 54%-60%.

Table 3.2 Self-containment Rates – Wealden (2021)

	Out Migration- Based Self- Containment	In Migration Based Self- Containment
All Moves	13,370	14,955
Internal Moves	6,667	6,667
Self-Containment Rates	50%	45%
All Moves, Excluding Long Distance Moves	11,044	12,405
Self-Containment Rates	60%	54%

Source: Icenl based on ONS Census 2021

- 3.13 By this benchmark, Wealden is not considered an HMA in its own right and therefore needs to merge with other local authorities to create an HMA.
- 3.14 Given the strong migratory and geographical links between Eastbourne and Wealden, it would be reasonable to combine these areas as a starting point. The table below also considers the self-containment rate for various combinations of local authorities.

¹ Long distance moves are defined as those with origins/destinations outside of the South East.

Table 3.3 Self-containment rates for select local authorities
(excluding long-distance moves)

Local Authority / Authorities	Out Migration- Based Self- Containment	In Migration Based Self- Containment
Wealden	60%	54%
Eastbourne	65%	65%
Wealden + Eastbourne	75%	70%
Wealden + Eastbourne + Rother + Hastings	82%	78%
Wealden + Eastbourne + Lewes	75%	71%
Wealden + Eastbourne + Tunbridge Wells + Sevenoaks	72%	72%

Source: Icen analysis of Census 2021

- 3.15 When combined (Wealden + Eastbourne), the in-migration self-containment is 70% and the out-migration is 75%. This indicates that the two areas could be considered an HMA when combined. Although wider HMAs could also be considered.

Commuting

- 3.16 The table below shows the total number of out-commuters from Wealden to neighbouring local authorities. It can be seen that the most significant volumes of out-commuters from Wealden are to Eastbourne, Lewes and Tunbridge Wells.
- 3.17 While Eastbourne and Lewes are also key origins for people commuting to Wealden, Rother is also a key origin for people who work in Wealden. Rother is also the only local authority that Wealden sees net in-commuting from.

Table 3.4 Commuting to and from Wealden by Local Authority

Local Authority	Out-commuting from Wealden	In-commuting to Wealden	Net (+ve is more out commuting from Wealden)
Wealden ²	55,191	55,191	
Eastbourne	5,410	3,879	1,531
Lewes	2,489	1,540	949
Tunbridge Wells	2,356	1,085	1,271
Mid Sussex	1,711	906	805
Rother	1,336	1,379	-43
Brighton and Hove	1,045	566	479
Hastings	741	692	49
Crawley	568	140	428

Source: ONS Census 2021

- 3.18 In total, the 2021 Census states that there are 74,541 residents in employment in Wealden. Of these, 55,191 also work in Wealden (including those working from home).
- 3.19 This is the equivalent of a residence-based self-containment rate of 74%. This is close to the 75% threshold used by ONS for travel-to-work areas (TTWA).
- 3.20 In total, the 2021 Census states that there are 66,964 jobs in Wealden. Of these, 55,191 are taken up by Wealden residents (including those working from home).
- 3.21 This is the equivalent of a jobs-based self-containment rate of 82%. This is above the 75% threshold used by ONS for travel-to-work areas

² Includes those who work from home.

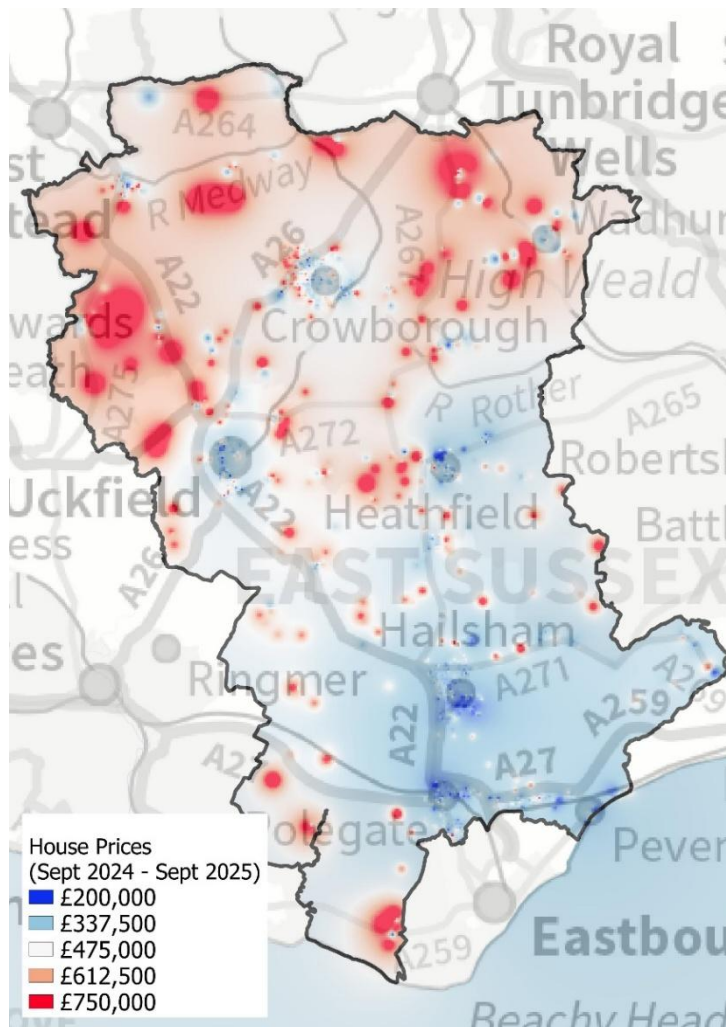
(TTWA). However, in both cases, the self-containment rates are significantly skewed by high levels of home working.

- 3.22 Generally, nearby local authorities see more residents commuting from Wealden than to it, which is unsurprising given Wealden's generally rural nature.

House Prices

- 3.23 The figure below shows the variation in median house prices across the district. Overall, the north of Wealden has higher prices than the south. Although parts of the south, particularly those around the South Downs National Park (SDNP), also see higher prices.

Figure 3.1 House Prices (September 2024 to September 2025)

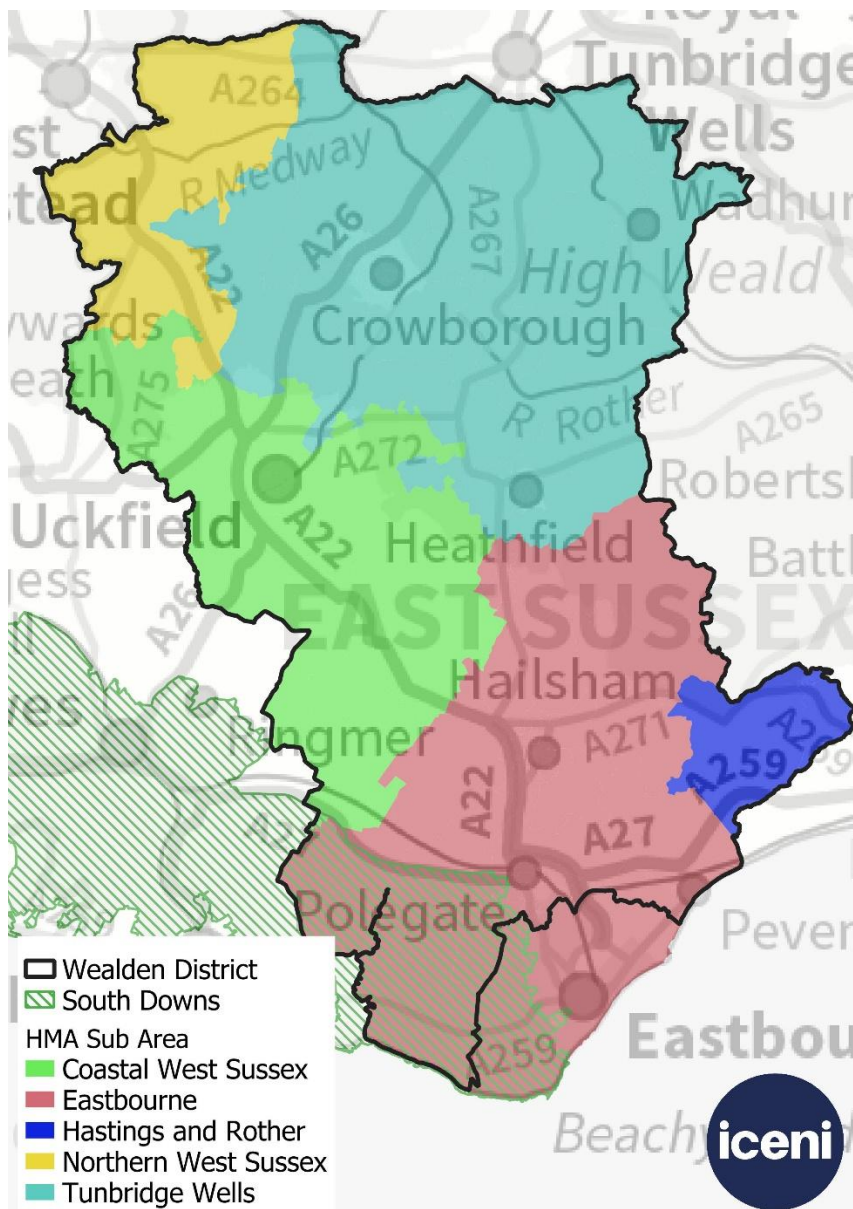


Source: Icen analysis of Land Registry Data

Summary

- 3.24 Overall, this assessment concludes that the boundaries of the Wealden HMA and sub-areas within the district remain the same as in the previous LHNA and are illustrated in the map overleaf.
- 3.25 With apparent links to Eastbourne as well as areas which closely relate to surrounding local authorities, such as Tunbridge Wells, Lewes and Hastings & Rother.

Table 3.5 HMA based Sub Area Boundaries



Source: Icen Projects, 2025

3.26 We have also noted that the parts of Wealden relating most closely to Eastbourne also include parts of the South Downs National Park. As the South Downs National Park Authority (SDNPA) has planning powers for this area, we have also provided some outputs for the Wealden area outside the National Park. This is referred to as the Plan Area.

4. Housing Stock

- 4.1 As of 2024, Wealden has 74,857 dwellings. This represents a 14.9% increase in the period since 2011. This compares to an increase of 12.3% in the South East region and 11.5% nationally.

Table 4.1 Growth in Dwellings

Location	2011	2024	Change	% Change
Wealden District	65,159	74,857	9,698	14.9%
South East	3,694,388	4,148,547	454,159	12.3%
England	22,976,066	25,617,413	2,641,347	11.5%

Source: ONS Census 2011 and MHCLG Dwelling Stock Estimates

- 4.2 Looking at sub-area based dwelling stock change it is only possible to examine this up to 2021 due to data limitations. As set out below, the most significant change in dwellings between 2011 and 2021 is observed across the Eastbourne HMA sub-area, with a 27.7% increase between 2011 and 2021. This reflects significant delivery in Hailsham and Polegate.

Table 4.2 Growth in Dwellings by Sub-Area

Location	2011	2021	Change	% Change
Wealden District	65,159	72,048	6,889	10.6%
Coastal West Sussex	12,085	13,140	1,055	8.7%
Eastbourne	23,828	30,428	6,600	27.7%
Hastings and Rother	1,031	1,059	28	2.7%
Northern West Sussex	3,600	3,750	150	4.2%
Tunbridge Wells	22,108	23,672	1,564	7.1%

Source: ONS Census 2011, 2021

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- 4.3 Looking specifically at households most recent data from 2023, this shows that there were 69,481 households in Wealden. This represents growth of 10.9% since 2011. With a surplus of dwellings over households, this implies a vacancy rate of 7.2%. This is an increase in the number of vacant dwellings since 2011 when the rate was 3.8%.

Table 4.3 Growth in Households

Location	2011	2023	Change	% Change
Wealden District	62,676	69,481	6,805	10.9%
South East	3,555,463	3,860,852	305,389	8.6%
England	22,063,368	23,718,000	1,654,632	7.5%

Source: ONS Census 2011 and ONS Subnational household estimates (2023)

- 4.4 Census data from 2011 and 2021 shows that at a Sub-Area level, the most significant household change is seen in the Eastbourne HMA Sub-Area, showing a 26.4% increase in households. This will be directly linked to the delivery of housing.

Table 4.4 Households by Sub-Area

Location	2011	2021	Change	% Change
Wealden	62,676	68,267	5,591	8.9%
Coastal West Sussex	11,646	12,425	779	6.7%
Eastbourne	22,870	28,915	6,045	26.4%
Hastings and Rother	993	1,000	7	0.7%
Northern West Sussex	3,460	3,491	31	0.9%
Tunbridge Wells	21,286	22,444	1,158	5.4%

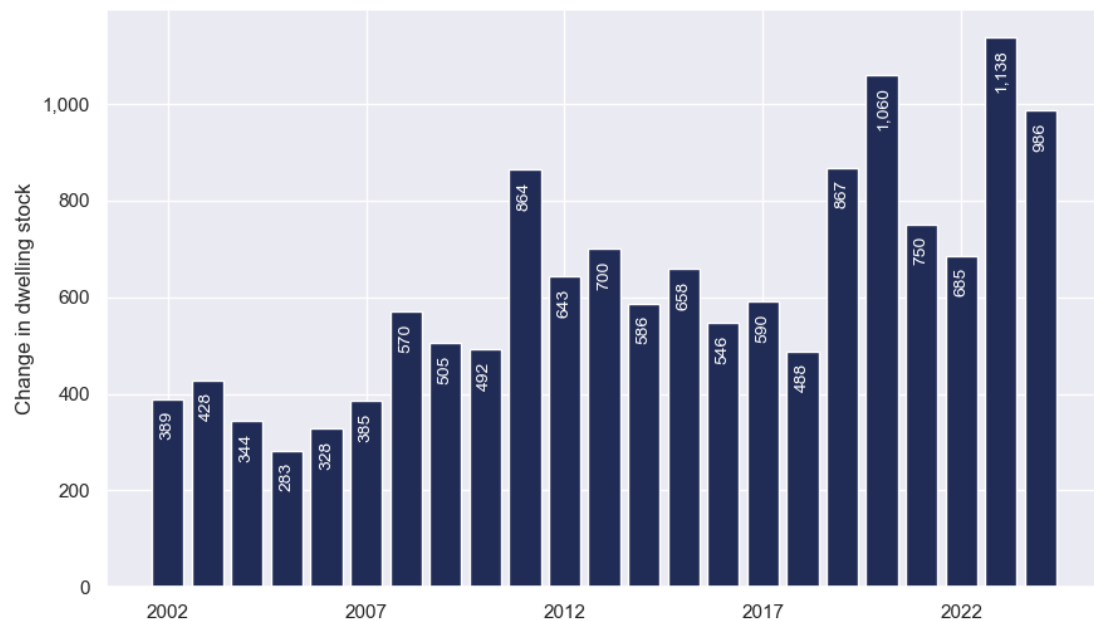
Source: ONS Census 2011, 2021

Housing Delivery Trends

- 4.5 Housing delivery in Wealden has varied year-on-year, but averages indicate a consistent contribution of new supply over the past decade with a broadly upwards trend in delivery.

- 4.6 As shown in the figure below, completions have been influenced by the timing of larger sites and the delivery of affordable housing. Housing completions peaked in the recent years of 2023 (1,138 dwellings), 2020 (1,060) and 2024 (966). Within the period shown, the fewest completions occurred in 2005 (283).

Figure 4.1 Housing Delivery in Wealden



Source: Council Authority Monitoring Report (AMR) data

- 4.7 The overall rate of stock growth has been slightly below the national average but remains an important driver of change in the local housing offer.

Tenure

- 4.8 Analysis of Census data indicates that owner occupation is the most common tenure in Wealden (77%), accounting for just over half of all households. This is significantly higher than the regional (65%) and national figures (62%).
- 4.9 The proportion of social renters within Wealden (8%) is broadly in line with East Sussex (9%) but lower than the regional (14%) and national (17%) comparators.

- 4.10 Private renting in Wealden shows a lower rate at 13% than all other areas shown with East Sussex, with England sitting at 20% and the South East at 19%.

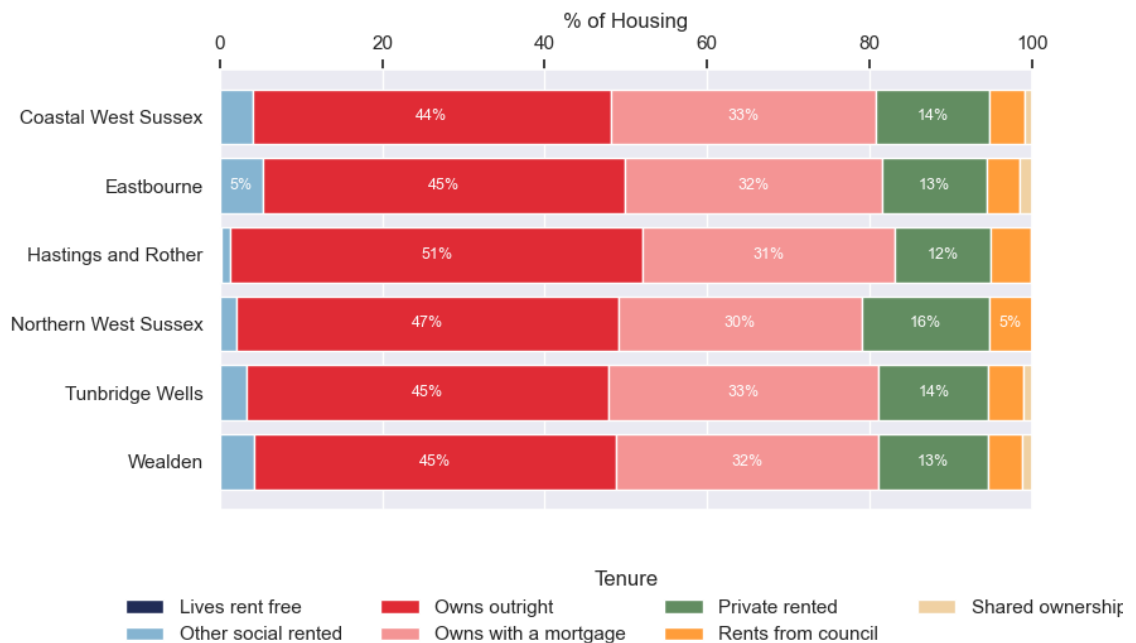
Figure 4.2 Housing composition by tenure, 2021



Source: ONS Census 2021

- 4.11 At the sub-area level, there is a small variation in the tenure profile of households. Some areas record higher concentrations of owner occupation, while others display a greater role for private renting or social housing.
- 4.12 Of all sub-areas, Hastings and Rother HMA sub-area show the largest proportion of ownership. The highest proportion of private renting and social renting are seen in the Northern West Sussex HMA sub-area.

Figure 4.3 Housing composition by tenure, 2021

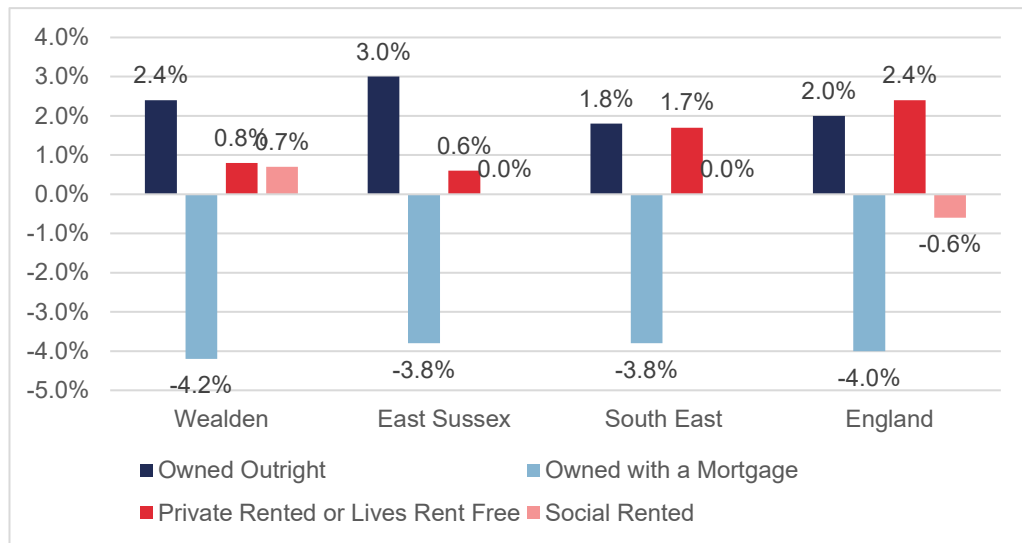


Source: ONS Census 2021

Change in tenure

- 4.13 Between the 2011 and 2021 Censuses, Wealden recorded slight shifts in its tenure profile. Owner occupation with a mortgage declined slightly, while outright ownership increased.
- 4.14 Of the comparator areas examined (see Figure 4.4 below), the most significant decrease in ownership with a mortgage and the largest increase in social rented homes are shown in Wealden.
- 4.15 This indicates a changing housing tenure landscape with less direct homeownership and more reliance on renting in Wealden. This pattern is repeated nationally and reflects the lack of affordability in market housing.

Figure 4.4 Change in housing composition by tenure, 2011-2021

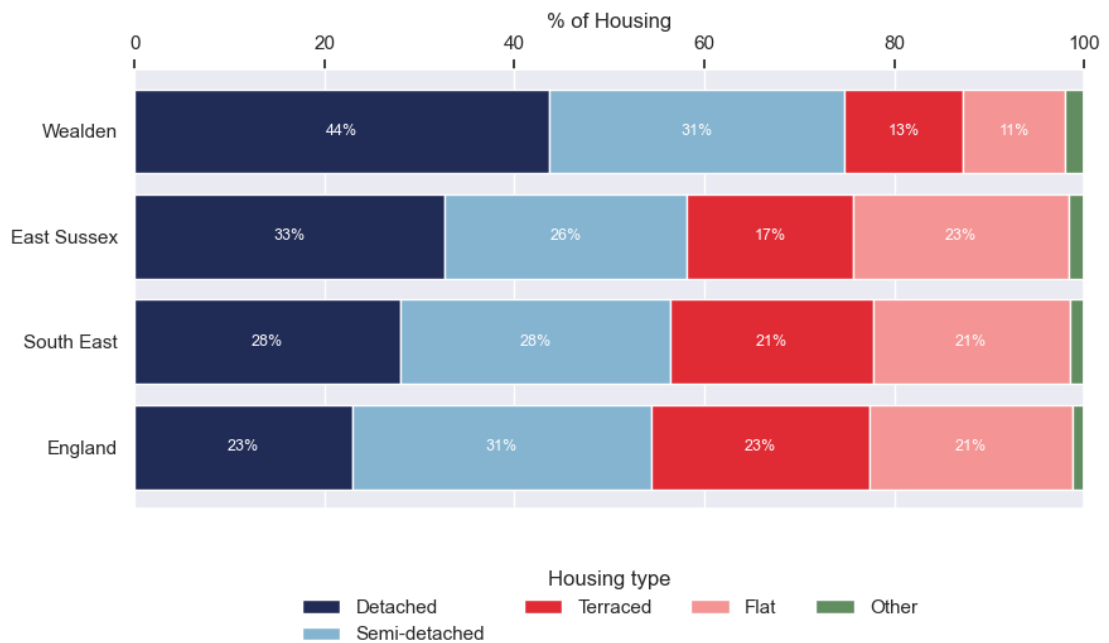


Source: ONS Census 2011, 2021

Dwelling Type

- 4.16 The highest proportion of households in Wealden are detached homes, making up 44% of the housing stock, higher than the rates seen across East Sussex (33%) and England (28%).
- 4.17 Semi-detached properties in Wealden account for 31% of the stock, in line with the national average, although higher than the proportions shown across East Sussex (26%) and the South East (28%).
- 4.18 Conversely, the proportion of terraced (13%) and flats (11%) in Wealden is lower than the East Sussex, regional and national comparatives.
- 4.19 In summary, Wealden's housing stock is dominated by larger properties, reflecting the rural character of the district relative to the wider comparatives.

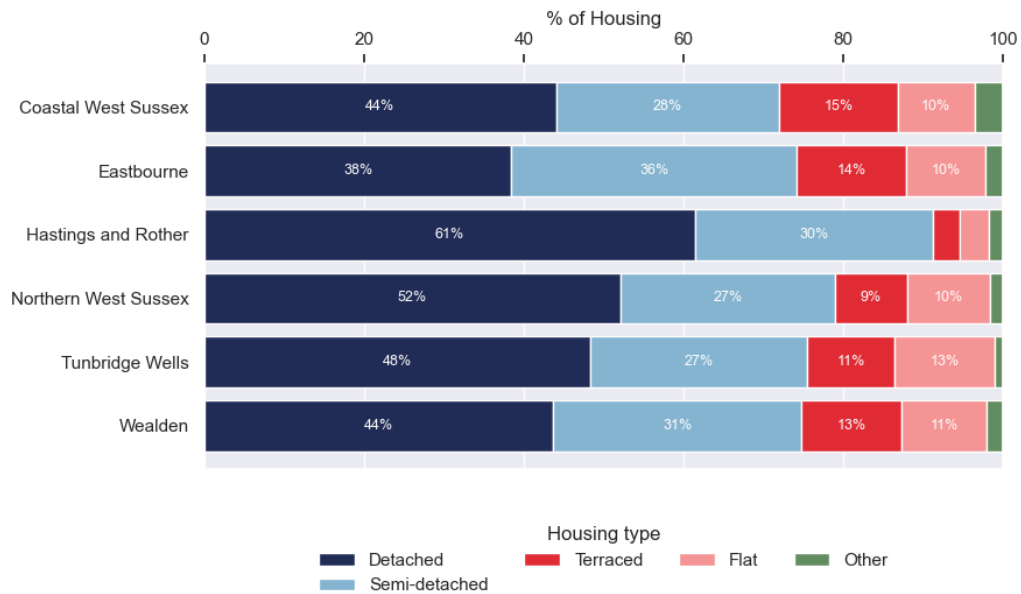
Figure 4.5 Housing composition by type, 2021



Source: ONS Census 2021

- 4.20 The sub-area data confirms that the mix of dwelling types varies across the district. The more rural sub-areas relating to the Hastings and Rother HMA and North West Sussex HMA, record higher shares of detached and semi-detached housing.
- 4.21 In contrast, the more urbanised sub-areas, such as those relating to Eastbourne, show greater proportions of terraced and flatted stock. However, even in these areas, detached and semi-detached housing is dominant.

Figure 4.6 Housing composition by type, 2021

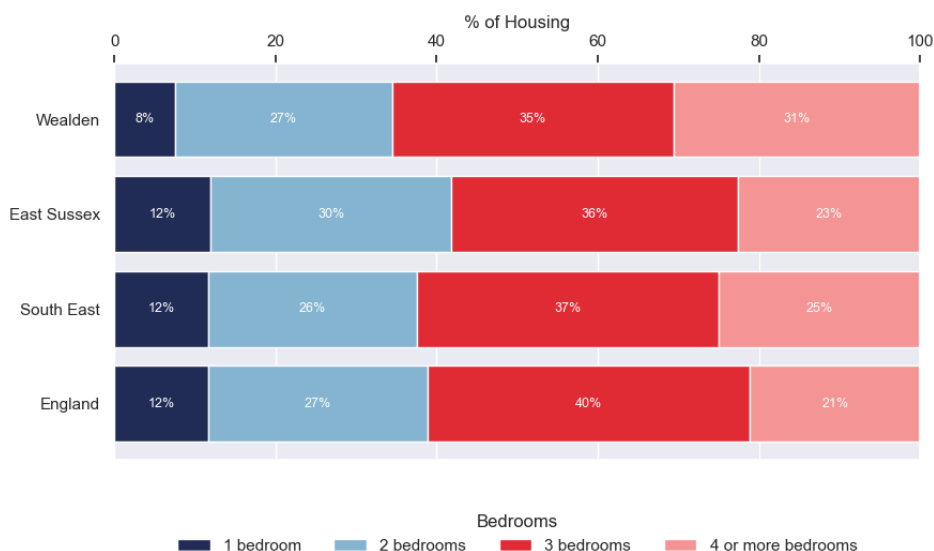


Source: ONS Census 2021

Bedrooms

4.22 Reflecting the dominant housing types, the housing stock in Wealden is characterised by three-bedroom homes (35%), followed by two-bedroom homes (27%) and four-plus bedroom dwellings (31%). One-bedroom homes represent a relatively small proportion of the stock.

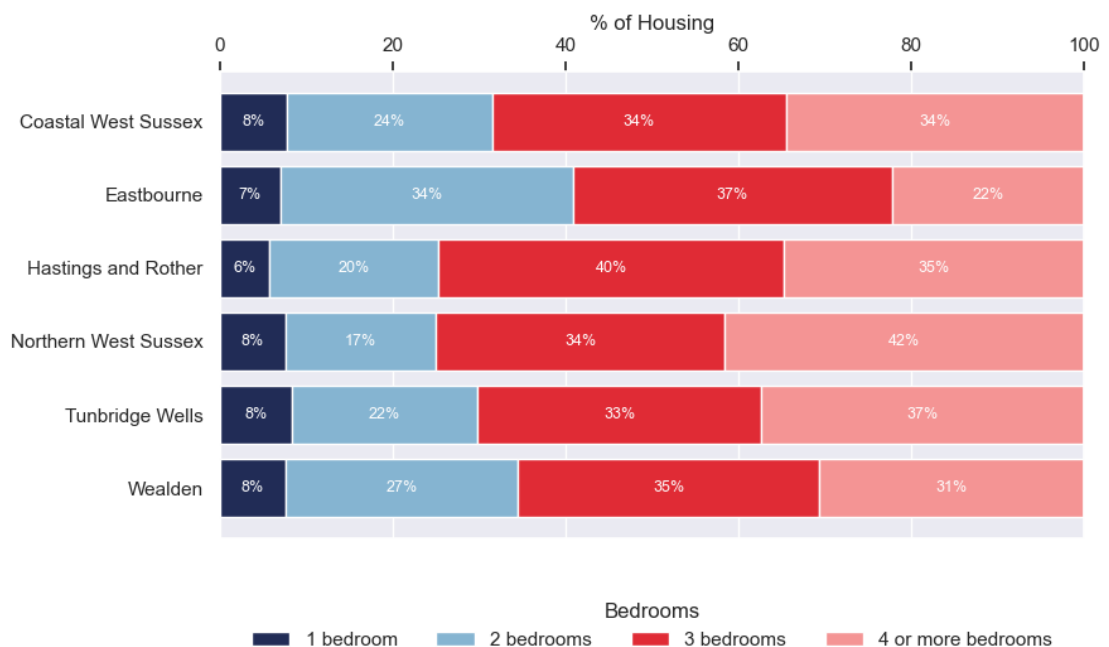
Figure 4.7 Housing composition by number of bedrooms (2021)



Source: ONS Census 2021

- 4.23 This profile is broadly consistent with comparator areas, though the relative proportion of larger homes is slightly higher in Wealden than in comparator areas.
- 4.24 At the sub-area level, the more urbanised Eastbourne HMA has a lower percentage of 4+ bedrooms and a higher percentage of 2-bedroom homes than elsewhere in the district.

Figure 4.8 Sub-area housing composition by number of bedrooms (2021)



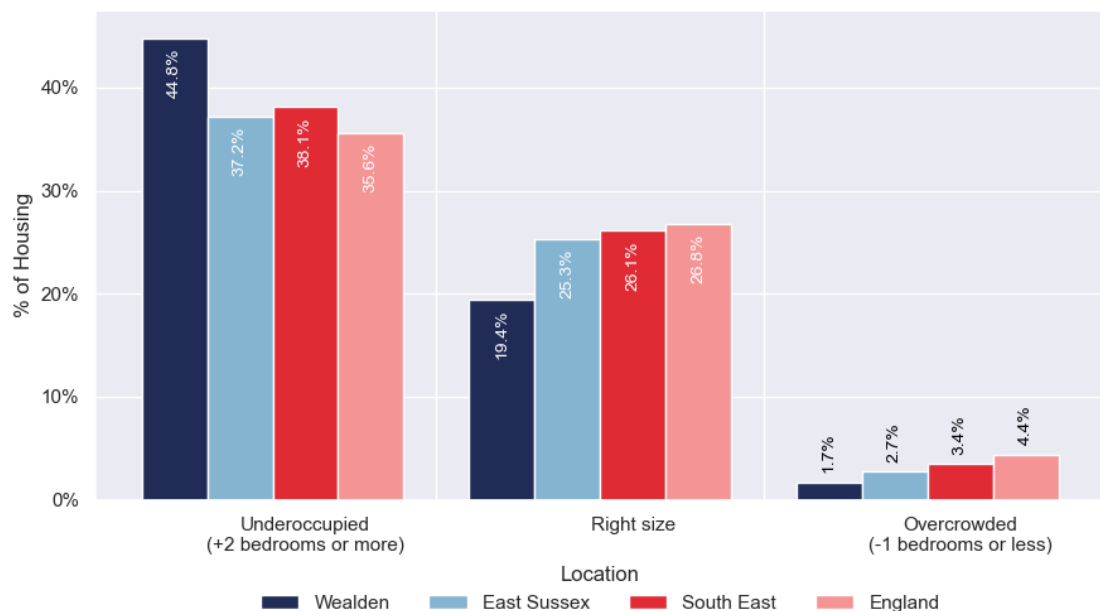
Source: ONS Census 2021

- 4.25 The Northern West Sussex and Tunbridge Wells HMA sub-area show the highest proportions of four-bedroom properties. All sub-areas have a broadly consistent level of 1-bedroom homes.

Occupancy

- 4.26 Census data on occupancy indicates that a substantial proportion (44.8%) of households in Wealden under-occupy their homes, meaning they have more bedrooms than required by the household composition.
- 4.27 This is often the case for areas with dwelling stock dominated by larger homes, which is the case in Wealden, and/or those areas with an ageing population, which, as set out later in this report, also relates to Wealden.

Figure 4.9 Housing occupancy



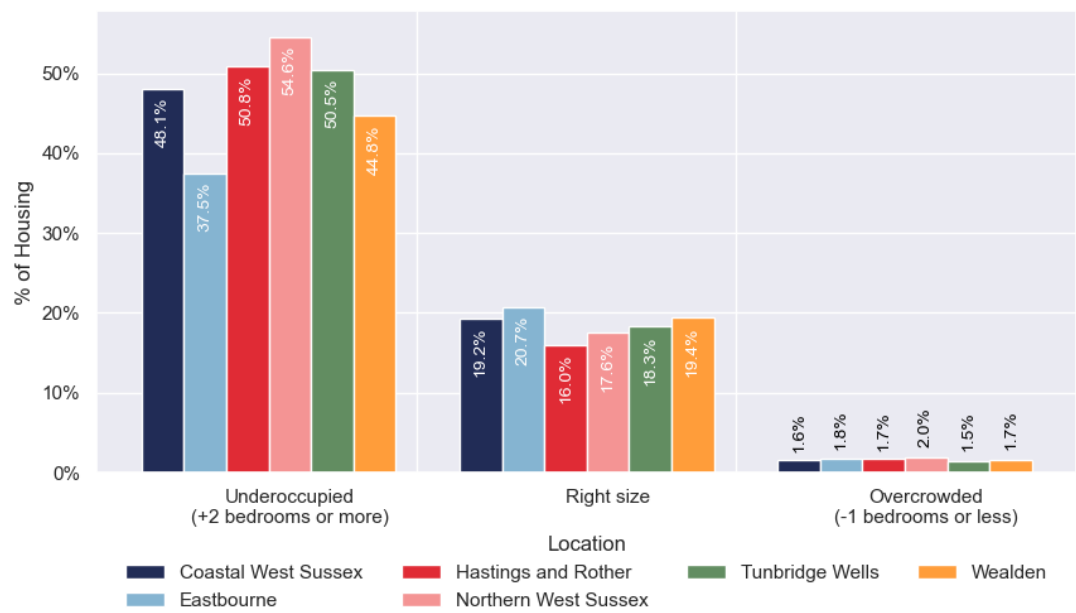
Source: ONS Census 2021

- 4.28 In contrast, overcrowding in Wealden is low (1.7%) in comparison to all the wider comparators shown in the figure below. Typically, this is seen in areas with smaller homes and high levels of multi-generational households.
- 4.29 Overcrowding remains low across all sub-areas, with the Northern West Sussex sub-area showing a slightly higher rate. The data also shows a

higher proportion of under-occupation in the Northern West Sussex sub-area, as well as Tunbridge Wells, and Hastings and Rother sub-area.

4.30 The Eastbourne sub-area shows the lowest proportion of under-occupancy and the highest rate of households living in the right-sized accommodation. Again, this reflects the housing stock in the more urbanised area.

Figure 4.10 Housing occupancy by sub-area



Source: ONS Census 2021

Key Messages

As of 2024, Wealden had 74,857 dwellings and had increased its housing stock since 2011 at a faster rate than the South East region and nationally.

Housing delivery in Wealden has varied, although it is broadly in an upward trajectory. Completions peaked in 2023 with 1,138 additional dwellings.

Owner occupation is dominant in Wealden, with social renters being proportionate to the East Sussex comparator, but private renting being lower than regional and national levels.

Dwelling types in Wealden are dominated by detached and semi-detached homes, higher than the East Sussex and national averages. Linked to this, there is a higher proportion of three-bedroom and four-plus-bedroom properties in Wealden.

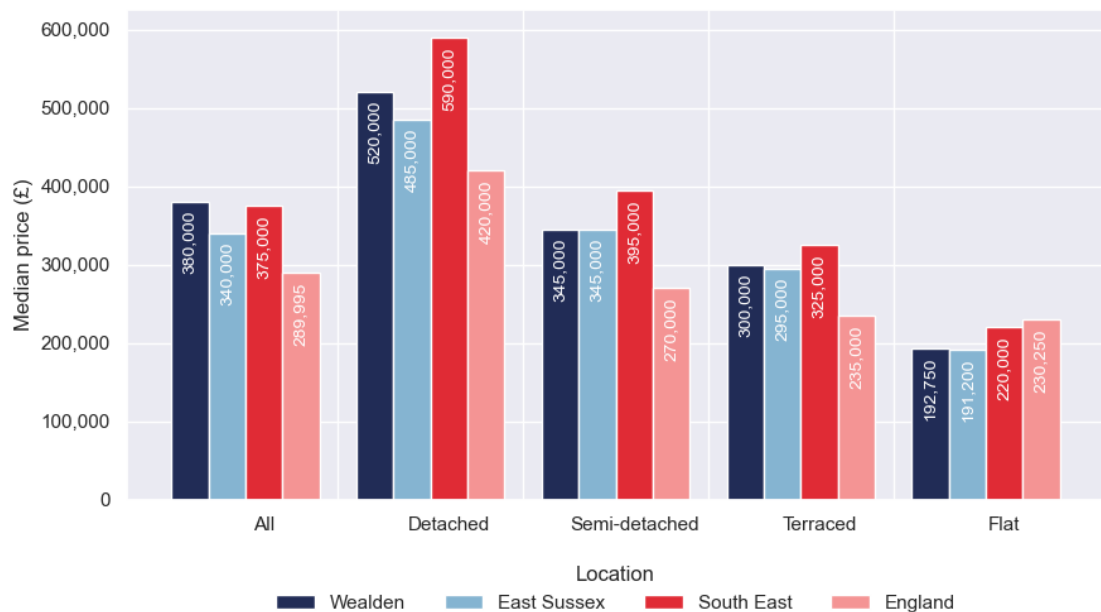
Occupancy data shows 44.8% of Wealden households live in under-occupied properties, with overcrowding low at 1.7%. This relates to the stock of larger homes and the ageing population.

5. Housing Market Dynamics

House Prices

- 5.1 At £380,000, overall median house prices in Wealden are in line with the regional average and higher than the averages seen across East Sussex and nationally.
- 5.2 As illustrated below, Wealden is consistently below the regional median for all house types and therefore must have a higher proportion of sales in detached homes. House prices in Wealden are broadly consistent with those across East Sussex and above the national medians.

Figure 5.1 Median house prices



Source: ONS Median House Price for Administrative Geographies (HPSSA Dataset 9)

- 5.3 Sub-area data breakdown shows that the Northern West Sussex sub-area has the highest prices overall, followed by Hastings and Rother

and Tunbridge Wells sub-areas. All these sub-areas have median prices higher than those of the Wealden district as a whole.

- 5.4 The highest overall median price is recorded in the Northern West Sussex HMA sub-area at £594,000, while the lowest is in the Eastbourne HMA sub-area at £337,750. This is likely in part to reflect the housing stock in these areas, although the same can also be said for all housing types.

Table 5.1 Median house prices by sub-area (2024)

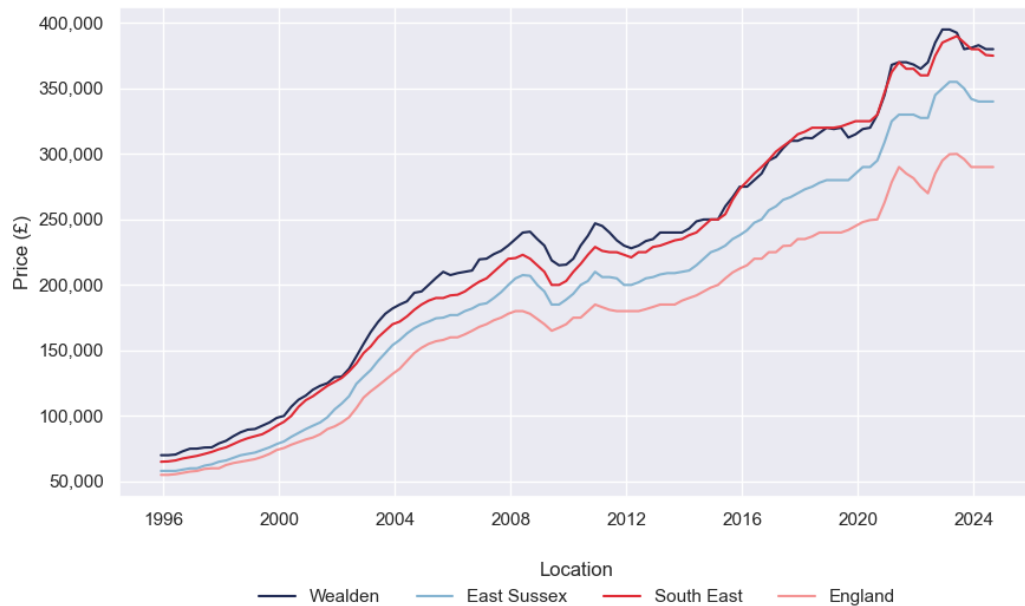
Location	All	Detached	Semi-detached	Terraced	Flat
Wealden District	£375,000	£520,000	£342,750	£302,250	£192,500
Coastal West Sussex	£425,000	£600,000	£380,000	£320,000	£190,000
Eastbourne	£337,750	£443,250	£320,000	£284,000	£179,950
Hastings and Rother	£425,000	£465,000	£350,000	£360,000	-
Northern West Sussex	£594,000	£795,000	£438,750	£422,500	£227,500
Tunbridge Wells	£413,750	£575,000	£382,500	£317,000	£210,000

Source: Icen analysis of HM Land Registry Price Paid Data

House price change

- 5.5 Since 1995, median house prices in Wealden have grown in line with the South East average and outpacing all other areas. Median house prices in Wealden have increased by a compound average annual growth rate of 6.1% over the period.
- 5.6 However, over the most recent five-year period (since 2019), prices have changed by 21.6%; over ten years (since 2014), by 52.0%. Looking at the Compound Annual Growth Rate for each area over these two periods shows that Wealden has seen less growth over both periods at 3.6% for 5 years and 4.6% for 10 years than the region (that stands at 3.7% for 5 years and 4.9% 10 years) and country.

Figure 5.2 Median house prices over time



Source: ONS Median House Price for Administrative Geographies (HPSSA Dataset 9)

Affordability

- 5.7 The ratio between median house prices and median local earnings is referred to as the affordability ratio. The affordability ratio in Wealden is consistently above the comparator areas examined and peaked in 2021 at almost 14.
- 5.8 All comparator areas have experienced deteriorating affordability, although recent years have shown a notable downturn across all regions shown. As of 2024, the workplace-based affordability ratio in Wealden is 11.62.

Figure 5.3 Median workplace-based affordability ratio over time



Source: ONS House price to workplace-based earnings ratio, 2024

5.9 ONS data shows that both workplace-based and residence-based earnings in 2024 are below the respective 5-year averages suggesting a downward trend.

Table 5.2 Affordability ratio values for Wealden

Type	Measure	2024	5-year average
Workplace-based	Lower Quartile (LQ)	11.13	12.39
	Median	11.62	12.54
Residence-based	LQ	10.35	11.38
	Median	10.57	10.96

Source: ONS House price to workplace-based earnings ratio, House price to residence-based earnings ratio

5.10 The workplace-based ratio remains higher than the residence-based, suggesting workers commute from Wealden to surrounding areas for higher-paid jobs.

Sales Market Engagement

- 5.11 In order to get an up-to-date view on the house sales market in Wealden, we engaged with local estate agents. This information was gathered in Autumn 2025 and should be taken as anecdotal.
- 5.12 One agent described the sales market in Wealden as cautious, with many buyers delaying decisions until after the national budget announcements.
- 5.13 This uncertainty has slowed transaction times and created a sense of hesitation among purchasers, particularly those reliant on mortgage finance.
- 5.14 Agents noted that while demand exists, it is concentrated in specific price brackets, and confidence remains fragile due to variable interest rates and broader economic pressures.
- 5.15 Properties priced up to £400,000–£500,000 are attracting the most interest, especially smaller family homes and well-located 2/3 bedroom houses.
- 5.16 Marketing strategies play a crucial role in achieving realistic sale prices; however, more recently, the final agreed figures are often below the asking price.
- 5.17 The market has cooled significantly when compared to the Covid-19 period, when open days regularly attracted 25 or more viewers. The lingering impact of the 'Truss' budget (inflation and increased interest rates) and ongoing uncertainty around mortgage rates have dampened confidence.
- 5.18 Larger new-build homes, particularly those with 4 or 5 bedrooms, are proving more challenging to sell with a much smaller market for this size of property.

-
- 5.19 One agent expressed frustration with the number of larger new-build homes being constructed, suggesting that smaller homes of 2-3 bedrooms would be a more effective use of space and presumably in greater demand.
- 5.20 Families are the most common type of buyer across Wealden, with downsizers taking up less of the market. Most prospective buyers are looking for homes with parking and garden space.
- 5.21 The need for access to rail links varies, while agents in the north of the district, particularly in Crowborough, considered this to be important for buyers, this was seen as less important in the south of the district around both Uckfield and Hailsham.

Rental Market

- 5.22 The latest average private rent in Wealden for a dwelling is £1,237 per month, lower than the comparator averages in the South East (£1,373) and England (£1,390).
- 5.23 As shown in the table below, average monthly rents by size are £875 for a one-bed, £1,119 for a two-bed, £1,401 for three-bed and £2,075 for four or more beds. At all sizes, this is below the regional and national averages, though for larger 3- and 4-bedroom homes, the margin is small.

Table 5.1 Average private rents by number of bedrooms (April 2025)

Location	One bed	Two bed	Three bed	Four or more bed	Overall
England	£1,137	£1,269	£1,411	£2,076	£1,390
South East	£952	£1,223	£1,490	£2,151	£1,373
Wealden	£875	£1,119	£1,401	£2,075	£1,237

Source: ONS Price Index for Private Rents

- 5.24 Average private rents for homes in Wealden increased from £861 per month in 2015 to £1,237 in 2025. The most recent year-on-year change is 2.7%, which is a much slower rate of growth than the regional and national rates.

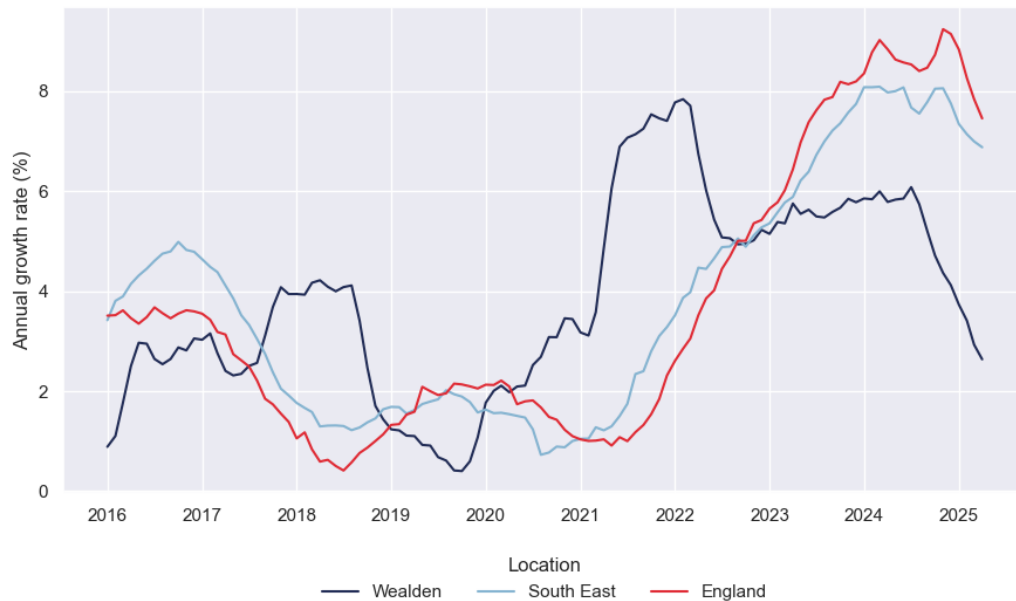
Figure 5.4 Average private rental price for housing over time



Source: ONS Price Index for Private Rents

- 5.25 This is further illustrated in the figure below, which shows that the growth rate in average private rents has varied over time. Over the past 12 months, the average year-on-year growth rate has been 4.5% but is continuing to fall.

Figure 5.5 Growth rate in average private rent for housing over time



Source: ONS Price Index for Private Rents

Key Takeaways

As of 2024, the median house price in Wealden was £375,000. Over time, house prices in Wealden have shown strong growth. In the last five years alone, prices have risen by 21.6%.

Affordability remains a significant challenge in Wealden. The workplace-based median affordability ratio (house price-to-income) in 2024 was 11.62.

The average private rent for a home in Wealden is £1,237 per month, which is lower than the South East (£1,373) and England (£1,390) averages.

Rental prices have also increased steadily, with a 2.7% year-on-year rise over the past 11 years.

Despite being relatively more affordable than regional averages, rents remain high in absolute terms, contributing to affordability pressures.

6. Overall Housing Need

Housing Need and the Housing Requirement

- 6.1 National government policies and guidance require housing need to be assessed as part of the plan-making process. As set out in Planning Practice Guidance (PPG):

“Housing need is an unconstrained assessment of the minimum number of homes needed in an area. Assessing housing need is the first step in the process of deciding how many homes need to be planned for. It should be undertaken separately from assessing land availability, establishing a housing requirement figure and preparing policies to address this.”³

- 6.2 Therefore, housing need is expected to be assessed upfront as part of the plan-making process, leaving aside constraints. The plan-making process (and testing of spatial development options within this) then tests whether the housing (and other development) needs identified can be sustainably met and whether there are any unmet needs which need to be accommodated, in defining what the housing requirement should be.

- 6.3 The emphasis within the NPPF is on plans meeting objectively assessed housing needs, unless national policies that protect areas or assets of particular importance provide a strong reason for restricting the overall scale, type or distribution of development; or the adverse impacts of doing so would significantly and demonstrably outweigh the benefits (paragraph 11b of the NPPF).

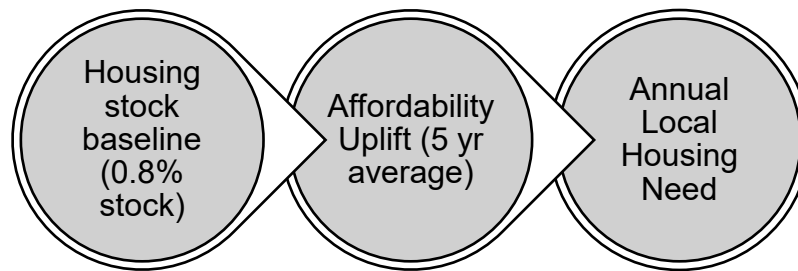
³ [Housing and economic needs assessment - GOV.UK](#) Para ID: 2a-001-20241212

Government's Revisions to the NPPF and 'Standard Method'

- 6.4 The Government, through revisions to the NPPF in December 2024, has revised the standard method. Its ambitions in doing so are to increase housing delivery, delivering 1.5 million homes across England over the next 5 years, with growth in all areas of the country.
- 6.5 The PPG sets out the revised standard method in the section on *Housing and Economic Development Needs Assessments*⁴. The paragraphs therein set out the methodology for calculating housing need.
- 6.6 The figure below provides an overview of the revised standard method. Step 1 takes a baseline of 0.8% of existing housing stock in the area; to which an affordability adjustment is then applied in Step 2.
- 6.7 The affordability adjustment is calculated by taking the average affordability ratio figure over the 5 most recent years for which data is available and applying a 0.95% increase for each 1% by which the average affordability ratio is above 5. This is shown at Figure 6.1.

Figure 6.1 Overview of Revised Standard Method

⁴ <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>



- 6.8 The 0.8% per annum stock baseline removes the use of demographic projections that were previously used for the ‘standard method’ (which can be volatile) and provides a baseline level of provision across all areas, which is not dissimilar to the 0.89% annual increase in housing stock nationally over the last 10 years.
- 6.9 The benchmark affordability ratio position of 5 years is consistent with the ONS use of this level as a broad indicator of affordability. With affordability uplifts applied to the stock baseline, the revised standard method supports the provision of around 370,000 homes nationally, which the Government consider should be targeted to improve housing affordability over time.
- 6.10 Previously, the NPPF provided scope to deviate from the standard method in assessing housing need in ‘exceptional circumstances’, enabling a ‘justified alternative approach’ to be advanced which reflects current and future demographic trends and market signals.
- 6.11 The revisions to the NPPF in December 2024 have removed the scope to use an alternative – they require housing need to be assessed using the (revised) standard method.

Revised Standard Method Calculation

6.12 It is a relatively straightforward exercise to calculate the local housing need using the standard method for Wealden.

Step 1: Housing Stock Baseline

6.13 The stock baseline is expected to be drawn from the Ministry of Housing, Communities and Local Government (MHCLG) Live Table 125. The PPG directs that ‘the most recent data published at the time should be used’. The latest data on the housing stock position is for 2024. The stock baseline is calculated as 0.8% of existing stock.

Step 2: Affordability Adjustment

6.14 The affordability adjustment is then to be applied, based on the average median (workplace-based) house price to income ratio over the last 5 years, which at the current time is for 2019-2024 period. The following formula is then used to calculate the affordability uplift:

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

6.15 The final stage is to then multiply the housing stock baseline by the affordability adjustment factor.

6.16 The results of the revised standard method calculation using the latest published affordability and housing stock data for Wealden are shown in the table below. This shows a need for 1,457 dwellings per annum (dpa), which is a notable uplift from the previous LHNA (1,225 dpa)

Table 6.1 Wealden District Local Housing Need

	Wealden
Housing Stock, 2024	74,857

0.8% Stock Baseline	599
Average Median Affordability Ratio, 2019-2024	12.54
Affordability Uplift	143%
Local Housing Need (dpa)	1,457

Source: Icenl analysis

- 6.17 The standard method figures change when new affordability and housing stock data are released (typically annually in the Spring), and the Council may need to keep any changes until the point of submission of the Local Plan, at which point the figures are ‘fixed’ for a period of two years.

Plan Area

- 6.18 The above calculations are for Wealden District; however, the parts of the district within the South Downs National Park (SDNP) are subject to the South Downs National Park Authority (SDNPA) in planning terms.
- 6.19 It is therefore worthwhile considering what proportion of the need falls inside and outside of the National Park. The PPG provides guidance on this, stating.
- “For local authorities whose boundaries cross National Parks or Broads Authority areas, the proportion of the local authority area that falls within and outside the National Park or Broads Authority area should also be considered”.*
- 6.20 However, the PPG goes on to add that “where only a minimal proportion of the existing housing stock of a local authority falls within the National Park...it may be appropriate to continue to use the local housing need figure derived by the standard method for the local authority area”.

-
- 6.21 This is the case for Wealden, where only 2.2% of all dwellings fall within the National Park, it is considered reasonable for the Council to continue to plan based on the overall number.

Population

- 6.22 The analysis to follow considers the demographic implications of the delivery of housing at the level set by the 'Standard Method' for the district by developing a population and household projection so there is a sufficient population to fill the suggested number of homes.
- 6.23 The projections look at the proposed plan period between 2025-2042. The analysis below starts with a review of local population trends.
- 6.24 As of mid-2024 (the latest date for which ONS has published mid-year population estimates (MYE)), the population of Wealden is estimated to be 166,900; this is an increase of around 12,900 people over the previous decade (an 8.4% increase), which is the same as seen across the South East region, slightly above the national figure and roughly double (in percentage terms) the level of population growth seen across East Sussex.

Table 6.2 Population change (2014-24)

	2014	2024	Change	% change
Wealden	154,017	166,908	12,891	8.4%
East Sussex	537,577	560,882	23,305	4.3%
South East	8,893,930	9,642,942	749,012	8.4%
England	54,370,319	58,620,101	4,249,782	7.8%

Source: ONS

- 6.25 The figure below shows an indexed population change back to 1991 (index to 1 in 2014). This shows population growth to have broadly followed trends in other areas over time with the main difference being when compared with the East Sussex position since about 2015.

Indexed Population Change – 1991-2024

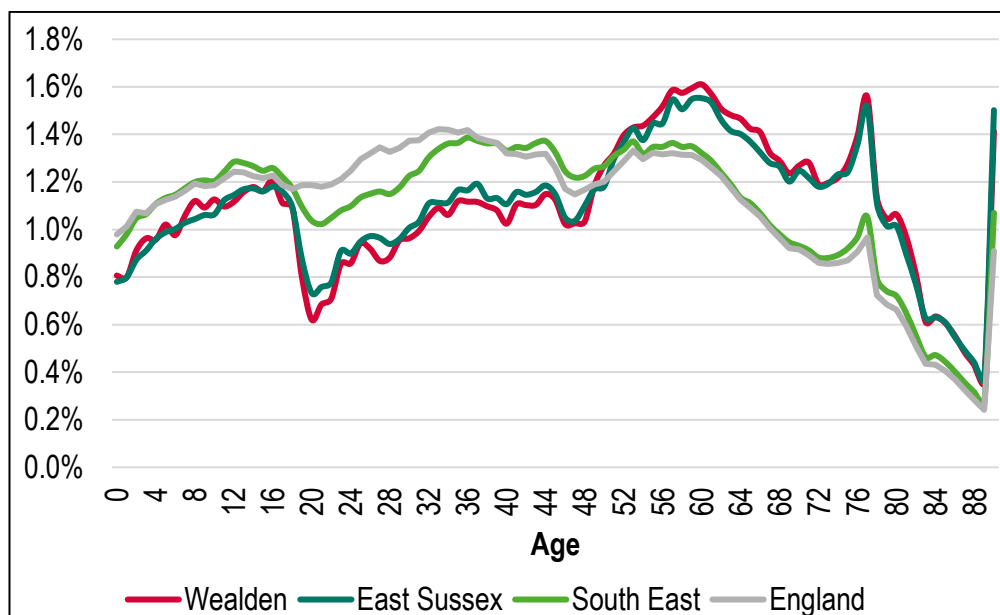


Source: ONS

Age Structure

- 6.26 The figure below shows the age structure by single year of age (compared with a range of other areas). Overall, the population structure is notably older than seen regionally or nationally with a higher proportion of the population in all age groups from about 50 onwards.
- 6.27 The data also shows a notable drop in population aged around 19 – this will reflect people moving away for further education, although there is evidence of some returning over time. The age profile of the district is very similar to that seen across East Sussex.

Figure 6.2 Population profile (2024)



Source: ONS

- 6.28 The analysis below summarises the above information (including total population numbers for Wealden) by assigning population to three broad age groups (which can generally be described as a) children, b) working age and c) pensionable age).
- 6.29 This analysis confirms the older age structure with 27% of the population aged 65 and over (compared with 20% regionally and 19% across England).

Table 6.3 Population profile (2024) – summary age bands

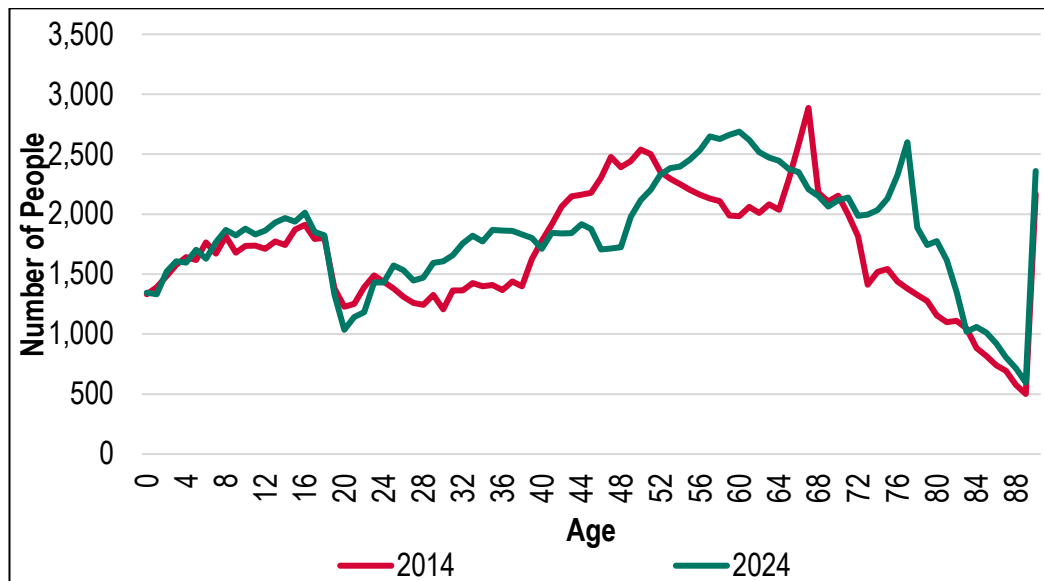
	Wealden		East Sussex	South East	England
	Population	% of pop	% of pop	% of pop	% of pop
Under 16	27,605	16.5%	16.3%	18.5%	18.4%
16-64	93,959	56.3%	57.1%	61.7%	62.9%
65+	45,344	27.2%	26.6%	19.8%	18.7%
All Ages	166,908	100.0%	100.0%	100.0%	100.0%

Source: ONS

Age Structure Changes

- 6.30 The figure below shows how the age structure of the population has changed in the 10-year period from 2014 to 2024 – the data used is based on population, so it will also reflect the increase seen in this period.
- 6.31 There have been some changes in the age structure with a clear increase in the number of people aged over about 70, as well as in their late 20s and 30s, and also mid-50s and early 60s. Where there are differences, it is often due to cohort effects (i.e. smaller or larger cohorts of the population getting older over time).

Figure 6.3 Population age structure (people) (2014 and 2024) – Wealden



Source: ONS

- 6.32 Again, the information above is summarised into the three broad age bands to ease comparison. This shows population increases in all age bands, with the highest overall and proportionate increase being amongst those aged 65 and over – this age group increasing by 6,600 people, accounting for 52% of all population change in the area.

Table 6.4 Change in population by broad age group (2014-24) – Wealden

	2014	2024	Actual Change	% change
Under 16	26,542	27,605	1,063	4.0%
16-64	88,775	93,959	5,184	5.8%
65+	38,700	45,344	6,644	17.2%
TOTAL	154,017	166,908	12,891	8.4%

Source: ONS

- 6.33 There has also been a notable increase in the number of people aged 16-64, increasing by 5,200 overall (a 6% rise over the decade).

Components of Population Change

-
- 6.34 The table below considers the drivers of population change from 2011 to 2024. The main components of change are natural change (births minus deaths) and net migration (internal/domestic and international).
- 6.35 There is also an Unattributable Population Change (UPC), which is a correction made by ONS upon publication of Census data if the population has been under- or over-estimated (this is only calculated for the 2011-21 period).
- 6.36 There are also 'other changes', which are variable (sometimes positive and sometimes negative but generally small in size) – these changes are often related to armed forces personnel, prisons or boarding school pupils.
- 6.37 The data shows natural change to be falling over time generally, and throughout the period, there have been more deaths than births.
- 6.38 Migration is highly variable but always positive for internal (domestic) migration and sometimes negative for international net migration.
- 6.39 The last three years for which data is available do, however, show a notably higher level of international migration than had been seen generally in the past – this being a consistent trend to that seen nationally.

Table 6.5 Components of population change, mid-2011 to mid-2024
– Wealden

	Natural change	Net internal migration	Net intern- ational migration	Other changes	Other (unattri- butable)	Total change
2011/12	-306	1,894	9	17	-421	1,193
2012/13	-337	1,868	30	53	-397	1,217
2013/14	-245	2,754	63	37	-417	2,192
2014/15	-356	2,010	71	10	-391	1,344
2015/16	-341	1,320	76	5	-365	695
2016/17	-499	1,216	-22	9	-381	323
2017/18	-606	1,441	-82	14	-355	412
2018/19	-407	1,568	-87	14	-336	752
2019/20	-699	1,865	-154	-10	-254	748
2020/21	-680	3,572	-116	-3	-353	2,420
2021/22	-501	2,445	455	-19	0	2,380
2022/23	-702	1,735	702	35	0	1,770
2023/24	-483	1,999	528	3	0	2,047

Source: ONS

6.40 The analysis also shows, for the 2011-21 period, a significant negative level of UPC (totalling around 3,700 people over the 10-year period). This suggests that when the 2021 Census was published, ONS had previously overestimated population change.

6.41 Overall, the data shows a continuing trend of increasing population throughout the period studied, but with some year-on-year variation.

Demographic Implications of the Standard Method

6.42 A demographic model has been developed to examine the potential implications of delivering 1,457 dwellings per annum over the proposed plan period from 2025-2042.

6.43 This considers the levels of migration likely to be needed to fill homes and also the possibility of seeing higher levels of household formation in younger age groups (where there is evidence of a historical constraint in formation). The key assumptions in the modelling are:

- Taking the 2022-based subnational population projections (SNPP) as a starting point – this includes data on birth and death rates as well as migration;
- Updating this projection to take account of mid-year population data to 2024 (looking at more recent data about births, deaths and migration);
- This revised trend position is then used to roll forward to get to a base position for 2025;
- Data about the communal population and household formation is taken from the 2021 Census, with household formation rates for the population aged under 45 assumed to return to the levels seen in 2001;
- It is assumed that around 3% of new stock will be vacant at any time (to allow for movement/churn within the housing stock). This means that for 1,457 dpa it is assumed there would be household growth of approximately 1,415 per annum; and
- The modelling then flexes migration estimates so there is a sufficient population to fill the additional homes (i.e. population required to generate 1,415 additional households per annum on average over a 17-year period (2025-42)).

6.44 In developing this projection, the population is projected to increase by 47,900 people over the 2025-2042 period, with this increase being

particularly strong in the 16-64 age group. However, the highest proportionate change is projected in the 65 and over age group (38%).

- 6.45 There is also projected to be an increase in the number of children. The two tables below show projected changes by age— the first shows broad age bands, and the second shows 5-year bands.

Table 6.6 Projected population change 2025 to 2042 by broad age bands – Wealden

	2025	2042	Change in population	% change
Under 16	27,647	32,954	5,307	19.2%
16-64	94,615	119,949	25,334	26.8%
65 and over	46,253	63,548	17,295	37.4%
Total	168,516	216,451	47,935	28.4%

Source: Icen analysis

Table 6.7 Projected population change 2025 to 2042 by 5-year age bands – Wealden

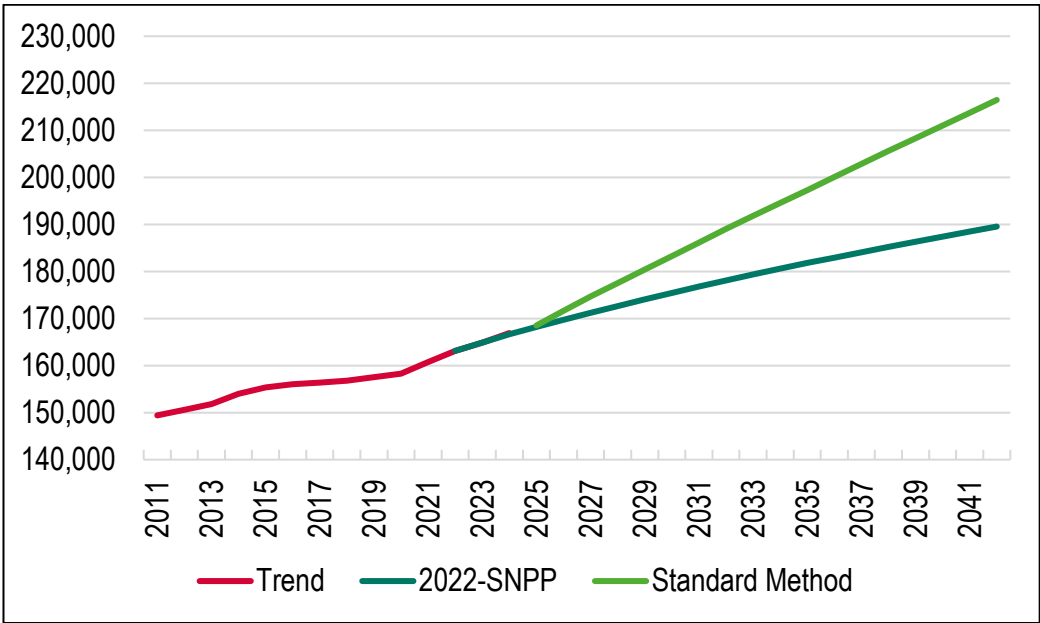
	2025	2042	Change in population	% change
0-4	7,388	10,051	2,663	36.0%
5-9	8,782	10,423	1,641	18.7%
10-14	9,480	10,404	924	9.7%
15-19	9,001	9,578	577	6.4%
20-24	6,440	8,454	2,014	31.3%
25-29	7,506	10,619	3,113	41.5%
30-34	8,738	12,383	3,645	41.7%
35-39	9,512	13,173	3,661	38.5%
40-44	9,274	12,945	3,671	39.6%
45-49	9,122	13,810	4,688	51.4%
50-54	11,171	14,316	3,145	28.2%
55-59	12,791	13,513	721	5.6%
60-64	13,058	13,234	176	1.3%
65-69	11,573	13,045	1,472	12.7%
70-74	10,243	14,436	4,193	40.9%
75-79	10,740	13,801	3,061	28.5%
80-84	7,182	10,583	3,401	47.4%
85 & over	6,516	11,684	5,168	79.3%
Total	168,516	216,451	47,935	28.4%

Source: Iceni analysis

- 6.46 Below are a series of charts showing past trends and projected population growth and key components of change for each of the projections linking to the Standard Method.
- 6.47 For comparison, data has also been provided from the 2022-based SNPP. The first figure examines overall population growth before considering natural change and net migration.
- 6.48 The analysis suggests the population of Wealden could rise to 216,500 by 2042 (up from 168,500 in 2025 (estimated)), a 28% increase, or 1.7% per annum increase.

6.49 For comparison, between 2014 and 2024, the population increased by an average of around 0.8% per annum, and so the 'Standard Method' would be projected to provide a significant boost in population growth.

Figure 6.4 Past trends and projected population – Wealden

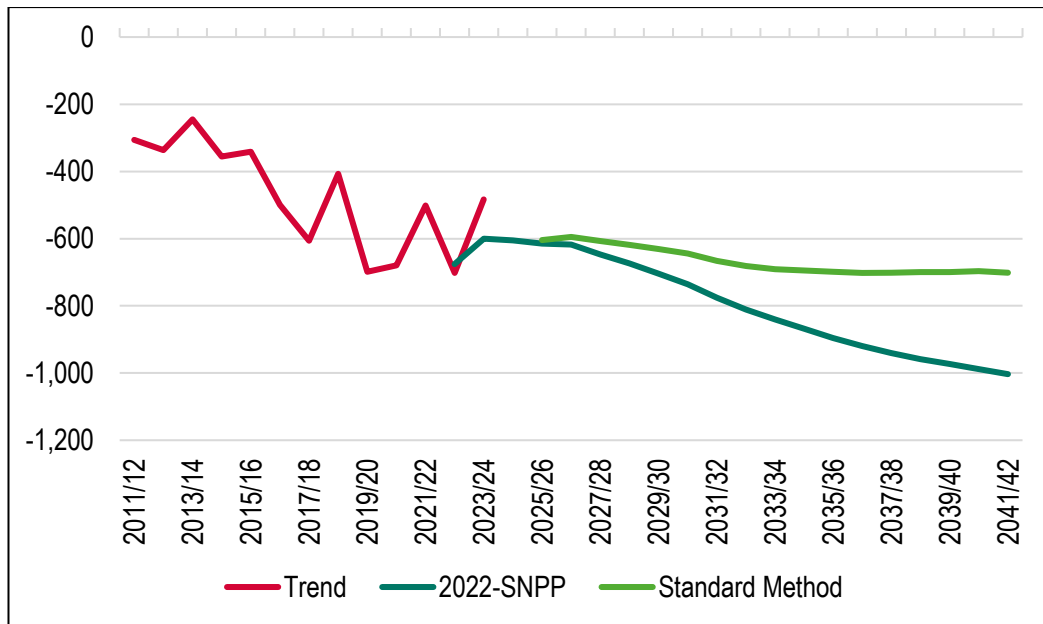


Source: ONS and Icen analysis

6.50 The main reason for the higher population growth would be due to increased net in-migration. However, the decline in natural change (births minus deaths) would also be projected to flatten off as the population rises (as there will be more females of child-bearing age).

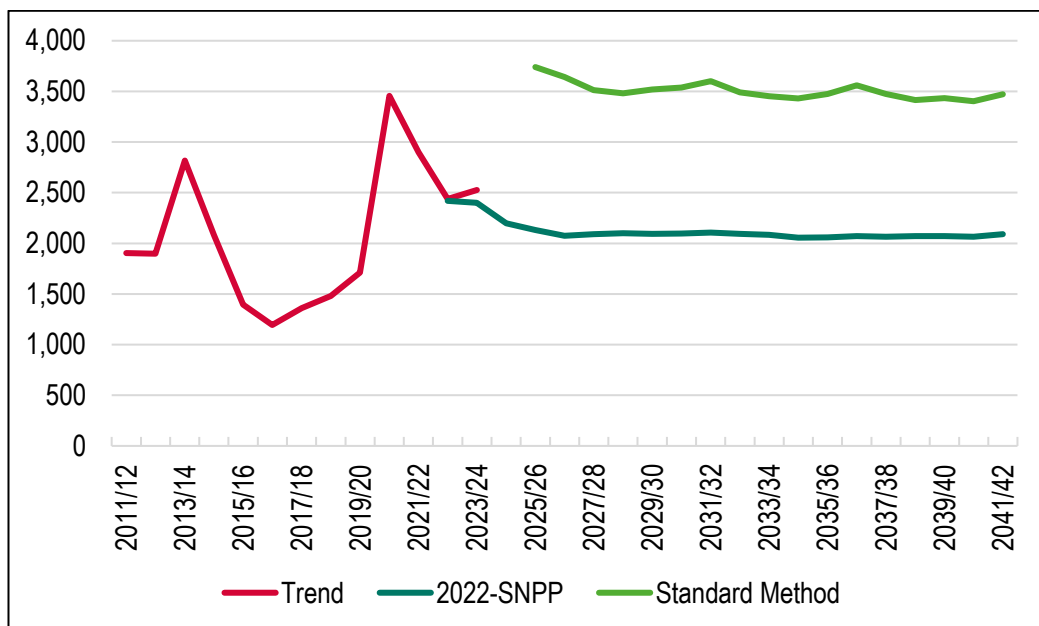
6.51 The figures below show projected natural change and net migration under the scenarios. Focussing on net migration, the analysis suggests that with higher delivery linked to the Standard Method net migration would be at a level higher than typical past trends – indeed at a level higher than seen in any year going back to 2011 apart from 2020/21.

Figure 6.5 Past trends and projected natural change – Wealden



Source: ONS and Icen analysis

Figure 6.6 Past trends and projected net migration – Wealden



Source: ONS and Icen analysis

Relationship Between Housing and Economic Growth

6.52 The analysis to follow considers the relationship between housing and economic growth; seeking to understand what level of jobs might be

supported by changes to the local labour supply (which will be influenced by population change).

6.53 To look at estimates of the job growth to be supported, a series of stages are undertaken. These can be summarised as:

- Estimate changes to the economically active population (this provides an estimate of the change in labour-supply);
- Overlay information about commuting patterns, double jobbing (i.e. the fact that some people have more than one job) and potential changes to unemployment; and
- Bringing together this information will provide an estimate of the potential job growth supported by the population projections.

Growth in Resident Labour Supply

6.54 The approach taken in this report is to derive a series of age and sex specific economic activity rates and use these to estimate how many people in the population will be economically active as projections develop.

6.55 This is a standard approach, with data being drawn in this instance from the Office for Budget Responsibility (OBR) – July 2018 (Fiscal Sustainability Report) – this data has then been rebased to information in the 2021 Census (on age, sex and economic activity).

6.56 The table below shows the assumptions made for the District. The analysis shows that the main changes to economic activity rates are projected to be in the 60-69 age groups – this will, to a considerable degree, be linked to changes to pensionable age, as well as general trends in the number of older people working for longer (which is linked to general reductions in pension provision).

Table 6.8 Projected changes to economic activity rates (2025 and 2042) – Wealden

	Males			Females		
	2025	2042	Change	2025	2042	Change
16-19	40.4%	40.7%	0.3%	40.3%	40.6%	0.3%
20-24	84.4%	84.5%	0.1%	79.3%	79.4%	0.1%
25-29	90.8%	90.8%	0.0%	83.4%	83.4%	0.0%
30-34	92.6%	92.6%	0.0%	82.4%	82.4%	0.0%
35-39	92.5%	92.3%	-0.2%	83.1%	83.5%	0.4%
40-44	91.6%	90.9%	-0.6%	84.6%	86.5%	2.0%
45-49	93.4%	92.1%	-1.3%	84.9%	88.0%	3.1%
50-54	89.9%	89.4%	-0.5%	79.8%	84.2%	4.4%
55-59	84.7%	84.2%	-0.5%	71.0%	73.5%	2.5%
60-64	72.6%	76.6%	4.0%	59.0%	63.7%	4.7%
65-69	39.4%	50.2%	10.8%	29.5%	40.1%	10.7%
70-74	17.4%	20.3%	2.9%	10.3%	15.7%	5.5%
75-89	7.7%	8.0%	0.3%	3.6%	6.1%	2.5%

Source: Based on OBR and Census (2021) data

- 6.57 In addition, a sensitivity has been developed where the economic activity rates are held constant at 2021 levels. It is considered that the sensitivity is reasonable, given that data (including Census data) have shown that economic activity rates have not grown as previously forecast.
- 6.58 Working through an analysis of age and sex specific economic activity rates, it is possible to estimate the overall change in the number of economically active people in the area – this is set out in the table below and shows the increase in the economically active population is projected to be up to 27,000 (a 33% increase).

Table 6.9 Estimated change to the economically active population (2025-42) – Wealden

	Econom- ically active (2025)	Econom- ically active (2042)	Total change in econom- ically active	% change
OBR EAR	81,311	108,293	26,982	33.2%
EAR no change	80,164	103,173	23,009	28.7%

Source: Icen Analysis

Linking Changes in Resident Labour Supply to Job Growth

6.59 The analysis above has set out potential scenarios for the change in the number of economically active people. However, it is arguably more useful to convert this information into an estimate of the number of jobs this would support. The number of jobs and resident workers required to support these jobs will differ depending on three main factors:

- Commuting patterns – where an area sees more people out-commute for work than in-commute it may be the case that a higher level of increase in the economically active population would be required to provide a sufficient workforce for a given number of jobs (and vice versa where there is net in-commuting);
- Double jobbing – some people hold down more than one job and therefore the number of workers required will be slightly lower than the number of jobs; and
- Unemployment – if unemployment were to fall then the growth in the economically active population would not need to be as large as the growth in jobs (and vice versa).

Commuting Patterns

- 6.60 The table below shows summary data about commuting to and from Wealden from the 2011 and 2021 Census. Data from both sources is used as the 2011 data is quite old, but the 2021 data was influenced by the Covid-19 pandemic.
- 6.61 Overall, from both sources the data shows a level of net out-commuting (around 28% more people living in the district and working than work in the district in 2011 (a lower figure of 11% in 2021)).
- 6.62 This is shown as the commuting ratio in the final row of the table and is calculated as the number of people living in an area (and working) divided by the number of people working in the area (regardless of where they live).
- 6.63 When comparing the two sources, it is worth reflecting on a large increase in the number of home workers (or those of no fixed workplace) in 2021 compared with 2011.
- 6.64 In 2011, a total of 19,700 people were recorded as home workers or with no fixed workplace; in 2021 this figure had roughly doubled (to 39,200). As the country has moved away from the pandemic, this figure may have started to decline slightly, with implications for commuting dynamics.

Table 6.10 Commuting Patterns – Wealden

	2011	2021
Live and Work in District	21,579	16,031
Home Workers or No Fixed Workplace	19,652	39,160
In Commute	15,009	11,773
Out Commute	30,524	19,350
Total Working in LA	56,240	66,964
Total Living in LA and Working Anywhere	71,755	74,541
Commuting Ratio	1.276	1.113

Source: Census 2011, 2021

-
- 6.65 The analysis below looks at both sets of Census data with a further sensitivity of a balanced (1:1) commuting ratio (i.e. the increase in the number of people working in the area is equal to the number of people living in the area who are working).

Double Jobbing

- 6.66 The analysis also takes into account that a number of people may have more than one job (double jobbing). This can be calculated as the number of people working in the local authority divided by the number of jobs.
- 6.67 Data from the Annual Population Survey (available on the NOMIS website) for the past 5-years (for which data exists) suggests across Wealden that typically about 4.7% of workers have a second job.
- 6.68 It has therefore been assumed that around 4.7% of people will have more than one job moving forward – this means the number of jobs supported by the workforce will be around 4.7% higher than workforce growth. It has been assumed in the analysis that the level of double jobbing will remain constant over time, standard practice for modelling such as this.

Unemployment

- 6.69 The last issue when looking at the link between jobs and resident labour supply is a consideration of unemployment. Essentially, this is considering if there is any latent labour force that could move back into employment to take up new jobs.
- 6.70 The latest model-based unemployment data from the Annual Population Survey (for January 2024-December 2024) puts unemployment at around 3.1% in the district, which is a level below the national average of 4.0%.

- 6.71 Based on this data, it is considered that there is unlikely to be any significant latent labour supply. Therefore, no further adjustment is made to the data to take account of unemployment.

Jobs Supported by Growth in the Resident Labour Force

- 6.72 The tables below show how many additional jobs might be supported by population growth under the different projection scenarios. It is estimated that between 18,900 and 28,300 additional jobs could be supported depending on the assumptions made about commuting and economic activity. All figures are for the 2025-2042 period.

Table 6.11 Jobs supported by demographic projections (2025-2042)
– Wealden

		Total change in economic- ally active	Allowance for double jobbing	Allowance for net commuting (= jobs supported)
OBR	2021 commuting	26,982	28,312	25,434
EAR	2011 commuting	26,982	28,312	22,191
	1:1 commuting	26,982	28,312	28,312
EAR no change	2021 commuting	23,009	24,144	21,690
	2011 commuting	23,009	24,144	18,923
	1:1 commuting	23,009	24,144	24,144

Source: Icenl analysis

Key Messages

The LHNA update studied the overall housing need set against the 'Standard Method'.

This shows a need for 1,457 dwellings per annum. This is based on 0.8% of the current stock of 74,857 (599), with an affordability uplift of 143%.

Our bespoke demographic projections suggest that the population might increase by 47,900 people over the 17-year plan period (a 28% increase) should the level of housing need be delivered.

This would also result in a continued ageing of the population, as well as notable increases in the 'working-age' population (16-64).

It was further estimated that population growth might be able to support somewhere in the region of 18,900 and 28,300 additional jobs.

7. Affordable Housing Need

Introduction

- 7.1 This section provides an assessment of the need for affordable housing in Wealden. The analysis follows the methodology set out in Planning Practice Guidance (PPG) (Sections 2a-018 to 2a-024⁵) and looks at the need from households unable to buy OR rent housing; and also from households able to afford to rent privately but not buy.

Affordable Housing Sector Dynamics

- 7.2 The 2021 Census indicated that 8% of households in Wealden lived in social or affordable rented homes, with the sector accommodating around 5,700 households.
- 7.3 Data from the Regulator of Social Housing (RSH) for 2024 indicates that the Council (LA) and Registered Providers (RPs) owned 7,400 properties in the district, of which 75% were for general needs rent; 7% supported housing or housing for older people; and 13% low-cost home-ownership homes (such as shared ownership properties). The majority of general needs homes are rented out at social rents (70% of all homes) and the rest at affordable rents.

⁵ [Housing and economic needs assessment - GOV.UK](#)

Table 7.1 Stock owned or Managed by the Council and Registered Providers – Wealden

	LA	RP	Total	% of stock
General needs rented	2,585	2,937	5,522	74.5%
Supported/older persons housing	427	460	887	12.0%
Low cost home ownership	81	918	999	13.5%
Total	3,093	4,315	7,408	100.0%

Source: RSR Geographical Look-Up Tool 2024

- 7.4 As of April 2024, there were 1,071 households on the Council's Housing Register. In addition, data for March 2025 show that 67 households were accommodated in temporary accommodation (some 34% (23 households) of these households had children).

Overview of Method

- 7.5 In summary, the methodology looks at a series of stages as set out below:
- Current affordable housing need (annualised so as to meet the current need over a period of time);
 - Projected newly forming households in need;
 - Existing households falling into need; and
 - Supply of affordable housing from existing stock.
- 7.6 The first three bullet points above are added together to identify a gross need, from which the supply (fourth bullet point) is subtracted to identify a net annual need for additional affordable housing. Examples of different affordable housing products are outlined in the box below.

Affordable Housing Definitions

Social Rented Homes – are homes owned by local authorities or private registered providers for which rents are determined by the national rent regime (through which a formula rent is determined by the relative value and size of a property and relative local income levels). They are low-cost rented homes.

Affordable Rented Homes – are let by local authorities or private registered providers to households who are eligible for social housing. Affordable rents are set at no more than 80% of the local market rent (including service charges).

Rent-to-Buy – where homes are offered, typically by housing associations, to working households at an intermediate rent which does not exceed 80% of the local market rent (including service charges) for a fixed period after which the household has the chance to buy the home.

Shared Ownership – a form of low-cost market housing where residents own a share of their home, on which they typically pay a mortgage; with a registered provider owning the remainder, on which they pay a subsidised rent.

Discounted Market Sale – a home which is sold at a discount of at least 20% below local market value to eligible households; with provisions in place to ensure that housing remains at a discount for future households (or the subsidy is recycled).

First Homes – a form of discounted market sale whereby an eligible First-Time Buyer can buy a home at a discount of at least 30% of market value. Councils are able to set the discounts and local eligibility criteria out in planning policies.

Affordability

- 7.7 An important first part of the affordable needs modelling is to establish the entry-level costs of housing to buy and rent. The affordable housing needs assessment compares prices and rents with the incomes of households to establish what proportion of households can meet their needs in the market, and what proportion require support and are thus defined as having an 'affordable housing need'.
- 7.8 For the purposes of establishing affordable housing need, the analysis focuses on overall housing costs (for all dwelling types and sizes).
- 7.9 The table below shows estimated current prices to both buy and privately rent a lower quartile home in the district (excluding newbuild sales when looking at house prices). Across all dwelling sizes the analysis points to a lower quartile price of £300,000 and a private rent of £1,200 per month.

Table 7.2 Estimated lower quartile cost of housing to buy (existing dwellings) and privately rent (by size) – Wealden

	To buy	Privately rent
1-bedroom	£150,000	£850
2-bedrooms	£245,000	£1,150
3-bedrooms	£330,000	£1,500
4-bedrooms	£470,000	£2,000
All dwellings	£300,000	£1,200

Source: Land Registry and Internet Price Search

- 7.10 It is then essential to understand local income levels as these (along with the price/rent data) will determine levels of affordability (i.e. the ability of a household to afford to buy or rent housing in the market without the need for some sort of subsidy).
- 7.11 Data about total household income has been based on ONS modelled income estimates, with additional data from the English Housing Survey

(EHS) being used to provide information about the distribution of incomes. Data has also been drawn from the Annual Survey of Hours and Earnings (ASHE) to consider changes since the ONS data was published.

- 7.12 Overall, the average (mean) household income across Wealden is estimated to be around £56,900 per annum, with a median income of £48,000; the lower quartile income of all households is estimated to be £27,700.
- 7.13 To assess affordability, two different measures are used; firstly, to consider what income levels are likely to be needed to access private rented housing, and secondly, to consider what income level is needed to access owner occupation.
- 7.14 This analysis therefore brings together the data on household incomes with the estimated incomes required to access private sector housing. For analysis, the following assumptions are used:
- Rental affordability – a household should spend no more than 35% of their income on rent; and
 - Mortgage affordability – assume a household has a 10% deposit and can secure a mortgage for four and a half times (4.5×) their income.

Need for Affordable Housing

- 7.15 The sections below work through the various stages of analysis to estimate the need for affordable housing in the district. Final figures are provided as an annual need (including an allowance to deal with current needs). As per the PPG (paragraph 2a-024), this figure can then be compared with the likely delivery of affordable housing.

Current Need

- 7.16 In line with PPG (paragraph 2a-020), the current need for affordable housing has been based on considering the likely number of households with one or more housing problems (housing suitability). The table below sets out estimates of the number of households within each category.
- 7.17 This shows an estimated 2,900 households as living in 'unsuitable housing'. Over a third of these are due to overcrowding, whilst approaching 400 currently have no accommodation (homeless or concealed households).

Table 7.3 Estimated number of households living in unsuitable housing (or without housing)

	Households	% of households
Concealed and homeless households	387	13.3%
Households in overcrowded housing	1,057	36.2%
Existing affordable housing tenants in need	127	4.4%
Households from other tenures in need	1,348	46.2%
TOTAL	2,919	100.0%

Source: Iceni analysis

- 7.18 In taking this estimate forward, the data modelling next estimates the need by tenure and considers affordability. The affordability in different groups is based on estimates of how incomes are likely to vary, and for owner-occupiers, there is a further assumption about potential equity levels.
- 7.19 For homeless and concealed households, it is assumed incomes will be low and households are unlikely to be able to afford to rent privately. The table below shows over half of those households identified above

are unlikely to be able to afford market housing to buy OR rent and therefore there is a current need from 1,598 households (this includes both households unable to rent or buy and those in the gap between renting and buying).

Table 7.4 Estimated housing need and affordability by tenure

	Number in unsuitable housing	% unable to afford	Current need after affordability
Owner-occupied	1,024	6.8%	69
Affordable housing	516	91.6%	472
Private rented	992	67.5%	669
No housing (homeless/concealed)	387	100.0%	387
TOTAL	2,919	54.7%	1,598

Source: *Iceni analysis*

- 7.20 From this estimate, households living in affordable housing are excluded (as these households would release a dwelling on moving and so no net need for affordable housing will arise) and the total current need is estimated to be 1,125 households.
- 7.21 For the purposes of analysis, it is assumed that the Council would seek to meet this need over a period of time. Given that this report typically looks at needs in the period from 2025 to 2042, the need is annualised by dividing by 17 (to give an annual need for around 66 dwellings).
- 7.22 This does not mean that some households would be expected to wait 17-years for housing as the need will be dynamic, with households

leaving the current need as they are housed but with other households developing a need over time.

- 7.23 The table below shows this data split between those unable to rent OR buy and those able to rent but NOT buy. Given the pricing of housing in the district this analysis shows a more modest need for those able to rent but NOT buy and the number unable to rent OR buy is notably higher.

Table 7.5 Estimated current affordable housing need by affordability – Wealden

	Number in need (excluding those in AH)	Annualised		
		TOTAL	Unable to rent OR buy	Able to rent but NOT buy
Number	1,125	66	53	13
Percentage	-	100%	80%	20%

Source: *Icenl analysis*

Projected Housing Need

- 7.24 Projected need is split between newly forming households who are unable to afford market housing and existing households falling into need. For newly forming households, a link is made to demographic modelling, with an affordability test also being applied.
- 7.25 Overall, it is estimated that 1,182 new households would form each year, and around two-thirds will be unable to afford market housing; this equates to a total of 819 newly forming households that will have a need per annum on average.
- 7.26 The second element of newly arising need is existing households falling into need. To assess this, information about households entering the social/affordable rented sector housing has been used to represent the flow of households onto the Housing Register over this period.

7.27 Following the analysis, there is a need arising from 122 existing households each year – again, most are households unable to buy OR rent.

7.28 The table below brings together the analysis of newly-forming and existing households falling into need, split into those unable to rent OR buy and those able to rent but NOT buy – this shows a total need for 941 units per annum with 73% from households unable to buy OR rent.

Table 7.6 Projected need for affordable housing (per annum) – Wealden

	Total Additional Need	Unable to rent OR buy	Able to rent but NOT buy
Newly forming households	819	581	238
Existing households falling into need	122	101	21
Total projected need	941	682	259
Percentage	100%	73%	27%

Source: Icenl analysis

Supply of Affordable Housing Through Relets/Resales

7.29 The future supply of affordable housing through relets is the flow of affordable housing arising from the existing stock that is available to meet future need.

7.30 This focuses on the annual supply of social/affordable rent relets. Information from a range of sources, mainly Continuous Recording of social housing lettings and sales (CoRe) and Local Authority Housing Statistics (LAHS) has been used to establish past patterns of social housing turnover. Data for three-years has been used (2021-22 to 2023-24).

- 7.31 The figures are for general needs lettings but exclude lettings of new properties and exclude an estimate of the number of transfers from other social rented homes.
- 7.32 These exclusions are made to ensure that the figures presented reflect relets from the existing stock. Based on past trend data, it is estimated that 193 units of social/affordable rented housing will become available each year going forward.

Table 7.7 Analysis of Past Social/Affordable Rented Housing Supply, 2021/22 – 2023/24 (average per annum) – Wealden

	Total Lettings	% as Non-New Build	Lettings in Existing Stock	% Non-Transfers	Lettings to New Tenants
2021/22	568	71.8%	408	60.2%	246
2022/23	336	78.6%	264	58.3%	154
2023/24	540	56.7%	306	58.9%	180
Average	481	67.7%	326	59.3%	193

Source: CoRe/LAHS

- 7.33 It is also possible to consider if there is any supply of affordable home ownership products from the existing stock of housing. One source is likely to be the resale of low-cost home ownership products, with data from the Regulator of Social Housing showing a total stock of 999 homes in 2024.
- 7.34 If these homes were to turn over at a rate of around 6% (which is roughly the turnover of owner-occupied housing (those with a mortgage) and evidenced through the English Housing Survey), then they would be expected to generate around 60 resales each year.
- 7.35 These properties would be available for these households and can be included as potential supply. The total estimated supply is therefore 253 units per annum (i.e. 193+60).

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- 7.36 In the affordable home ownership sector, there is arguably an additional (and significant) source of supply from resale market homes below a lower quartile price.
- 7.37 Data from the Land Registry shows 1,901 resales of homes in 2024; therefore, 475 homes were sold at or below the lower quartile price and could contribute to meeting the needs of those in the 'gap' between renting and buying. However, a supply from this source has not been included in the analysis below but is considered when concluding.
- 7.38 The PPG model also includes bringing vacant homes back into use and the pipeline of affordable housing as part of the supply calculation. These, however, have not been included in the modelling in this report and this is justified below.
- 7.39 Firstly, there is no evidence of any substantial stock of vacant homes (over and above a level that might be expected to allow movement in the stock).
- 7.40 Secondly, with the pipeline supply, it is not considered appropriate to include this, as including it would mean netting off new housing, which would fail to show the full extent of the need. However, in monitoring, it will be essential to net off these dwellings as they are completed.

Net Need for Affordable Housing

- 7.41 The table below shows the overall calculation of affordable housing need. The analysis shows that there is a need for 754 dwellings per annum across the district. The net need is calculated as follows:

$$\text{Net Need} = \text{Current Need (allowance for)} + \text{Need from Newly-Forming Households} + \text{Existing Households falling into Need} - \text{Supply of Affordable Housing}$$

Table 7.8 Estimated Need for Affordable Housing (per annum)

	Unable to buy OR rent	Able to rent but NOT buy	TOTAL
Current need	53	13	66
Newly forming households	581	238	819
Existing households falling into need	101	21	122
Total gross need	736	272	1,007
Relet/resale supply	193	60	253
Net need	542	212	754
% in the affordability category	72%	28%	100%

Source: Icení analysis

- 7.42 The table also splits between households unable to afford to buy OR rent and those able to rent but NOT buy. For this analysis, it is assumed that the Low Cost Home Ownership (LCHO) supply would meet the needs of the latter group, although in reality, there will be crossover between categories.
- 7.43 For example, it is likely in some cases that the cost of shared ownership for example, will have an outgoing below that for privately renting and could meet some of the needs of households unable to buy OR rent – the issue of access to deposits would still be a consideration.
- 7.44 The analysis shows a greater need from households unable to buy OR rent and for whom a rented affordable product is likely to be most suitable.

Affordable Need and Overall Housing Numbers

- 7.45 The PPG encourages local authorities to consider increasing planned housing numbers where this can help to meet the identified affordable need. Specifically, the wording of the PPG (housing and economic needs Ref ID 2a-024) states:

“The total affordable housing need can then be considered in the context of its likely delivery as a proportion of mixed market and affordable housing developments, given the probable percentage of affordable housing to be delivered by market housing led developments. An increase in the total housing figures included in the strategic plan may need to be considered where it could help deliver the required number of affordable homes”.

- 7.46 However, the relationship between affordable housing need and overall housing need is complex. This was recognised in the Planning Advisory Service (PAS) Technical Advice Note of July 2015⁶. PAS concludes that there is no arithmetical way of combining the OAN (calculated through demographic projections) and the affordable need. There are a number of reasons why the two cannot be ‘arithmetically’ linked.
- 7.47 Firstly, the modelling contains a category in the projection of ‘existing households falling into need’; these households already have accommodation and hence if they were to move to alternative accommodation, they would release a dwelling for use by another household – therefore, there is no net additional need arising.
- 7.48 The modelling also contains ‘newly forming households’; these households are a direct output from demographic modelling and are therefore already included in overall housing need figures (a point also made in the PAS advice note – see paragraph 9.5 of the PAS Technical Advice Note of July 2015).
- 7.49 The analysis estimates an annual need for 542 affordable homes from households unable to buy OR rent housing. However, as noted, caution

⁶ <https://www.local.gov.uk/sites/default/files/documents/objectively-assessed-need-9fb.pdf>. While the technical note produced by PAS is arguably becoming dated, there is no more up-to-date guidance on this matter from a Government source and the remarks remain valid despite the changes to the Standard Method and housing need calculations

should be exercised in trying to make a direct link between affordable need and planned delivery, with the key point being that many of those households picked up as having a need will already be living in housing and so providing an affordable option does not lead to an overall net increase in the need for housing (as they would vacate a home to be used by someone else).

- 7.50 It is possible to investigate this in some more detail by re-running the model and excluding those already living in accommodation. This is shown in the table below, which identifies that meeting these needs would lead to an affordable need for 409 homes per annum across the district, around three-quarters of the figure when including those with housing.
- 7.51 This figure is, however, theoretical and should not be seen to be minimising the need (which is clearly acute). That said, it does serve to show that there is a difference in the figures when looking at overall housing shortages.
- 7.52 The analysis is arguably even more complex than this – it can be observed that the leading group of households in need are newly forming households.
- 7.53 These households are already included in demographic projections, so demonstrating a need for this group again should not be seen as additional to the overall figures from those projections.

Table 7.9 Estimated Need for Affordable Housing (households unable to buy OR rent) excluding households already in accommodation

	Including existing households	Excluding existing households
Current need	48	20
Newly forming households	581	581
Existing households falling into need	101	0
Total Gross Need	736	602
Re-let Supply	193	193
Net Need	542	409

Source: Icení analysis

- 7.54 Additionally, it should be noted that the affordable housing need estimate is on a per annum basis and should not be multiplied by the plan period to get a total need.
- 7.55 Essentially, the estimates are for the number of households who would be expected to have a need in any given year (i.e. needing to spend more than 35% of their income on housing).
- 7.56 In reality, some (possibly many) households would see their circumstances change over time such that they would ‘fall out of need’ and this is not accounted for in the analysis.
- 7.57 One example would be a newly forming household with an income level that means they spend more than 35% of their income on housing. As the household’s income rises, it would potentially pass this affordability test and therefore not have an affordable housing need in the future.
- 7.58 Additionally, there is the likelihood that when looking over the longer term, a newly forming household will become an existing household in need and would be counted twice if trying to multiply the figures out for a whole plan period.

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- 7.59 It also needs to be remembered that the affordability test used for this analysis is based on assuming a household spends no more than 35% of their income on housing (when privately renting).
- 7.60 Of course, many households will spend more than this and so would be picked up by modelling as 'in need', but in fact are paying for a private sector tenancy.
- 7.61 ONS research⁷ for 2023 estimates, private tenants are paying an average of 34% of income on housing, which implies that approximately half are spending more than the affordable level assumed in this report.
- 7.62 A further consideration is that some 212 of the 754 per annum affordable need is for households able to rent in the market (but not buy).
- 7.63 Technically, these households can afford market housing (to rent) and historically would not have been considered as having a need in assessments such as this – until recently, only households unable to buy OR rent would be considered as having a need for affordable housing.
- 7.64 For these reasons, these households have not been included in the analysis, looking at households with and without accommodation.
- 7.65 Finally, it should be recognised that PPG does not envisage that all needs will be met (whether this is affordable housing or other forms of accommodation such as for older people). Paragraph 67-001 of the PPG (housing needs of different groups) states:

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<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/bulletins/privaterentalaffordabilityengland/2023>

“This guidance sets out advice on how plan-making authorities should identify and plan for the housing needs of particular groups of people. This need may well exceed, or be proportionally high in relation to, the overall housing need figure calculated using the standard method. This is because the needs of particular groups will often be calculated having consideration to the whole population of an area as a baseline as opposed to the projected new households which form the baseline for the standard method”.

The Role of the Private Rented Sector (PRS)

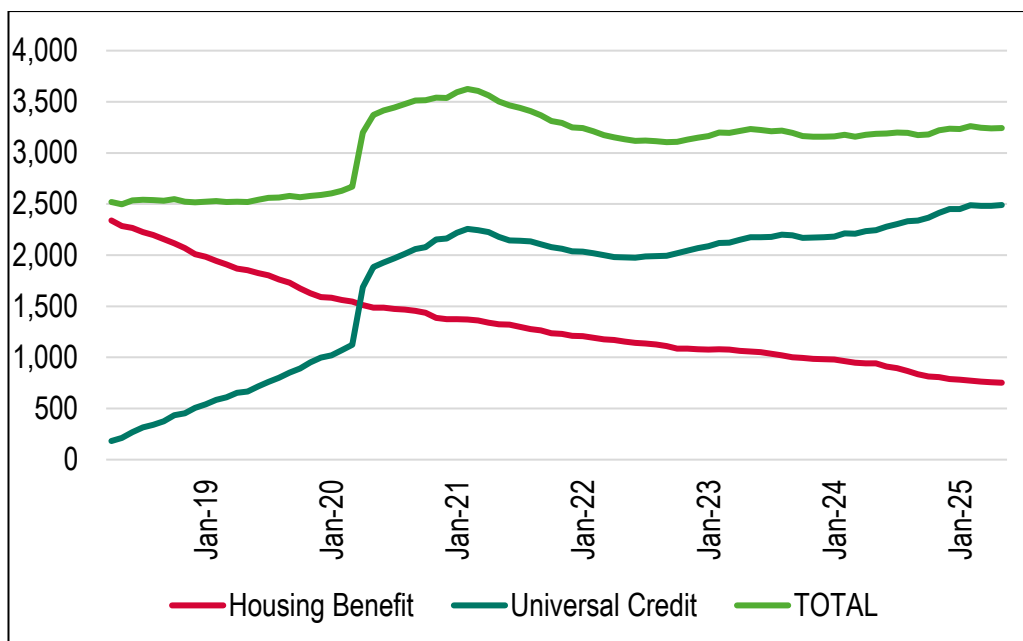
- 7.66 The discussion above has already noted that the need for affordable housing does not generally lead to a need to increase overall housing provision.
- 7.67 However, it is worth briefly thinking about how affordable need works in practice and the housing available to those unable to access market housing without Housing Benefit.
- 7.68 In particular, the role played by the Private Rented Sector (PRS) in providing housing for households who require financial support in meeting their housing needs should be recognised.
- 7.69 Whilst the Private Rented Sector (PRS) does not fall within the types of affordable housing set out in the NPPF (other than affordable private rent, which is a specific tenure separate from the primary ‘full market’ PRS), it has evidently been playing a role in meeting the needs of households who require financial support in meeting their housing need.
- 7.70 The government recognised this and indeed legislated through the 2011 Localism Act to allow Councils to discharge their “homelessness duty” through providing an offer of a suitable property in the PRS.
- 7.71 Data from the Department of Work and Pensions (DWP) has been used to look at the number of Housing Benefit supported private rented

homes. As of May 2025, it is estimated that there were over 3,200 benefit claimants in the Private Rented Sector in Wealden. From this, it is clear that the PRS contributes to the wider delivery of 'affordable homes' with the support of benefit claims.

- 7.72 Whilst the PRS is providing housing for some households, there are, however, significant risks associated with future reliance on the sector to meet an affordable housing need.
- 7.73 The last couple of years have seen rents increase whilst Local Housing Allowance (LHA) levels have remained static. In the Autumn Statement 2023, the then Government increased the LHA rent to the 30th percentile of market rents (based on existing rents rather than those likely to be payable by those moving home).
- 7.74 However, demand pressure could nonetheless have some impact of restricting future supply of PRS properties to those in need; emphasising the need to support the delivery of genuinely affordable homes.
- 7.75 The figure below shows the trend in the number of claimants in the district. This shows there has been a notable increase since March 2020, which is likely to be related to the Covid-19 pandemic.
- 7.76 However, even the more historical data shows a substantial number of households receiving housing benefit support in the private sector (typically around 2,500 households).
- 7.77 The data about the number of claimants does not indicate how many new lettings are made each year in the PRS. However, data from the English Housing Survey (EHS) over the past three years indicates that nationally, around 7% of private sector tenants are new to the sector each year.

- 7.78 If this figure is applied to the number of households claiming Housing Benefit /Universal Credit, then this would imply around 230 new benefit-supported lettings in the sector.
- 7.79 Whilst we would not recommend including PRS supply as part of the modelling, not least as it is uncertain whether the availability of homes will remain at this level, as well as concerns about the security of tenure, it is the case that the sector does provide housing and again the overall analysis does not point to the need to increase overall provision.

Figure 7.1 Number of Housing Benefit/Universal Credit claimants in the PRS in Wealden



Source: Department of Work and Pensions

- 7.80 Whilst housing delivery through the Local Plan can be expected to secure additional affordable housing, it needs to be noted that delivery of affordable housing through planning obligations is an important, but not the only means, of delivering affordable housing. The Council should also work with housing providers to secure funding to support enhanced affordable housing delivery on some sites and through use of its own land assets.

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- 7.81 Overall, it is difficult to link the need for affordable housing to the overall housing need; indeed, there is no justification for trying to make the link. Put simply, the two do not measure the same thing, and in interpreting the affordable need figure, consideration needs to be given to the fact that many households already live in housing and therefore do not generate an overall net need for an additional home.
- 7.82 Further issues arise as the need for affordable housing is complex, and additionally, the extent of concealed and homeless households needs to be understood, as well as the role played by the PRS.
- 7.83 Regardless of the discussion above, the analysis identifies a notable need for affordable housing, and it is clear that the provision of new affordable housing is an important and pressing issue across the district.
- 7.84 It does, however, need to be stressed that this report does not provide an affordable housing target; the amount of affordable housing delivered will be limited to the amount that can viably be provided.
- 7.85 As noted previously, the evidence does, however, suggest that affordable housing delivery should be maximised where opportunities arise.

Types of Affordable Housing

- 7.86 The analysis above has clearly pointed to a need for affordable housing, and particularly for households who are unable to buy OR rent in the market.
- 7.87 There is a range of affordable housing options that could meet the need, which will include rented forms of affordable housing (such as social or affordable rents) and products which might be described as

intermediate housing (such as shared ownership or discounted market housing/First Homes). These are discussed in turn below.

Social and Affordable Rented Housing

- 7.88 The table below shows current rent levels in the district for a range of products along with relevant local housing allowance (LHA) rates. Parts of Wealden District fall into four Broad Rental Market Areas (BRMAs) – Crawley & Reigate, Eastbourne, High Weald and Sussex East - and the table shows the range of values across the whole district.
- 7.89 Data about average social and affordable rents has been taken from the Regulator of Social Housing (RSH), and this is compared with lower quartile market rents.
- 7.90 This analysis shows that social rents are significantly lower than affordable rents; the analysis also shows that affordable rents are well below lower quartile market rents – particularly for larger property sizes.
- 7.91 The LHA rates for all sizes of home are generally below the lower quartile market rents for all sizes of accommodation. This does potentially mean that many households seeking accommodation will struggle to secure sufficient benefits to cover their rent.

Table 7.10 Comparison of rent levels for different products –
Wealden

	Social rent	Affordable rent (AR)	Lower quartile (LQ) market rent	LHA range
1-bedroom	£376	£595	£850	£593-£858
2-bedrooms	£453	£743	£1,150	£748-£1,097
3-bedrooms	£514	£878	£1,500	£947-£1,361
4-bedrooms	£609	£1,102	£2,000	£1,147-£1,820

ALL	£460	£762	£1,200	-
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Source: RSH, VOA and market survey

7.92 To some extent, it is easier to consider the data above in terms of the percentage one housing cost is of another, and this is shown in the tables below.

7.93 Focusing on 2-bedroom homes, the analysis shows that social rents are significantly cheaper than market rents (and indeed affordable rents) and that affordable rents (as currently charged) represent 65% of the current lower quartile rent.

Table 7.11 Difference between rent levels for different products – Wealden

	Social rent as % of affordable rent	Social rent as % of LQ market rent	Affordable rent as % of LQ market rent
1-bedroom	63%	44%	70%
2-bedrooms	61%	39%	65%
3-bedrooms	59%	34%	59%
4-bedrooms	55%	30%	55%
ALL	60%	38%	64%

Source: RSH and market survey

7.94 The table below suggests that around 14% of households that cannot afford to rent privately could afford an affordable rent at 80% of market rents, with a further 16% being able to afford current affordable rents.

7.95 There are also an estimated 32% who can afford a social rent (but not an affordable one). A total of 37% of households would need some degree of benefit support (or spend more than 35% of income on housing) to be able to afford their housing (regardless of the tenure). This analysis points to a clear need for social rented housing.

Table 7.12 Estimated need for affordable rented housing (% of households able to afford to buy OR rent)

	% of households able to afford
Afford 80% of market rent	14%
Afford current affordable rent	16%
Afford social rent	32%
Need benefit support	37%
All unable to afford market	100%

Source: Icenl analysis

- 7.96 The analysis indicates that the provision of around 70% of rented affordable housing at social rents could be justified; albeit in setting planning policies, this will need to be considered alongside viability evidence. Higher provision of social rents will reduce the support through housing benefits required to ensure households can afford their housing costs.

Intermediate Housing

- 7.97 As well as rented forms of affordable housing, the Council could seek to provide forms of intermediate housing, with the analysis below considering the potential affordability of shared ownership and discounted market sale housing (which could include First Homes).
- 7.98 Generally, intermediate housing will be a newbuild product, sold at a discount (or on a part buy, part rent arrangement with shared ownership). It will therefore be based on the Open Market Value (OMV) of a new home.

Discounted Market Sale

- 7.99 The table below sets out a suggested maximum purchase price for affordable home ownership/First Homes in Wealden by size.

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- 7.100 It works through first (on the left-hand side) what households with an affordable home ownership need could afford (based on a 10% deposit and a mortgage at 4.5 times' income).
- 7.101 The right-hand side of the table then sets out what Open Market Value (OMV) this might support, based on a 30% discount. The 'able to afford' figure is based on a midpoint between the house price a household (just) able to rent privately might be able to afford and the lower quartile house price (or just the lower quartile price where this is higher).
- 7.102 Focussing on 2-bedroom homes, it is suggested that an affordable price is no more than £223,600 and therefore the open market value of homes of this size would need to be no more than £319,400 (if discounted by 30%).

Table 7.13 Affordable home ownership prices – Wealden

	What households able to rent but not buy could afford	Open Market Value (OMV) of Home with 30% Discount
1-bedroom	£147,900	£211,200
2-bedrooms	£223,600	£319,400
3-bedrooms	£293,600	£419,400
4+-bedrooms	£406,400	£580,600

Source: Icen analysis

- 7.103 It is difficult to definitively analyse the cost of newbuild homes as these will vary from site to site and will be dependent on a range of factors such as location, built form and plot size.
- 7.104 We have, however, looked at newbuild schemes currently advertised on Rightmove, with the table below providing a general summary of existing schemes.
- 7.105 This analysis is interesting as it shows the median newbuild price to be above the top end of the OMV typically required to make homes

affordable to those in the gap between buying and renting (this is particularly the case for 2- and 3-bedroom homes).

7.106 That said, homes at the bottom end of the price range could potentially be discounted by 30% and considered as affordable. The analysis is also noteworthy for showing a negligible supply of smaller (1- and 2-bedroom) newbuild homes (just 12% of the total).

7.107 This analysis shows how important it will be to know the OMV of housing before discounting to be able to determine if a product is going to be genuinely affordable in a local context. While the Council should aim to ensure a 30% discount on this type of housing this will not automatically mean it becomes affordable housing.

Table 7.14 Estimated newbuild housing cost by size – Wealden

	No. of homes advertised	Range of prices	Median price
1-bedroom	4	£184,000-£215,000	£192,000
2-bedrooms	27	£265,000-£695,000	£430,000
3-bedrooms	108	£343,000-£935,000	£450,000
4+-bedrooms	128	£390,000-£1,800,000	£570,000

Source: Iceni analysis

7.108 Overall, it is considered that the evidence does not support significant need for First Homes (or other discounted market products) in a local context due to the cost of newbuild housing. However, discounted market products may aide in supporting cross subsidy of other affordable tenure types, as well as ensuring that a range of tenures are delivered across Wealden.

7.109 With regards to First Homes specifically and given the price cap set for homes within this tenure of £250,000, it is unlikely for any homes to be provided with more than 2 bedrooms and therefore a wide mix of sizes in this tenure is unlikely to be delivered.

7.110 As part of the research on house prices, a small number of homes being sold under First Homes were listed, and these were arguably affordable in the context of the analysis above: two 1-bedroom homes priced (after discount) at £140,000-£150,000 and three 2-bedroom homes at £245,000.

7.111 Given estimated lower quartile prices (1 bedroom at £150,000 and 2-bedrooms at £250,000), this again suggests a fairly marginal need for First Homes, as those above to afford that tenure will in most cases also be able to afford in the open market without a discount.

Shared Ownership

7.112 The analysis below moves on to consider shared ownership. For this analysis, an assessment of monthly outgoings has been undertaken, with the core assumption that outgoings should be the same as for renting privately, to make this tenure genuinely affordable.

7.113 The analysis has looked at what the OMV would need to be for a shared ownership to be affordable with a 10%, 25% and 50% share. To work out outgoings, the mortgage part is based on a 10% deposit (for the equity share) and a repayment mortgage over 25 years at 5% with a rent at 2.75% per annum on unsold equity.

7.114 The findings for this analysis are interesting and do point to the possibility of shared ownership being a more affordable tenure than discounted market housing (including First Homes).

7.115 By way of an explanation of this table (focusing on 3-bedroom homes), if a 50% equity share scheme came forward, then it is estimated the OMV could not be above £397,000 if it is to be genuinely affordable (due to the outgoings being in excess of the cost of privately renting).

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- 7.116 However, given the subsidised rents, the same level of outgoings could be expected with a 10% equity share but a much higher OMV of £579,000.
- 7.117 Although affordability can only be considered on a scheme-by-scheme basis, it is notable that we estimate a median 3-bedroom newbuild to cost around £450,000. This points to a shared ownership model, where an equity share of 25% as being genuinely affordable, although lower shares could increase the number of households able to afford; for 2-bedroom homes a lower equity share might be required on the basis of this analysis although it does need to be remembered that this is all based on data from a single point in time.
- 7.118 Overall, it is considered that shared ownership is likely to be a more affordable product than discounted market housing, but that lower equity shares (say at no more than 25%) should be encouraged in any development.

Table 7.15 Estimated OMV of Shared Ownership with a 50%, 25% and 10% Equity Share by Size – Wealden

	50% share	25% share	10% share
1-bedroom	£225,000	£280,000	£328,000
2-bedroom	£304,000	£379,000	£444,000
3-bedroom	£397,000	£494,000	£579,000
4-bedrooms	£530,000	£659,000	£772,000

Source: Icení analysis

Rent-to-Buy

- 7.119 A further affordable option is Rent to Buy; this is a government scheme designed to ease the transition from renting to buying the same home. Initially (typically for five years), the newly built home will be provided at the equivalent of an affordable rent (approximately 20% below the market rate).

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- 7.120 The expectation is that the discount provided in the first five years is saved in order to put towards a deposit on the purchase of the same property. Rent to Buy can be advantageous for some households as it allows for a smaller 'step' to be taken onto the home ownership ladder.
- 7.121 At the end of the five years, depending on the scheme, the property is either sold as a shared ownership product or purchased outright as a full market property. If the occupant cannot do either of these, then the property is vacated.
- 7.122 In order to access this tenure, it effectively requires the same income threshold for the initial phase as a market rental property. However, the cost of accommodation will be that of affordable rent.
- 7.123 The lower-than-market rent will allow the household to save for a deposit for the eventual shared ownership or market property. In considering the affordability of rent-to-buy schemes, there is a direct read across to the income required to access affordable home ownership (including shared ownership).
- 7.124 It should therefore be treated as part of the affordable home ownership products suggested by the NPPF.

Policy Response

- 7.125 It is not possible through the LHNA to set out the amount of affordable housing to be required through policy as this will largely depend on the viability of provision, which is a separate evidence base.
- 7.126 We do, however, note the Council's policy position from the Core Strategy (adopted 2013), which seeks 35% of homes as affordable housing with an 80:20 split between social rents and intermediate housing.

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- 7.127 The 35% overall target could provide a good starting point for viability testing, although higher figures should also be considered.
- 7.128 In terms of a tenure split, this report can, however, provide some advice, particularly in light of the latest NPPF (December 2024), which states (in paragraph 64) that *‘planning policies should specify the type of affordable housing required (including the minimum proportion of Social Rent homes required)’*.
- 7.129 Overall, it is recommended that the Council consider maintaining a split between rented and intermediate housing in an 80:20 ratio. However, with rented housing, there is likely to be a role for tenures other than social rents.
- 7.130 Whilst the primary analysis in this report identified a split of 72:28 between those unable to buy OR rent and those able to rent but NOT buy, it was noted that these figures do not include the sizeable amount of market housing available for sale at a price below the lower quartile and which could be available for some households in the latter group.
- 7.131 In addition, the proportion of rented affordable housing is considered justified, as those households with a need for rented products are more likely to have acute needs and fewer options in the housing market.
- 7.132 In terms of types of affordable housing, the analysis suggests around 70% of rented homes should be at social rents (the rest at affordable rents).
- 7.133 The analysis also suggests there is unlikely to be any significant role for discounted market housing (including First Homes), with the primary focus likely to be on shared ownership (and possible rent-to-buy housing).

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- 7.134 The following table sets out a suggested tenure split based on the evidence in this report. This would still be subject to viability and for the Council to make alternative choices if it wishes too.
- 7.135 Those alternative choices may include, for example, increasing levels of intermediate housing which may increase overall delivery of affordable homes, and this may be considered preferable to providing homes at social rents (of course, the opposite decision could also be made – more social rents, fewer affordable homes overall).
- 7.136 Overall, our recommendation is for an 80:20 split in affordable housing tenures (i.e. 80% rented affordable housing and 20% intermediate housing), with the majority (circa 70%) of rented housing at social rents and the 20% of intermediate housing focusing on shared ownership and rent-to-buy.
- 7.137 A small target is suggested for discounted market sale or First Homes. Although there is not considered to be a significant need for this product in Wealden, it is recognised that its delivery can aid in cross-subsidising the delivery of other forms of affordable housing as well as add to the range of tenures across Wealden. We are therefore recommending that up to 5% of affordable homes be delivered in this tenure.
- 7.138 This aims to reflect the contribution the tenure can make but also recognises that the need is not significant. It will also be important for the Council to ensure that any properties delivered in this tenure are ‘genuinely affordable’ (i.e. at a price lower than the market rate for housing of the same size).
- 7.139 The categories used in the table below are consistent with the affordable housing definitions set out in Annex 2 - Glossary of the NPPF.

Table 7.16 Suggested mix of affordable housing – Wealden

Type of affordable housing	Recommended Target (subject to viability)
a) Social Rent	55%
b) Other affordable housing to rent	25%
c) Discounted market sales housing	Up to 5%
d) Other affordable routes to home ownership (Shared Ownership, Rent to Buy)	15%

Source: Iceni analysis

Key Messages

The evidence indicates that there is an acute need for affordable housing in the district (at 754 dwellings per annum).

The majority of affordable need is from households who are unable to buy OR rent (72%) and therefore points particularly towards a need for rented affordable housing rather than affordable home ownership.

Despite the level of affordable housing need being high, it is not considered that this points to any requirement for the Council to increase the Local Plan housing requirement due to affordable housing needs.

The link between affordable housing need and overall housing need (of all tenures) is complex, and in trying to make a link, it must be remembered that many of those picked up as having an affordable housing need are already in housing (and therefore do not generate a net additional need for a home).

In addition, the private rented sector is providing benefit-supported accommodation for many households. That said, the level of

affordable housing need suggests the Council should maximise the delivery of such housing at every opportunity.

The analysis suggests there will be a need for both social and affordable rented housing – the latter will be suitable particularly for households who are close to being able to afford to rent privately and possibly also for some households who claim full Housing Benefit.

It is, however, clear that social rents are more affordable and could benefit a wider range of households – social rents could therefore be prioritised where delivery does not prejudice the overall delivery of affordable homes.

The study also considers different types of AHO (notably First Homes and shared ownership) as each may have a role to play.

Shared ownership is likely to be suitable for households with more marginal affordability (those only just able to afford to rent privately) as it has the advantage of a lower deposit and subsidised rent.

There was no evidence of a significant need for First Homes or discounted market housing more generally. However, in order to support the overall delivery of affordable housing and ensure that a range of tenures are delivered across Wealden, we have recommended that up to 5% of affordable dwellings could be delivered as discounted market sale housing.

In deciding what types of affordable housing to provide, including a split between affordable rented and affordable home ownership products, the Council will need to consider the relative levels of need and also viability issues.

Recognising, for example, that providing AHO may be more viable and may therefore allow more units to be delivered, but at the same

time noting that households with a need for rented housing are likely to have more acute needs and fewer housing options.

Our recommendation is for an 80:20 split in affordable housing tenures (i.e. 80% rented affordable housing and 20% intermediate housing), with the majority (circa 70%) of rented housing at social rents and the 20% of intermediate housing focusing on shared ownership and rent-to-buy.

Overall, the analysis identifies a notable need for affordable housing in the district, and it is clear that the provision of new affordable housing is an important and pressing issue in the area.

It does, however, need to be stressed that this report does not provide an affordable housing target; the amount of affordable housing delivered will be limited to the amount that can viably be provided.

The evidence does, however, suggest that affordable housing delivery should be maximised where opportunities arise and the focus of that need should be rental accommodation and particularly social rent.

8. Housing Mix

Introduction

- 8.1 This section considers the appropriate mix of housing across Wealden, with a particular focus on the sizes of new homes required in different tenure groups.
- 8.2 This section looks at a range of statistics in relation to families (generally described as households with dependent children) before moving on to look at how the number of households in different age groups are projected to change moving forward.

Background Data

- 8.3 The number of families in Wealden (defined for the purpose of this assessment as any household which contains at least one dependent child) totalled 17,200 as of the 2021 Census, accounting for 25% of households.
- 8.4 This proportion is slightly lower than seen across the region and nationally but is very slightly higher than the equivalent figure for East Sussex. The proportion of lone-parent households is lower than in other locations.

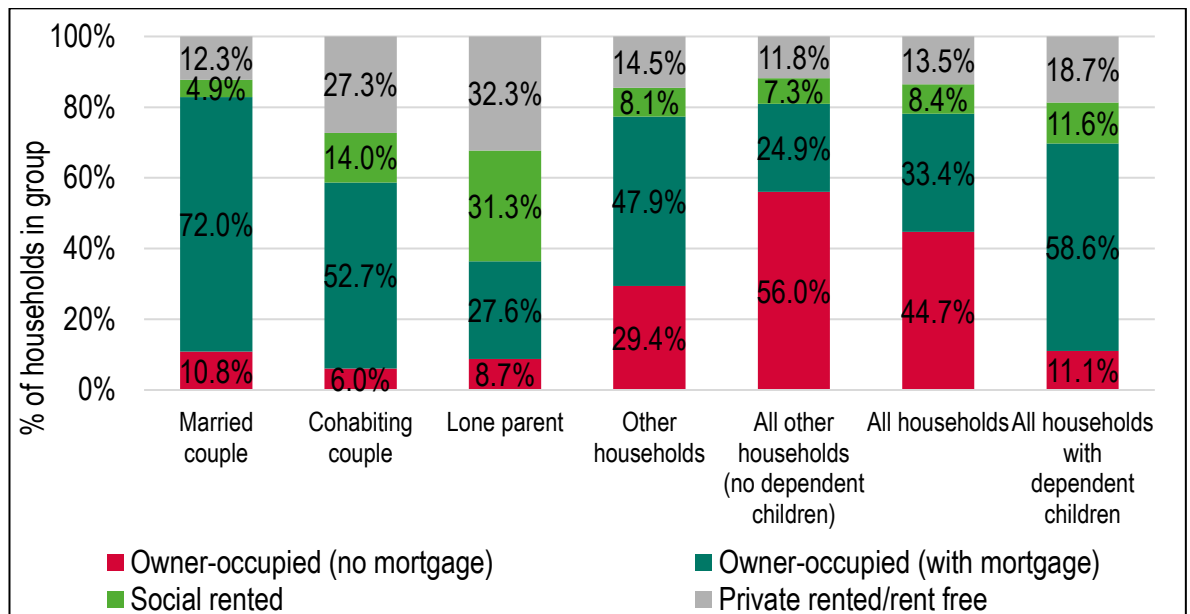
Table 8.1 Households with Dependent Children (2021)

	Wealden		East Sussex	South East	England
	No.	%	%	%	%
Married couple	9,884	14.5%	12.0%	16.3%	14.4%
Cohabiting couple	2,729	4.0%	4.3%	4.4%	4.5%
Lone parent	3,292	4.8%	6.0%	6.0%	6.9%
Other households	1,301	1.9%	2.1%	2.5%	2.7%
All other households	51,061	74.8%	75.6%	70.9%	71.5%
Total	68,267	100.0%	100.0%	100.0%	100.0%
Total with dependent children	17,206	25.2%	24.4%	29.1%	28.5%

Source: Census (2021)

- 8.5 The figure below shows the current tenure of households with dependent children. There are some considerable differences by household type, with lone parents having a very high proportion living in the social and private rented sectors.
- 8.6 Across the district, only 36% of lone-parent households are owner-occupiers compared with 83% of married couples with children.

Figure 8.1 Tenure of households with dependent children (2021) – Wealden

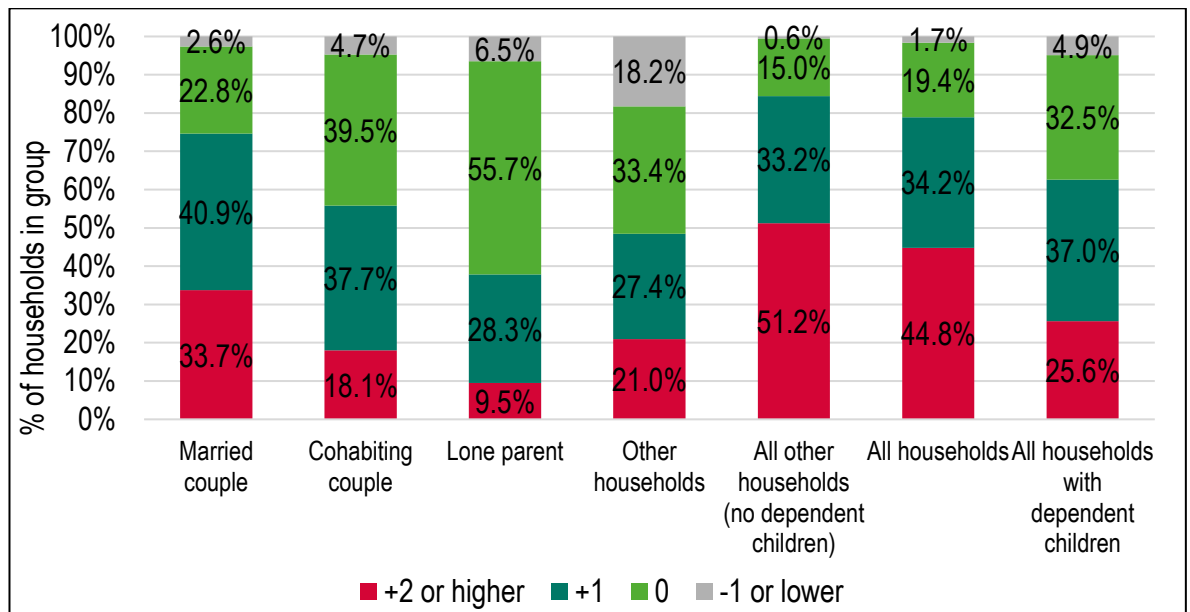


Source: Census (2021)

8.7 The figure below shows levels of overcrowding and under-occupancy of households with dependent children. This shows higher levels of overcrowding (minus figure) for all household types with dependent children, with 6% of all lone parents and 18% of 'other' households being overcrowded.

8.8 Overall, some 5% of all households with dependent children are overcrowded, compared with less than 1% of other households. Levels of under-occupancy (positive figures) are also notably lower in households with dependent children.

Figure 8.2 Occupancy rating of households with dependent children (2021) – Wealden



Source: Census (2021)

The Mix of Housing

- 8.9 A model has been developed that starts with the current profile of housing by size (bedrooms) and tenure. In the data, information is available on household ages and the typical sizes of the homes they occupy.
- 8.10 By using demographic projections, it is possible to see which age groups are expected to change in number, and by how much.
- 8.11 On the assumption that occupancy patterns for each age group (within each tenure) remain the same, it is therefore possible to assess the profile of housing needed over the assessment period (taken to be 2025-2042 to be consistent with other analyses in this report and the proposed plan period).

- 8.12 An important starting point is to understand the current balance of housing in the area – the table below profiles the sizes of homes in different tenure groups across areas.
- 8.13 The data shows a market stock (owner-occupied) that is dominated by 3+-bedroom homes (making up 73% of the total in this tenure group, although this is a slightly lower proportion than that seen both nationally and across the South East); the proportion of homes with 4+-bedrooms is, however, higher than seen in other locations.
- 8.14 The profile of the social rented sector is broadly similar to that seen in other areas (more 1-bedroom homes and fewer with 3+ bedrooms), whilst the private rented sector is generally slightly larger, with a relatively low proportion of 1-bedroom homes.
- 8.15 Observations about the current mix feed into conclusions about future housing mix later in this section.

Table 8.2 Number of Bedrooms by Tenure, 2021

		Wealden	South East	England
Owner-occupied	1-bedroom	3%	4%	4%
	2-bedrooms	24%	21%	21%
	3-bedrooms	36%	42%	46%
	4+-bedrooms	37%	33%	29%
	Total	100%	100%	100%
	Ave. no. beds	3.07	3.04	3.01
Social rented	1-bedroom	31%	31%	29%
	2-bedrooms	36%	35%	36%
	3-bedrooms	29%	31%	31%
	4+-bedrooms	3%	4%	4%
	Total	100%	100%	100%
	Ave. no. beds	2.05	2.08	2.10
Private rented	1-bedroom	18%	24%	21%
	2-bedrooms	40%	38%	39%
	3-bedrooms	31%	27%	29%
	4+-bedrooms	12%	12%	11%

	Total	100%	100%	100%
	Ave. no. beds	2.36	2.27	2.30

Source: Census (2021)

Overview of Methodology

- 8.16 The method to consider future housing mix looks at the ages of the Household Reference Persons (HRPs) and how these are projected to change over time. The sub-sections to follow describe some of the key analyses.

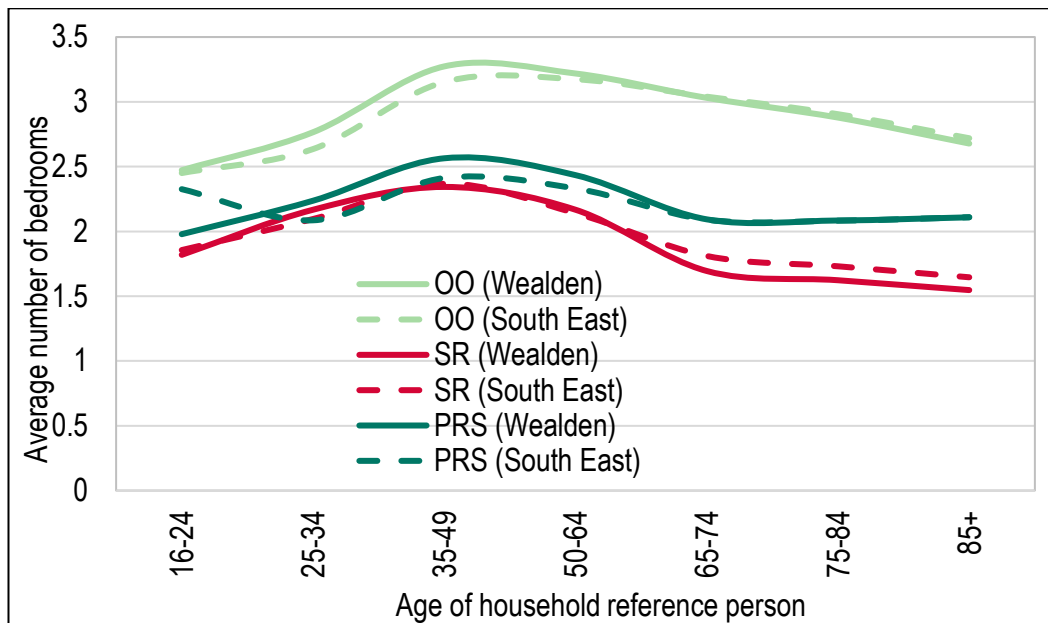
Understanding How Households Occupy Homes

- 8.17 Whilst the demographic projections provide a good indication of how the population and household structure will develop; it is not a simple task to convert the net increase in the number of households into a suggested profile for additional housing to be provided.
- 8.18 The main reason for this is that in the market sector, households can buy or rent any size of property (subject to what they can afford) and therefore, knowledge of the profile of households in an area does not directly transfer into the sizes of property to be provided.
- 8.19 The size of housing which households occupy relates more to their wealth and age than the number of people they contain. For example, there is no reason why a single person cannot buy (or choose to live in) a 4-bedroom home if they can afford it, and hence, projecting an increase in single-person households does not automatically imply a need for smaller units.
- 8.20 That said, issues of supply can also impact occupancy patterns. For example, a supply of additional smaller-level access homes may encourage older people to downsize. Still, in the absence of such

accommodation, these households continue to live in their larger homes.

- 8.21 The issue of choice is less relevant in the affordable sector (particularly since the introduction of the social sector size criteria) where households are allocated properties which reflect the size of the household.
- 8.22 However, there will still be some level of under-occupation moving forward with regards to older persons and working households who may be able to under-occupy housing (e.g. those who can afford to pay the spare room subsidy ('bedroom tax')).
- 8.23 The approach used is to interrogate information derived in the projections about the number of HRPs in each age group and apply this to the profile of housing within these groups (data being drawn from the 2021 Census).
- 8.24 The figure below shows an estimate of how the average number of bedrooms varies by different ages of HRP and the broad tenure group for Wealden and the South East region.
- 8.25 In all sectors, the average size of accommodation rises over time to typically reach a peak around the age of 50. After peaking, the average dwelling size decreases slightly – as typically some households downsize as they get older.
- 8.26 The analysis also confirms Wealden as having broadly similar dwelling sizes across many age and tenure groups when compared with regional data.

Figure 8.3 Average Bedrooms by Age and Tenure in Wealden and the region



Source: Census (2021)

8.27 The analysis uses the existing occupancy patterns at a local and regional level as a starting point for analysis and applies these to the projected changes in HRP by age discussed below. The analysis has been used to derive outputs for three broad categories. These are:

- **Market Housing** – which is taken to follow the occupancy profiles in the market sector (i.e. owner-occupiers and the private rented sector);
- **Affordable Home Ownership** – which is taken to follow the occupancy profile in the private rented sector (this is seen as reasonable as the Government’s desired growth in home ownership looks to be largely driven by a wish to see households move out of private renting); and
- **Rented Affordable Housing** – which is taken to follow the occupancy profile in the social rented sector. The affordable sector in the analysis to follow would include social and affordable rented housing.

Changes to Households by Age

- 8.28 The table below presents the projected change in households by age of HRP under the 'Standard Method'.
- 8.29 This shows growth as being expected in all age groups and in particular older age groups (notably 85+), although some high growth is also projected in younger age groups, in part due to an assumption that household formation could improve over time (and from a low base in the under 25 age group).

Table 8.3 Projected Change in Household by Age of HRP in Wealden

	2025	2042	Change in Households	% Change
Under 25	698	1,547	849	121.5%
25-34	6,192	8,910	2,717	43.9%
35-49	14,451	21,192	6,741	46.6%
50-64	21,668	23,947	2,279	10.5%
65-74	12,260	15,505	3,245	26.5%
75-84	12,175	16,669	4,494	36.9%
85+	4,739	8,462	3,723	78.6%
TOTAL	72,185	96,232	24,047	33.3%

Source: Icen Analysis

Modelled Outputs

- 8.30 By following the methodology set out above and drawing on the sources shown, a series of outputs have been derived to consider the likely size requirement of housing within each of the three broad tenures at a local authority level. The analysis is based on considering both local and regional occupancy patterns.
- 8.31 The data linking to local occupancy will, to some extent, reflect the role and function of the local area, whilst the regional data will help to

establish any gaps (or relative surpluses) of different sizes/tenures of homes when considered in a wider context.

- 8.32 The table below shows the modelled outputs of need by dwelling size in the three broad tenures. Market housing focusses on 3+-bedroom homes, affordable home ownership on 2-bedroom accommodation and rented affordable housing showing a slightly smaller profile again.

Table 8.4 Initial Modelled Mix of Housing by Size and Tenure – Wealden

	1- bedroom	2- bedrooms	3- bedrooms	4+ bedrooms
Market	8%	28%	37%	27%
Affordable home ownership	21%	40%	28%	11%
Affordable housing (rented)	33%	36%	28%	3%

Source: Housing Market Model

Rightsizing

- 8.33 The analysis above sets out the potential need for housing if occupancy patterns remain the same as they were in 2021 (with differences from the current stock profile being driven by demographic change).
- 8.34 It is, however, worth also considering that the 2021 profile will have included households who are overcrowded (and therefore need a larger home than they actually live in) and also those who under-occupy (have more bedrooms than they need).
- 8.35 There is a case to seek new housing stock to more closely match actual size requirements. Whilst it would not be reasonable to expect to remove all under-occupancy (particularly in the market sector), it is the case that in seeking to make the most efficient use of land, it would be prudent to look to reduce this over time. Further analysis has been

undertaken to take account of overcrowding and under-occupancy (by tenure).

- 8.36 The table below shows a cross-tabulation of a household's occupancy rating and the number of bedrooms in their home (for owner-occupiers).
- 8.37 This shows a high number of households with at least 2 spare bedrooms that are living in homes with 3 or more bedrooms. There are also a number of overcrowded households.
- 8.38 In the owner-occupied sector in 2021, there were 46,900 households with some degree of under-occupation and around 460 overcrowded households – some 88% of all owner-occupiers have some degree of under-occupancy.

Table 8.5 Cross-tabulation of occupancy rating and number of bedrooms (owner-occupied sector) – Wealden

Occupancy rating	Number of bedrooms				
	1-bed	2-bed	3-bed	4+ bed	TOTAL
+2 spare bedrooms	0	0	11,868	16,633	28,501
+1 spare bedrooms	0	10,404	5,408	2,585	18,397
0 "Right sized"	1,698	2,003	1,916	363	5,980
-1 too few bedrooms	52	204	145	60	461
TOTAL	1,750	12,611	19,337	19,641	53,339

Source: Census (2021)

- 8.39 For completeness, the tables below show the same information for the social and private rented sectors. In both cases, there are more under-occupying households than overcrowded households, but the differences are less marked than those seen for owner-occupied housing.

Table 8.6 Cross-tabulation of occupancy rating and number of bedrooms (social rented sector) – Wealden

Occupancy rating	Number of bedrooms				
	1-bed	2-bed	3-bed	4+ bed	TOTAL
+2 spare bedrooms	0	0	357	63	420
+1 spare bedrooms	0	778	488	55	1,321
0 "Right sized"	1,718	1,102	703	61	3,584
-1 too few bedrooms	51	200	110	12	373
TOTAL	1,769	2,080	1,658	191	5,698

Source: Census (2021)

Table 8.7 Cross-tabulation of occupancy rating and number of bedrooms (private rented sector) – Wealden

Occupancy rating	Number of bedrooms				
	1-bed	2-bed	3-bed	4+ bed	TOTAL
+2 spare bedrooms	0	0	952	686	1,638
+1 spare bedrooms	0	2,183	1,131	286	3,600
0 "Right sized"	1,575	1,358	681	82	3,696
-1 too few bedrooms	67	141	64	20	292
TOTAL	1,642	3,682	2,828	1,074	9,226

Source: Census (2021)

- 8.40 In using this data in the modelling, an adjustment is made to move some of those who would have been picked up in the modelling as under-occupying into smaller accommodation.
- 8.41 Where there is under-occupation by 2 or more bedrooms, the adjustment takes 25% of this group and assigns to a '+1' occupancy.
- 8.42 This does need to be recognised as an assumption, but can be seen as reasonable, as they do retain some (considerable) degree of under-

occupation (which is likely) and also seek to model a better match between household needs and the size of their home.

- 8.43 For overcrowded households, a move in the other direction is made; in this case, households are moved up by as many bedrooms as is needed to resolve the problems (this is applied to all overcrowded households).
- 8.44 The adjustments for under-occupation and overcrowding lead to the suggested mix as set out in the following tables.
- 8.45 The table below tends to suggest a very slightly different profile of homes as being needed (compared to the initial modelling), including an increase in the need for 4+ bedroom homes in the rented affordable housing sector due to levels of overcrowding.

Table 8.8 Modelled Mix of Housing by Size and Tenure – Wealden

	1- bedroom	2- bedrooms	3- bedrooms	4+ bedrooms
Market	7%	33%	39%	21%
Affordable home ownership	20%	41%	28%	10%
Affordable housing (rented)	32%	35%	28%	5%

Source: Housing Market Model

- 8.46 Across the district, the analysis points to approaching a third of the social/affordable housing need being for 1-bedroom homes, and it is of interest to see how much of this is due to older person households.
- 8.47 In the future, household sizes are projected to drop, whilst the population of older people will increase. Older person households (as shown earlier) are more likely to occupy smaller dwellings. The impact that older people have on the demand for smaller stock is outlined in the table below.

-
- 8.48 This table identifies a slightly larger profile of homes needed for households where the HRP is aged under 65, with a concentration of 1-bedroom homes for older people.
- 8.49 This information can be used to inform the mix required for housing for older people (e.g. age restricted), although it does need to be noted that not all older people would be expected to live in homes solely for older people.
- 8.50 The 2, 3, and 4+ bedroom categories have been merged for the purposes of older persons, as we would not generally expect many (if any) households in this category to need (or indeed be able to be allocated) more than 2 bedrooms in the rented affordable housing sector.

Table 8.9 Modelled Mix of Housing by Size and Age – affordable housing (rented) – Wealden

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	21%	39%	34%	6%
65 and over	56%	44%		
All affordable housing (rented)	32%	35%	28%	5%

Source: Housing Market Model

- 8.51 A further analysis of the need for rented affordable housing is to compare the need with the supply (turnover) of different sizes of accommodation.
- 8.52 This links back to estimates of need in the previous section (an annual need for 542 dwellings per annum from households unable to buy OR rent), with additional data from Continuous Recording (CoRe) about the sizes of homes let over the past three years.

-
- 8.53 This analysis is quite clear in showing the very low supply of larger homes relative to the need for 4+bedroom accommodation, where it is estimated the supply is only around 12% of the need arising each year, whereas for 2-bedroom homes, around a third of the need can be met. This means that households in need of 4+ bedroom homes are likely to wait longer than those seeking smaller homes as less supply is available.

Table 8.10 Need for rented affordable housing by number of bedrooms – Wealden

	Gross Annual Need	Gross Annual Supply	Net Annual Need	As a % of total net annual need	Supply as a % of gross need
1-bedroom	229	57	172	31.6%	25.0%
2-bedrooms	283	95	188	34.7%	33.6%
3-bedrooms	192	37	155	28.5%	19.4%
4+-bedrooms	32	4	28	5.2%	11.6%
Total	736	193	542	100.0%	26.3%

Source: Icenl analysis

Indicative Targets for Different Sizes of Property by Tenure

- 8.54 The analysis below provides some indicative targets for different sizes of home (by tenure). The conclusions take account of a range of factors, including the modelled outputs and an understanding of the stock profile and levels of under-occupancy and overcrowding.
- 8.55 The analysis (for rented affordable housing) also draws on data from the local authority's Housing Register with regard to the profile of need, as well as taking a broader view of issues such as the flexibility of homes to accommodate changes to households (e.g. the lack of flexibility offered by a 1-bedroom home for a couple looking to start a family).

-
- 8.56 The Housing Register data below shows a pattern of need focused on 1-bedroom homes, but with a quarter of households needing 3+ bedroom accommodation.

Table 8.11 Size of Social/Affordable Rented Housing Needed – Housing Register Information (March 2024)

	Number of households	% of households
1-bedroom	526	49.1%
2-bedrooms	301	28.1%
3-bedrooms	191	17.8%
4+-bedrooms	53	4.9%
TOTAL	1,071	100.0%

Source: LAHS

Social/Affordable Rented

- 8.57 Bringing together the above, a number of factors are recognised. This includes recognising that it is unlikely that all affordable housing needs will be met and that households with a need for larger homes will have greater priority (as they are more likely to contain children).
- 8.58 The following mix of social/affordable rented housing is therefore recommended subject to viability:
- 1-bedroom: 35%
 - 2-bedrooms: 30%
 - 3-bedrooms: 25%
 - 4+-bedrooms: 10%
- 8.59 If a development is to include housing specifically for older people (e.g. forms of age-restricted housing), then broadly a 50:50 split between 1- and 2-bedroom homes is recommended.

-
- 8.60 The inclusion of some 2-bedroom homes is considered sensible with the aim to promote the opportunity for older person households to downsize – a 2-bedroom offering being more likely to encourage this than 1-bed homes.
- 8.61 Also, whilst technically most older person households will only have a ‘need’ for a 1-bed home, a larger property remains affordable as the bedroom tax/spare room subsidy does not impact most older person households.
- 8.62 It should be noted that the above recommendations are to a considerable degree based on projecting the need forward to 2042 and this will vary over time.
- 8.63 It may be at a point in time that Housing Register data identifies a shortage of housing of a particular size/type, which could lead to the mix of housing being altered from the overall suggested requirement on individual sites as the need arises.
- 8.64 It should be noted however that this recommended mix is for the entire plan period and alterations to it should only be made in conjunction with consultation with the team responsible for managing the housing register. Overall, the delivery of affordable housing should aim to align with the recommended mix.

Affordable Home Ownership (AHO)

- 8.65 In the affordable home ownership sector, a profile of housing that more closely matches the outputs of the modelling is suggested. It is considered that the provision of affordable home ownership products should be more explicitly focused on delivering smaller family housing for younger households and childless couples.

8.66 The conclusions also take account of the earlier observation that it may be challenging to make larger homes genuinely affordable for AHO due to newbuild prices.

8.67 Based on this analysis, it is suggested that the following mix of affordable home ownership products would be appropriate:

- 1-bedroom: 20%
- 2-bedrooms: 40%
- 3-bedrooms: 30%
- 4+-bedrooms: 10%

Market Housing

8.68 Finally, in the market sector, a balance of dwellings is suggested that takes account of both the demand for homes and the changing demographic profile (as well as observations about the current mix when compared with other regional comparators and nationally and also the potential to reduce levels of under-occupancy slightly).

8.69 We have also had regard to the potential for rightsizing, but also recognise that in the market sector, there is limited ability to control what households purchase. This shows a slightly larger recommended profile than other tenure groups.

- 1-bedroom: 5%
- 2-bedrooms: 35%
- 3-bedrooms: 40%
- 4+-bedrooms: 20%

8.70 Although the analysis has quantified this on the basis of the market modelling and an understanding of the current housing market (including the stock profile in different tenures as set out earlier in this

section), it does not necessarily follow that such prescriptive figures should be included in the plan making process (although it will be helpful to include an indication of the broad mix to be sought across the district).

- 8.71 It should be noted that site location and the area's character are also relevant considerations in determining the appropriate mix of market housing on individual development sites.
- 8.72 Equally, demand can change over time, linked to macro-economic factors and local supply. Policy aspirations could also influence the mix sought.
- 8.73 The recommended figures can be used as a monitoring tool to ensure that future delivery is not unbalanced when compared with the likely requirements as driven by demographic change in the area.
- 8.74 The recommendations can also be used as a set of guidelines to consider the appropriate mix on larger development sites, and the Council could expect justification for a housing mix on such sites which significantly differs from that modelled herein.

Smaller-Area Housing Mix

- 8.75 The analysis above has focused on overall district-wide needs with conclusions at the strategic level. It should, however, be recognised that there will be variations in need within the area due to the different roles and functions of locations and the specific characteristics of local households (which can also vary over time).
- 8.76 This report does not seek to model a smaller-area housing mix, but below are some points for consideration when looking at needs in any specific location:

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- a) Whilst there are differences in the stock profile in different locations, this should not necessarily be seen as indicating particular surpluses or shortfalls of particular types and sizes of homes;
 - b) As well as looking at the housing stock, an understanding of the role and function of areas is important. For example, areas traditionally favoured by family households might be expected to provide a greater proportion of larger homes;
 - c) That said, some areas may have relatively few small/cheaper homes, and so consideration needs to be given to diversifying the housing stock; and
 - d) The location/quality of sites will also have an impact on the mix of housing. For example, brownfield sites in urban locations may be better suited to flatted development (while recognising the point above about role and function). In contrast, a more suburban/rural site may be more appropriate for family housing. Other considerations (such as proximity to public transport) may impact on a reasonable mix at a local level.

8.77 Overall, it is suggested that the Council should broadly seek the same mix of housing in all locations as a starting point but should be flexible to a different mix where specific local characteristics suggest otherwise (such as site characteristics and location).

8.78 Additionally, in the affordable sector, it may be the case that Housing Register data for a smaller area identifies a shortage of housing of a particular size/type, which could lead to the mix of housing being altered from the overall suggested requirement.

Key Messages

Analysis of the future mix of housing required takes account of demographic change, including potential changes to the number of family households and the ageing of the population.

The proportion of households with dependent children in Wealden is below average, with around 25% of all households containing dependent children as per the 2021 Census.

There are notable differences between different types of households, with married couples (with dependent children) seeing a high level of owner-occupation. In contrast, lone parents are particularly likely to live in social and private rented accommodation.

There is a range of factors which will influence demand for different sizes of homes, including demographic changes, future growth in real earnings and households' ability to save, economic performance and housing affordability.

The analysis linked to future demographic change concludes that the following represents an appropriate mix of affordable and market homes, which takes into account both household changes and the ageing of the population, as well as seeking to make more efficient use of new stock by not fully projecting forward levels of under-occupancy (which is notable in the market sector).

In all sectors, the analysis points to a particular need for 2- and 3-bedroom accommodation, with varying proportions of 1- and 4+ bedroom homes.

For rented affordable housing, there is a clear need for a range of different sizes of homes, including 35% to have at least 3-bedrooms, of which 10% should have at least 4+ bedrooms.

Our recommended housing mix by tenure is set out below:

Suggested size mix of housing by tenure – Wealden

	Market	Affordable home ownership	Rented affordable housing
1-bedroom	5%	20%	35%
2-bedrooms	35%	40%	30%
3-bedrooms	40%	30%	25%
4+-bedrooms	20%	10%	10%

Source: Iceni analysis

The strategic conclusions in the affordable sector recognise the role that the delivery of larger family homes can play in releasing a supply of smaller properties for other households.

Also recognised is the limited flexibility which 1-bedroom properties offer to changing household circumstances, which feed through into higher turnover and management issues.

The conclusions also take account of the current mix of housing by tenure and also the size requirements shown on the Council's Housing Register.

The housing mix identified above could inform strategic policies, although a flexible approach should be adopted.

For example, in some areas, affordable housing registered providers find difficulties in selling 1-bedroom AHO homes and therefore, the 1-bedroom elements of AHO might be better provided as 2-bedroom accommodation.

That said, given current house prices, there are potential difficulties in making AHO genuinely affordable (particularly for larger homes).

Additionally, in applying the mix to individual development sites, regard should be had to the nature of the site and character of the area, and to up-to-date evidence of need as well as the existing mix and turnover of properties at the local level.

The Council should monitor the mix of housing delivered and respond accordingly in the review of its Local Plan policies.

9. Private Rental Sector

- 9.1 As set out earlier in this report, private renting in Wealden accounts for 13% of all households but is growing at a fast rate due to deteriorating affordability in the home purchase market.
- 9.2 The report also shows the latest average private rent in Wealden is £1,237 per month, lower than the comparator averages in the South East (£1,373) and England (£1,390).

Rental Market Engagement

- 9.3 In Autumn 2025, Iceni engaged with local letting agents to gain a better understanding of what is happening in the local lettings market. This information should be taken as anecdotal.
- 9.4 According to local letting agents, the rental market in Wealden is described as highly active, with strong demand from tenants and continued interest from landlords.
- 9.5 Agents report that interest is high, with some offices holding the details of 50 or more active prospective renters at any given time. Consequently, available properties are let quickly.
- 9.6 Average rents vary dependent on the size of the property. 1-bed dwellings are around £800 per calendar month (pcm), 2-bed dwellings at £1,000 and 3-bed dwellings at £1,400.
- 9.7 Smaller homes, particularly one- to three-bedroom properties are the most sought after, as they appeal to a wide range of tenants, including couples, young professionals, and small families.
- 9.8 According to local agents, there is a tiny market for larger rental properties of 4 or more bedrooms.

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- 9.9 In the north of the district around Crowborough, there has recently been an increase in tenants moving to Wealden from more expensive locations such as Tunbridge Wells, drawn in by the relative affordability of Wealden. This is less evident in the south of the district, with most buyers coming from the Wealden/Eastbourne area.
- 9.10 Couples are a key demographic in the rental market, often choosing smaller properties while saving for a deposit to purchase their own home.
- 9.11 These tenants typically prefer compact rentals that are easy to maintain, and they show little preference between flats and houses, focusing instead on location and price.
- 9.12 The Renters Reform Bill has had a significant impact on the market with a number of landlords leaving the sector. The exact implications of the new regulations are not yet known, and as a result, there is still significant uncertainty in the market.
- 9.13 Agents are working to keep landlords informed, but they also expect more changes over the coming months as new regulation details are hashed out.

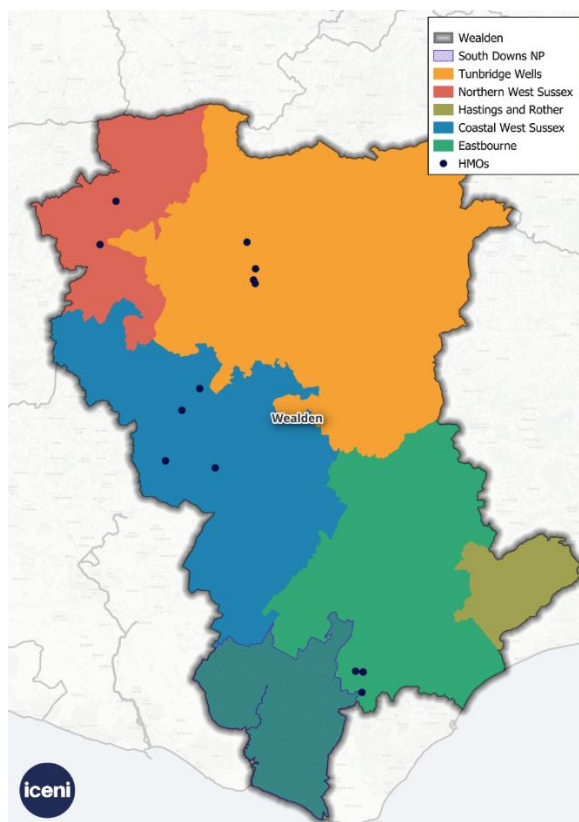
Houses in Multiple Occupation (HMO's)

- 9.14 Wealden District Council follows the mandatory HMO licensing scheme under the Housing Act 2004. This means that all properties which meet the following criteria are required to apply for an HMO license.
- *'Houses five or more people from two or more households (not all related); and*
 - *Shares basic amenities such as bathrooms, toilets, or cooking facilities.'*
- 9.15 According to the Council, Wealden has currently recorded 18 HMO licensed properties in the district. Although only 18 are licensed this

does not mean these are the only HMOs, as the data will not include any HMOs that do not meet the above criteria, for example, HMOs of 4 or less people.

- 9.16 Data submitted by the Council as part of the Local Authority Housing Statistics Data returns indicates that there may be up to 50 HMOs across the district.
- 9.17 The figure below illustrates the spatial distribution of all licensed HMOs across Wealden. As shown, with the exception of Hastings and Rother HMA sub-area, these are distributed across all Sub-Areas within the district. The HMOs appear to be focused in more urban areas, such as Polegate, Crowborough and Uckfield.

Figure 9.1 HMOs in Wealden



Source: HMO Register, 2025

- 9.18 The HMOs are a mixture of detached houses, cottages, flats, semi-detached houses and converted commercial buildings. The maximum

number of occupants in the properties ranges between 5 and 10; the average number of occupants in licensed HMOs is 6.

- 9.19 Data from the 2021 Census shows a total of 56 HMOs within Wealden, 37 of which are small HMOs and 19 are large HMOs. Between 2021 and 2025, there has only been a loss of one large HMO according to the Council's own data.

Build to Rent

- 9.20 The Housing White Paper (February 2017)⁸ set out that previous government's position to build on earlier initiatives to attract new investment into large-scale housing, which is purpose-built for market rent (i.e. Build to Rent).
- 9.21 The previous government set out that this would drive up the overall housing supply, increase choice and standards for people living in privately rented homes and provide more stable rented accommodation for families, particularly as access to ownership has become more challenging.
- 9.22 The NPPF sets out that the needs of people who rent their homes (as separate from affordable housing) should be assessed and reflected in planning policies (see paragraph 63). The NPPF glossary (Annex 2) also includes a definition for Build to Rent development:

"Purpose-built housing that is typically 100% rented out. It can form part of a wider multi-tenure development comprising either flats or houses but should be on the same site and/or contiguous with the main development. Schemes will usually offer longer

⁸ [Housing white paper - GOV.UK](https://www.gov.uk/government/consultations/housing-white-paper)

tenancy agreements of three years or more, and will typically be professionally managed stock in single ownership and management control.”

- 9.23 It therefore represents development which is constructed with the intention that it will be let rather than sold.

Benefits of Build-to-Rent

- 9.24 The benefits of Build to Rent are best summarised in the previous Government’s Build to Rent Guide for Local Authorities⁹, which was published in March 2015. The guide states that the benefits are wide-ranging, but can include:
- Helping local authorities to meet the demand for private rented housing whilst increasing tenants’ choice, “as generally speaking tenants only have the option to rent from a small-scale landlord”.
 - Retaining tenants for longer and maximising occupancy levels as Build to Rent investment is an income-focused business model;
 - Helping to increase housing supply, particularly on large, multiple-phased sites, as it can be built alongside build-for-sale and affordable housing; and
 - Utilising good design and high-quality construction methods, which are often key components of the Build to Rent model.
- 9.25 This Build to Rent Guide provides a helpful overview of the role that Build to Rent is intended to play in the housing market, offering opportunities for those who wish to rent privately (i.e. young

⁹ [Build to Rent: guide for local authorities - GOV.UK](#)

professionals) and for those on lower incomes who are unable to afford their own home.

- 9.26 Over recent years, there has been rapid growth in the Build to Rent sector backed by domestic and overseas institutional investment. Savills' UK Build-to-Rent Market Update¹⁰ for H1 2025, states that the BTR market now has 132,000 completed units, 51,000 units under construction, and 110,000 units in the development pipeline, totalling 293,000 units, up 5% from the year previous.
- 9.27 However, much of this stock is located in the largest cities of London, Manchester, Birmingham and Leeds. It has not yet reached smaller towns in large numbers due to the economies-of-scale requirements and the limited market potential for this product among tenants.

The Profile of Tenants

- 9.28 The British Property Federation ("BPF"), London First and UK Apartment Association ("UKAA") published in November 2022 was a report¹¹ profiling those who live in Build-to-Rent accommodation in England. Whilst this is focused on more urban locations, it helps understand the broad profile of tenants.
- 9.29 According to their research, around 40% of residents were aged between 25 and 34, which is broadly similar to the wider private rented sector.
- 9.30 The survey identified that incomes are similar to those in private rented sector accommodation, with 18% earning between £26,000 and

¹⁰ https://www.savills.co.uk/research_articles/229130/379550-0

¹¹ <https://bpf.org.uk/our-work/research-and-briefings/who-lives-in-build-to-rent-2022/>

£32,000 per annum, and 23% earning between £32,000 and £44,000 per annum.

- 9.31 The report also noted that Build to Rent has comparable levels of affordability but is notably more affordable for couples and sharers.

Potential Demand in Wealden

- 9.32 Data collected by the HomeViews website¹² on Build-to-Rent development suggests that there are no existing BTR schemes in Wealden.
- 9.33 From now on, Wealden is most likely to be suited towards “single-family” BTR development, which is commonly suburban in style. Various locations across the country have seen BTR development come forward across parcels on large housing sites, as it can often aid development in a slower housing market.

The Recommended Policy Response

- 9.34 The PPG on Build to Rent recognises that where a need is identified, local planning authorities should include a plan policy relating to Build to Rent.
- 9.35 There is no significant specific demand for BTR in Wealden at this current moment in time. However, in recognition of the potential growth of the sector as well as growing demand in the wider PRS market, the Council may consider including a policy on Build-to-Rent development in order to ensure that it can be appropriately dealt with if a scheme were to ever come forward.
- 9.36 Such a policy should consider how such schemes would be considered at the planning application stage, as well as deal with how affordable

¹² [Interactive Build to Rent Map - HomeViews Business Hub](#)

housing policies would be applied. An example of this can be found in the London Plan 2021 and associated Affordable Housing and Viability Supplementary Planning Guidance¹³.

- 9.37 A policy could also set out parameters such as design, contract lengths, space standards, communal space standards (even if stipulating wider standards apply), facilities, outdoor space, bike storage and active transport measures, etc.
- 9.38 Given that the sector is still evolving, we would recommend that the Council not be overly prescriptive on the mix of dwelling sizes within new Build to Rent development.
- 9.39 While the recommended size mix outlined in this report serves as a good starting point, the Council should work with developers to understand what mix can be viably delivered on each site.
- 9.40 The mix on each site should be reflective of the type of development proposed as well as the location of the scheme. For example, proposed multi-family (flatted schemes) in urban locations are unlikely to deliver four-bed properties.
- 9.41 The NPPF's definition of Build-to-Rent development sets out that schemes will usually offer tenancy agreements of three or more years and will typically be professionally managed stock in single ownership and management control.
- 9.42 The Council will also need to consider affordable housing policies specifically for the Build-to-Rent sector. The viability of Build-to-Rent development, however, differs from that of a typical mixed-tenure

¹³ [Affordable Housing and Viability Supplementary Planning Guidance \(SPG\) | London City Hall](#)

development in that returns from the Build-to-Rent development are phased over time. In contrast, in a typical mixed-tenure scheme, capital receipts are generated when units are sold.

- 9.43 In general terms, it is expected that a proportion of Build to Rent units will be delivered as 'Affordable Private Rent' housing. The PPG¹⁴ states that:

“The National Planning Policy Framework states that affordable housing on build-to-rent schemes should be provided by default in the form of affordable private rent, a class of affordable housing designed explicitly for build-to-rent. Affordable private rent and private market rent units within a development should be managed collectively by a single build-to-rent landlord.

20% is generally a suitable benchmark for the level of affordable private rent homes to be provided (and maintained in perpetuity) in any build-to-rent scheme. If local authorities wish to set a different proportion, they should justify it using evidence from their local housing need assessment and set the policy out in their local plan. Similarly, the guidance on viability permits developers, in exceptional circumstances, to make a case for departing from this benchmark.

National affordable housing policy also requires a minimum rent discount of 20% for affordable private rent homes relative to local market rents. The discount should be calculated when a discounted home is rented out, or when the tenancy is renewed. The rent on the discounted homes should increase on the same basis as rent increases for longer-term (market) tenancies within the development”.

¹⁴ [Build to rent - GOV.UK](#) Paragraph ID: 60-002-20180913

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- 9.44 The Council should also have regard to the PPG on Build-to-Rent developments. This states that at least 20% of the units in a Build to Rent development should be let as Affordable Private Rented units at a 20% discount to local market rents.
- 9.45 The Council might consider whether these should be capped at LHA rates, subject to viability.

Key Messages

Due to increased regulation, the number of landlords leaving the market has increased significantly.

There remains significant interest in rental properties in Wealden, particularly for smaller homes.

The lack of supply and increased demand have helped to support growth in the rental costs.

There are 18 registered large HMOs in Wealden, and with the exception of Hastings and Rother HMA sub-area, these are distributed across all Sub-Areas within the district.

These properties range from detached houses to converted commercial buildings, typically housing 5 to 10 occupants with an average of 6.

Currently, there are no existing Build-to-Rent schemes in Wealden, although the sector is growing nationally, particularly in major cities.

If demand exists, Wealden is considered more suitable for “single-family” BTR developments, which are suburban in nature and can be integrated into larger housing sites.

The Council is encouraged to consider a specific policy for BTR, this should include expectations on affordable housing contributions.

National guidance suggests that 20% of BTR units should be offered as Affordable Private Rent at a 20% discount to market rents.

10. Second and Holiday Homes

- 10.1 This section considers the presence of second and holiday homes across Wealden. The district's location and rural nature make it a desirable destination for holidaymakers, and as such, second homes in the area are common.
- 10.2 Icení has analysed the latest Council Tax data alongside data from the 2021 Census to understand how many second homes are present in Wealden.

Council Tax Data

- 10.3 Council tax data defines second homes into three categories: Class A Exemptions, Class B Exemptions and Long Term. Class A and Class B exemptions are no longer applied to new homes.
- 10.4 Second homes with Class A exemptions are substantially furnished dwellings that are unoccupied and have a planning restriction preventing occupation for at least 28 days.
- 10.5 Second homes with a Class B exemption are also fully furnished homes that are not occupied as a primary dwelling but do not have any planning restrictions.
- 10.6 The Levelling Up and Regeneration Act (LURA) sought to introduce Long-Term Premiums on second homes aimed at reducing the overall number and increasing the availability of housing overall. Long-Term Premiums can be applied to furnished homes that are not a primary residence. Homes that fall into the following categories are exempt from the Long-Term Premium:
- *Job-related dwellings;*
 - *Annexes used as part of the main home;*

-
- *Armed forces accommodation;*
 - *Properties restricted by planning conditions (e.g. holiday let only); and*
 - *Actively marketed for sale or rent (12-month exemption).*

10.7 Data from Wealden District Council indicates that as of 2025, there were 484 second homes in the district, this includes homes within the National Park outside the Plan area. This represents 0.6% of all properties. This might underestimate the number of second homes, as there is no longer any benefit for declaring them.

10.8 Most known second homes (397, 82%) in Wealden are subject to the Long-Term premium; a much smaller number are Class B Exemptions (71, 15%), and even fewer are in Class A Exemptions (16, 3%). However, this might reflect the discontinuation of these categories.

Table 10.1 Parishes where 2% or more dwellings are Second Homes

Parish	National Park Status	Number of Second Homes	Total Households	% Second Homes
Cuckmere Valley	Wholly within SDNP	12	87	14%
Alciston	Partly within SDNP	3	46	7%
Pevensey	-	96	1650	6%
Long Man	Partly within SDNP	9	186	5%
Hadlow Down		9	301	3%
East Dean and Friston	Wholly within SDNP	20	768	3%
Berwick	Partly within SDNP	3	124	2%
Alfriston	Wholly within SDNP	9	379	2%
Hartfield	-	21	913	2%
Warbleton	-	11	566	2%
Danehill	-	14	726	2%
Chiddingly	-	8	430	2%
Mayfield And Five Ashes	-	29	1,679	2%
Laughton	-	4	242	2%
Fletching	-	7	453	2%

Source: Wealden District Council and Census 2021

- 10.9 Looking at the distribution of second homes, the data below shows the parishes where 2% or more of the dwellings are second homes. Of all the parishes listed, Cuckmere Valley (14%) and Alciston (7%) have the highest proportion of second homes, both of which lie wholly or partly in the National Park. However, the overall number of households in each Parish is low. It is worth noting that 6 of the 7 Parishes that are wholly or partly within the SDNP have high proportions of second homes, this is with the exception of Willingdon and Jevington.

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- 10.10 Pevensey Parish and Mayfield and Fives Ashes Parish have the highest total numbers of second homes at 96 and 29, respectively. With Pevensey Parish close to the coast and Eastbourne, its high number of second homes is unsurprising.
- 10.11 Similarly, Mayfield and Fives Ashes Parish lies within the High Weald National Landscape Area, which may also be a draw to those wanting a second home.

Census Data

- 10.12 Census data also provides additional data on 'second addresses', meaning any address where a person spends more than 30 days in a year that is not their usual residence.
- 10.13 The data shows the highest number of second addresses relate to people (probably children) living at another parent's or guardian's address, with over a third (34%) of second home properties in the district used for this reason.

Table 10.2 Dwellings used as a Second Address by Category

	Wealden
Another parent or guardian's address	2,438 (34%)
Students home address	345 (5%)
Holiday home	1,567 (22%)
Partner's address	746 (10%)
Other (including armed forces)	1,486 (21%)
Another address when working away from home	597 (8%)

Source: 2021 Census

- 10.14 With 1,567 entries, the subsequent most common use of second addresses is holiday homes, accounting for 22% of second homes in Wealden.
- 10.15 The figure below sets out the level of holiday homes by ward. The Frant & Wadhurst ward has the highest overall count. Herstmonceux &

Pevensey and Forest Row also have notably high levels of both categories.

- 10.16 Perhaps unsurprisingly, rural and tourism-oriented areas in the east and north of the district show higher rates of holiday properties than the urban areas (e.g. Hailsham and Uckfield New Town).

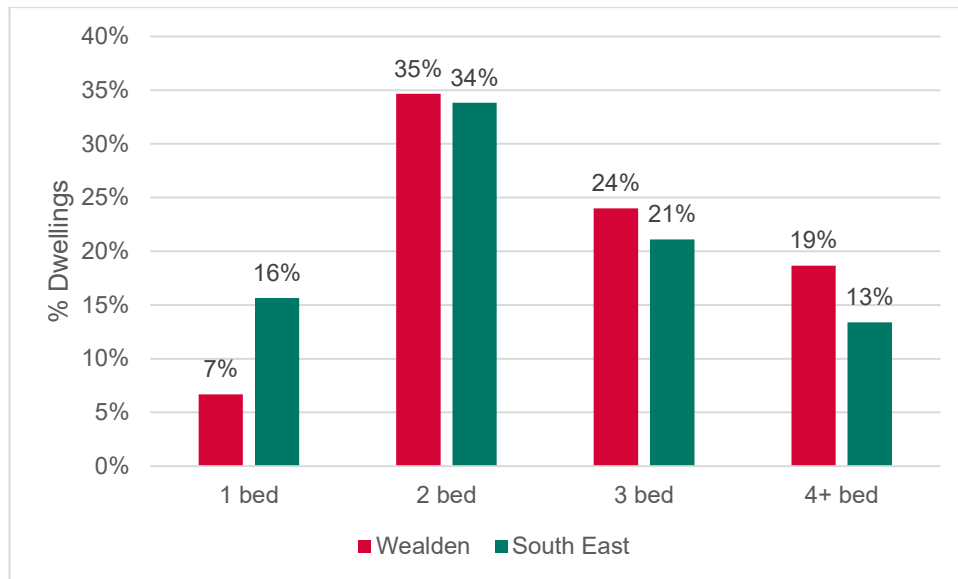
Figure 10.1 Holiday homes by ward, 2021



Source: 2021 Census

- 10.17 As shown in the figure below, there is a higher proportion of 2-bed properties used as second homes in Wealden than in the South East region.
- 10.18 Broadly, when compared to the regional rate, Wealden shows a higher proportion of larger properties as second homes and a lower proportion of 1-bed properties.

Figure 10.2 Profile of sizes of Second Homes, 2021



Source: 2021 Census

- 10.19 Nearly half (49%) of the second homes in Wealden are detached properties, followed by semi-detached homes (19%) and flatted developments (12%).

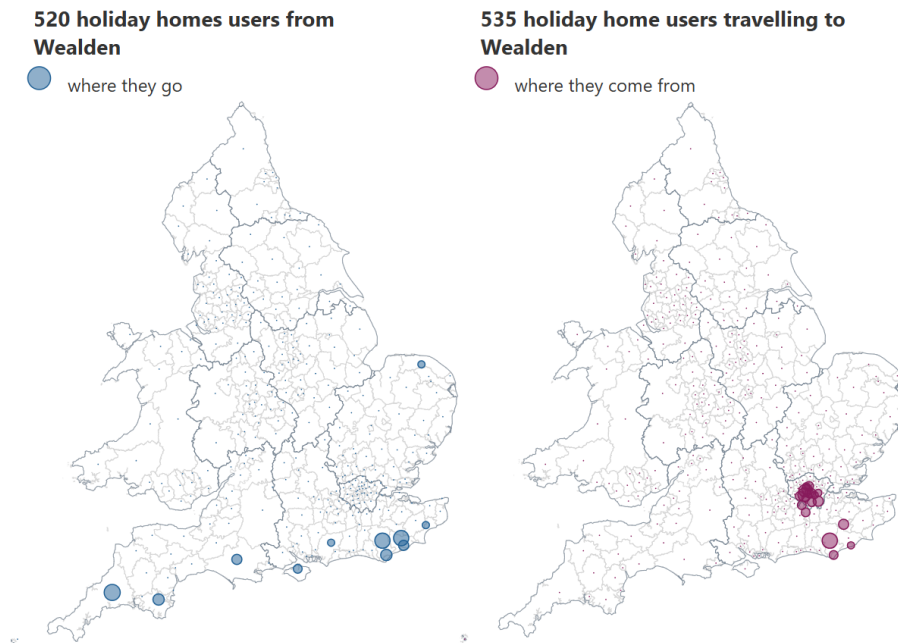
Second Homes Movements

- 10.20 According to Census data, 520 Wealden residents had a second home elsewhere in the country, which includes homes across Cornwall, East Devon, Dorset and North Norfolk. This data is seen in the figure below.
- 10.21 We also see that the majority of those that own a second home in Wealden have a primary residence in London and Surrey although there a few others in and around Wealden itself.
- 10.22 Data from the 2021 Census indicates that the Hastings and Rother sub-area has the highest percentage of unoccupied dwellings, although the lowest actual figure owing to its size.

Figure 10.3 Second Home Dynamics

Holiday home locations and where their users live

Location of usual residence and location of second address used as a holiday home, by local authority, England and Wales



Source: ONS "More than 1 in 10 addresses used as holiday homes in some areas of England and Wales"

Unoccupied Dwellings

- 10.23 There will inevitably be some properties used as holiday lets for which a Census form was not completed, or which were not identified by respondents as second addresses. This issue can be explored further by looking at unoccupied dwellings.
- 10.24 The Eastbourne sub-area sees the highest number at 1,155 although the proportion is lower at 4%. Nearly a third of the vacant dwellings were two-bedroom properties, followed by one-bed (20%) and three-bed properties (20%).

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- 10.25 A high proportion of the vacant dwellings were detached (36%) and flatted properties (28%). Overall, around 4% of dwellings in Wealden are unoccupied.

Figure 10.4 Unoccupied dwellings by Sub-Area

	Unoccupied	Total Dwellings	% Unoccupied
Coastal West Sussex	575	13,140	4%
Hastings and Rother	95	1,059	9%
Tunbridge Wells	1,135	23,672	5%
Eastbourne	1,155	30,428	4%
Northern West Sussex	235	3,750	6%
Wealden	3,195	72,049	4%

Source: 2021 Census

- 10.26 Further data from AirDNA, a website that considers holiday rentals from a number of sites such as AirBNB and VRBO, shows that there are in the region of 1,600 rentals across the East Sussex area. Although this data is not Wealden specific, it does show the scale of second and holiday homes in the sub-region.

Key Messages

Overall, the analysis suggests there is a proportion of properties which are second and holiday homes in Wealden, but not to the degree that it is a district-wide issue.

According to Council Data as of 2025, there are 484 second homes in Wealden, representing 0.6% of the housing stock. However, this is potentially an undercount.

The 2021 Census also identified 1,567 holiday homes in the wider Wealden District. These properties are more common in rural and tourism-oriented areas. Some parishes, such as Cuckmere Valley

(14%) and Alciston (7%), have notably high concentrations although it should be noted that both parishes lie wholly or partly in the National Park and therefore are outside the plan area.

However, typically 20% of households in second home usage is the “tipping point” for adverse impact. Therefore, the Council may wish to monitor the situation within the Plan Area and consider the impacts these may have on local economies and/or services.

11. Older and Disabled People

Introduction

- 11.1 This section studies the characteristics and housing needs of the older person population and the population with some form of disability. The two groups are taken together as there is a clear link between age and disability.
- 11.2 This section responds to PPG on Housing for Older and Disabled People published by the Government in June 2019.
- 11.3 The PPG includes an assessment of the need for specialist accommodation for older people and the potential requirements for housing to be built to M4(2) and M4(3) housing technical standards (accessibility and wheelchair standards).

Older People

- 11.4 The table below provides the baseline population data about older persons in Wealden and compares this with other areas. The table shows that the district has an older age structure than the regional and national levels, with 27% of the population aged 65 and over.
- 11.5 The proportion of people aged 75 and over is also above equivalent figures for other areas.

Table 11.1 Older Persons Population, 2024

	Wealden		East Sussex	South East	England
	No.	%	%	%	%
Under 65	121,564	72.8%	73.4%	80.2%	81.3%
65-74	21,424	12.8%	12.5%	9.6%	9.4%
75-84	17,509	10.5%	10.2%	7.3%	6.8%
85+	6,411	3.8%	4.0%	2.9%	2.5%
Total	166,908	100.0%	100.0%	100.0%	100.0%
Total 65+	45,344	27.2%	26.6%	19.8%	18.7%
Total 75+	23,920	14.3%	14.1%	10.2%	9.3%

Source: ONS

Projected Future Change in the Population of Older People

- 11.6 Population projections can next be used to indicate how the number of older persons might change, with the table below showing that Wealden is projected to see a notable increase in the older person population – the projection is based on the ‘Standard Method’.
- 11.7 For the 2025-2042 period, a projected increase in the population aged 65+ of around 37% is shown – the population aged under 65 is in contrast projected to see a more modest (but still substantial) increase of 25%.

Table 11.2 Projected Change in Population of Older Persons, 2025 to 2042 – Wealden

	2025	2042	Change in population	% change
Under 65	122,263	152,903	30,640	25.1%
65-74	21,816	27,481	5,665	26.0%
75-84	17,921	24,384	6,462	36.1%
85+	6,516	11,684	5,168	79.3%
Total	168,516	216,451	47,935	28.4%
Total 65+	46,253	63,548	17,295	37.4%
Total 75+	24,437	36,067	11,630	47.6%

Source: Icen Analysis

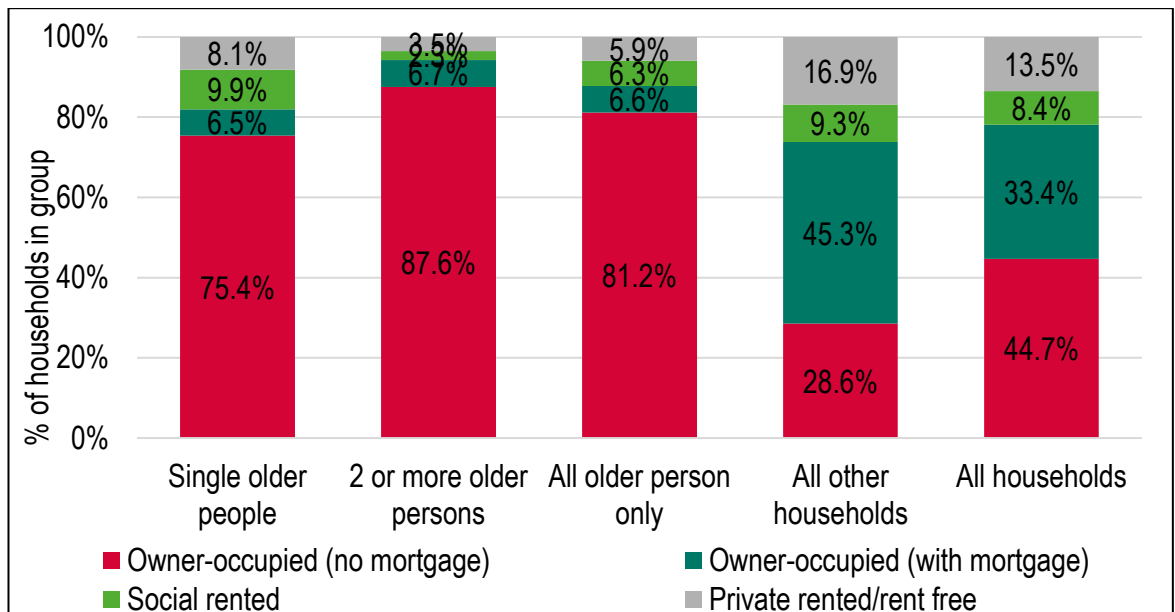
11.8 In total population terms, the projections show an increase in the population aged 65 and over of 17,300 people to 2042. This is against a backdrop of an overall increase of 47,900 over the same period – population growth of people aged 65 and over therefore accounts for 36% of the total projected population change.

Characteristics of Older Person Households

11.9 The figure below shows the tenure of older person households. The data has been split between single older-person households and households with two or more older people (which will largely be couples).

11.10 The data shows that most older persons' households are owner occupiers (88% of older person households), and indeed most are owner-occupiers with no mortgage and thus may have significant equity which can be put towards the purchase of a new home.

Figure 4.1: Tenure of Older Persons Households in Wealden, 2021



Source: 2021 Census

11.11 Some 6% of older persons' households live in the social rented sector, and the proportion of older persons' households living in the private rented sector is relatively low (also about 6%).

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- 11.12 There are also notable differences for different types of older person households, with single older people having a lower level of owner-occupation than larger older person households – this group also has a higher proportion living in the social rented sector.

Disabilities

- 11.13 The table below shows the proportion of people who are considered as disabled under the definition within the 2010 Equality Act¹⁵, drawn from 2021 Census data, and the proportion of households where at least one person has a disability.
- 11.14 The data suggest that 31% of households in the district contain someone with a disability. This figure is similar to that seen regionally and nationally (but lower than East Sussex).

Table 11.3 Households and People with a Disability, 2021

	Households Containing Someone with a Disability		Population with a Disability	
	No.	%	No.	%
Wealden	21,318	31.2%	27,629	17.3%
East Sussex	83,638	34.8%	110,553	20.3%
South East	1,144,083	30.0%	1,496,340	16.1%
England	7,507,887	32.0%	9,774,510	17.3%

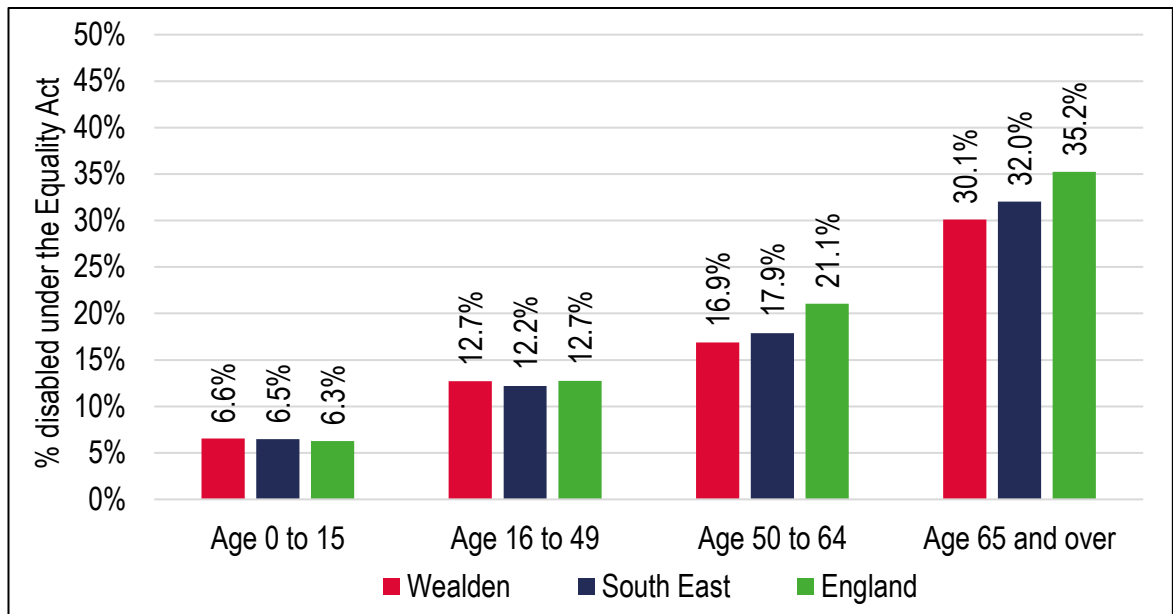
Source: 2021 Census

- 11.15 The figures for the population with a disability show the same pattern in comparison with other comparator areas, with some 17% of the population having a disability.

¹⁵ The Census uses the same definition of disability as described in the Equality Act. This defines disability as a person with a physical or mental impairment that has a 'substantial' and 'long-term' negative effect on their ability to do normal daily activities.

- 11.16 As noted, it is likely that the age profile will impact the numbers of people with a disability, as older people tend to be more likely to have a disability. The figure below shows the age bands of people with a disability across comparator areas.

Figure 4.2: Population with Disability by Age



Source: 2021 Census

- 11.17 It is clear from this analysis that those people in the oldest age bands are more likely to have a disability. The analysis also shows lower age-specific levels of disability when compared with the national and regional position for both the 50-64 and 65 and over age groups.

Health Related Population Projections

- 11.18 The incidence of a range of health conditions is an important component in understanding the potential need for care or support for an ageing population.
- 11.19 The analysis undertaken covers both younger and older age groups and draws on prevalence rates from the PANSI (Projecting Adult Needs and Service Information) and POPPI (Projecting Older People Population Information) websites. Adjustments have been made to take account of the age specific health/disabilities previously shown.

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- 11.20 Of particular note are the large increases in the number of older people with dementia (increasing by 57% from 2025 to 2042) and mobility problems (up 49% over the same period).
- 11.21 Changes for younger age groups are smaller, reflecting the fact that projections expect older age groups to see the most significant proportional increases in population.
- 11.22 When related back to the total projected change to the population, the increase of people aged 65+ with a mobility problems represent around 8% of the total projected population growth.

Table 11.4 Projected Changes to Population with a Range of Disabilities – Wealden

Disability	Age Range	2025	2042	Change	% change
Dementia	65+	2,895	4,547	1,652	57.1%
Mobility problems	65+	7,471	11,106	3,635	48.7%
Autistic Spectrum Disorders	18-64	809	1,029	220	27.2%
	65+	369	506	137	37.2%
Learning Disabilities	15-64	2,161	2,734	573	26.5%
	65+	818	1,121	303	37.1%
Impaired mobility	16-64	5,408	6,307	900	16.6%

Source: POPPI/PANSI and Demographic Projections

- 11.23 Invariably, there will be a combination of those with disabilities and long-term health problems that continue to live at home with family, those who chose to live independently with the possibility of incorporating adaptations into their homes and those who choose to move into supported housing.
- 11.24 The projected change shown in the number of people with disabilities provides clear evidence justifying delivering ‘accessible and adaptable’ homes as defined in Part M4(2) of Building Regulations, subject to viability and site suitability.

Need for Specialist Accommodation for Older People

- 11.25 Given the ageing population and higher levels of disability and health problems amongst older people, there is likely to be an increased requirement for specialist housing options moving forward. The box below shows the different types of older persons housing which are considered.

Definitions of Different Types of Older Persons' Accommodation

Age-restricted general market housing: This type of housing is generally for people aged 55 and over and the active elderly. It may include some shared amenities such as communal gardens but does not include support or care services.

Retirement living or sheltered housing (housing with support): This usually consists of purpose-built flats or bungalows with limited communal facilities such as a lounge, laundry room and guest room. It does not generally provide care services but provides some support to enable residents to live independently. This can include 24-hour on-site assistance (alarm) and a warden or house manager.

Extra care housing or housing-with-care (housing with care): This usually consists of purpose-built or adapted flats or bungalows with a medium to high level of care available if required, through an onsite care agency registered through the Care Quality Commission (CQC). Residents are able to live independently with 24-hour access to support services and staff, and meals are also available. There are often extensive communal areas, such as space to socialise or a wellbeing centre. In some cases, these developments are known as retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses.

Residential care homes and nursing homes (care bedspaces): These have individual rooms within a residential building and provide a high level of care meeting all activities of daily living. They do not usually include support services for independent living. This type of housing can also include dementia care homes.

Source: Planning Practice Guidance [63-010]

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- 11.26 The need for specialist housing for older persons is typically modelled by applying prevalence rates to current and projected population changes and considering the level of existing supply.
- 11.27 The approach taken below considers a range of publications from Housing Learning Improvement Network (Housing LIN) (including that mentioned in the PPG) to derive a series of prevalence rates. The rates also take into account the health of the population in Wealden and levels of deprivation (which will impact on the tenure split between market and affordable housing).
- 11.28 The following prevalence rates, expressed as a need per 1,000 people aged 75 and over, have been used in the analysis:
- Housing with support (market) – 63 units;
 - Housing with support (affordable) – 48 units;
 - Housing with care (market) – 28 units;
 - Housing with care (affordable) – 12 units;
 - Residential care – 35 bedspaces; and
 - Nursing care – 40 bedspaces.
- 11.29 It is also important to understand the supply of different types of specialist accommodation, with the table below showing various categories of accommodation. Figures are presented as totals and as proportions of the population aged 75 and over (estimated at 24,437 in 2025).
- 11.30 The analysis shows a total of around 2,000 units of housing with support, which represents around 81 per 1,000 people aged 75 and over – some 58% of this is in the market sector.
- 11.31 For housing with care, a lower current supply is shown (305 units – broadly split equally between the market and affordable sectors).

- 11.32 For nursing and residential care, a supply of 1,581 bedspaces is shown with the majority (66%) being nursing care.

Table 11.5 Current supply of housing for older people – Wealden

		Current supply	Supply per 1,000 aged 75+
Housing with support	Market	1,145	47
	Affordable	839	34
Total (housing with support)		1,984	81
Housing with care	Market	148	6
	Affordable	157	6
Total (housing with care)		305	12
Residential care bedspaces		540	22
Nursing care bedspaces		1,041	43
Total bedspaces		1,581	65

Source: EAC

- 11.33 Taking the supply forward and using the prevalence rates, the tables below show estimated needs for different types of housing linked to the population projections.
- 11.34 The analysis is separated into the various types and tenures. However, it should be recognised that there may be overlap between categories (i.e. some households may be suited to more than one type of accommodation).
- 11.35 The analysis shows there is currently a shortfall in supply of housing with support (e.g. sheltered/retirement housing) in both the market and affordable sectors, and this shortfall increases (to around 2,000 units) when projecting forward to 2042 – some 56% of the shortfall is estimated to be for market housing.
- 11.36 For housing with care (e.g. extra-care), both a current and future shortfall is estimated in both the market and affordable sectors. Overall,

by 2042, a shortfall of just over 1,100 units of housing with support is identified (around three-quarters in the market sector).

- 11.37 For nursing and residential care, the analysis suggests a current shortfall of around 255 units (although this includes a modest surplus of nursing care). Moving through to 2042, a total need for just over 1,100 bedspaces is identified, mainly (65%) for residential care.

Table 11.6 Specialist Housing Need for Older Persons, 2025-42 – Wealden

		Housing demand per 1,000 75+	Current supply	Current demand	Current shortfall / surplus (-ve)	Addition -al demand to 2042	Shortfall /surplus by 2042
Housing with support	Market	63	1,145	1,536	391	731	1,122
	Affordable	48	839	1,164	325	554	878
Total (housing with support)		110	1,984	2,699	715	1,285	2,000
Housing with care	Market	28	148	683	535	325	860
	Affordable	12	157	289	132	138	270
Total (housing with care)		40	305	972	667	463	1,129
Residential care bedspaces		35	540	864	324	411	735
Nursing care bedspaces		40	1,041	972	-69	463	393
Total bedspaces		75	1,581	1,836	255	874	1,128

Source: Icenl analysis/EAC

Consultation with East Sussex County Council Adult Social Care

- 11.38 The current strategy for housing older people in East Sussex and Wealden is under review, with a growing emphasis on supporting individuals in their own homes (in-situ support) for as long as possible.
- 11.39 However, there is also recognition of the need to rebalance the provision of housing and care, potentially shifting towards additional extra care housing and nursing care, and away from traditional

sheltered housing. This would shift the results for specific typologies set out above, but not the overall need.

- 11.40 Extra care housing is already present in Wealden, with two schemes: one in Uckfield offering 39 units (29 for affordable rent and 10 shared equity), and another in Hailsham with 45 flats (35 affordable, 10 shared equity).
- 11.41 Most of the extra-care provision is one-bedroom units. Although fewer in number, two-bedroom properties are still harder to let or sell. Resales of shared equity properties have been slow, with six units currently on the market.
- 11.42 There are challenges in meeting the increasing complexity of supported needs within some settings. While many older people are supported at home, there comes a point where this is no longer safe or appropriate, particularly when regular nursing care is required.
- 11.43 Demand for nursing and residential care remains, especially for dementia-specialist services. However, many new residential care homes built in the past five years have been luxury residential-only facilities without nursing elements, creating a mismatch between supply and need. Securing affordable bedspaces remains a priority, with weekly rates around £700.
- 11.44 There is anecdotal evidence of demand for affordable owner-occupier options, but the market is not always responsive. East Sussex County Council finds it challenging to engage with private providers, particularly luxury operators who often avoid working with local authorities.
- 11.45 Some care homes have closed due to financial issues, and others are up for sale as empty buildings. Physical infrastructure, such as lift sizes and the ability to accommodate stretchers, can also be problematic.
- 11.46 Gaps in the market have been identified, particularly for dementia care, age-exclusive housing, and accessible supported living for younger adults with disabilities.

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- 11.47 The HOLD scheme (home ownership for people with long-term disabilities) has not been successful locally, though there is interest from the County Council in developing it further.
- 11.48 Occupancy rates vary, with some difficulties in letting certain types of units, especially two-bedroom or shared equity properties. Most people move into older persons' housing in their 80s, despite eligibility starting at 55 or 60.
- 11.49 Cost is also a barrier, particularly as older care homes require investment and are less attractive to providers. There are fewer care homes in rural Wealden compared to urban areas like Eastbourne.
- 11.50 Waiting times for specialist accommodation and the adequacy of supply in terms of location, size, and care level are also under review.
- 11.51 Accessibility, adaptability, and transport infrastructure are key considerations, especially when people need to move across the county for specialist care.
- 11.52 Staffing is another challenge, particularly in rural areas where care work is less attractive. Pay rates vary, with higher wages in Lewes and North Wealden. There is also a need for key worker housing to support the care workforce.
- 11.53 Finally, there is concern about the lack of "move-on" accommodation, which limits the effectiveness of investment in older people's housing.

Wheelchair User Housing

- 11.54 The analysis below draws on secondary data sources to estimate the number of current and future wheelchair users and to estimate the number of wheelchair accessible/adaptable dwellings that might be required in the future.

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- 11.55 Estimates of need produced in this report draw on data from the English Housing Survey (EHS) – mainly 2020/21 data. The EHS data used includes the age structure of wheelchair users, information about work needed to properties to make them ‘visitable’ for wheelchair users and data about wheelchair users by tenure.
- 11.56 The table below shows at a national level the proportion of wheelchair user households by the age of HRP. Nationally, around 3.1% of households contain a wheelchair user – with around 1% using a wheelchair indoors.
- 11.57 There is a clear correlation between the age of HRP and the likelihood of there being a wheelchair user in the household.

Table 11.7 Proportion of wheelchair user households by age of household reference person – England

Age of household reference person	No household members use a wheel-chair	Uses wheel-chair all the time	Uses wheel-chair indoors only	Uses wheel-chair outdoors only
24 and under	99.4%	0.4%	0.0%	0.1%
25-34	99.4%	0.1%	0.1%	0.3%
35-49	97.9%	0.4%	0.3%	1.4%
50-64	97.1%	0.5%	0.2%	2.2%
65 and over	94.3%	1.3%	0.5%	4.0%
All households	96.9%	0.6%	0.3%	2.2%

Source: English Housing Survey (2020/21)

- 11.58 The prevalence rate data can be brought together with information about the household age structure and how this is likely to change moving forward – adjustments have also been made to take account of the relative health (by age) of the population. The data estimates that there are 1,800 wheelchair-user households in 2025, and that this will rise to 2,500 by 2042.

Table 11.8 Estimated number of wheelchair user households (2025-42) – Wealden

	Prevalence rate (% of households)	Households 2025	Households 2042	Wheelchair user households (2025)	Wheelchair user households (2042)
Under 24	0.6%	698	1,547	4	9
25-34	0.6%	6,192	8,910	35	51
35-49	1.5%	14,451	21,192	213	312
50-64	1.7%	21,668	23,947	362	401
65 and over	4.2%	29,175	40,637	1,211	1,687
All households	-	72,185	96,232	1,826	2,460

Source: Iceni analysis

- 11.59 The estimated current number of wheelchair user households does not indicate how many homes might be needed for this group – some households will be living in a home that is suitable for wheelchair use, whilst others may need improvements to accommodation, or a move to an alternative home.
- 11.60 Data from the EHS nationally shows that of the 814,000 wheelchair user households, some 200,000 live in a home that would either be problematic or not feasible to make fully ‘visitable’ – this is around 25% of wheelchair user households.
- 11.61 Applying this to the current number of wheelchair user households across the district gives a current need for 456 additional wheelchair user homes.
- 11.62 If the projected need is also discounted to 25% of the total (on the basis that many additional wheelchair user households will already be in accommodation that is fit for purpose), then a further need for 158 homes in the 2025-2042 period can be identified.

- 11.63 Added together, this leads to an estimated need of 615 wheelchair user homes by 2042, equating to 36 dwellings per annum.

Table 11.9 Estimated need for wheelchair user homes, 2025-42

	Current need	Projected need (2025-42)	Total current and future need
Wealden	456	158	615

Source: Icen Analysis

- 11.64 Furthermore, information in the EHS (for 2020/21) also provides national data about wheelchair users by tenure. This showed that, at that time, around 6.7% of social tenants were wheelchair users (including 1.8% who used a wheelchair indoors/all the time), compared with 2.6% of owner-occupiers (0.8% who used a wheelchair indoors/all the time).
- 11.65 These proportions can be expected to increase with an ageing population but do highlight the likely need for a greater proportion of social (affordable) homes to be for wheelchair users.

Table 11.10 Proportion of wheelchair user households by tenure of household reference person – England

Tenure	No household members use a wheelchair	Uses wheel-chair all the time	Uses wheelchair indoors only	Uses wheelchair outdoors only
Owners	97.4%	0.6%	0.2%	1.8%
Social sector	93.3%	1.3%	0.5%	4.9%
Private renters	98.6%	0.2%	0.2%	1.0%
All households	96.9%	0.6%	0.3%	2.2%

Source: English Housing Survey (2020/21)

- 11.66 To meet the identified need, the Council could seek a proportion (potentially up to 3%) of all new market homes to be M4(3) compliant and potentially a higher figure in the affordable sector (potentially up to 10%).

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- 11.67 These figures reflect that not all sites would be able to deliver homes of this type. In the market sector, these homes would be M4(3)A (adaptable) and M4(3)B (accessible) for affordable housing.
- 11.68 As with M4(2) homes, it may not be possible for some schemes to be built to these higher standards due to built-form, topography, flooding, etc.
- 11.69 Furthermore, provision of this type of property may, in some cases, challenge the viability of delivery given the reasonably high build-out costs.
- 11.70 It is worth noting that the (previous) Government has reported on a consultation (Raising Accessibility Standards for New Homes¹⁶) on changes to the way the needs of people with disabilities and wheelchair users are planned for as a result of concerns that, in the drive to achieve housing numbers, the delivery of housing that suits the needs of the households (in particular those with disabilities) is being compromised on viability grounds.
- 11.71 The key outcome is that the:
- ‘Government is committed to raising accessibility standards for new homes. We have listened carefully to the feedback on the options set out in the consultation, and the government response sets out our plans to mandate the current M4(2) requirement in Building Regulations as a minimum standard for all new homes. This change is due to be implemented through a change to building regulations shortly’.*
- 11.72 It goes onto state that:
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¹⁶ <https://www.gov.uk/government/consultations/raising-accessibility-standards-for-new-homes>

'The consultation outcome still requires a need for M4(3) dwellings to be evidenced, stating 'M4(3) (Category 3: Wheelchair user dwellings) would continue as now, where there is a local planning policy in place in which a need has been identified and evidenced. Local authorities will need to continue to tailor the supply of wheelchair user dwellings to local demand'.

- 11.73 As well as evidence of need, the viability challenge is particularly relevant for M4(3)(B) standards. These make properties accessible from the moment they are built and involve high additional costs that could, in some cases, challenge the feasibility of delivering all or any of a policy target.
- 11.74 It should be noted that local authorities only have the right to request M4(3)(B) accessible compliance from homes for which they have nomination rights. They can, however, request M4(3)(A) adaptable compliance from the wider (market) housing stock.

Key Messages

Wealden has an older age structure than is seen regionally and nationally, but generally lower age-specific levels of disability compared with other areas.

The older person population shows high proportions of owner-occupation, and particularly outright owners who may have significant equity in their homes (81% of all older person households are outright owners).

The older person population is projected to increase notably. An ageing population means that the number of people with disabilities is also likely to increase.

Key findings for the 2025-2042 period include:

a 37% increase in the population aged 65+ (potentially accounting for 36% of total population growth);

a 57% increase in the number of people aged 65+ with dementia and a 49% increase in those aged 65+ with mobility problems;

a need for around 2,000 additional housing units with support (sheltered/retirement housing) – 56% in the market sector;

a need for around 1,100 additional housing units with care (e.g. extra-care) – around three-quarters in the market sector;

a need for additional nursing and residential care bedspaces (around 1,100 in the period); and

a need for around 600 dwellings to be for wheelchair users (meeting technical standard M4(3)).

This would suggest that there is a clear need to increase the supply of accessible and adaptable dwellings and wheelchair-user dwellings, as well as providing specific provision of older persons' housing.

Given the evidence, the Council could consider (as a starting point) requiring all dwellings (in all tenures) to meet the M4(2) standards and around 3% of homes meeting M4(3) – wheelchair user dwellings in the market sector (a higher proportion of around 10% in the affordable sector).

Where the authority has nomination rights, the supply of M4(3) dwellings would be wheelchair-accessible dwellings (constructed for immediate occupation).

In the market sector, they should be wheelchair-user adaptable dwellings (constructed to be adjustable for occupation by a wheelchair user).

It should be noted that there will be cases where this may not be possible (e.g. due to viability or site-specific circumstances), so any policy should be applied flexibly.

In framing policies for the provision of specialist older persons' accommodation, the Council will need to consider a range of issues. This will include the different use classes of accommodation (i.e. C2 vs. C3) and the requirements for affordable housing contributions (linked to this, the viability of the provision).

There may also be some practical issues to consider, such as the ability of any individual development being mixed tenure, given the way care and support services are paid for.

12. Other Specific Groups

Self and Custom Build

- 12.1 The 2021 Local Housing Needs Assessment (LHNA) considered self and custom build in detail. It concluded that the self-build and custom housebuilding sector is expanding and can help meet housing needs.
- 12.2 At that time, 130 individuals had joined the Council's self-build register in the first five Base Periods (2016-2020), and Iceni recommended that the Council create a specific planning policy for self-build housing that encourages the development to come forward.
- 12.3 The Council is required to have established and publicised a self-build and custom housebuilding register which records those seeking to acquire serviced plots of land in the authority's area to build their own self-build and custom houses.
- 12.4 Since the last LHNA was produced, there have been an additional five Base Periods as well as changes made to the legal framework of Self and Custom build housing made via amendments to the 2015 Self and Custom Housebuilding Act by the 2023 Levelling Up and Regeneration Act (LURA).
- 12.5 When assessing demand, the LURA inserted in section 6 of the 2015 Act the following:

“(a) the demand for self-build and custom housebuilding in an authority's area in respect of a base period is the aggregate of—

(i) the demand for self-build and custom housebuilding arising in the authority's area in the base period; and

(ii) any demand for self-build and custom housebuilding that arose in the authority's area in an earlier base period and in relation to which—

(A) the time allowed for complying with the duty in subsection (2) expired during the base period in question, and

(B) the duty in subsection (2) has not been met;

(aa) the demand for self-build and custom housebuilding arising in an authority's area in a base period is evidenced by the number of entries added during that period to the register under section 1 kept by the authority”.

12.6 As a result, although each local authority still has 3 years to meet the need that arises from the register, but this **need must now be counted cumulatively**.

12.7 For example, the need as of the 30 October 2024 will be the cumulative demand shown in all base periods prior to the 30 of October 2021.

12.8 Furthermore, when considering the supply of plots, LURA removes section 6(c) of the 2015 Act, which reads:

“development permission is “suitable” if it is permission in respect of development that could include self-build and custom housebuilding”

12.9 This change means that the Council will therefore need to demonstrate that permitted serviced plots have resulted in self and custom-build development rather than what could be self and custom-build plots, for example, on the assumption of a CIL exemption.

12.10 Essentially, this means that for planning permissions to be counted towards the supply of self and custom build homes, there needs to be evidence to show that this is what the development is for.

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- 12.11 The exact details of what can be considered appropriate evidence that a dwelling or planning application is specifically for self and custom build are still to be confirmed.
- 12.12 Nonetheless, appeal case law provides some indication of what this may be. Evidence that would confirm that a development is specifically for the self and custom-build may include:
- Planning Condition attached to approval requiring the development to be carried out for self-build; or
 - Confirmation through S106 agreement for self-build; or
 - Requirement for the self-build nature of the scheme to be included within the description of the development.
- 12.13 On historic permissions, further evidence will likely be required to demonstrate that the development is self and custom build; often, this will be in the Design and Access Statement.
- 12.14 Therefore, the Council may wish to require a Self-Build Delivery Statement to be submitted at the validation stage or during the decision-making process that confirms a development will be brought forward as a self and custom build development. Examples of this include in Mid-Sussex¹⁷ as well as in East Suffolk¹⁸.
- 12.15 Although the regulations of the evidence for what does and does not constitute an appropriate permission for self-build are not yet known, it can be expected that regulations will reflect the 2015 Act and existing PPG and demonstrate that the applicant/occupant has had “primary input” into the design of the scheme.

¹⁷ [Self-build and Custom Build Statement](#)

¹⁸ [Custom-and-Self-build-Delivery-Statement-Template.pdf](#)

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- 12.16 It is also likely that applications to replace existing dwellings with new self-build properties will constitute a fair proportion of the self-build supply, even though they do not result in a net gain of housing.
- 12.17 Going forward, the Council will need to continue to monitor applications for self-build and custom-build dwellings. Ensuring that all supply permissions are evidenced as self-build/custom-build will also be essential to assess whether the duty is adequately met.
- 12.18 Currently, the Council tracks and publishes all self-build applications that are counted towards supply on their website, with reference to where in the application self-build is specified. This is a good approach and should be continued in future.

Self and Custom Build Register

- 12.19 As previously mentioned, there have been an additional five Base Periods since the last LHNA was published in 2021. This brings the total number of Base Periods since the register was introduced up to ten.
- 12.20 As of the end of Base Period 10, no groups had joined the Wealden register; therefore, the information below only refers to individuals.

Table 12.1 Wealden Self and Custom Build Register

	Entries	Permissions
Base Periods 1 - (1/4/16 to 30/10/16)	2	-
Base Periods 2 - (31/10/16 to 30/10/17)	24	15
Base Periods 3 - (31/10/17 to 30/10/18)	24	37
Base Periods 4 - (31/10/18 to 30/10/19)	21	12
Base Period 5 - (31/10/19 to 30/10/20)	33	16
Base Period 6 - (31/10/20 to 30/10/21)	44	69
Base Period 7 - (31/10/21 to 30/10/22)	37	84
Base Period 8 - (31/10/22 to 30/10/23)	50	40
Base Period 9 - (31/10/23 to 30/10/24)	43	TBC
Base Period 10 - (31/10/24 to 30/10/25)	17	TBC
Total	295	273
Average	29	30

Source: Council Data and MHCLG Monitoring

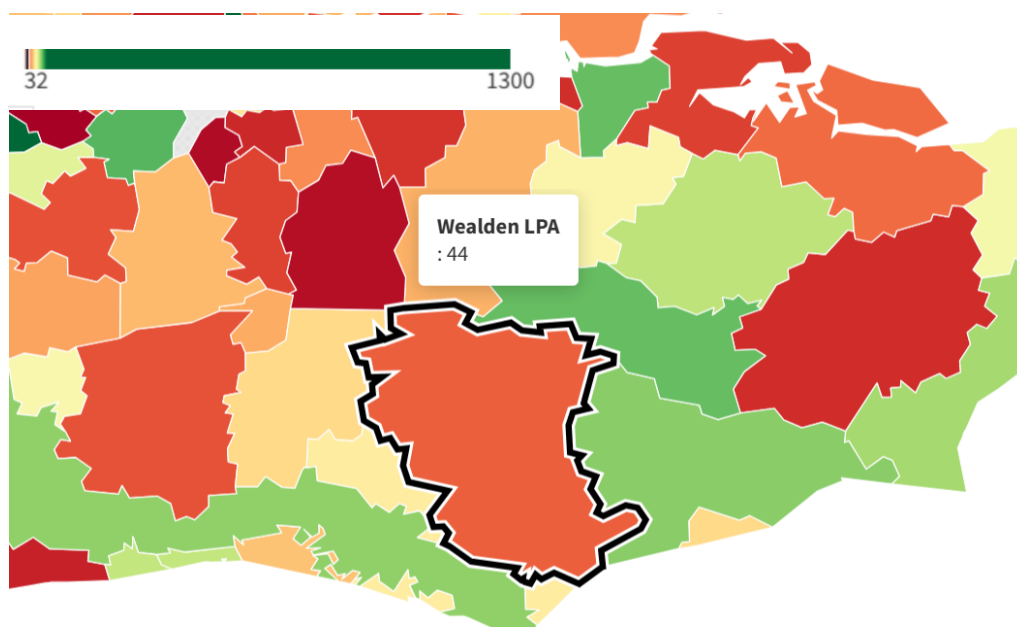
-
- 12.21 The Council are required to have provided 185 plots for self and custom build housing by the 30 of October 2025. Thus far, 273 plots for self and custom-build housing have been permitted; therefore, the backlog need for self and custom-built housing is currently being met in Wealden.
- 12.22 The Council should consider a review of the supply permissions to ensure that all permissions can demonstrate evidence that they are specifically for self and custom build, as required by the LURA.
- 12.23 The register also indicates future need for self and custom build plots. On this basis, the Council may wish to plan to permit 29 plots per annum, although the Council will need to respond to any specific numbers entering the register.

Broader demand evidence

- 12.24 To supplement the data from the Council's register(s), we have looked to secondary sources as recommended by the PPG, which, for this report, is data from NaCSBA – the National Custom and Self-build Association.
- 12.25 First, it is worth highlighting that the October 2020 national survey undertaken by YouGov on behalf of NaCSBA found that 1 in 3 people (32%) are interested in building their own home at some point in the future, including 12% who said they were very interested.
- 12.26 Notably, almost half (48%) of those aged between 18 and 24 were interested in building their own home, compared to just 18% of those aged 55 and over.
- 12.27 This is notable as, traditionally, self-build has been seen as the reserve of older members of society aged 55 and over, with equity in their property.

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- 12.28 Secondly, we can draw on NaCSBA data to better understand the level of demand for serviced plots in Wealden in relative terms. The association published an analysis with supporting maps and commentary titled “Mapping the Right to Build” in 2020.
- 12.29 This document includes an output on the demand for serviced plots as a proportion of the total population relative to all other local authorities across England (see Figure below).

Figure 12.1 Total registrations per 100,000 population in Wealden (2020)



Source: NaCSBA

- 12.30 This shows that the demand in Wealden was 44 per 100,000 population. Based on Wealden's population in 2021, this would equate to a need for around 70 serviced plots.
- 12.31 Despite the figure from NaCSBA being lower than the level of demand shown on the register, the Council still must permit enough plots for self and custom build as indicated by the register.

Policy Response

- 12.32 The Self-Build and Custom Housebuilding PPG sets out how local authorities can increase the number of planning permissions which are suitable for self-build and custom housebuilding and support the sector.
- 12.33 The PPG¹⁹ is clear that authorities should consider how local planning policies may address identified requirements for self- and custom-housebuilding to ensure enough serviced plots with suitable permissions come forward, and this should focus on playing a key role in facilitating relationships to bring land forward.
- 12.34 There are several measures which can be used to do this, including but not limited to:
- supporting Neighbourhood Planning groups where they choose to include self-build and custom-build housing policies in their plans;
 - working with Homes England to unlock land and sites in wider public ownership to deliver self-build and custom-build housing;
 - when engaging with developers and landowners who own sites that are suitable for housing, encouraging them to consider self-build and custom housebuilding, and facilitating access to those on the register where the landowner is interested; and
 - working with local partners, such as Housing Associations and third sector groups, to custom build affordable housing for veterans and other groups with acute housing need.
- 12.35 An increasing number of local planning authorities have adopted specific self-build and custom housebuilding policies in their respective

¹⁹ Paragraph: 025 Reference ID: 57-025-20210508 [Self-build and custom housebuilding - GOV.UK](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/98456/self-build-and-custom-housebuilding-ppg.pdf)

Local Plans to encourage delivery, as well as promote and boost housing supply.

- 12.36 There are also several appeal decisions in the context of decision-making which have found that paragraph 11(d) of the NPPF is engaged in the absence of a specific policy on self-build housing when this is the focus of a planning application.
- 12.37 While Wealden have been successful thus far in meeting the need for self and custom build housing, this need is likely to continue to grow. In order to ensure that the Council are able to continue meeting this need there are several policy levers that could be considered as part of its response. These include:
- **General Support Policies** - Although these set out the Council's intentions to support housing, they are weak unless supplemented with clear guidance and expectations around how self and custom build can be delivered.
 - **Housing Mix Policies** – Such policies are more strategic in nature but could address Self and Custom Build needs as well as built form and the size and tenure of homes. However, such policies are unlikely to be applicable to every site.
 - **Percentage Policies** – This approach seeks a specific percentage of plots from typically large sites. It is a good way to generate a continued supply, but the Council needs to ensure it is reliable. The scale of the site and the percentage to be applied should reflect the identified and projected need and the likely delivery.
 - **Site Allocations** – The Council could also consider allocating sites specifically for Self and Custom Build use. This could be council-owned sites or smaller sites in a high-demand locations. Such sites provide greater certainty for delivery but may not be welcomed by the site owner.
 - **Exception Sites** – This allows Self and Custom Build homes to be built where the market will not deliver (e.g. small sites in remote areas).
 - **Criteria-Based Policies** – Establish criteria that must be met for planning to be supported (e.g. limiting the number of developments in each parish, garden sites, infill sites, etc.).

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- 12.38 No single policy choice will be fully effective; therefore, the Council should consider which suite of policies will be most effective in Wealden.
- 12.39 When examining future supply, either through site allocations or that resultant from percentage policies, the Council should ensure that a mix of sites is forthcoming.
- 12.40 This should include both small sites that are primed for early delivery and large sites that could be sustained later into the plan period. There should also be a wide spread of sites across the district, not just in one settlement. The register can inform the location of these sites.
- 12.41 If the Council wishes to pursue a percentage policy, then, given typical build-out rates, it should only seek to enforce such plots on larger sites. This could be applied to sites of 70 dwellings or more based on average annual completions on sites with one sales outlet.
- 12.42 These plots should be marketed appropriately for 12 months (online and offline at realistic prices).
- 12.43 This figure is recommended as sites of more than 70 dwellings often have a construction period of more than 12 months. This would allow for the developer to begin market the units for the full 12-month period, if the plots see no interest the developer can then revert to delivering these sites as market accommodation without significantly elongating the build-out period.
- 12.44 The Council may also wish to consider making the first three months of marketing these plots to those with a local connection or on the custom and self-build register, with the remaining time widening it out to anyone else.

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- 12.45 To provide greater clarity to the development industry, the Council may wish to consider publishing supporting text or additional guidance on matters relating to:
- Design codes;
 - Phasing;
 - Marketing strategies;
 - S106 Clauses;
 - Validation requirements (e.g. delivery statements); and
 - Affordable Contributions.
- 12.46 A further consideration for the Council is that, when demonstrating supply to meet this demand, the LURA makes it more difficult for Councils to count CIL exemption sites.
- 12.47 They now must demonstrate that these homes are specifically for self or custom-build occupiers. The Council could consider introducing a self-build delivery statement to be submitted alongside planning applications and adapting its monitoring to ensure its implementation.

Children in Care

- 12.48 Key legislation relating to the accommodation and maintenance of a looked-after child is set out in Section 22G of the Children Act 1989. The act places a duty on local authorities (East Sussex County Council) to plan strategically for children in their care, ensuring that, where aligned with the child's welfare, accommodation should be provided within the authority's own area.
- 12.49 This means that Councils must take steps to ensure sufficient local provision is available. Looked-after children can remain close to their home community, family and support networks whenever possible.

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- 12.50 The legislation provides a framework within which decisions about the most appropriate way to accommodate and maintain children must be considered:
- Section 22A of the Children Act 1989 imposes a duty on the responsible authority when a child is in their care to provide the child with accommodation.
 - Section 22B of the Children Act 1989 sets out the duty of the responsible authority to maintain a looked-after child in other respects apart from providing accommodation.
 - Section 22C of the Children Act 1989 sets out the ways in which a looked-after child is to be accommodated.
 - Section 22D of the Children Act 1989 imposes a duty on the responsible authority to formally review the child's case prior to making alternative arrangements for accommodation.
 - Section 22G of the Children Act 1989 requires local authorities to take strategic action with respect to those children they look after and for whom it would be consistent with their welfare for them to be provided with accommodation within their own local authority area.
- 12.51 In a Written Ministerial Statement²⁰ (WMS) made in May 2023, the Housing and Planning Minister reminded local authorities of their requirement to assess the housing need of different groups in the community including “accommodation for children in need of social services care”.
- 12.52 The WMS statement said that “Local planning authorities should give due weight to and be supportive of applications, where appropriate, for all types of accommodation for looked after children in their area that reflect local needs and all parties in the development process should work together closely to facilitate the timely delivery of such vital accommodation for children across the country”.

²⁰ <https://questions-statements.parliament.uk/written-statements/detail/2023-05-23/hcws795>

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- 12.53 The WMS follows on from the Department for Education (DfE) Implementation Strategy²¹ to fix children’s social care from February 2023. The “Stable Homes Built on Love” Strategy has undergone consultation with aspects of the Government’s reform proposals receiving a broad welcome.
- 12.54 However, some stakeholders raised concerns that the proposals amounted to a “piecemeal approach” rather than the required whole-system reset.
- 12.55 In response, the previous Government said it is taking a “test and learn” approach and the strategy marks “the start of the journey”.
- 12.56 The strategy outlined an ambition to transform Children’s Care through six pillars. The first of these pillars makes it clear that supporting families is the priority. This ensures that children can remain in their family home for as long as possible (Pillar 1) and, if this is not possible, within their wider family (Pillar 3).
- 12.57 If both the immediate and wider family cannot look after a child, then Pillar 4 seeks to ensure that “when care is the best choice for a child, the care system must provide stable, loving homes close to children’s communities”.
- 12.58 To achieve this, the strategy aims to increase and support foster carers and develop a programme to support improvements in the quality of leadership and management in the children’s homes sector.
- 12.59 The report sets out a mission to “see an increase of high-quality, stable and loving homes available for every child in care, local to where they are from”.

²¹[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1147317/Children s social care stable homes consultation February 2023.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1147317/Children_s_social_care_stable_homes_consultation_February_2023.pdf)

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- 12.60 To do this it suggests that an immediate action is to “boost the number of the right homes in the right places available for children as a matter of urgency”.
- 12.61 The strategy notes that “local authorities have primary responsibility for the children in their care. This includes ensuring there is sufficient accommodation locally to meet the range of needs of children in care in their area” and that there is a “statutory duty to ensure there is sufficient provision for their children in care”.
- 12.62 It also states that the DfE “will continue to build on our work reforming supported accommodation for 16- to 17-year-olds. Semi-independent provision, including supported lodgings, can be the right option for some older children, but only where it is high-quality, and the young person is ready for the level of independence it promotes”.
- 12.63 The DfE will also continue “with the Children’s Home Capital Programme, which has seen £259 million of capital funding invested to increase provision in local authority-run open and secure children’s homes. We are working with local authorities to create new children’s homes and increase provision in their local area”.
- 12.64 At a similar time, the government also launched a consultation on the “Children’s Social Care National Framework²²” and the “Children’s Social Care Dashboard”. The Framework sets out some of the outcomes to be measured, including Outcome 4 relating to those seeking to ensure “children in care and care leavers have stable, loving homes”.
- 12.65 The indicators include the percentage of children in care living in foster care and living in residential care, and the distance of placements from home. This is important to ensure the stability of schooling and contact

²² [Children in Care Sufficiency and Commissioning Strategy 2023 to 2026](#)

with their siblings. The framework recognises that this will mean prioritising foster homes rather than residential homes.

- 12.66 The outcome can also be achieved by leaders undertaking “sufficiency planning and work with other local authorities and partners to jointly invest in care options that meet the future needs of children”.

The County Position

- 12.67 East Sussex County Council (ESCC) are the relevant authority in charge of the Children’s Service in Wealden and across East Sussex. The County Council has advised that they are currently refreshing the Children’s Social Care Sufficiency Strategy and are due to publish this in late autumn 2025, but as of December 2025 this had not been published.
- 12.68 The County Council should keep this under review to ensure that the most up-to-date sufficiency strategy is reflected in planning and decision-making going forward.
- 12.69 ESCC have provided some information on placements of looked-after children in Wealden. In total, there are 96 looked-after children in Wealden, most of whom are in Foster Care (82).
- 12.70 There are 8 Children in Wealden living in Children’s Homes and 2 housed in Lansdowne Home, which is a secure unit.
- 12.71 There are no County Council-provided Children’s Homes in Wealden; however, Ofsted data indicates that there are 39 privately provided spaces (within the Sussex Weald Constituency).
- 12.72 This would indicate that there is currently capacity within Wealden to house more children in children’s homes if needed. It would also likely indicate that some children are being placed in Wealden from out of the area.

Conclusions and Recommendations

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- 12.73 The WMS statement said that “local planning authorities should give due weight to and be supportive of applications, where appropriate, for all types of accommodation for looked after children in their area that reflect local needs”.
- 12.74 Clearly, the national and County policy direction is to provide in-situ support, followed by familial and foster support. Therefore, the demand for care homes will largely be determined by the success of these policies. Where this is not possible, then local authorities will be required to provide safe accommodation in the right places.
- 12.75 Wealden District Council should also give consideration to engaging with partner agencies like Health, Education/Early Years and the voluntary sector to strengthen their role in supporting increased placement provision as and when necessary.
- 12.76 If this does arise, they should ensure that any new 3–4 bed homes or multi-building units are developed in close collaboration with existing service providers. This need could also be met by seeking provision on larger strategic sites.
- 12.77 Such sites should align with the most appropriate locations according to Ofsted’s Location Assessment²³ for such accommodation. In summary, this includes ensuring safeguarding concerns are met and that children have access to services.
- 12.78 Any additional capacity is likely to be in the urban areas, particularly Polegate, Hailsham and Uckfield, to allow for wider access. To ensure the needs of those from the rural parts of the district can be provided locally, there should also be a provision in Crowborough.

²³https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/339545/Children_s_homes_regulations_amendments_2014.pdf

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- 12.79 To ensure that the County Council has access to any new provision, the District Council may wish to adopt a policy similar to that of Lancaster City Council, whereby any additional children's residential care home permission/licences are only permitted if the Council get first refusal of placement.
- 12.80 There will also be a need for supported accommodation for young adults leaving care, and the Council should work with Registered Providers to explore opportunities to provide this through developer contributions and in the existing stock.

Students

- 12.81 There are no higher education establishments in Wealden which have the biggest impact on the local housing market.
- 12.82 However, there is the East Sussex College Group, which has a campus in Uckfield, offering various Further Education courses to students aged 16 and over.
- 12.83 The 2021 Census suggests that of the 2,690 students over the age of 18 living in Wealden, 74% live with their parents.
- 12.84 Therefore, there is no justification for a specific policy relating to student housing in the district.

Service Personnel

- 12.85 According to Ministry of Defence (MOD) statistics, there are no Military or civilian personnel based in Wealden.
- 12.86 Crowborough Training Camp is the only military establishment within Wealden district. While the camp hosts a number of youth Cadet groups

(Army Cadet Force, Air Training Corps and Royal Marines Cadets) no regular military forces are stationed here.

- 12.87 Given the low number of military personnel in Wealden, there is unlikely to be a significant need for housing from this group. Therefore, there is no justification for a specific policy relating to housing for service personnel.
- 12.88 The most acute and pressing issue is likely to be finding accommodation for those transitioning out of the forces, as well as existing personnel who are seeking to buy in the district.
- 12.89 Military personnel are listed as part of the definition of essential local workers in Annex 2 of the NPPF. Depending on their incomes, this group will already be accounted for within the affordable housing need and will largely not be additional to it.
- 12.90 Although we have only recommended a small proportion (less than 5%) of delivery be for discounted market sale products, which would include First Homes, the government having moved away from it as a product. The PPG for First Homes allows local authorities to set out criteria for accessing such housing. One such criterion could be a key worker requirement, which would include service personnel, should the Council seek to deliver First Homes.
- 12.91 The PPG also stipulates that “local connection criteria should be disapplied for all active members of the Armed Forces, divorced/separated spouses or civil partners of current members of the Armed Forces, spouses or civil partners of a deceased member of the armed forces (if their death was wholly or partly caused by their service) and veterans within 5 years of leaving the armed forces”.

Gypsies and Travellers

- 12.92 The most recent assessment on the accommodation needs for Gypsy and Travellers is the Gypsy, Traveller and Travelling Showpeople Accommodation Needs Assessment (GTAA) published in 2022²⁴.
- 12.93 This assessment covers the whole of East Sussex and for Wealden this showed an identified need for 51 pitches (ethnic definition) and 32 pitches under the previous Planning Policy for Traveller Sites (PPTS) definition up to 2040. There is also a need for an additional 3 Travelling Showpeople plots up to 2040.
- 12.94 The Council is in the process of updating this GTAA with all other local authority partners.

Key Messages

Self and Custom Build

The Council is currently meeting the need for self and custom build housing in Wealden. However, it should plan to permit around 30 plots per annum based on past trends.

The Council may wish to consider the supply of permissions in more detail. Requiring all relevant applications to submit a Self-Build Delivery Statement is one example of this.

The Council could also seek to introduce specific policies on self and custom housebuilding. These policies typically express support for self-build and custom housebuilding, require that a minimum proportion of plots within development schemes (often over a certain

²⁴ [East Sussex Gypsy and Traveller Accommodation Needs Assessment 2022 - V3 Addendum](#)

size) be offered to self-builders or as custom-build plots and/or allocation of sites solely for their use.

Children in Care

There are 96 looked after children in Wealden most of which are in Foster Care (82).

There are eight Children in Children's Homes and two in a Secure Unit (Lansdowne).

There are no county or local authority provided Children's Homes in Wealden; however, Ofsted data indicates that there are 39 privately provided spaces (within the Sussex Weald Constituency).

ESCC are due to update the Children's Social Care Sufficiency Strategy in late autumn although as of December 2025 this has not yet been published.

Students

There are no higher education establishments in Wealden.

The Census data suggests that of the 2,690 students over the age of 18 living in Wealden 74% live with their parents. Therefore, there is no justification for a specific policy relating to student housing.

Service Personnel

According to Ministry of Defence (MOD) data there are no military personnel based in Wealden district.

Gypsies and Travellers

The most recent assessment covers the whole of East Sussex and for Wealden this showed an identified need for 51 pitches (ethnic definition) and 32 pitches under the previous Planning Policy for Traveller Sites (PPTS) definition up to 2040. There is also a need for an additional 3 Travelling Showpeople plots up to 2040.

The Council is in the process of updating this GTAA with all other local authority partners.

13. Conclusions and Recommendations

Overall Housing Need

- 13.1 The assessment identifies a Local Housing Need figure of **1,457 dwellings per annum**, calculated using the revised 'Standard Method'. Delivering this level of housing over the plan period (2025–2042) would increase the population by approximately **47,900 people (+28%)**, with notable growth in the working-age population and continued ageing population.
- 13.2 This level of growth could support between **18,900 and 28,300 additional jobs**, depending on commuting and economic activity assumptions.

Affordable Housing Need

- 13.3 There is an **acute need for affordable housing**, estimated at **754 dwellings per annum**. Most of this need (72%) comes from households unable to buy or rent in the market, pointing to a strong requirement for rented affordable housing rather than affordable home ownership.
- 13.4 Despite this high level of need, the report advises that it does not justify increasing the overall housing target, as many households in need are already housed and do not create net additional demand. The Council should **maximise affordable housing delivery where viable**, with a focus on social rented accommodation.
- 13.5 Policy recommendations include maintaining an **80:20 tenure split**: 80% rented affordable housing (with around 70% of that at social rents) and 20% intermediate products (shared ownership and rent-to-buy). Up to **5% of affordable homes** could be delivered as discounted market

sale (e.g. First Homes) for viability and tenure diversity, despite limited evidence of a significant need for this product. However, social rent should be prioritised where possible, as it is the most affordable option for households with acute needs.

Housing Mix

- 13.6 Future housing mix should reflect demographic change, affordability constraints, and the need to reduce under-occupancy. The analysis identifies a particular need for **two- and three-bedroom homes** across all tenures, with some provision for one-bedroom properties and a smaller proportion of four or more bedroom homes. The recommended mix by tenure is as follows:
- **Market Housing:** 5% one-bed, 35% two-bed, 40% three-bed, 20% four or more beds.
 - **Affordable Home Ownership:** 20% one-bed, 40% two-bed, 30% three-bed, 10% four or more beds.
 - **Rented Affordable Housing:** 35% one-bed, 30% two-bed, 25% three-bed, 10% four or more beds.
- 13.7 Flexibility should be applied at site level, considering local needs, viability, and site characteristics. The Council should monitor delivery and adjust policies as needed when reviewing its Local Plan policies.

Second and Holiday Homes

- 13.8 At present **second and holiday homes are not considered to be a district-wide issue**. However, the Council should **monitor the situation** and consider potential impacts on local housing availability, services, and the economy if the proportion of second homes rises significantly.

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- 13.9 It should be noted that a “tipping point” for adverse impact is typically around **20% of dwellings** in an area.

Older and Disabled People

- 13.10 The ageing population will drive demand for specialist housing and accessible homes. By 2042, the population aged 65+ is projected to increase by **37%**, with significant growth in those aged 85+. There is a need for around **2,000 additional supported housing units, 1,100 extra-care units, 1,100 care bedspaces**, and approximately **600 wheelchair-accessible dwellings**.
- 13.11 Policy recommendations include requiring all new homes to meet **M4(2) accessible and adaptable standards** and requiring **3% of market homes** and **10% of affordable homes** to meet **M4(3) wheelchair user standards**. Delivery of extra-care housing should be supported, with flexibility applied where viability is an issue.

Other Specific Groups

- 13.12 The Council should plan for around **30 self and custom build plots per year**, based on past trends and register demand. It should consider requiring Self-Build Delivery Statements and policies to secure a proportion of plots on larger sites.
- 13.13 The Council have undertaken a Gypsy and Traveller Accommodation Assessment which identifies need for between **32 and 51 pitches for Gypsies and Travellers**. This assessment is currently being reviewed by the local planning authority alongside other East Sussex authorities.
- 13.14 No specific policy is required for students or service personnel at present, but monitoring is advised.